

Healthcare Digital Services



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The healthcare industry continues to be under pressure from customers, governments and other stakeholders to increase investments. In 2022, the COVID-19 pandemic continues to affect industry practices. The public continues to seek more effective healthcare outcomes at lower costs, while expecting transparency, appropriate data sharing and access to their own records. All segments of the U.S. healthcare industry are being compelled to comply with new regulations, engage in competitive mergers and acquisitions and adapt to the needs of an aging population. Furthermore, consumers expect advanced and convenient digital service delivery across the care continuum. Many companies and government agencies are struggling to stay apace with the growing demand for their services, and in the private sector, they struggle to deal with the mounting competitive pressures.

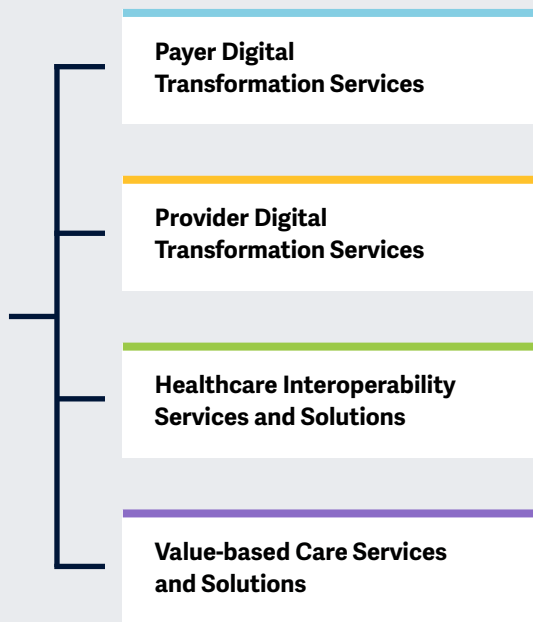
This study will also look at the second-largest healthcare market in the world, Germany, where KHGZ or the Hospital Future Act provides earmarked funding for the digitalization of hospitals.

The service providers participating in the Healthcare Digital Services 2022 study will be evaluated on how effective they are as an extension of a client's technology organization and how they are involved in creating blueprints, architecture frameworks and management processes. They will also be assessed on factors such as brand recognition, market reach, and the number and quality of clients. Furthermore, they will be evaluated based on annual revenue, assigned employee numbers and skills, domain expertise, partnerships and R&D and innovation investments.



Healthcare
Digital
Services
2022
focuses on
payers and
providers.

Simplified Illustration Source: ISG 2022



This ISG Provider Lens™ study offers technology and procurement decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Perspective on different markets, including the U.S. and Germany

This study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Definition

Leading service providers in the healthcare industry have diverse digital offerings that can help payers and providers identify new ways of working together, while also assisting them in designing innovative products and service offerings to improve patient and member services. These service providers offer a combination of technology, process, and business expertise to aid payers and providers in their digital journeys.

This quadrant assesses a service provider's ability to deliver digital transformation services to payers, also known as insurance plan companies in the U.S., and statutory health

insurance companies and private health insurance companies in Germany. Digital transformation services help payers progressively prioritize a digital-first pathway to improve patient care. The services should help these insurance companies reach out to and serve members wherever they are located, via computers, remote monitoring devices, smartphones and other mobile devices. In addition, the services should address operational processes for payers, such as claims processing, member verification and enrollment, and their modernization capabilities should be clear.

Eligibility Criteria

1. Technology **consulting for the use of appropriate traditional and emerging healthcare technologies**, with the ability to plan, develop and implement consumer-grade interfaces for employee systems and member information sources, including mobile apps
2. Established or emerging basic/standard relationships with **trusted partners**, including innovative startups
3. Ability to provide **services for the digitalization of processes** while navigating regulation complexities
4. Ability to **provide consultation services on the development of models** using AI, machine learning and analytics
5. Capabilities in the **modernization of payer systems**, including cloud migration, data center consolidation and application portfolio management
6. Experience in **large transition projects** that include consolidation of merged companies and the modernization of systems and applications



Definition

Digital transformation helps to combat many of the ongoing and anticipated industry challenges. In the healthcare industry in the U.S. and Germany, digital transformation of services helps provider segments evolve to better serve their constituents.

Successful healthcare providers meet their challenges with the following:

1. Driving targeted investments and continuous cost control
2. Using advanced technologies and digital operating models
3. Focusing on improved and innovative patient engagements
4. Building, buying and improving data sharing processes and tools

5. Shifting to digital platforms for rapid modernization and adjusting to the changing care environment

This quadrant assesses service providers that offer digital transformation services to healthcare providers such as hospital systems and independent healthcare providers. These providers should be responsible for processes and systems pertaining to patient relations and care, such as patient intake, physician referral management, ambulatory and chronic care and post-acute care. The services should also include employee systems such as information portals, scheduling and collaboration.

Eligibility Criteria

1. Ability to plan, develop and implement **consumer-grade interfaces** of hospital and office systems and patient information and monitoring sources, including mobile apps for wellness, medical reference and fitness
2. Capability to offer guidance on **selecting and deploying telehealth solutions**, including measures for cybersecurity
3. Established or emerging basic or standard relationships with **trusted partners**, including emerging firms with new models of care delivery
4. Ability to advise on **workforce development**, including upskilling, to support digital and private data protection
5. Consulting on the **development of models**, using AI and analytics **for screening, diagnostics and treatment**
6. Capabilities in the **modernization of provider systems**, including cloud migration, data center consolidation and application portfolio management
7. Experience in **large transition projects** that include consolidation of merged companies and the modernization of systems and applications



Definition

The emphasis on interoperability and transparency in the sharing of health records among stakeholders has increased in the recent past. In the largest healthcare market in the world, the U.S. Office of the National Coordinator for Health Information Technology (ONC) and the Centers for Medicare and Medicaid Services (CMS) have created structured data standards and other mandates that electronic health records (EHRs) must adhere to. CMS and ONC guidelines require that patients have access to their healthcare data and provider directories via application programming interfaces (APIs). Other new regulations on interoperability address security; payer-to-payer data exchange; and admission, discharge and transfer event notifications.

Access to the right information at the right time helps in delivering optimal care to patients or members. Recently, focus has been on meeting interoperability mandates of governments, while at the same time giving patients easier access to their medical records and allowing timely and efficient sharing of information across the healthcare ecosystem.

This quadrant assesses providers of solutions and services that enable improved data sharing across the healthcare continuum. For the U.S., service providers should know and advise clients on the CMS and ONC guidelines that mandate patients' access to their healthcare data and healthcare provider directories via APIs. Providers should also adhere to other new rules requiring interoperability capabilities to address security and payer-to-payer data exchange, as well as admission, discharge and transfer event notifications.

Eligibility Criteria

1. Knowledge and experience with the **Fast Healthcare Interoperability Resources (FHIR)** standard developed for exchanging healthcare information
2. Knowledge and experience in tools to make it easier for healthcare systems and providers to **connect and share data across different sources**, such as Google Cloud Platform's Cloud Healthcare API
3. Ability to support consultation services for the **development of custom capabilities for interoperability solutions**
4. Ability to build, maintain and scale **seamless and secure personal experiences** across APIs
5. Capability in **designing user experiences** to ease the implementation and use of healthcare interoperability solutions



Definition

The rapid changes in healthcare, propelled by the pandemic, highlight the need for healthcare providers to focus more on value-based care. During the pandemic, many payers transformed their associations with providers into more economically balanced, value-based care contracts. For patients, an exposure to telemedicine prompted a shift in the way they chose to interact with their healthcare providers and the way they evaluated the value of in-person visits. Consequently, patients are adapting the way they relate with their healthcare providers. Telehealth and in-person care are not the same, but the latter is increasingly being swapped with the former, compared to the time before the pandemic.

This category includes service providers that offer a range of services to support payers or providers seeking to build or extend value-based care (VBC) services. VBC is a healthcare model focused on patient outcomes, in contrast to the more common fee-for-service models. In the U.S., Medicare and other plans are starting to use VBC. Because this model is different, processes and systems must be changed to accommodate the new model. Service providers that participate in this quadrant help healthcare companies measure patient outcomes, share appropriate data between payers/providers and patient, and create new contract models. They also need to advise on how to reduce the downsides of VBC and potential unintended consequences for their clients so that all involved can experience the benefits.

Eligibility Criteria

1. Ability to **guide clients in contract modifications** that address financial incentives and payment reconciliation
2. Knowledge of **outcome measurements and systems** to manage and communicate them
3. Ability to **define and manage the necessary data** needed to achieve VBC objectives
4. Experience in setting up **performance management benchmarks** and continuous improvements
5. Ability to understand how to apply **population health analytics and social determinants of health** to inform care plans
6. Ability to advise on and support needed **modifications of utilization and case management** processes and systems
7. Experience in **setting up and managing digital infrastructure** and processes



Quadrants By Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants on Healthcare Digital Services 2022.

Quadrants	U.S.	Germany
Payer Digital Transformation Services	✓	✓
Provider Digital Transformation Services	✓	✓
Healthcare Interoperability Services and Solutions	✓	NA
Value-based Care Services and Solutions	✓	NA



The research phase falls in the period between August and October 2022, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2022.

Milestones

	Beginning	End
Survey Launch	August 18, 2022	
Survey Phase	August 18, 2022	September 15, 2022
Sneak Preview	November 2022	
Press Release & Publication	January 2023	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2022 research agenda.

Access to Online Portal

You can view/download the questionnaire [here](#) using the credentials you have already created or refer to the instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

ISG Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments. To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: ISG.star@isg-one.com



Contacts For This Study



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ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT).

The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as

part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



**Bob
Krohn**

Partner, Healthcare



SG Anand

Director, Healthcare



**James
Burke**

Partner, Healthcare



**Kevin
Spiekermann**

**Principal Consultant,
DACH**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

2nd Watch	Cognizant	Genpact	ITC Infotech
Accenture	Computacenter	Google	ITS Care
Allscripts	Concentrix	gvk informatik	KPIT
Arvato	Conduent	HARMAN	Leidos
Atos	Deloitte	HCL	LTI
AWS	Deutsche Telekom	Hexaware Technologies	LTTS
Bechtle	DXC	Hitachi Vantara	MEDHOST
Birlasoft	eClinicalWorks	HTC Global Services	Microsoft
Bitmarck	EPAM	HPE	Mindtree
Capgemini	Epic	IBM	Mphasis
CANCOM	EXL	Infinite	NASCO
CGI	Firstsource	Infogain	NTT DATA
Cigniti	Flexential	Infostretch	Optum
CitiusTech	Fujitsu	Infosys	Oracle / Cerner
Coforge	GAVS Technologies	Involta	Orange Business Services



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Perficient	Unisys
Persistent	UST
PwC	V2Soft
Siemens Healthineers	Verizon
Softtek	Virtusa
SoftwareONE	Vituso
Stefanini	Virtustream
Sutherland	Wipro
TCS	WNS
Tech Mahindra	Zensar
TEKsystems	Zipari
T-Systems	



*ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

*ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.





AUGUST 2022

REPORT: HEALTHCARE DIGITAL SERVICES