



***ISG** Provider Lens™

2021

Healthcare Digital
Services 2021

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006 and based in Stamford, Conn., ISG employs more than 1,300 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.



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Overview

The healthcare industry continues to be under pressure to change despite the waning of the pandemic in some parts of the world. In 2021, the COVID-19 pandemic and public demand for more effective outcomes mandate actions to better meet care lifecycle requirements and build patient-centric business models. All segments of the 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. Also, consumers expect advanced and convenient digital service delivery. At the same time, many companies are struggling to stay apace with the growing demand for their services and mounting competitive pressures.

As companies adopt new business approaches in keeping with the changing market environment, regulatory hurdles and cost pressures are at an all-time high. The competitive landscape has never been more dynamic or universal. In this context, innovation is imperative. The explosion of virtual care in 2020 led to the rapid increase in connected technology deployments for telehealth, a trend that ISG expects will continue in the foreseeable future.

Achieving interoperability is key to expanding not only virtual care, but also modernizing overall healthcare. In the U.S., the Office of the National Coordinator for Health Information Technology (ONC) and the Centers for Medicare & 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.

In the U.S. almost half of the population is a part of the public healthcare program, a growth from about one-third before the COVID-19 pandemic. This shift means payers are enrolling and catering to more people than ever through Medicaid for the low-income group, Medicare for seniors and the disabled, and the Child Health Insurance Program (CHIP) for children that do not qualify for Medicaid.

In Germany, the "Krankenhauszukunftsgesetz" (Hospital Future Act) and EHRs bring both challenges and opportunities for the healthcare industry and its service providers.

Successful organizations in the healthcare industry have been meeting these 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 adjustment to changing care environment

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 payer and provider segments evolve to better serve their constituents. As healthcare payers and providers are shifting the focus of purchase decisions to business outcomes, finance and other business leaders are driving digital transformation. While some enterprises do it on their own, others use business process-as-a-service (BPaaS) solutions.

Overview (cont.)

Participating service providers in the Healthcare Digital Services 2021 study will be evaluated on how effective they are as an extension of a client's technology organization and involved in creating blueprints, architecture frameworks and management processes. They will also be assessed on factors such as brand recognition in the markets studied, market reach and the number and quality of clients. Also, they will be evaluated on thresholds of annual revenue, assigned employee numbers/skills and R&D investments.

The ISG Provider Lens™ study offers technology decision makers:

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

Our 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.

Quadrants Research

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

Healthcare Digital Services 2021		
Payer Digital Transformation Services	Payer Business Process as a Service	Provider Digital Transformation Services
Healthcare Cloud Migration Services	Healthcare Interoperability Services & Solutions	

Source: ISG 2021

Payer Digital Transformation Services

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 and serve members wherever they are located via computers, remote monitors, smartphones and other mobile devices. Also, the services should address operational processes for payers such as claims processing, member verification and enrollment. Service modernization capabilities should also be clear.

Eligibility criteria:

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

Provider Digital Transformation Services

This quadrant assesses service providers that offer digital transformation services to healthcare providers such as hospital systems and independent healthcare providers. They 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:

- 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
- Capability to offer guidance on selecting and deploying telehealth solutions, including measures for cybersecurity
- Established or emerging basic/standard relationships with trusted partners, including emerging disruptors with new models of care delivery
- Ability to advise on workforce development, including upskilling, to support digital and private data protection
- Consulting on the development of models, using AI and analytics for screening, diagnostics and treatment
- Platform consulting for the use of appropriate emerging healthcare technologies such as telehealth services, remote patient monitoring (through IoT and wearables), blockchain for data sharing, robotics and electronic prescription services
- Experience in large transition projects that include consolidation of merged companies and modernization of systems and applications

Payer BPaaS

This quadrant assesses providers of healthcare payer BPaaS engaged in end-to-end outsourcing of business processes across the technology stack with the aim to improve business outcomes. A service provider integrates services, processes, applications and infrastructure into a comprehensive service, with the clear objective of cost control. Apart from cost savings, BPaaS also supports improved member and provider experience, operational insights, improved quality of care and regulatory compliance.

Eligibility criteria:

- Ability to advise, with focus on outcomes, via member engagement and financial value metrics
- Ability to support any application or platform, including legacy systems
- Possesses established protocols and technologies for integrated security
- Ability to implement appropriate intelligent automation specific to business processes
- Experience in implementing and expanding health plan analytics
- Ability to support back-office, middle-office and front-office business processes
- Competencies in integrated governance and performance service management
- Established or emerging partnerships with application providers, platform companies and infrastructure firms

Healthcare Cloud Migration Services

Introduced in 2021, this new quadrant assesses a service provider's ability to deliver services to U.S. healthcare providers and payers centered on hyperscaler platforms. Some of the cloud platforms, including AWS, Google, Microsoft, IBM, Oracle and Salesforce, offer healthcare-specific capabilities. The services should help payers and providers modernize their systems to improve processes and business outcomes.

Eligibility criteria:

- Platform consulting for the use of the appropriate emerging healthcare technologies, with the ability to plan, develop and implement consumer-grade interfaces of employee systems and patient and member information services, including mobile apps
- Established partnerships with hyperscaler(s) and employees with appropriate skills
- Contracts for services with payer and provider clients in the U.S., both in progress and planned
- Knowledge of and experience with specific healthcare tools offered by the cloud platforms, including AWS for Health, Google Health, Microsoft Healthcare Cloud, IBM Watson Health, Oracle Health Insurance and Salesforce Health Cloud
- Ability to provide consultation services for the development of custom capabilities on the platforms
- Experience with related offerings (for example, AI and machine learning, and IoT) from the hyperscalers, and in other industries

Healthcare Interoperability Solutions and Services

Introduced in 2021, this new 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 patient access to their healthcare data and healthcare provider directories via APIs. Also important are adherence 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:

- Knowledge and experience with the Fast Healthcare Interoperability Resources (FHIR) standard developed for exchanging health information
- Knowledge and experience with 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
- Ability to support consultation services for the development of custom capabilities for interoperability solutions
- Ability to build, maintain and scale seamless, personal and secure experiences across APIs.
- Capability in designing user experiences to ease the implementation and use of healthcare interoperability solutions

Quadrants by Region

Quadrants	Global	U.S.	Germany
Payers Digital Transformation Services	Overview	✓	✓
Providers Digital Transformation Services	Overview	✓	✓
Payers BPaaS Services	Overview	✓	✓
Healthcare Cloud Migration Services	N/A	✓	N/A
Healthcare Interoperability Solutions and Services	N/A	✓	N/A

Schedule

The research phase is between **July and October 2021**. During this period, survey, evaluation, analysis and validation will take place. The results will be presented to the media in **November 2021**.

Milestones	Beginning	End
Launch	July 28, 2021	
Survey Phase	July 28, 2021	August 27, 2021
Sneak preview	November 2021	
Press release	January 2022	

Please [refer to this link to view/download](#) the ISG Provider Lens™ 2021 research agenda.

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.

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

2nd Watch

Accenture

Allscripts

Arvato

Atos

AWS

Bechtle

Birlasoft

Bitmarck

Capgemini

CANCOM

Cerner

CGI

Cigniti

CitiusTech

Coforge

Cognizant

Computacenter

Concentrix

Conduent

Deloitte

Deutsche Telekom

DXC

eClinicalWorks

EPAM

Epic

EXL

Firstsource

Flexential

Fujitsu

GAVS Technologies

Genpact

Google

gvk informatik

HARMAN

HCL

Hexaware Technologies

HTC Global Services

HPE

IBM

Infinite

Infogain

Infostretch

Infosys

Involta

ITC Infotech

ITS Care
KPIT
Leidos
LTI
LTTS
MEDHOST
Microsoft
Mindtree
Mphasis
NASCO
NTT DATA
Optum
Oracle
Orange Business Services
Perficient
Persistent
PwC
Siemens Healthineers
Softtek

SoftwareONE
Stefanini
Sutherland
TCS
Tech Mahindra
TEKsystems
T-Systems
Unisys
UST
V2Soft
Verizon
Virtusa
Vituso
Virtustream
Wipro
WNS
Zensar
Zipari

ISG Star of Excellence™ – Call for nominations

The 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: Star@isg-one.com

Contacts for this study



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Do you need any further information?

If you have any questions, please do not hesitate to contact us at ISG.ProviderLens@isg-one.com.

ISG Provider Lens™ QCRT Program Description

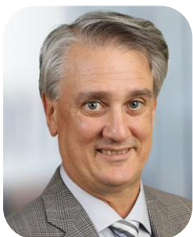
ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence 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 & 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 providers inclusion, participate in briefing calls
- Give their perspectives on service provider ratings and review report drafts

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study



Bob Krohn
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Tony Mataya
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James Burke
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