ISG Provider Lens™

Healthcare Digital Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: wipro

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Table of Contents

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Healthcare embraces digital transformation to boost efficiency, outcomes and care

Payer Digital Transformation (Private)

The healthcare payer landscape is undergoing a significant transformation, driven by a shift toward value-based care (VBC), the integration of advanced analytics and AI, and a commitment to improved member engagement and interoperability. These trends reflect a broader movement toward patient-centered models that prioritize quality outcomes and enhance the healthcare experience for all stakeholders.

The emphasis on VBC is reshaping payer digital transformation. This approach prioritizes patient outcomes over traditional fee-for-service models, incentivizing healthcare providers to deliver high-quality care. Payers are adopting solutions that facilitate risk management, care coordination and enhanced patient engagement. By leveraging predictive analytics and integrated health data, organizations can identify care gaps, stratify patient populations and implement tailored interventions. This alignment of incentives among stakeholders is crucial for fostering a more effective, patient-centered healthcare system.

Integrating advanced analytics and AI revolutionizes how payers operate and interact with members. Solutions utilizing generative AI (GenAI), ML and data analytics enable health plans to extract actionable insights from vast datasets, driving efficiencies and enhancing decision-making processes. From automating claims processing to improving member engagement through personalized interactions, data-driven technologies are streamlining operations and reducing costs, emphasizing the growing recognition of data as a critical strategic asset in healthcare.

Payers are also embracing omnichannel engagement strategies as member expectations evolve. This trend focuses on creating seamless interactions across various

Digital transformation unlocks a new era of **smarter, faster and personalized** healthcare.

touchpoints, including mobile apps, websites, call centers and social media. By employing digital tools such as chatbots and automated communication systems, payers can enhance member satisfaction and engagement, making it easier for individuals to access healthcare information and services. This holistic approach underscores the importance of personalized and responsive support throughout the healthcare journey, ultimately improving the overall experience for members.

Interoperability and data integration are fundamental elements in the payer landscape. Achieving seamless data exchange across the healthcare ecosystem is essential for creating comprehensive patient profiles and optimizing care management. Solutions that support interoperability, particularly Fast Healthcare Interoperability Resources (FHIR)-based platforms, are becoming increasingly important for enhancing collaboration with providers and improving care coordination. This trend boosts operational efficiency and addresses the growing demand for transparency and access to healthcare information.

Finally, a strong commitment to responsible and ethical AI practices among payers is evident as they integrate AI into their operations. Organizations are prioritizing the establishment of ethical guidelines that protect patient privacy, promote fairness and ensure compliance with regulations. By implementing governance frameworks and best practices for AI use in decision-making processes, payers can balance innovation with ethical considerations, thereby building trust among stakeholders and safeguarding patient interests.

Payer Digital Transformation (Public)

The public payer landscape is experiencing a significant transformation driven by digital transformation strategies and advanced technology integration. Public payers are increasingly adopting innovative technologies such as GenAI, ML and telehealth to enhance operational efficiency and streamline claims processing. This trend stems from the need to improve overall service delivery and is evidenced by the implementation of automated platforms that facilitate rapid claims resolution and reduce administrative burdens.

As payers invest in these digital solutions, they improve user satisfaction and patient outcomes, transforming the healthcare delivery landscape.

A critical aspect of this transformation is the enhanced focus on CX. Payers are prioritizing the relationships they cultivate with Medicaid and Medicare beneficiaries through personalized communication, efficient claims resolution and improved service accessibility. By leveraging innovative solutions such as AI-driven chatbots and user-friendly digital portals, payers can build trust and satisfaction among beneficiaries. This approach focuses on CX, which is essential for maintaining member retention and promoting improved health outcomes, as beneficiaries are increasingly supported throughout their healthcare journeys.

Furthermore, there is a growing emphasis on developing a collaboration and partnership ecosystem. Public payers increasingly seek partnerships with digital health providers and technology vendors, enabling them to access a broader range of resources and capabilities. Collaborations with hyperscalers and other organizations enhance solution offerings for Medicaid and Medicare operations, improving the availability of services to beneficiaries. This approach assists payers in navigating regulatory complexities and responding effectively to the evolving market demands, allowing them to stay ahead in a rapidly changing healthcare environment.

Revenue cycle management (RCM)

The healthcare industry is transforming as providers increasingly adopt advanced technologies to enhance operational efficiency and patient care. Key emerging trends highlight the integration of cognitive AI, modular RCM solutions, proactive denial management and enhanced financial assistance programs. Cognitive AI utilization is at the forefront of this transformation. Providers are implementing cognitive AI solutions that automate routine tasks and analyze patient interactions and claims data for informed decision-making. For instance, sentiment analysis allows providers to deliver more nuanced responses during patient interactions, enhancing service delivery through real-time insights.

The trend towards modular RCM solutions with flexible integration is gaining traction, enabling healthcare organizations to customize their RCM processes according to specific needs. Providers can create tailored workflows that optimize efficiency and adaptability in their operations by selecting and integrating various functionalities, such as patient registration and claims management.

Additionally, proactive denial management through predictive analytics is reshaping the approach to revenue cycle integrity. By leveraging predictive analytics, organizations can identify potential denials before they occur, allowing for proactive issue resolution at their source. This forward-thinking approach enhances revenue integrity and streamlines claim processing by flagging high-risk submissions for preemptive action.

There is also a notable emphasis on enhanced financial assistance and patient support, mainly aimed at assisting the uninsured and underinsured. Solutions that guide patients through government and charity care options digitally empower providers to improve patient satisfaction and foster improved revenue collection through informed participation.

Enterprise Resource Planning (ERP)

The transformation of healthcare providers is increasingly characterized by the adoption of cloud-based ERP solutions, marking a significant shift in operational capabilities. This transition offers scalability and flexibility and results in reduced infrastructure costs, allowing providers to rapidly implement systems that grant access to patient records, scheduling tools and billing processes from any device. By fostering collaboration among care teams, cloud hosting enables providers to concentrate on critical patient care objectives and enhances service delivery while mitigating the complexities associated with traditional on-premises systems.

In addition to cloud adoption, integrating advanced technologies into ERP systems plays a central role in provider transformation. The incorporation of GenAI enhances decision-making by providing actionable insights derived from comprehensive datasets, facilitating personalized treatment plans that lead to improved patient outcomes. Analytics tools empower healthcare providers to monitor real-time performance metrics, enabling data-driven decision-making that optimizes resource allocation. Simultaneously, automation streamlines repetitive tasks such as billing and appointment scheduling, significantly reducing administrative burdens, minimizing errors and allowing the providers to focus on high-quality care delivery.

As healthcare organizations increasingly rely on digital solutions, providers focus on enhanced data security and compliance. They deploy robust encryption methods to safeguard patient information and adhere to stringent compliance standards. Implementing role-based access controls mitigates the risk of data breaches by ensuring that only authorized personnel can access sensitive data. This commitment to security protects patient information and reinforces trust and the reputation of healthcare entities dedicated to maintaining privacy and regulatory compliance.

Furthermore, adopting agile proprietary frameworks has gained traction in ERP transformations, empowering providers to respond swiftly to dynamic market demands. Agile methodologies enable teams to rapidly develop and deploy new features, such as telehealth capabilities, in response to emerging healthcare needs. This flexibility fosters a culture of innovation, allowing providers to continuously adapt their processes to the rapidly changing landscape of healthcare delivery.

Electronic Health Records (EHR)

A focus on interoperability, cloud migration, AI-driven enhancements and patient-centric digital solutions increasingly characterizes the transformation of EHR systems. These advancements reshape the healthcare landscape, facilitating improved care delivery and health outcomes.

Interoperability and data exchange are at the forefront of EHR transformation. A growing emphasis on seamless data exchange drives EHR providers to implement standards such as FHIR, which enhances real-time integration across various health information exchanges (HIEs). This interoperability ensures healthcare providers can efficiently access and share patient information, improving care continuity. Enhanced collaboration fosters more effective care models and supports initiatives such as accountable care organizations (ACOs), improving population health management and patient outcomes.

Alongside interoperability, cloud migration is becoming increasingly prevalent among EHR providers, enhancing the scalability, flexibility and accessibility of health records. This transition enables advanced data analytics capabilities, allowing providers to harness data as a strategic asset. Healthcare organizations gain valuable insights into patient outcomes, operational efficiencies and care management by leveraging analytics. Cloud solutions also support disaster recovery, bolster cybersecurity measures and ensure compliance with regulatory requirements, significantly alleviating the burden associated with traditional on-premises management.

Integrating AI-driven enhancements transforms EHRs by automating routine tasks and improving data processing. Advanced capabilities enable the generation of detailed reports from complex queries using natural language, significantly reducing turnaround times. Enhanced search functionalities facilitate quick access to essential information, minimizing time spent on information retrieval and reducing the risk of diagnostic and treatment errors. Intelligent solutions also streamline lab order placements, contributing to increased service throughput and revenue generation. Continuous monitoring systems foster proactive patient management, enhancing health outcomes and overall productivity.

A notable shift toward patient-centric digital solutions is observed. EHR providers are developing applications that prioritize patient engagement and experience, enabling virtual consultations, remote monitoring and personalized care management. These solutions empower patients with access to their health data, educational resources and self-service capabilities, leading to improved satisfaction and health outcomes. Incorporating telehealth platforms and mobile health applications encourages ongoing patient-provider communication, supports chronic disease management and reduces hospital readmission rates through timely interventions and support.

Healthcare is digitally transforming and is driven by AI, analytics and seamless data integration. Payers and providers embrace VBC, advanced analytics and cloud technologies to enhance operational efficiency, improve patient outcomes and foster innovation. This shift creates a more connected, patient-centered ecosystem prioritizing intelligent decision-making, personalized care and streamlined healthcare delivery across the entire landscape.

Provider Positioning

Page 1 of 5

	Payer Transformation - Public	Payer Transformation - Private	Provider Transformation - ERP	Provider Transformation - RCM	Provider Transformation - EHR
Accenture	Leader	Leader	Leader	Leader	Leader
Access Healthcare	Not In	Not In	Not In	Contender	Not In
AGS Health	Not In	Not In	Not In	Product Challenger	Not In
Beyondsoft	Not In	Contender	Not In	Not In	Not In
Capgemini	Not In	Product Challenger	Not In	Not In	Not In
CitiusTech	Product Challenger	Leader	Not In	Product Challenger	Rising Star ★
Coforge	Not In	Product Challenger	Not In	Not In	Not In
Cognizant	Leader	Leader	Leader	Leader	Not In
Conduent	Not In	Product Challenger	Not In	Not In	Not In
Conifer	Not In	Not In	Not In	Product Challenger	Not In
Deloitte	Leader	Leader	Leader	Leader	Leader

Provider Positioning

	Payer Transformation - Public	Payer Transformation - Private	Provider Transformation - ERP	Provider Transformation - RCM	Provider Transformation - EHR
DXC Technology	Not In	Contender	Not In	Not In	Not In
Emids	Not In	Product Challenger	Contender	Not In	Contender
Ensemble Health Partners	Not In	Not In	Not In	Product Challenger	Not In
Eviden (Atos Group)	Contender	Product Challenger	Product Challenger	Contender	Market Challenger
Exela Technologies	Contender	Product Challenger	Not In	Product Challenger	Not In
EXL	Market Challenger	Leader	Not In	Market Challenger	Not In
Firstsource	Product Challenger	Leader	Not In	Rising Star ★	Not In
Gainwell Technologies	Product Challenger	Not In	Not In	Not In	Not In
Genpact	Not In	Product Challenger	Leader	Product Challenger	Market Challenger
GS Lab | GAVS	Not In	Product Challenger	Not In	Not In	Contender
Guidehouse	Not In	Not In	Not In	Market Challenger	Not In

Provider Positioning

	Payer Transformation - Public	Payer Transformation - Private	Provider Transformation - ERP	Provider Transformation - RCM	Provider Transformation - EHR
HCLTech	Leader	Leader	Leader	Leader	Leader
Hexaware	Not In	Product Challenger	Not In	Contender	Not In
HTC Global Services	Contender	Contender	Product Challenger	Not In	Contender
Huron	Not In	Not In	Product Challenger	Not In	Contender
IBM	Not In	Market Challenger	Not In	Not In	Not In
Impact Advisors	Not In	Not In	Product Challenger	Product Challenger	Product Challenger
Infinite Computer Solutions	Not In	Product Challenger	Not In	Not In	Product Challenger
Infosys	Leader	Leader	Not In	Market Challenger	Leader
Innova Solutions	Rising Star ★	Product Challenger	Not In	Not In	Not In
KPMG	Not In	Not In	Leader	Not In	Not In
Kyndryl	Leader	Product Challenger	Not In	Not In	Leader

Provider Positioning

	Payer Transformation - Public	Payer Transformation - Private	Provider Transformation - ERP	Provider Transformation - RCM	Provider Transformation - EHR
LTIMindtree	Product Challenger	Leader	Product Challenger	Contender	Product Challenger
Mastek	Not In	Contender	Contender	Not In	Not In
Mphasis	Market Challenger	Product Challenger	Contender	Contender	Contender
NTT DATA	Leader	Leader	Market Challenger	Market Challenger	Market Challenger
Optum	Not In	Not In	Not In	Leader	Not In
Perficient	Not In	Contender	Not In	Not In	Not In
Persistent Systems	Not In	Product Challenger	Not In	Not In	Not In
PwC	Not In	Market Challenger	Leader	Not In	Not In
R1rcm	Not In	Not In	Not In	Leader	Not In
Rackspace Technology	Not In	Contender	Not In	Not In	Product Challenger
RCM Solutions	Not In	Not In	Not In	Product Challenger	Not In

Provider Positioning

	Payer Transformation - Public	Payer Transformation - Private	Provider Transformation - ERP	Provider Transformation - RCM	Provider Transformation - EHR
Sagility Health	Not In	Not In	Not In	Market Challenger	Not In
Softtek	Not In	Contender	Contender	Not In	Contender
Sutherland	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
TCS	Leader	Leader	Not In	Not In	Market Challenger
Tech Mahindra	Market Challenger	Rising Star ★	Rising Star ★	Market Challenger	Market Challenger
Tegria	Not In	Not In	Not In	Product Challenger	Not In
UST	Market Challenger	Leader	Market Challenger	Not In	Product Challenger
Virtusa	Not In	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Leader
WNS	Not In	Contender	Not In	Product Challenger	Not In

The IPL **Healthcare Digital Services** 2024 study focuses on digital transformation solutions and services for payers and providers.

- **Payer Transformation — Public**
- **Payer Transformation — Private**
- **Provider Transformation — ERP**
- **Provider Transformation — RCM**
- **Provider Transformation — EHR**

Simplified Illustration Source: ISG 2024

Definition

Digital transformation in healthcare is the strategic integration of technologies, such as electronic health records (EHRs), telemedicine, AI and wearable devices, and the use of big data analytics to ensure operational efficiency and optimize patient care, where each technology is associated with certain inherent benefits. AI is crucial for enhancing data management, diagnostics and tailoring treatments to specific patient needs; telemedicine expands access to healthcare through virtual consultations; mobile health (mHealth) uses mobile devices, giving patients control over their health data, following real-time monitoring with wearables and IoT devices; RPA streamlines administrative tasks; and blockchain ensures secure data management across healthcare systems. Patient engagement platforms further personalize healthcare, while ensuring compliance with strict data security regulations to maintain the operational integrity of cloud solutions.

Despite challenges such as interoperability, cyber threats and disparities in digital access, the ongoing digital transformation promises a healthcare system that is efficient, accessible and patient-centric. Evolving regulatory frameworks and technological advances will support this transformation, benefitting both patients and healthcare providers.

The ISG Provider Lens™ Healthcare Digital Services 2024 study will assess providers based on their capacity to enhance clients' technological capabilities, develop robust architectural frameworks and streamline management. Evaluations would focus on their readiness to support future technological advances, offer strategic insights and show a certain preparedness for forthcoming innovations.

ISG's Healtcare Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Healthcare Digital Services and helps connect them to the digital solutions
- Represents the entire value chain of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities, with unique market leading providers and solutions

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services: Payer Transformation — Public, Payer Transformation — Private, Provider Transformation — ERP, Provider Transformation — RCM and Provider Transformation — EHR.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Payer Transformation - Public

Who Should Read This Section

This quadrant report is relevant to healthcare public payer enterprises across the U.S. for evaluating providers offering digital transformation services to improve patient and member services.

In this quadrant, ISG highlights the current market positioning of providers offering digital transformation services to public payers in the U.S. and shows how each provider addresses the rising demands and critical challenges.

Public healthcare payers face several challenges, such as increasing administrative demands, the need for greater operational efficiency and the complexities arising from regulatory changes. To address such issues, enterprises are focusing on automating key processes such as claims adjudication, enrollment and eligibility verification, which helps reduce manual errors and administrative backlogs.

Additionally, as more people become eligible for public health programs, there is a growing need for enhanced administrative efficiency to manage rapid enrollment and compliance with shifting healthcare reforms. Leading service providers in the U.S. payer market are offering flexible and scalable systems that streamline operations and improve data access while ensuring they can adapt to evolving requirements effectively.

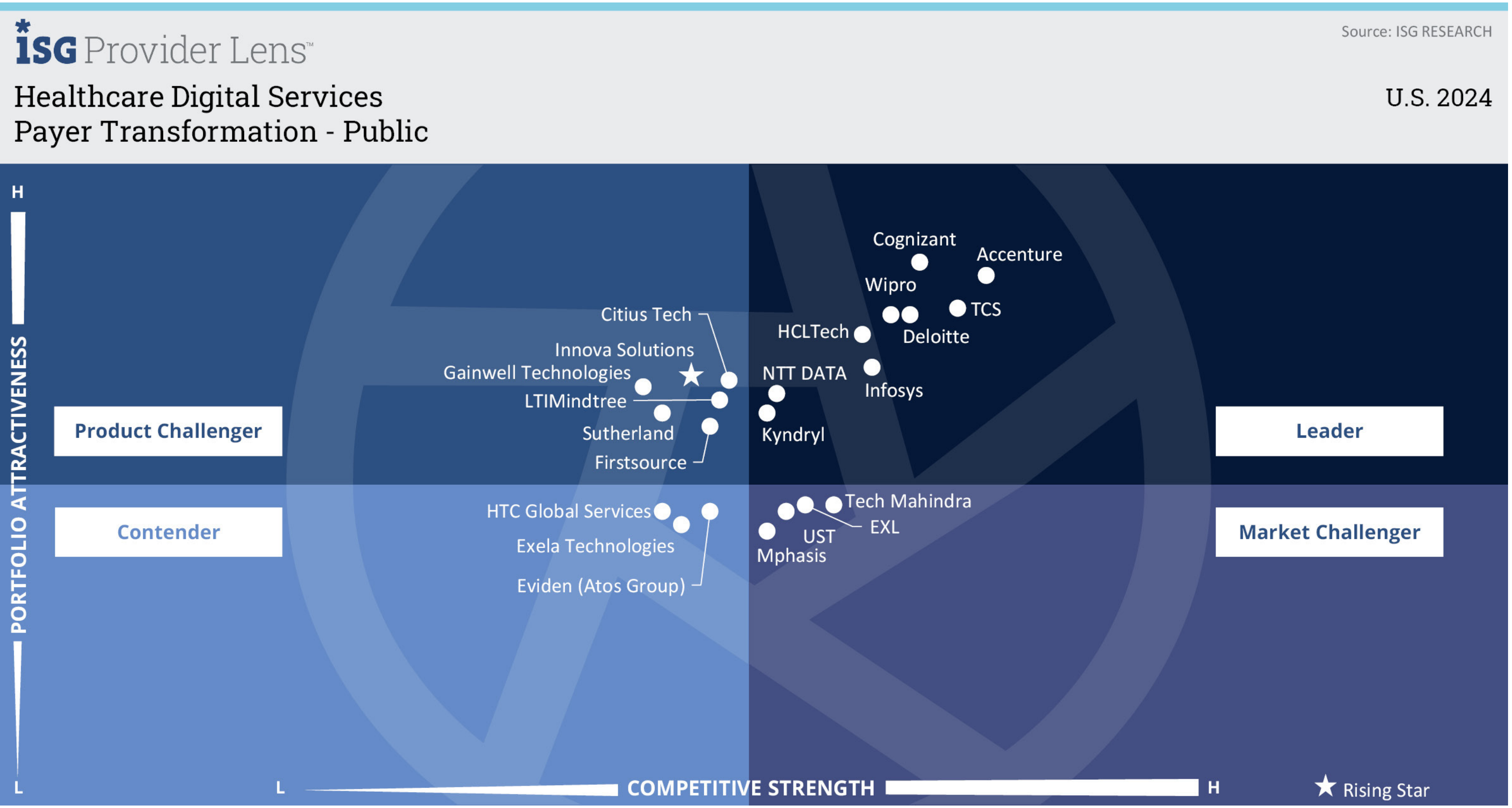
Service providers are also leveraging cloud-based technologies to facilitate better integration with health records and other systems, enabling real-time data access and improved workflows. By prioritizing automation and system integration, they enhance overall care quality, support efficient claims processing and navigate the complexities of the healthcare landscape more effectively.

Digital professionals should read this report to understand digitalization in the U.S. healthcare payer public sector and how top providers enhance efficiency and effectiveness across payer operations.

Industry practitioners should read this report to understand providers' relative positioning and capabilities and meticulously plan and select appropriate digital services and solutions.

Technology professionals should read this report to understand the U.S. public healthcare technology landscape and how providers leverage cutting-edge technologies to meet payer needs.

Cybersecurity professionals should read this report to understand providers' efforts to adhere to security requirements and regulations without compromising patient privacy and experience.



In this quadrant, ISG evaluates providers that offer digital transformation services to **public sector payers, including government health agencies and public health insurance programs.**

Rohan Sinha

Definition

In this quadrant, ISG evaluates providers that offer digital transformation services to public sector payers, including government health agencies and public health insurance programs. Digital transformation in the public sector involves integrating advanced technologies to enhance the administration, efficiency and effectiveness of healthcare payer operations. These services aim to modernize processes, improve data management and enhance service delivery. The benefits of digital transformation in the public sector include enhanced operational efficiency, improved data accuracy, augmented regulatory compliance and increased transparency.

Eligibility Criteria

1. Have a **clear understanding of the U.S. public healthcare** operations and be familiar with critical regulations by **CMS. Also, ensuring compliance with other regulations such as HIPAA, the Affordable Care Act (ACA)** and other relevant standards to ensure compliance and protect data integrity
2. Ensure that the **systems and technologies it implements align** with the **payer's processes and objectives**, enhancing overall efficiency and service delivery, with customization addressing each public sector payer's unique requirements
3. **Expertise in integrating and managing** advanced technologies such as **data analytics, AI and ML, cloud computing and cybersecurity** within healthcare payer environments
4. Proficiency in **implementing robust data management** and analytics solutions to enhance data accuracy and **provide actionable insights**
5. Capability in **developing and integrating** systems that facilitate **seamless data exchange** between various healthcare entities
6. Can adopt the **latest technologies and best practices**, offering solutions that adapt **to future advances and industry standards**

Observations

ISG has observed that various payer organizations have direct contracts with federal and state agencies, apart from the usual model where a private insurer collaborates with the government. This shift highlights an evolving landscape in payer transformation, where government entities, acting as payers, increasingly seek to engage directly with IT service providers to meet the demands of public health administration.

In these scenarios, IT service providers are critical in delivering essential services such as claims processing, data management and IT support for government health programs such as Medicare Advantage, Medicaid and the Children's Health Insurance Program (CHIP). While these contracts may not directly involve private insurers, they are vital for enhancing the capabilities and efficiency of programs that serve vast populations.

Focusing on direct contracts with agencies such as the Centers for Medicare & Medicaid Services (CMS) and various Departments of Health highlights the strategic importance of IT service providers in ensuring compliance, facilitating data interoperability and improving overall service delivery within public health systems. This trend underscores technology's essential role in driving payer transformation and improving outcomes in a complex healthcare environment.

From the 28 companies assessed for this study, 22 have qualified for this quadrant, with nine being Leaders and one a Rising Star.

Accenture integrates healthcare stakeholders to improve national health outcomes. It offers tailored tech solutions for federal systems, focusing on virtual and mobile health accessibility to ensure equitable care for all, particularly in underserved areas.

Cognizant partners with Medicare and Medicaid to establish itself as a trusted healthcare provider. Its ClaimsXM solution automates Veterans Health Administration (VHA) claims with real-time data access, while its Medicaid Solutions enhance efficiency and care quality.

Deloitte drives digital transformation for U.S. federal health agencies through tailored strategies, workforce development and cybersecurity. Strategic partnerships with tech leaders enable Deloitte to deliver customized solutions that ensure compliance and resilience.

HCLTech supports public programs such as Medicare and Medicaid with a robust Medicaid Management Information System (MMIS) and open architecture, facilitating modernization and adapting to evolving business models.

Infosys excels in public sector engagement by managing state health programs such as Medicaid and CHIP. Expertise in design, development and implementation (DDI) and innovative solutions boost service delivery and member experiences.

Kyndryl modernizes systems by optimizing California's MMIS and transitioning New Mexico's Indian Health Service (IHS) to its Z Cloud mainframe. This approach effectively addresses client challenges and fosters trust with partners such as HCSC and Blue Cross Blue Shield.

NTT DATA's Government Consulting and Advisory Group excels in state healthcare, especially Medicaid, with strong relationships enhancing tailored solutions. Its focus on public sector consulting positions it among the trusted advisors.

TCS modernizes Medicare and Medicaid systems to enhance claim processing and reduce turnaround times. Its scalable platform addresses health information exchange challenges, enabling CMS compliance while delivering client-centric solutions that enhance healthcare operations.

Wipro demonstrates its federal expertise through direct contracts with CMS for Medicare processing. Its strong state-level engagement in Missouri highlights its commitment to social and educational programs, enhanced by innovative platforms such as Medicare in a Box.

Innova Solutions

Innova Solutions (Rising Star) modernizes Medicaid operations with a digital transformation strategy that leverages GenAI and advanced technologies, enhancing claims operations and improving health outcomes through strong partnerships.

Wipro

Leader

"Wipro's platform-centric approach and smart automation drive digital transformation for public sector payers, while strategic partnerships and a commitment to innovation ensure exceptional service delivery and operational efficiency in healthcare."

Rohan Sinha

Overview

Wipro is headquartered in Bengaluru, India. It has more than 234,000 employees across 200 offices in 65 countries. In FY24 the company generated $10.7 billion in revenue, with IT Services as its largest segment. Wipro has forged strong partnerships with leading payers and key healthcare organizations, enhancing its credibility and execution in delivering effective payer solutions. By investing in emerging technologies such as GenAI and cloud solutions, coupled with a skilled talent pool, Wipro is well-positioned to provide advanced solutions tailored to the evolving needs of public sector payers.

Strengths

Expertise in federal programs: Wipro's contracts with the CMS highlight its expertise in the federal healthcare landscape. Its capabilities in Medicare eligibility verification and Medicare Advantage Plan submissions showcase the company's proficiency in managing critical healthcare data and processes.

Strong state-level engagement: Wipro has established direct contracts with multiple departments in Missouri, including the Department of Social Services and the Department of Secondary Education. This extensive engagement allows the company to effectively support various social and educational programs, demonstrating its commitment to serving state needs.

Digital transformation through platform-centric approach: Wipro leverages its innovative platform, Medicare in a Box and Enterprise Medicaid as a Service (EMaaS®) solution to deliver superior value to public sector payer clients. This platform-centric approach enhances efficiency and transforms healthcare delivery.

Extensive claims processing expertise: Wipro's significant claims processing experience as the Medicaid fiscal agent for a major Midwestern state has resulted in over 99 percent electronic claims processing and automated submissions, leading to notable cost savings. Its expert team ensures efficient and accurate handling of millions of claims annually.

Caution

While Wipro's investments in technologies such as GenAI and cloud services are promising, the company should focus on maintaining long-term commitment and continuous support for these initiatives to deliver sustained value over time.

Payer Transformation - Private

Who Should Read This Section

This quadrant report is relevant to healthcare private payer enterprises across the U.S. for evaluating providers offering digital transformation services to improve patient and member services.

In this quadrant, ISG highlights the current market positioning of providers that offer digital transformation services to private payers in the U.S. and shows how each provider addresses the rising demands and critical challenges.

Owing to rising costs, labor shortages, evolving customer expectations, fragmented operations, regulatory compliance

and technology disruption, payers are increasingly investing in integrated platforms and advanced technologies that streamline operations — from claims processing to member onboarding — to enhance productivity and profitability.

By integrating advanced analytics and automation, payers achieve substantial operational efficiencies, reduce administrative burdens and decrease costs. Moreover, incorporating generative (GenAI) across the payer value chain is pivotal in delivering a unified experience and enhancing business outcomes for all stakeholders.

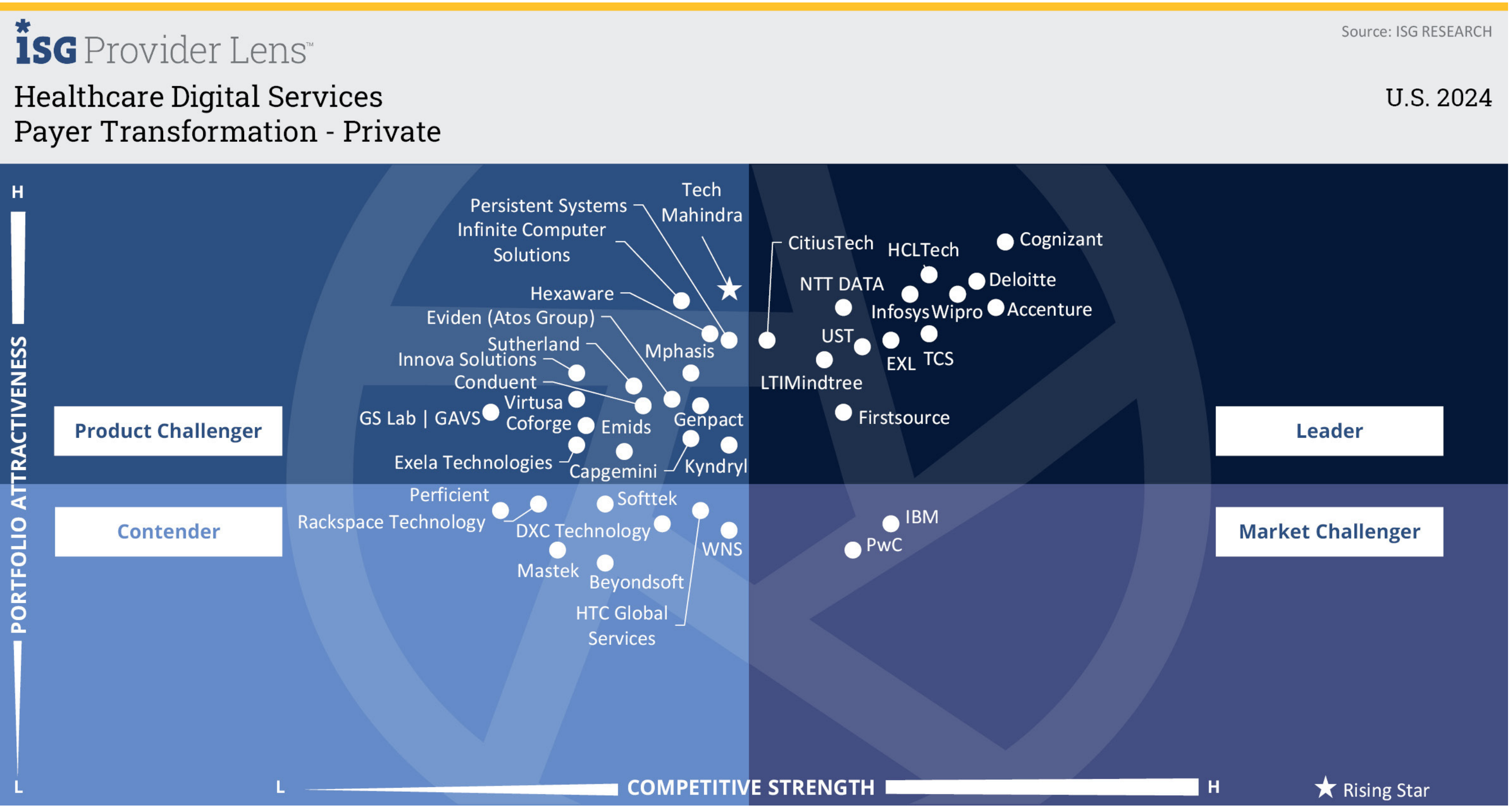
Providers are developing innovative tools and accelerators to further streamline operations, enhance administrative efficiencies and ensure regulatory compliance. Their commitment to fostering a culture of innovation remains strong as they continue to generate new ideas and upskill their teams in next-generation digital technologies. This proactive approach positions them well to meet the evolving demands of the healthcare landscape while driving improved member engagement and superior care delivery.

Digital professionals should read this report to understand digitalization in the U.S. healthcare payer private sector and how top providers enhance efficiency and effectiveness across payer operations.

Industry practitioners should read this report to understand providers' relative positioning and capabilities and meticulously plan and select appropriate digital services and solutions.

Technology professionals should read this report to understand the U.S. healthcare technology landscape and how providers leverage cutting-edge technologies to meet payer needs.

Cybersecurity professionals should read this report to understand the providers' efforts to adhere to security requirements and regulations without compromising patient privacy and experience.



This quadrant assesses service providers' proficiency in delivering comprehensive digital transformation services to **payers within the U.S. healthcare domain, including consulting, process, system modernization and member experience enhancement.**

Rohan Sinha

Definition

In this quadrant, ISG evaluates providers that offer digital transformation services to private sector payers, including private health insurance companies and managed care organizations. Digital transformation in this context involves integrating advanced technologies to enhance healthcare payer operations, efficiency and effectiveness. These services aim to modernize processes, improve data management and augment service delivery. Digital transformation in the private sector is characterized by numerous benefits such as enhanced operational efficiency, improved data accuracy and regulatory compliance, and increased customer satisfaction.

Eligibility Criteria

1. Have a **comprehensive understanding** of private healthcare operations in the U.S., alongside **familiarity with critical regulations such as HIPAA and the Affordable Care Act (ACA)** to ensure compliance and protect data integrity
2. Ensure that the **systems and technologies** it **implements align** with the **payer's processes and objectives**, enhancing overall efficiency and service delivery, with customization addressing each private sector payer's unique requirements
3. **Expertise in integrating and managing** advanced technologies such as **data analytics, AI and ML, cloud computing and cybersecurity** within healthcare payer environments
4. Proficiency in **implementing robust data management** and analytics solutions to enhance data accuracy and **provide actionable insights**
5. Capability in **developing and integrating** systems that facilitate **seamless data exchange** between various healthcare entities
6. Can adopt the **latest technologies and best practices**, offering solutions that adapt **to future advances and industry standards**

Observations

The digital landscape for healthcare payers is undergoing significant transformation, influenced by several important factors. One of the main drivers of this change is the increasing demand for smooth processes and improved operational efficiency. Organizations are finding ways to effectively navigate the complex healthcare environment. Technological advancements and a growing reliance on data-driven decision-making are key contributors to this transition. As healthcare providers and members change their expectations, improving member experiences becomes even more pivotal, making digital transformation initiatives valuable.

In this competitive and rapidly changing marketplace, healthcare payers are adopting digital solutions as a strategic response to various challenges. Leading organizations in this area are increasingly involved with payers across the U.S., offering a complete range of services to reduce costs and enhance member experiences. These companies are dedicated to solving complex claims processing and modernization issues. This analysis highlights most organizations with well-defined technology road maps to support their transformation efforts. They are investing in essential technologies such as GenAI, ML, blockchain and data analytics, which are crucial for enhancing their digital capabilities. As the healthcare payer sector evolves, embracing these innovations will be vital for long-term success.

From the 50 companies assessed for this study, 40 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

Accenture enhances member satisfaction through secure digital channels and promotes advanced technologies for operational efficiency and revenue growth. Streamlining operations reduces administrative burdens, enabling healthcare payers to focus on delivering quality care.

CitiusTech offers health plans to replace manual workflows with scalable AI solutions that enhance efficiency and compliance while driving digital transformation in insurance and streamlining prior authorization to enhance member experiences and patient access.

Cognizant enhances the efficiency of the claims value chain through comprehensive digital solutions and intelligent process automation, delivering significant cost savings for healthcare payers.

Deloitte harnesses advanced technologies to transform healthcare processes and enhance competitiveness, offering tailored solutions through modern administration and improved customer engagement.

EXL adopts a data-led, digital-first approach to transform value chains, using custom LLMs for health trend predictions and personalized care. It provides comprehensive payer support and partners with technology leaders to deliver significant client value.

Firstsource uses its AI platform, FirstSenseAI, to streamline healthcare processes and boost member engagement. It also provides touchless automation for eligibility, enrollment, billing and advanced health risk assessment solutions.

HCLTech transforms the healthcare payer industry with GenAI and tailored solutions, providing advanced data operations to boost efficiency and ensure compliance.

Infosys leverages its Topaz platform for GenAI solutions that transform healthcare payers by improving efficiency and care access. Its comprehensive offerings, strategic partnerships and talent development drive operational growth and meet diverse payer needs.

LTIMindtree enhances healthcare payer engagement with personalized digital solutions and optimizes costs through cloud modernization. The company focuses on VBC and data integration, enabling payers to effectively improve outcomes and navigate challenges.

NTT DATA strengthens healthcare payer operations with its Medical Cost Manager and CarePro suite, ensuring secure transactions through its Enrollment and Billing Solution while enhancing efficiency via a robust partnership ecosystem.

TCS enhances healthcare with analytics for VBC to optimize reimbursements and ensure compliance. Its patient-centric solutions improve engagement, while its ignio™ platform uses cognitive AI to streamline claims processing and reduce costs.

UST emphasizes patient-centric VBC initiatives to improve outcomes and cost efficiency, supported by its UST HealthIQ platform, which streamlines operations. A robust partner ecosystem enhances its ability to deliver integrated healthcare solutions.

Wipro offers comprehensive care management solutions for public payers, enhancing health outcomes through innovative tools. It leverages GenAI and the ACA Integrated Links Platform to improve member-provider interactions and streamline enrollment.

Tech Mahindra (Rising Star) provides digital transformation solutions for healthcare payers with platforms such as HealthNxt and CareNxt to enhance efficiency. Its Generative AI Studio and automation initiatives streamline enrollment and claims processes, improving CX.

Wipro

Leader

"Wipro is transforming the payer landscape by harnessing the power of digital innovation and strategic partnerships to enhance member engagement, streamline operations and drive value-based care."

Rohan Sinha

Overview

Wipro is headquartered in Bengaluru, India. It has more than 234,000 employees across 200 offices in 65 countries. In FY24 the company generated $10.7 billion in revenue, with IT Services as its largest segment. Wipro's credibility is bolstered by its extensive partnerships with leading payers and collaborations with essential healthcare organizations, including HealthEdge, PLEXIS, Medversant, GetInsured and Icertis. These alliances play a vital role in enhancing Wipro's proven execution track record.

Strengths

Comprehensive care management solutions: Wipro provides a robust suite of services for public payers across the care continuum, including utilization management, care coordination and risk adjustments. Its innovative tools, such as the prior authorization intake automation bot and research bots, enable effective care management and support VBC, improving health outcomes and operational efficiency.

Advancing payer services with GenAI: Wipro leverages GenAI to improve interactions between members and providers and core administrative functions in the payer sector. By addressing member queries and resolving claim denials, the company enhances operational efficiency. Critical applications such as Connected Patient Intelligence generate insights into patient behavior, enabling timely interventions and personalized care plans that improve patient experience.

Platform solutions for enrollment and billing: Wipro's ACA Integrated Links Platform provides a robust enrollment and billing solution focused on data integrity and compliance. This modular platform as a service includes the GetNext! workflow system to enhance efficiency and CX, supported by print and mail integration, eDelivery and advanced analytics. These functionalities are delivered through a Health Insurance Portability and Accountability Act (HIPAA)/Payment Card Industry (PCI)-compliant online portal.

Caution

Clients should be aware of potential challenges in integrating Wipro's solutions into their existing systems. Wipro should focus on effective change management to ensure a smooth transition, as adopting new technologies and processes may require significant adjustments and staff training.

Provider Transformation - ERP

Who Should Read This Section

This quadrant report is relevant to healthcare provider enterprises across the U.S. for evaluating providers offering ERP implementation services to improve patient experiences.

In this quadrant, ISG highlights the current market positioning of providers offering ERP implementation services to U.S. healthcare providers and shows how each provider addresses the rising demands.

In the current market landscape, healthcare-specific, preconfigured solutions are witnessing significant demand. These solutions generate valuable insights and apply best practices in the sector. Healthcare provider organizations are changing their perspective on ERP systems, from viewing them merely as essential transactional tools to recognizing their potential as strategic solutions. These advanced systems offer enhanced business intelligence capabilities, enabling providers to drive value-driven outcomes and improve operational efficiency.

In response, leading service providers in the U.S. payer market are strategically investing in their ERP offerings, particularly cloud-based ERP solutions, which offer scalability and flexibility and reduce infrastructure costs. Their commitment to security ensures patient information protection and builds trust, reinforcing the reputation of enterprises dedicated to maintaining privacy and adhering to regulations.

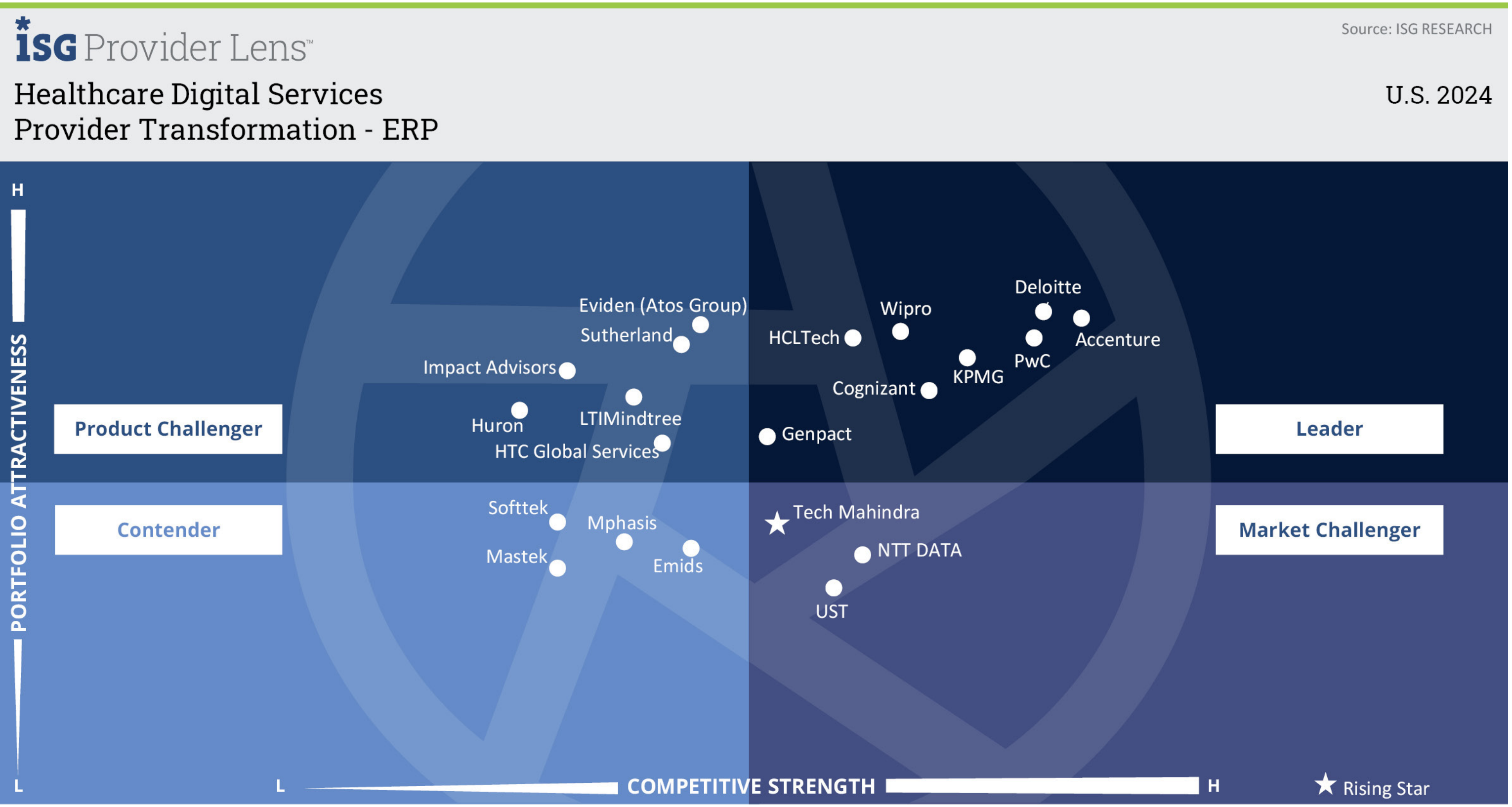
Service providers are using advanced technologies to further streamline operations and enhance operational efficiency. Integrating technologies enables them to extract actionable insights from vast datasets to facilitate personalized treatment plans and improve patient outcomes. This proactive approach positions them to meet the evolving demands of the healthcare landscape while enhancing patient experience.

Digital professionals should read this report to understand ERP solutions and services in U.S. healthcare and how service providers streamline workflows across healthcare provider operations.

Industry practitioners should read this report to understand service providers' positioning and capabilities and carefully plan and select appropriate ERP services and solutions.

Technology professionals should read this report to understand ERP implementation and how providers leverage cutting-edge technologies to meet enterprise needs.

Cybersecurity professionals should read this report to understand the service providers' efforts to adhere to security requirements and regulations without compromising patient privacy and experience.



In this quadrant, ISG evaluates providers that offer **ERP services** to healthcare organizations. These organizations are increasingly engaging ERP applications to **streamline operations, enhance patient care and improve financial management.**

Sneha Jayanth

Definition

In this quadrant, ISG assesses providers offering ERP implementation services to the healthcare industry. These providers specialize in delivering comprehensive software solutions that streamline and integrate the operations of healthcare providers, including hospital systems and independent healthcare organizations. They focus on deploying ERP systems tailored to the unique needs of the healthcare industry, ensuring benefits such as cost savings, improved operational efficiency, enhanced staff collaboration and optimized patient management. The expertise of these providers encompasses the entire implementation process — from initial planning and customization to deployment and ongoing support — enabling healthcare organizations to achieve seamless and effective system integration.

Eligibility Criteria

1. Have an in-depth **understanding of the operations** and challenges pertaining to the healthcare industry, including **regulations such as HIPAA and GDPR**
2. **Experience and specialization** in the healthcare industry, including successful **ERP implementations** for hospitals and independent healthcare organizations
3. Possess **advanced technical expertise in ERP software**, encompassing the development of intellectual property assets, strategic partnerships, installation, customization, integration and ongoing support
4. Ability to **tailor an ERP system to the specific needs of a healthcare** facility and ensure that it is in alignment with its processes and objectives
5. **Ability to integrate** next-generation technologies such as **AI, ML and analytics** to enhance the functionalities and effectiveness of an ERP system
6. Can provide **postimplementation services** such as troubleshooting, system updates and user training
7. **Offer scalable and flexible solutions** to accommodate organizational growth and evolving healthcare needs

Observations

The healthcare industry is poised for significant disruption, with consumers and care providers increasingly demanding seamless, personalized and secure experiences that enhance decision-making through tailored recommendations and contextual nudges. Providers that connect clinical and operational data will likely gain a competitive edge and reduce long-term costs.

Healthcare providers assess their ERP solutions to prepare for the upcoming challenges; they recognize the potential of ERP systems to streamline patient data management. By automating various administrative and clinical processes, these solutions enable providers to focus more on patient care. Integrating patient information across facilities offers a comprehensive view, granting access to real-time, accurate data that supports informed decision-making and improved patient outcomes.

ERP solutions enable the consolidation of financial data across organizations, delivering real-time visibility into financial performance while automating billing, payroll and accounting processes. This process leads to more accurate budgeting, efficient billing and enhanced cash flow management, ultimately reducing errors and fostering financial growth.

In an era of increasing cyberthreats, healthcare providers require robust systems to safeguard sensitive patient data. Cloud-based ERP systems enhance security by centralizing data and employing advanced security protocols, mitigating vulnerabilities. Thus, providers are investing substantially in healthcare ERP services, which provide system-agnostic integration across diverse healthcare IT infrastructures, including EHR, lab information management systems, radiology systems, claims and billing, and pharmacy systems, facilitating seamless data exchange and collaboration across the healthcare continuum.

From the 32 companies assessed for this study, 21 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture's proficiency in cloud-based ERP solutions positions it as a vital partner for healthcare providers transitioning to modern technology. Focusing on business transformation, it helps providers streamline operations and reduce IT costs, enhancing operations.

cognizant

Cognizant's comprehensive support throughout the ERP lifecycle customizes installations to regional needs. By leveraging advanced technologies such as AI and RPA it enhances operational efficiency, improves decision-making and patient experiences, and reduces costs.

Deloitte.

Deloitte's comprehensive support throughout the ERP implementation ensures that healthcare providers can effectively leverage operational performance with strategic objectives and achieve excellence across departments.

genpact

Genpact integrates advanced analytics and ML into its ERP systems, delivering actionable insights, optimizing workflows and improving decision-making. Its commitment to digital transformation and domain expertise tailors ERP solutions for scalability and efficiency.

HCLTech

HCLTech's strategic partnerships with leading vendors enable swift problem resolution and foster innovative solutions, enabling the company to harness cloud opportunities and deliver enhanced healthcare outcomes.

KPMG

KPMG accelerates healthcare modernization by focusing on data-driven decision-making, improving patient experiences, and adopting proactive risk management strategies to ensure compliance and operational integrity.

pwc

PwC excels in the healthcare sector with its profound understanding of cloud ERP solutions. It utilizes preconfigured ERP models tailored for the industry. Its design-by-exception approach ensures rapid adoption while preparing clients against potential disruptions.

wipro

Wipro offers a comprehensive suite of accelerators and tools to enhance providers' ERP functionalities. The company invests in a tailored framework to enable the successful adoption of ERP solutions and drive measurable business improvements.

Tech Mahindra

Tech Mahindra's (Rising Star) commitment to integrating advanced technologies enhances patient outcomes and streamlines operations. Its proprietary ERP solutions — EHR management, patient scheduling and supply chain optimization — solidify its role as a trusted healthcare partner.

Leader

"Wipro's comprehensive suite of accelerators and AI-driven solutions transforms healthcare ERP, ensuring seamless integration with provider operations and delivering improved outcomes."

Sneha Jayanth

Wipro

Overview

Wipro is headquartered in Bengaluru, India. It has more than 234,000 employees across 200 offices in 65 countries. In FY24 the company generated $10.7 billion in revenue, with IT Services as its largest segment. Wipro's ERP capabilities in healthcare focus on optimizing processes through integrated solutions. They offer services such as system consolidation, advanced analytics and cloud migration to enhance healthcare providers' decision-making. Wipro Healthcare ERP drives advancements in care delivery and provider support, backed by strong partnerships and continuous growth in the sector.

Strengths

Comprehensive suite of accelerators: Wipro delivers a broad suite of accelerators and tools designed for healthcare providers, featuring AI-driven model-based testing and innovative solutions for Oracle ERP. Its in-depth expertise in Epic Ambulatory implementation improves healthcare delivery, focusing on critical functions such as patient registration and scheduling. Wipro's robust partnerships enhance cloud migration capabilities to enable seamless transitions.

AI-driven advancements: Wipro emphasizes an AI-first strategy and offers AI-powered solutions across its technology practices, including ERP. Collaborating with the ai360 ecosystem, Wipro provides specialized learning pathways for associates and aims to integrate AI into processes and tools seamlessly. This focus enhances productivity and creates significant value.

Effective change management framework: Wipro's robust change management framework enables the successful adoption of ERP solutions. By identifying opportunities to maximize value, this framework helps prioritize the seamless integration of new digital workflows and optimized processes, translating technology adoption into measurable business improvements and alignment with organizational goals.

Caution

Wipro's robust ERP capabilities are commendable. Healthcare providers are eager to integrate AI and GenAI to enhance services and elevate patient care. The company should focus on increasing investments in innovation to sustain growth in today's evolving landscape.

Provider Transformation - RCM

Who Should Read This Section

This quadrant report is relevant to healthcare provider enterprises across the U.S. for evaluating providers offering RCM solutions and services to improve patient experiences. In this quadrant, ISG highlights the current market positioning of providers that offer RCM services to healthcare providers in the U.S. and shows how each provider addresses the rising demands.

In the current market landscape, RCM systems address significant healthcare provider challenges, including rising patient financial responsibility, claim denials and rejections, poor patient experience, delays in insurance claim reimbursement and administrative burdens. RCM solutions address these challenges by enhancing transparency in patient billing, reducing claim denials through automated error detection and integrating modern technology to streamline processes. These solutions ultimately enhance financial performance while boosting patient satisfaction.

Therefore, leading service providers in the U.S. provider market are strategically investing in RCM services that comply with evolving regulations and support value-based care models. These services enable healthcare organizations to access specialized expertise and improve financial performance while managing increasing patient volumes.

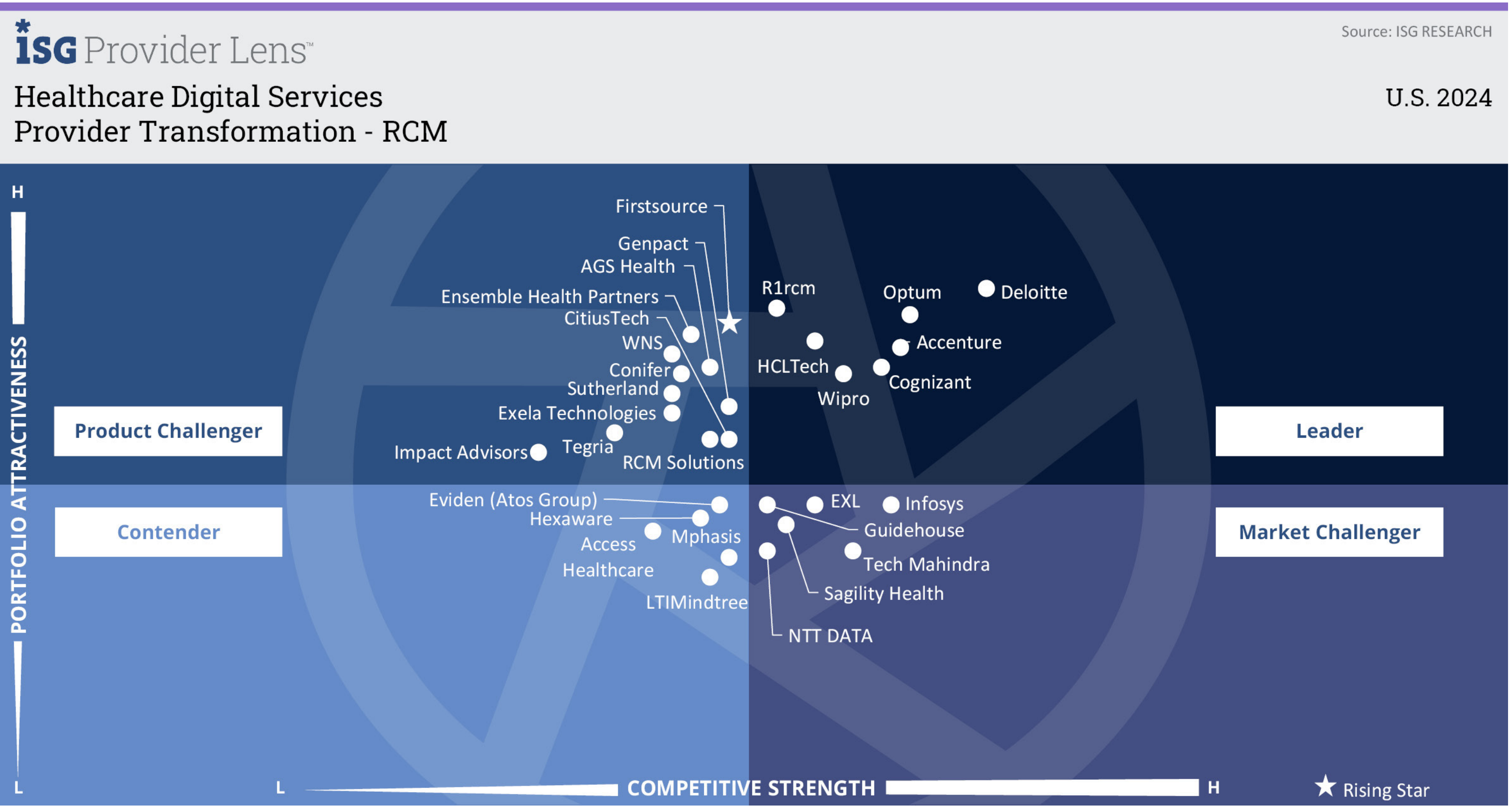
To further streamline operations, service providers are adopting advanced technologies such as cloud-based solutions and AI to streamline billing processes and improve accuracy. They are also focusing on automation to reduce errors and enhance efficiency, allowing staff to concentrate on patient care. This proactive approach enables them to meet the evolving demands of the healthcare landscape while enhancing patient experience.

Digital professionals should read this report to understand RCM solutions and services in U.S. healthcare and how service providers streamline workflows across healthcare provider operations.

Industry practitioners should read this report to understand service providers' positioning and capabilities and carefully plan and select appropriate RCM services and solutions.

Technology professionals should read this report to understand RCM implementation and how service providers leverage cutting-edge technologies to meet healthcare enterprise needs.

Cybersecurity professionals should read this report to understand the service providers' efforts to meet security requirements and regulations without compromising patient privacy and experience.



This quadrant assesses providers specializing in **revenue cycle management** for healthcare, evaluating their ability to deliver **advanced solutions that streamline financial processes.**

Rohan Sinha

Definition

In this quadrant, ISG evaluates providers specializing in revenue cycle management (RCM) for the healthcare industry, delivering advanced solutions that streamline the financial processes of healthcare organizations. By using sophisticated medical billing software, these providers manage the entire revenue cycle — from patient registration and appointment scheduling to final payment collection. Their services ensure efficient identification, collection and management of revenues from patient services, wherein they integrate administrative and clinical data to enhance billing accuracy, payment processing and claims management. The solutions offered by these providers help healthcare organizations maintain financial stability, improve operational efficiency and achieve full visibility of revenue generation practices.

Eligibility Criteria

1. Have an in-depth **understanding of the operations** and unique challenges of the healthcare industry, including a familiarity with **regulations such as HIPAA and GDPR**
2. Possess **advanced technical expertise in RCM** software, encompassing the development of intellectual property assets, strategic partnerships, installation, customization, integration and ongoing support
3. Have **proficiency in implementing tailored RCM solutions** for hospital systems and independent healthcare givers and managing the entire revenue cycle — from patient registration to payment collection.
4. **Ability to handle key revenue cycle activities** such as charge capture; claim submission; coding; patient collections; pre-registration, registration and remittance processing; fostering operational efficiency; and regulatory compliance.
5. Ability to **integrate next-generation technologies** such as **AI, ML, IoT and analytics** to enhance the functionalities and effectiveness of an RCM system
6. Has **a team of experts with the relevant skills** to implement and support advanced technologies, including data analytics and GenAI and cybersecurity components, to ensure the security, scalability and accessibility of an RCM system — in short, **robust support for healthcare providers in delivering high-quality patient care**

Observations

The RCM space is experiencing a significant transformation characterized by the integration of advanced technologies, particularly AI and automation, which streamline financial processes and enhance operational efficiency. A clear trend is noticed toward comprehensive, end-to-end solutions that support the entire patient journey, ensuring seamless interactions from scheduling to payment while improving financial outcomes.

Additionally, the focus on modular solutions allows healthcare providers to customize their RCM processes, enabling tailored approaches that suit their specific workflows and operational needs. Proactive denial management through predictive analytics is emerging, allowing organizations to identify and address potential issues before they impact revenue. Enhancing patient engagement and support is also emphasized, particularly for those who are uninsured or underinsured, as providers recognize the importance of guiding patients through financial assistance programs to improve satisfaction and drive revenue collection.

From the 43 companies assessed for this study, 30 qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture provides workflow analysis and data-driven insights to optimize RCM, enabling efficient transitions that are aligned with organizational goals.

cognizant

Cognizant enhances RCM with innovative technologies and solutions that streamline the patient journey, driving efficiency and reducing payer-provider friction.

Deloitte.

Deloitte's RCM services enhance processes to increase net revenue and cash flow for healthcare providers. It employs proprietary tools to improve charge integrity and patient experience while ensuring compliance and data integrity.

HCLTech

HCLTech optimizes healthcare operations and minimizes revenue loss through efficient denial management while alleviating administrative burdens by handling non-core RCM tasks. This approach enables providers to focus on strategic goals and deliver high-quality care.

Optum

Optum enhances revenue integrity by unifying clinical and financial domains for accurate coding and billing while reducing claim denials. Its AI technology provides insights that optimize utilization review and improve patient care.

R1 RCM

R1 RCM offers a comprehensive RCM approach that streamlines the patient journey and improves financial outcomes. It uses intelligent automation and robust coding solutions to enhance efficiency and optimize cash flow.

Wipro's RCM solutions streamline processes with automation and AI, improving efficiency and maximizing revenue while enhancing patient engagement and reducing denied claims.

Firstsource (Rising Star) enhanced its RCM by acquiring Quintessence and PatientMatters and integrating AI technologies. Its solutions enhance efficiency and patient engagement, while partnerships with leaders such as Cerner drive operational growth.

Leader

"Wipro redefines RCM by seamlessly integrating automation and AI to empower healthcare providers to maximize revenue while elevating patient experience."

Rohan Sinha

Wipro

Overview

Wipro is headquartered in Bengaluru, India. It has more than 234,000 employees across 200 offices in 65 countries. In FY24 the company generated $10.7 billion in revenue, with IT Services as its largest segment. Wipro provides expansion opportunities into EHR integrations and other connected services, positioning itself as an orchestrator in RCM implementation through its healthcare IT expertise. Its modular AI and automation systems and white-labeled partner solutions provide flexibility while focusing on localized solutions that address market-specific needs.

Strengths

Comprehensive RCM solutions: Wipro offers a robust suite of RCM solutions designed to streamline processes from patient registration to claims management. Its RCM Edge platform provides modular, cloud-enabled solutions that enhance operational efficiency through automation, AI and analytics, enabling healthcare providers to maximize revenue and reduce administrative burdens.

AI and automation leveraged for efficiency: Wipro integrates advanced AI and automation technologies to optimize revenue cycle processes, significantly improving accuracy and accelerating tasks such as eligibility verification, claims processing and denial management. This tech-driven approach reduces the likelihood of errors and enhances financial performance by proactively identifying issues before they escalate.

Enhanced patient engagement and satisfaction: Wipro improves the overall patient experience by leveraging technologies such as patient portals and mobile apps. This strategy increases patient satisfaction by allowing easy insurance and demographic information updates, minimizing denied claims and fostering engagement throughout the revenue cycle.

Caution

Wipro's solutions are designed for a diverse range of healthcare providers. Clients may find that customization options are available to suit specific operational needs. They would benefit from exploring how Wipro's offerings can be tailored to align with their unique workflow requirements.

Provider Transformation - EHR

Who Should Read This Section

This quadrant report is relevant to healthcare provider enterprises across the U.S. for evaluating providers offering EHR implementation services to improve patient experiences. In this quadrant, ISG highlights the current market positioning of providers that offer EHR services to healthcare providers in the U.S. and shows how each provider addresses the rising demands.

In the current market landscape, healthcare EHR systems address significant provider challenges, including high implementation costs, interoperability issues and data privacy concerns. They help streamline workflows, reduce administrative burden and manage staff, enhancing patient care and operational efficiency.

Healthcare provider organizations are witnessing a need for enhanced interoperability, improved patient engagement and advanced AI and analytics that can meet providers' demand for personalized care, streamlined workflows and improved operational efficiency.

With advanced features, these organizations can promote value-driven outcomes and transform healthcare delivery into a more proactive and patient-centered model.

In response, leading service providers in the U.S. payer market are strategically investing in EHR offerings, focusing on scalability and reduced infrastructure costs.

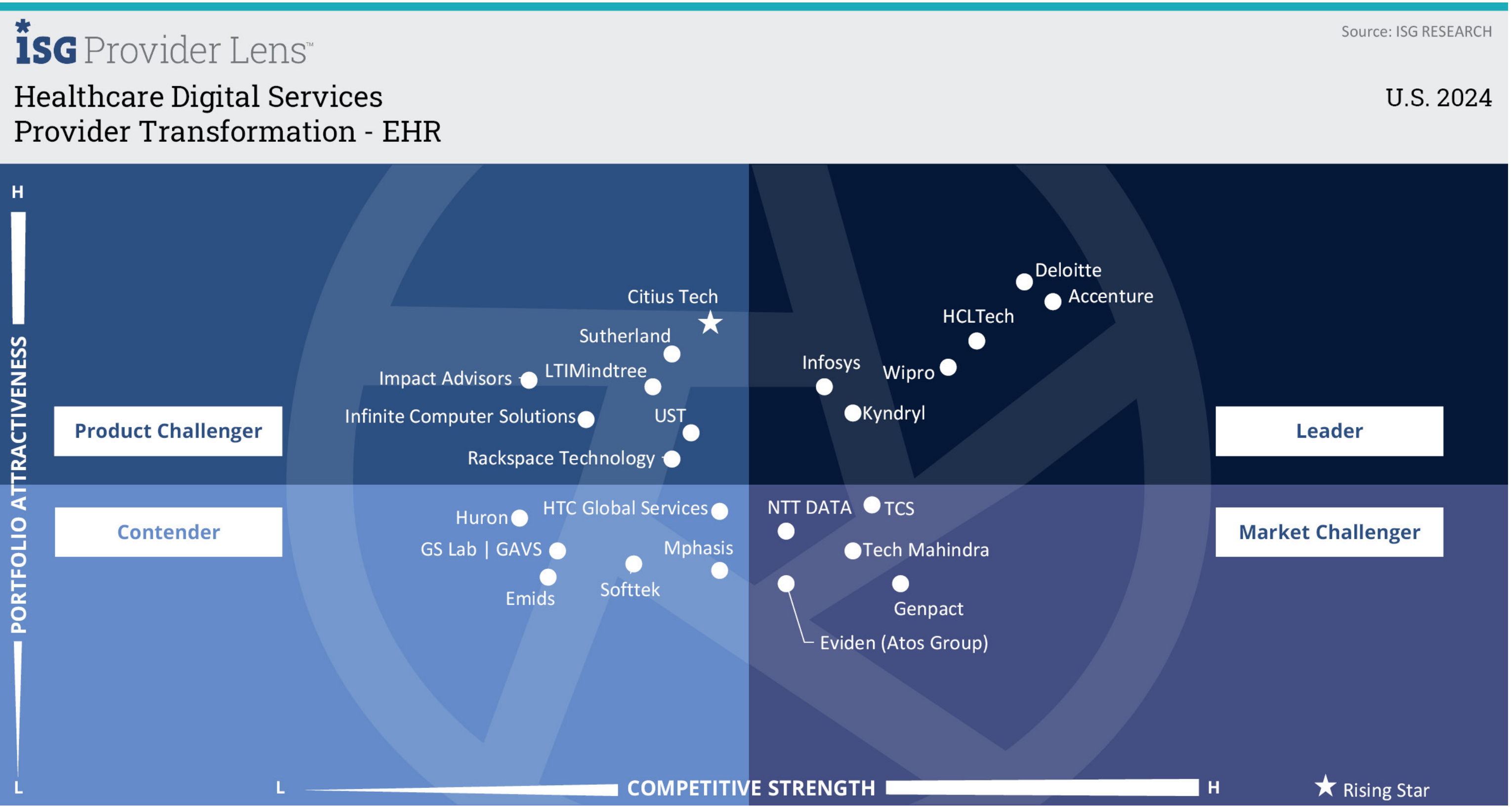
To further streamline operations, service providers are focusing on advanced technologies that enhance overall operational efficiency. Integrating technologies also increases patient engagement and enables delivering high-quality care. Their commitment to security protects patient information and builds trust. This proactive approach allows them to meet the evolving demands of the healthcare landscape while enhancing patient experience.

Digital professionals should read this report to understand EHR solutions and services in U.S. healthcare and how service providers streamline workflows across healthcare provider operations.

Industry practitioners should read this report to understand service providers' positioning and capabilities and effectively plan and select appropriate EHR services and solutions.

Technology professionals should read this report to understand EHR implementation and how providers leverage cutting-edge technologies to meet enterprise needs.

Cybersecurity professionals should read this report to understand the service providers' efforts to meet security requirements and regulations without compromising patient privacy and experience.



In this quadrant, ISG evaluates providers offering **EHR services** to healthcare organizations. These organizations are increasingly adopting EHR applications to **improve patient care, enhance data accessibility and streamline clinical workflows.**

Sneha Jayanth

Definition

In this quadrant, ISG evaluates providers that offer electronic health record (EHR) implementation services to healthcare providers. These services encompass the strategic planning, technical expertise and practical support needed to integrate EHR systems seamlessly into healthcare organizations. The process involves assessing healthcare providers' operational workflows and regulatory requirements and carefully selecting and customizing EHR platforms tailored to their specific needs. Covering data migration and system configuration to comprehensive training and ongoing support, these services ensure that healthcare professionals can efficiently adopt and leverage EHRs to enhance patient care, streamline administrative processes and comply with industry standards. Ultimately, the effective delivery of EHR implementation services drives digital transformation across the healthcare industry, fostering improved clinical outcomes and operational efficiencies.

Eligibility Criteria

1. **Have an in-depth understanding of the operations** and unique challenges of the healthcare industry, including a familiarity with **regulations such as HIPAA and GDPR**
2. **Possess advanced technical expertise in EHR software**, encompassing the development of intellectual property assets, strategic partnerships, installation, customization, integration and ongoing support
3. **Ability to tailor EHR systems/ platforms to the specific needs** of a healthcare facility and in alignment with its processes and objectives, with the capability to scale the system in the future as an organization grows or a new technologies emerge
4. **Ability to integrate next-generation technologies such as AI, ML, IoT and analytics** to enhance the functionalities and effectiveness of an EHR system that has the capabilities and methodologies for data migration, thus ensuring data integrity and security
5. **Has a team of experts with the relevant skills** to implement and support advanced technologies, including data analytics, GenAI and cybersecurity components, to ensure the security, scalability and accessibility of an EHR system — in short, **robust support for healthcare providers in delivering high-quality patient care**
6. **Offer robust post-implementation support**, including troubleshooting and system updates

Observations

Implementing electronic medical records (EMR) among U.S. healthcare providers has accelerated significantly, driven by federal incentives and regulatory mandates. The Health Information Technology for Economic and Clinical Health Act has established a framework to promote EMR adoption for enhancing the quality of patient care. EHR/EMR solutions now tackle the critical challenges and opportunities healthcare organizations face in the digital era.

Cloud-based EHR systems, for instance, offer scalable and cost-effective solutions, while AI-driven analytics significantly enhance clinical decision-making. Interoperability standards further increase the practicality and appeal of EHRs for healthcare providers. In the U.S. healthcare landscape, EHR systems are vital in improving patient care by ensuring that accurate, up-to-date, and complete information is readily available at the point of care. These systems help reduce medical errors, improve diagnosis and treatment outcomes, and foster care coordination.

EHRs provide real-time access to patient records, an essential feature for emergency care and chronic disease management. By accurately recording patient data that authorized healthcare providers can easily access, EHRs enhance the quality of care by enabling quick retrieval of vital patient histories, lab results and other essential information, fostering informed decision-making.

EHR adoption in the U.S. is bolstered as stakeholders recognize the long-term benefits, including improved patient outcomes and enhanced operational efficiencies. Thus, providers are investing significantly to enhance their EHR offerings and capabilities. The EMR implementation services market witnessed unprecedented growth in 2024, intensifying competition for leadership positions in this evolving landscape.

From the 33 companies assessed for this study, 24 qualified for this quadrant, with six being Leaders and one a Rising Star.

Accenture's commitment to integrating cutting-edge technologies with a client-centered approach distinguishes itself in the healthcare sector. It empowers providers to enhance decision-making and operational efficiency by harnessing AI and predictive analytics.

Deloitte's focus on cloud-based EHR solutions represents a shift toward greater flexibility and security. The company enhances healthcare providers' priority for patient care, enhancing coordination and patient care outcomes.

HCLTech is a frontline leader in innovative healthcare solutions. Its commitment to optimizing performance and user experience reflects a deep understanding of the healthcare landscape's complexities.

Infosys demonstrates exceptional capabilities in EHR solutions, leveraging a vast network of clinical SMEs and advanced technologies. Its patient-centric approach and robust interoperability services significantly enhance healthcare delivery.

kyndryl

Kyndryl partners with hyperscalers and commits to innovation through analytics and AI, which align perfectly with Epic's road map. This strategy delivers tailored solutions that meet customer-specific needs, empowering healthcare organizations to improve patient outcomes.

wipro

Wipro has extensive capabilities as an implementation partner for Epic Ambulatory software. Its proven track record showcases its proficiency in clinical and administrative realms, underscoring a commitment to improving patient experiences and clinical outcomes.

CitiusTech

CitiusTech's (Rising Star) robust partnerships with leading EHR vendors and hyperscalers enable the development of tailored solutions that integrate workflows and streamline processes. This focus drives high adoption rates and leads to more effective care delivery.

Leader

"Wipro's expertise in EHR solutions and skilled resource teams elevate patient experiences and clinical outcomes across healthcare organizations."

Sneha Jayanth

Wipro

Overview

Wipro is headquartered in Bengaluru, India. It has more than 234,000 employees across 200 offices in 65 countries. In FY24 the company generated $10.7 billion in revenue, with IT Services as its largest segment. Wipro enhances patient care through streamlined data management and analytics, enabling healthcare providers to improve operational efficiency and clinical outcomes. Wipro's strategic approach to U.S. healthcare EHR transitions emphasizes meticulous planning, collaborative execution and effective cloud migrations to ensure successful implementations.

Strengths

Skilled resources: Wipro has established a professional resource team with various experience levels in the U.S. to lead and support client EHR implementation and workflow improvement initiatives. Initially focusing on Epic Ambulatory and related modules, Wipro's team is poised to expand services to additional clients across various sectors, ensuring comprehensive support and enhanced operational capabilities.

End-to-end service capability: Wipro excels in providing end-to-end EHR services with robust consulting, implementation, integration and managed services. It partners with leaders such as Epic and Cerner to deliver tailored and interoperable services, ensuring seamless operations for diverse U.S. clients.

Broad EHR partnerships: Wipro boasts its extensive capabilities in EHR solutions. It functions as an implementation partner for Epic Ambulatory software within provider organizations. The company has a proven track record in accelerating EHR product development for Cerner, where it has established specialized software development teams across clinical and administrative domains. Wipro also possesses expertise in eClinicalWorks, Athenahealth and Allscripts EHRs. The company also enhances patient and member experience while improving clinical outcomes by optimizing data and integrating it with non-encounter information.

Caution

Wipro boasts a top-tier partner ecosystem and a skilled workforce. Emphasizing a stronger focus on analytics and AI could enhance the overall effectiveness of Wipro's EMR/EHR solutions, leading to improved insights, streamlined operations and better patient outcomes.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till December 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Healthcare** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Sales/Marketing

▼ **Least satisfied**
Shared Services Operations

Region

▲ **Most satisfied**
North America

▼ **Least satisfied**
Central/South America

Industry Average CX Score

78.4

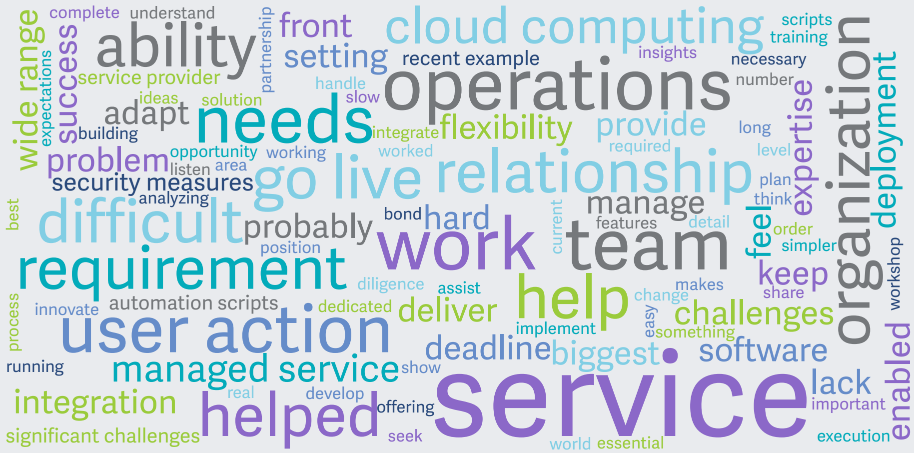
▲ Highest CX: 95.0
▼ Lowest CX: 70.4

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 244

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	54.5%
Nearshore	19.5%
Offshore	26.0%



Appendix

The ISG Provider Lens 2024 – Healthcare Digital Services research study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Healthcare Digital Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

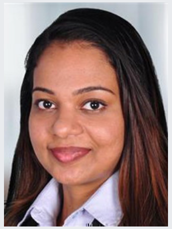
Lead Author

Rohan Sinha
Principal Analyst

Rohan Sinha is a seasoned professional with over a decade of experience as an analyst in the healthcare and life sciences industries. He has been at the forefront in offering strategic guidance to industry CIOs, leveraging a wealth of published research and extensive interactions with industry stalwarts.

His work has been instrumental in shaping the strategies and decisions of organizations in these critical industries. Rohan also possesses a keen interest in the world of AI and GenAI, where he continually explores the significant impact of these cutting-edge technologies on the said industries.

Rohan currently is a Principal Analyst at ISG, where his role includes handling IPL reports related to the healthcare and life sciences domains.



Co-Author and Research Analyst

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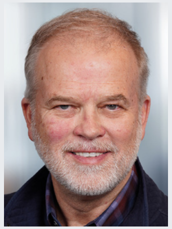
Sneha Jayanth is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Healthcare, Procurement service and platform, FAO and other custom research. She has six years of experience conducting ICT related research and writing thought leadership content within various industries. In her previous role, she handled market analysis, and market intelligence and authored reports focusing on the latest technologies like IoT, AI, cloud, and blockchain. She has also worked in a thought leadership division in the ICT industry managing blogs, reports, whitepapers, and case studies.

She is responsible for writing enterprise content and the global summary report, which includes market trends and insights relevant to the border customer landscape.

Study Sponsor

Iain Fisher
Director, Research

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximize benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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.

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 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 isg-one.com.

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