ISG Provider Lens™

Healthcare Digital Services

Payer Transformation - Public

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

cognizant

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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

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	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

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	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

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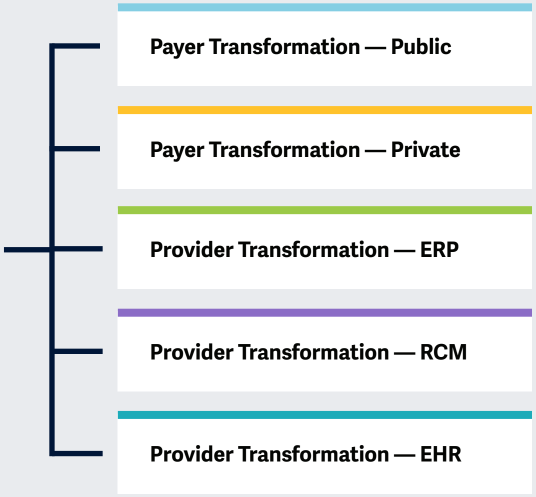
	Payer Transformation - Public	Payer Transformation - Private	Provider Transformation - ERP	Provider Transformation - RCM	Provider Transformation - EHR
Sagility Health	Not In	Not In	Not In	Market Challenger	Not In
Softtek	Not In	Contender	Contender	Not In	Contender
Sutherland	Product Challenger	Product 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.



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.

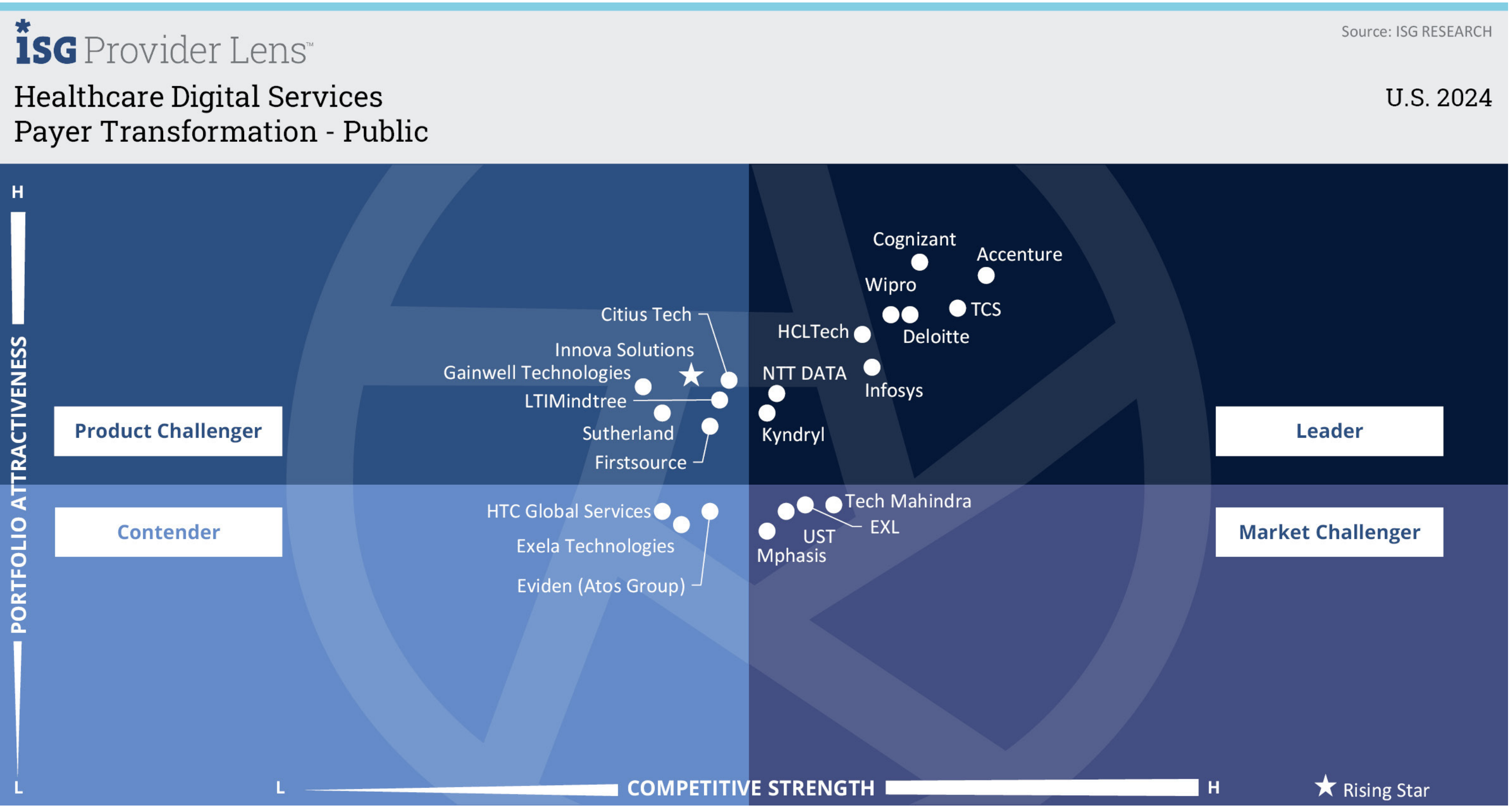
Service providers are also leveraging cloud-based technologies to facilitate better integration with health records and other systems, enabling real-time data access and improved workflows. By prioritizing automation and system integration, they enhance overall care quality, support efficient claims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

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

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 TATA CONSULTANCY SERVICES

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

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.

Leader

"Cognizant strengthens public healthcare through solid partnerships, streamlining Veterans Health Administration (VHA) claims and improving efficiency and care quality."

Rohan Sinha

Cognizant

Overview

Cognizant is headquartered in New Jersey, U.S. It has more than 347,700 employees across 147 offices in 50 countries. In FY23 the company generated $19.4 billion in revenue, with Financial Services as its largest segment. Cognizant is dedicated to supporting healthcare payers with a comprehensive suite of digital transformation services tailored to meet the unique needs of public sector clients. Its innovative solutions cover member engagement, care management, claims administration and regulatory compliance, ensuring optimized processes and improved outcomes.

Strengths

Advanced claims processing solutions: Cognizant's ClaimsXM solution enhances claims management for the VHA by automating workflows and reducing errors. With seamless integration into EHR and hosted in the Microsoft Azure™ Government Cloud, it ensures real-time data access and efficient claims processing across all 50 states and U.S. territories.

Comprehensive automated Medicaid solutions: Cognizant's automated Medicaid Solutions portfolio supports plans amid rapid growth and regulatory changes, enhancing administrative efficiency. With flexibility and scalability, these solutions streamline processes and improve care quality for a significant share of managed Medicaid beneficiaries across 42 states. They also ensure effective management in a shifting healthcare landscape.

Robust public sector partnerships: Cognizant has established extensive partnerships with public sector agencies, enabling the firm to address the unique needs of various government programs effectively. The company collaborates with entities such as Medicare, Medicaid, CHIP, VHA and Department of Defense (DoD), positioning it as a trusted provider in the public healthcare landscape.

Caution

The implementation of Cognizant's automated solutions may necessitate substantial user training. Clients must allocate sufficient time and resources required to ensure that staff are adequately trained and can effectively utilize new systems.

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

▲ 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

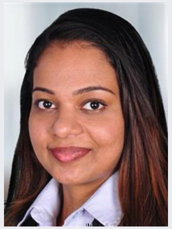
Lead Author

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

Sneha Jayanth
Senior Research Analyst

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.

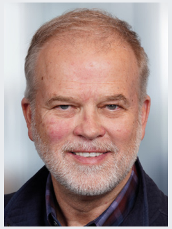
She is responsible for writing enterprise content and the global summary report, which includes market trends and insights relevant to the border customer landscape.

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.

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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.

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REPORT: HEALTHCARE DIGITAL SERVICES