iSG Provider Lens®

Healthcare
Digital Services

Evaluating the innovation, integration and impact of
digital transformation within healthcare ecosystems

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Table of Contents 🏠

Introduction

Digital transformation in healthcare refers to the strategic use of technologies, including EHRs, telemedicine, AI, wearables and data analytics, to drive operational efficiency and optimize patient care, each offering unique advantages. In 2025, AI continues to be central to advanced diagnostics, workflow automation and highly personalized treatment, while also supporting predictive analytics and population health management.

Telemedicine has expanded through secure and immersive AR/VR tools, making expert care accessible regardless of location. mHealth and IoT-powered wearables enable patients to monitor health in real time, encouraging proactive self-care. RPA streamlines administrative processes, reducing staff workload and errors. Advanced blockchain and encryption technologies protect health data and enable fast, secure sharing across institutions.

Next-gen patient engagement platforms leverage AI to offer tailored interventions, virtual health coaching and continuous remote monitoring, all within robust cloud architectures that adapt to evolving data security and privacy regulations. While progress has been made, challenges persist, particularly regarding interoperability among varied digital systems, rising cyberthreats (including AI-driven attacks) and access disparities for rural or underserved populations. Nonetheless, digital transformation is enhancing the efficiency, accessibility and patient-centeredness of healthcare in 2025. Ongoing regulatory changes and rapid technological advances promise to sustain this momentum.

The IPL Healthcare Digital Services 2025 study will evaluate providers' capabilities to upgrade client technologies, build agile frameworks and future-proof digital operations, with a focus on innovation readiness and resilience.

The IPL **Healthcare Digital Services** 2025 study focuses on **digital transformation services and solutions** designed for both healthcare payers and providers.

Payer Digital Transformation

Provider Digital Transformation

Value-based Care*

Interoperability and Data Security
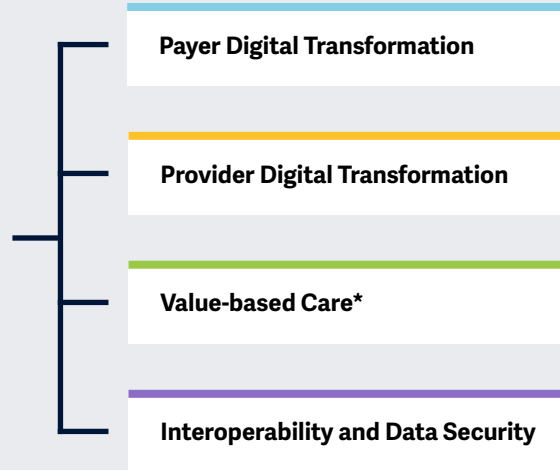
Simplified Illustration Source: ISG 2025

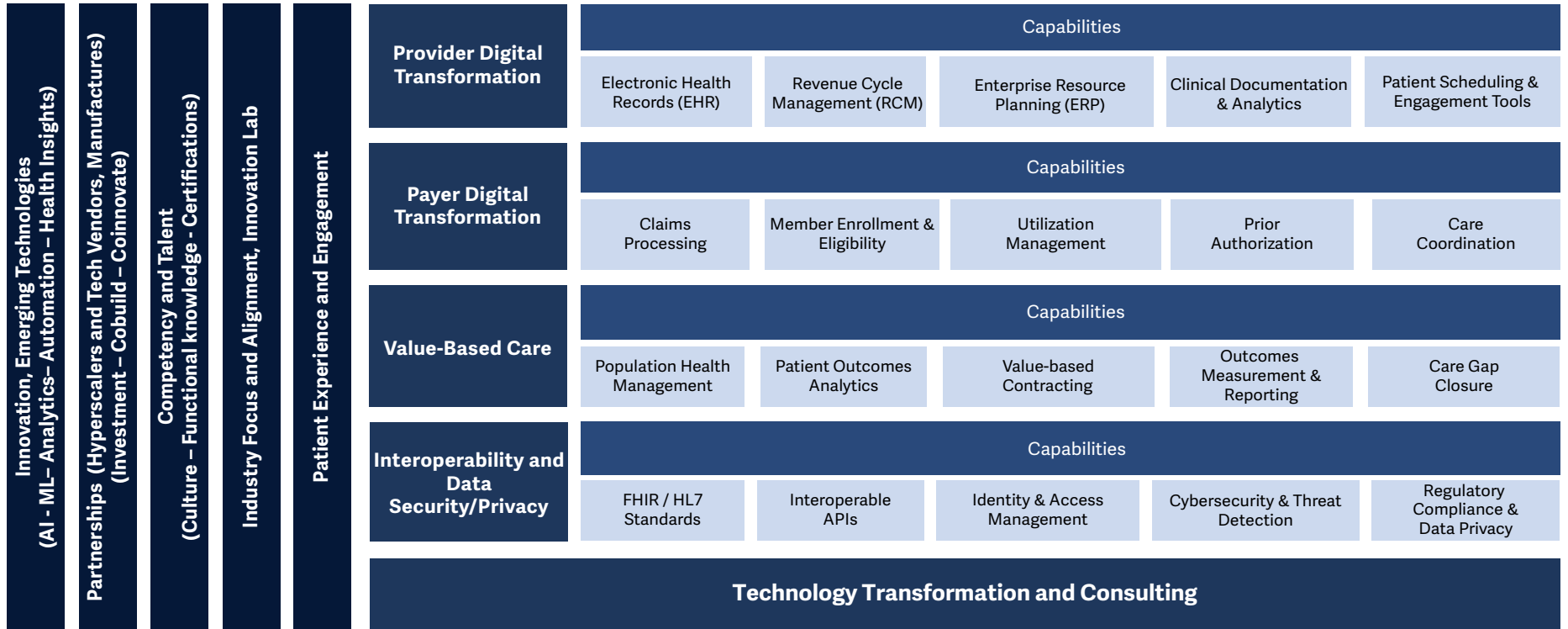*Applicable only for the U.S. region

The ISG Provider Lens® Healthcare Digital Services study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S. and Brazil

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

Blueprint* – Healthcare Digital Services

Innovation, Emerging Technologies (AI - ML– Analytics– Automation – Health Insights)

Partnerships (Hyperscalers and Tech Vendors, Manufactures) (Investment – Cobuild – Coinnovate)

Competency and Talent (Culture – Functional knowledge - Certifications)

Industry Focus and Alignment, Innovation Lab

Patient Experience and Engagement

Provider Digital Transformation

Capabilities				
Electronic Health Records (EHR)	Revenue Cycle Management (RCM)	Enterprise Resource Planning (ERP)	Clinical Documentation & Analytics	Patient Scheduling & Engagement Tools

Payer Digital Transformation

Capabilities				
Claims Processing	Member Enrollment & Eligibility	Utilization Management	Prior Authorization	Care Coordination

Value-Based Care

Capabilities				
Population Health Management	Patient Outcomes Analytics	Value-based Contracting	Outcomes Measurement & Reporting	Care Gap Closure

Interoperability and Data Security/Privacy

Capabilities				
FHIR / HL7 Standards	Interoperable APIs	Identity & Access Management	Cybersecurity & Threat Detection	Regulatory Compliance & Data Privacy

Technology Transformation and Consulting

*Non-exhaustive

Payer Digital Transformation

Definition

In this quadrant, ISG assesses providers offering digital transformation services to healthcare payers, such as insurers, coverage firms and managed care organizations. Digital transformation involves adopting advanced technologies to optimize operations, boost member experience, cut costs and drive innovation. Key services include automating claims, eligibility, authorizations and using AI for risk prediction, fraud detection and personalized engagement.

The focus is on secure data sharing and interoperability for transparency and efficient coordination. Benefits include streamlined operations, faster claims, improved satisfaction, regulatory compliance and agility to meet market needs. By modernizing and using member-focused digital tools, payers can reduce overhead, manage risks and improve care outcomes, supporting a more efficient and responsive healthcare system.

Eligibility Criteria

1. Demonstrate a comprehensive understanding of **payer operations, healthcare regulations** (such as **HIPAA** in the U.S. and **ANS** in Brazil) and all compliance requirements specific to **insurers** and **healthcare plans**

2. Leverage advanced technologies, including automation, **AI, analytics, cloud solutions, data interoperability and cybersecurity,** to modernize **legacy systems** and support innovation in **claims processing, risk management and member engagement**

3. Enable seamless **interoperability** and **integration** with existing systems, third-party tools and broader healthcare ecosystems, ensuring efficient **data exchange** and future **scalability**

4. Implement robust protocols for **security, data privacy and risk management** to safeguard sensitive health and member data, supported by well-defined incident response and compliance procedures

5. Clearly articulate **cost structure**, define measurable **KPIs** and maintain a strong focus on **ROI** to ensure tangible business outcomes

Provider Digital Transformation

Definition

In this quadrant, ISG evaluates providers delivering digital transformation services to healthcare organizations, including hospitals, clinics and integrated care networks. Provider digital transformation involves adopting advanced technologies to enhance clinical care, operational efficiency and patient engagement. Key offerings include integrating EHRs, telemedicine, AI-powered diagnostics, cloud platforms, IoT-enabled devices and analytics to enable evidence-based care and streamlined processes.

The focus is on building interoperable systems for secure data sharing, real-time monitoring and coordinated care. Benefits include more accurate diagnoses, personalized treatments, reduced administrative burden, better patient safety, and expanded remote and preventive care. Digital workflows also support compliance and data privacy. By modernizing clinical and operational processes, providers achieve more connected, efficient and patient-centered care while keeping pace with industry and regulatory changes.

Eligibility Criteria

1. Demonstrate a comprehensive understanding of clinical workflows, care delivery processes and healthcare regulations (such as **HIPAA** in the U.S., **ANS** in Brazil and local data protection laws) relevant to hospitals, clinics and integrated care networks

2. Integrate advanced digital technologies, including **EHRs, telemedicine platforms, AI-driven diagnostics, IoT-enabled medical devices, cloud solutions and data analytics**, to modernize clinical and operational systems for evidence-based, data-driven care

3. Ensure robust **security, data privacy and risk management** frameworks to protect sensitive patient and organizational data, with clear incident response and **compliance** strategies

4. Enable seamless **interoperability** and **integration** between electronic health systems, medical devices, third-party applications and broader **health information exchanges** to support coordinated, real-time care

5. Employ agile, iterative approaches to **project management** and **solution delivery**, ensuring rapid adaptation to changes in clinical needs, **regulations** and **emerging technologies**

Value-based Care

Definition

In this quadrant, ISG evaluates providers delivering digital services that support value-based care in healthcare organizations, such as hospitals, physician groups and accountable care organizations. These services leverage advanced technologies and data-driven platforms to shift from fee-for-service to care models focusing on patient outcomes and cost efficiency. They integrate EHRs, real-time analytics, patient engagement platforms and care coordination tools for continuous outcome measurement and tailored interventions.

Core features include interoperability for data sharing, predictive modeling for proactive population health management, and digital tools for patient engagement. Benefits include improved care quality, fewer readmissions, higher patient satisfaction and optimized resources. Digital transformation helps align incentives, achieve compliance and ensure long-term sustainability, enabling more patient-centric care in a digital age.

Eligibility Criteria

1. Demonstrate a thorough understanding of **value-based care** concepts, care coordination, clinical quality measures and regulatory requirements (such as **MACRA**, MIPS and **ACOs**) relevant to healthcare organizations

2. Integrate **advanced digital technologies**, including **actionable analytics, patient engagement platforms, interoperable EHRs, care management systems and population health tools**, to enable continuous outcome tracking and targeted interventions

3. Implement **robust security, privacy and data governance** measures to safeguard sensitive patient and provider data, ensuring **compliance** with **HIPAA** and other relevant privacy regulations

4. Enable seamless data **interoperability** and **integration** among **EHRs, claims systems, payer platforms** and third-party tools to support holistic patient views and comprehensive care coordination

5. Adapt solutions for diverse **patient populations and care settings**, utilizing scalable and customizable tools for **workflow automation, risk stratification and chronic disease management**

6. Prioritize **tools** and **processes** that actively engage patients in their wellness journeys, such as **personalized portals, remote monitoring and real-time health coaching**

Interoperability and Data Security

Definition

In this quadrant, ISG evaluates IT service providers that enable interoperability and data security for healthcare organizations, including hospitals, clinics, payers and partners. Interoperability means the secure, seamless exchange and use of data across different systems, devices and organizations. Providers achieve this with open standards like HL7 and FHIR, standard data formats, and governance frameworks, ensuring patient data stays accurate, accessible and actionable.

Data security involves protecting sensitive health information with encryption, strict access controls, audit trails, and compliance with HIPAA, GDPR and ANS regulations. Providers offer solutions to ensure privacy during data transfer and storage, manage patient consent and quickly detect threats. Through strong interoperability and security, IT providers help healthcare organizations access real-time insights, coordinate care, maintain trust and meet compliance needs efficiently in a complex digital landscape.

Eligibility Criteria

1. Demonstrate knowledge of healthcare interoperability standards (such as **HL7, FHIR** and **DICOM** in the U.S.) and regulatory frameworks (such as **HIPAA** and **GDPR** and Brazil's **TISS, ICP Brazil** and **LGPD**), ensuring solutions comply with legal and industry requirements

2. Implement a technical architecture that enables **seamless, secure data exchange** across **platforms, devices** and organizational boundaries, supporting **legacy** and **modern** systems

3. Employ **advanced security practices**, including **encryption, MFA**, role-based access controls, **comprehensive audit trails** and continuous **threat monitoring**, to protect sensitive data at rest and in transit

4. Adapt and **scale solutions** to accommodate growing, evolving or geographically distributed healthcare environments, incorporating **emerging requirements**

5. Facilitate the **rapid detection**, response and remediation of security **vulnerabilities** by providing regular updates and transparent incident communication

6. Educate client stakeholders **on interoperability workflows, security protocols** and best practices to foster a culture of compliance and vigilance

7. Clearly define security policies, **SLAs**, compliance documentation and measurable **KPIs**, focusing on uptime, breach response times and regulatory audit readiness

Quadrants by Regions

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants on Healthcare Digital Services 2025:

Quadrant	U.S.	Brazil
Payer Digital Transformation	✔	✔
Provider Digital Transformation	✔	✔
Value-based Care	✔	
Interoperability and Data Security	✔	✔

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Healthcare industry 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
- Green tiles represent where an ISG Software Research will produce a Buyers Guide in 2025

The research phase falls in the period between August and September 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in November 2025.

Milestones	Beginning	End
Survey Launch	August 7, 2025	
Survey Phase	August 7, 2025	September 10, 2025
Sneak Preview	November 2025	December 2025
Press Release & Publication	December 2025	

Please refer to the **ISG Provider Lens® 2025 research** agenda to view and download the list of other studies conducted by ISG Provider Lens®.

Access to Online Portal

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

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Healthcare Digital Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

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

ISG Star of Excellence™ – Call for nominations

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

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

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

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens® 2025 – Healthcare Digital Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Iain Fisher

Lead Authors:
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Research Analysts:
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Data Analyst:
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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.
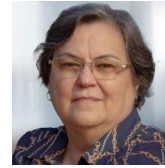
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ISG Provider Lens® Advisors Involvement Program

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

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

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires

- Advise on service provider inclusion and participate in briefing calls

- Give their perspectives on service provider ratings and review report drafts

ISG Advisors to this study

James Burke

Partner

SG Anand

Director – Healthcare Services

Shayne Yeager

Director

Invited Companies

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

A3Data	Blue Prism	CTC	Eviden (Atos Group)*
Accenture*	Capgemini*	Dasa	Evox Solutions
Access Healthcare*	Carelon	dataRain	Exela Technologies*
AGS Health*	Cast Group	Dell Technologies	Exímio
Allscripts – Veradigm	CGI	Deloitte*	EXL*
Alvarez and Marsal	Cigniti	DGS Brasil	EY
Atos	Cisco Systems	Digisystem*	FCamara*
AVN Tecnologia	CitiusTech*	DXC Technology*	Firstsource*
Avvale	Claranet	Embratel	Folks
Axway	Coforge*	EMIDS*	FPT
Ayko Technology	Cognizant*	Ensemble Health Partners	Fujitsu
BCI Consulting	Compass UOL	EPAM	Funcional Health Tech
Benner*	Computacenter	EPI-USE	Gainwell Technologies*
Beyondsoft*	Conduent*	Essence	GE HealthCare
Birlasoft	Conifer*	Eval Digital	Genpact*

Invited Companies

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* Rated in previous iteration

Get Connect	Huron*	Logicalis	Nuria
GHAS Consulting	IBM*	LTIMindtree*	Optum*
GHR Business Solutions	Impact Advisors*	Mastek*	Perficient*
Globalthings	Inetum	Memed	Persistent Systems*
Globant	Infinite Computer Solutions*	Mphasis*	Philips Tasy*
GS Lab | GAVS*	Infosys*	MPL	Pivot Point Consulting
Guidehouse*	Innova Solutions*	Munai	Pixeon*
HARMAN	Intmed Software	MV*	Planium*
HCLTech*	Intuitive Care*	NEORIS	Pulsati
Health Catalyst, Inc. (HCAT)	IQVIA	NeuralMed	PwC*
HealthBit	ITC Infotech	New Vision	Quantiphi
Hewlett Packard Enterprise (HPE)	Kainos	Nilo Saúde	R1rcm*
Hexaware*	KPMG*	Ninecon	Rackspace Technology*
Hitachi Digital Services	Kyndryl*	Nordic	RCM Solutions*
HTC Global Services*	Lanlink	NTT Data*	Sagility Health*

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* Rated in previous iteration

Salux*	Tech Mahindra*	Virtusa*
Saúde Hi	Tegria*	WellSky
SEIDOR	Teleinfo Soluções	Wipro*
Senior Sistemas	The Silicon Partners Inc	WNS*
Shift*	TIVIT	Wolters Kluwer
Softtek*	TOTVS Consulting*	Yash Technologies
SONDA	Triágil	ZG Soluções
Stefanini	T-Systems	
Sutherland*	Unisys	
Tascom	UpFlux*	
TATA Elxsi	UST*	
TCS*	V8.TECH	

ïSG 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.

ïSG Research™

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

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

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ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

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AUGUST, 2025

BROCHURE: HEALTHCARE DIGITAL SERVICES