



Everest Group PEAK Matrix[®] for Healthcare Analytics Service Providers 2022

Focus on NTT DATA
November 2021



Background of the research

In recent years, data-driven decision making has become the backbone of healthcare enterprises' growth strategy to reduce costs, enhance operational efficiency, deliver better member/patient engagement, and improve health outcomes. The pandemic has further accelerated the adoption of analytics as enterprises need to become more agile and meet the unprecedented demands faced by the healthcare ecosystem. Although payers are ahead of providers in leveraging analytics, the majority of the enterprises are yet to access the complete benefits of analytics initiatives due to the lack of right skillsets, adoption of analytics in silos, and inefficient data management practices. Service providers can help enterprises formulate the core vision for analytics, modernize their data landscape, derive insights, and provide the right set of recommendations to enable enterprise-wide decision making that drives business value.

In this context, we present an assessment of 25 service providers featured on the **Healthcare Analytics Services PEAK Matrix® Assessment 2022**. Each service provider profile offers a comprehensive picture of its services focus through a snapshot of its key strengths and limitations, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process for the calendar year 2021, interactions with leading service providers, client reference checks, and an ongoing analysis of the healthcare analytics services market.

In this report, we are focusing on:

- Market trends for healthcare analytics services
- Assessment of the service providers on several capability- and market success-related dimensions
- Enterprise sourcing considerations highlighting the strengths and limitations of each service provider

Scope of this report:



Geography
Global



Industry
Healthcare (payer and provider)



Services
Analytics services

Healthcare analytics services PEAK Matrix® characteristics

Leaders:

Accenture, Cognizant, Deloitte, EXL, NTT DATA, Optum, and TCS

- Leaders serve as strategic partners to enterprises and have established themselves as front runners to support the clients in their analytics initiatives
- They have made meaningful internal investments in building a balanced and comprehensive portfolio of analytics solutions and platforms to help clients achieve faster business outcomes
- Leaders demonstrate strong domain-centricity, thought leadership, and a focus on innovation. They leverage their technology partnership ecosystem to develop innovative healthcare-specific analytics use cases and show proactiveness in bringing these offerings to the clients

Major Contenders:

Capgemini, CitiusTech, DXC Technology, emids, GAVS, HCL Technologies, IBM, Infinite Computer Solutions, Infosys, PwC, SoftServe, Tech Mahindra, Virtusa, and Wipro

- Major Contenders demonstrate cost-competitiveness and client intimacy, and that has helped them maintain a strong base of satisfied clientele for their healthcare analytics services
- Compared to Leaders, most of the Major Contenders do not have a comprehensive analytics services portfolio; however, many of these players have the vision to offer end-to-end analytics offerings to clients. They are investing in building their IP and enhancing their partnerships with technology vendors to improve their analytics capabilities and increase their market foothold

Aspirants:

ACS Solutions, HGS, Infostretch, and UST

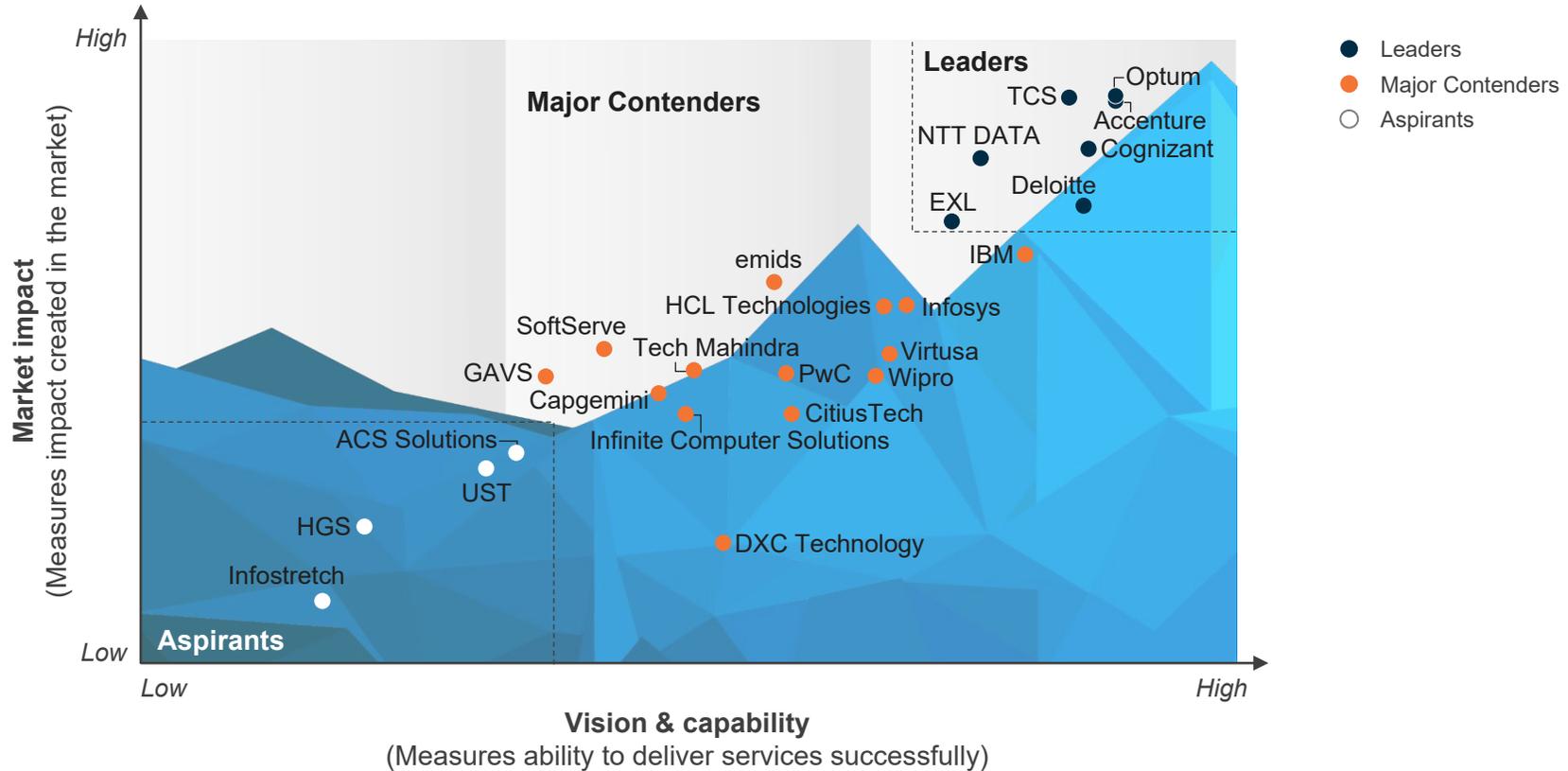
- Aspirants are trying to increase their market presence by building domain-specific offerings; however, these offerings are skewed toward payers or providers
- They need to build a more mature technology partnership ecosystem, and make strategic investments to broaden their analytics capabilities and develop solutions for both healthcare payers and providers

Everest Group PEAK Matrix®

Healthcare Analytics Services PEAK Matrix® Assessment 2022 | NTT DATA positioned as Leader



Everest Group Healthcare Analytics Services PEAK Matrix® Assessment 2022¹



¹ Assessments for CitiusTech, Deloitte, DXC Technology, IBM, Infostretch, Infosys, PwC, Tech Mahindra, UST, and Wipro exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers.

Source: Everest Group (2021).

NTT DATA | healthcare analytics services profile (page 1 of 5)

Overview

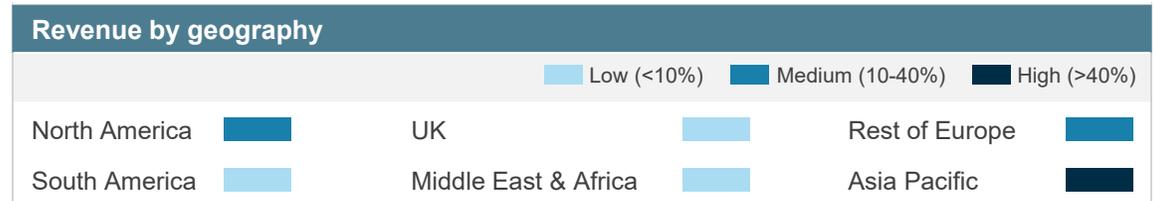
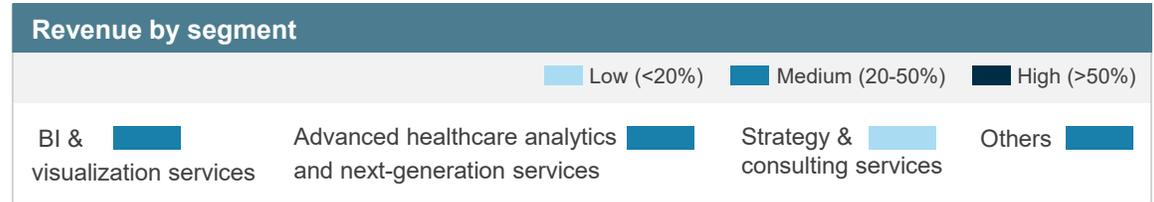
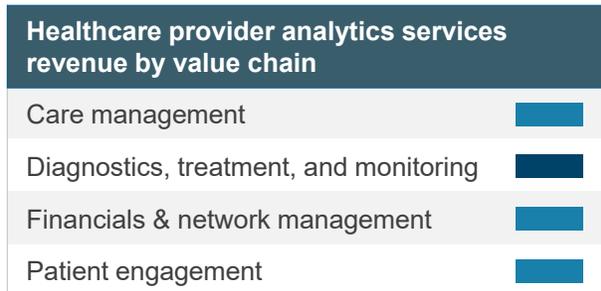
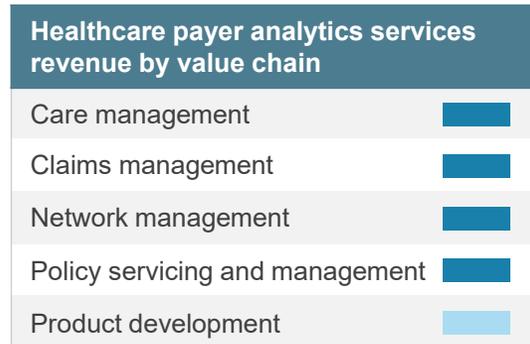
Company vision & strategy

NTT DATA's vision for healthcare analytics is to help its customers leverage data as an asset for their digital transformations and use the power of analytics to improve patient engagement for better clinical outcomes. For its clients, the company aims to provide actionable insights to understand performance, utilization, and cost drivers for optimizing their business models to lower operating cost and provide quality outcomes. It wants to be a strategic partner to clients in their most mission-critical analytics work.

Healthcare analytics services revenue



Adoption by LoBs



NTT DATA | healthcare analytics services profile (page 2 of 5)

Offerings

Proprietary solutions for healthcare analytics (representative list)

Solutions	Details
NTT DATA Healthcare Provider Analytics (HePA) (a component of Nucleus for Healthcare)	HePA provides advanced analytics and next-generation services; it helps in assessing the maturity of healthcare providers on the data journey and helps create future state / roadmaps.
NTT DATA Business Insights Engine (BIE)	BIE is a pre-built, configurable Azure/Snowflake-based health plan data hub, designed by users, for users. Pre-built data ingestion pipelines and microservices leveraging a standardized health plan-specific canonical data model (or can leverage custom) with complete/configurable 360° views for member, provider, claims, and executive dashboards with natural search across all entities.
NTT DATA Chronic Disease Progression Prediction (CDP) / Patient Treatment Optimization (PTO) AI Engine for next-generation chronic disease care management	This is an AI-based chronic disease prediction and intervention solution for personalized care management. NTT DATA's proprietary CDP/PTO AI engine tracks health condition prevalence, severity, and progression in member populations across multiple stages – from data ingestion to curation and harmonization, to chronic disease progression prediction and results visualization – to enable health systems make timely decisions and drive better outcomes.
NTT DATA Medical Cost Manager (MCM)	Medical Cost Manager (MCM) solution is developed by leveraging NTT DATA's strong experience with health plans and providers. MCM delivers transformational outputs by providing business insights into the health plan's payment integrity value chain at an enterprise level by bringing a holistic and unified view of high-value data products. Interoperable, compatible, and integrated through EDI, FHIR, APIs, and BOTS.
ehCOS SmartICU	The ehCOS SmartICU solution improves the care given to critically-ill ICU patients. The solution is designed for ICU professionals. It simplifies the visualization of all of a patient's data on a single screen, improving the efficiency and productivity of work. It collects data to improve quality of care and patient safety, while reducing hospital costs.
NTT DATA Advocate AI	Advocate AI helps clients evaluate the impact an AI tool may have with specific insights into the patient population and allows participating sites in Advocate AI to generate new revenue from the data for machine learning and pharmaceutical development/trials.

NTT DATA | healthcare analytics services profile (page 3 of 5)

Recent developments

Key events (representative list)

Event name	Type of event	Details
NTT DATA Nashville innovation center	Investment	NTT DATA partnered with the State of Tennessee and the City of Nashville to open a digital innovation and delivery center in Nashville (Tennessee, US). NTT DATA will invest US\$9.9 million to establish this center. The delivery center will focus on healthcare and manufacturing digital technology, including analytics and automation.
Healthcare AI center	Investment	Set up in April 2020 in Tokyo with global members to engage in basic/applied R&D on AI technology in healthcare industry and technical support for delivery teams.
AI CoE	Investment	In 2019, NTT DATA established its Artificial Intelligence Center of Excellence (AI CoE) to develop further expertise in AI and train engineers engaged worldwide in the AI field. The "center," a network of engineers with specialized skills related to AI at NTT DATA companies around the world, is tasked with developing AI assets and applying them for global expansion of digital businesses.
Client collaboration center	Investment	Center for co-Innovation with customers, applying over US\$10 million annually from NTT R&D, combined with customer investment, completing more than 15 Proof of Concept (PoC) projects each year.
Hashmap	Investment	In 2021, NTT DATA Services completed the acquisition of HashMap, a Snowflake premier partner. This acquisition adds deep technical expertise with modern data platforms to support analytics, AI, and ML. Together, the companies will support clients to gain insights from their cloud data and accelerate digital enablement.
Acorio	Investment	In 2020, NTT DATA Services completed the acquisition of Acorio LLC, a ServiceNow Elite Partner. With this acquisition, NTT DATA, also a ServiceNow Elite Partner, will add new capabilities in the fast-growing ServiceNow ecosystem and unique industry approaches to help clients enable automated and intelligent digital workflows.

NTT DATA | healthcare analytics services profile (page 4 of 5)

Case studies

Case study 1	Data platform modernization
<p>Business challenge</p> <ul style="list-style-type: none"> • Lower maintenance and support costs for the enterprise data environment. • Scalable solution that supports ingestion of multiple EMRs and data types (internal/external, structured/unstructured, etc.) • Faster integration of new facilities into their redesigned EDW to enable consolidated enterprise reporting • Quicker onboarding of downstream applications with reusable components for data consumption <p>Solution</p> <p>NTT DATA helped enable M&A for this client through analytics and integration services. NTT DATA implemented the M&A Data Framework that covered –</p> <ul style="list-style-type: none"> • Migration of data assets into a cloud-based platform • Rearchitecture data platform to handle multiple versions of EMR • Accelerate the redesigned EDW leveraging generic healthcare data models for multi-EMR & new facility integration • Service-based architecture for their downstream information needs using APIs <p>Impact</p> <ul style="list-style-type: none"> • Increased speed to value: Implementation of the solution leveraging the framework took 25% less time than building out a traditional data warehouse • Lowered the total cost of ownership for the enterprise data environment by annual savings of US\$1.2 million • Enabled business users via self-service BI capabilities for faster downstream integration 	

Case study 2	Improved care management
<p>Business challenge</p> <p>NTT DATA partnered with a national health plan operating in all 50 US states (includes Medicare) to improve care management and impact MLR. Client needs to address challenges in chronic disease care management and specifically to:</p> <ul style="list-style-type: none"> • Identify target population for interventions, identify gaps in care, and enhance the care quality • Integrate with and strengthen existing expert clinical systems • Advocate for the patient’s individual needs • Control healthcare spend • Improve CMS Star ratings <p>Solution</p> <ul style="list-style-type: none"> • Implementation of NTT DATA Chronic Disease Progression Prediction AI Engine • Ability to predict disease onset in patients with a high risk of being diagnosed with chronic diseases • Timely actionable insights to improve patient care (preventive) • Complete interpretability (explainable AI) of AI model prediction • Model trained with a large amount of disparate data provides a solid foundation and framework to continue adding additional chronic diseases in the future <p>Impact</p> <ul style="list-style-type: none"> • Ability to target population by several categories for early intervention measures • Reduction of chronic disease population levels and cost • Early prediction to helps providers take timely preventive measures • Ability to provide better treatments and improved health outcomes • Avoiding long-term treatments and invasive surgeries • Increased awareness about chronic conditions to encourage healthier lifestyles 	

NTT DATA | healthcare analytics services profile (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- NTT DATA has built a strong portfolio of healthcare-focused analytics offerings (such as an AI engine for next-generation chronic disease care management) for healthcare spanning from basic dashboarding and visualization to advanced analytics
- Clients appreciate the value NTT DATA brings in through Nucleus for Healthcare, which is enabling data integration, automation, and AI, and is impacting clients across the areas of experience, access, care, population health, and revenue cycle management
- Unlike most its peers, NTT DATA has a truly global healthcare analytics presence with coverage across the regions of North America, Europe, and APAC
- Clients value NTT DATA's ability to bring in the right talent, its client-centric approach, and strong focus on offering innovation. Its propensity to engage in business outcome-based models in healthcare analytics deals is well perceived by the market

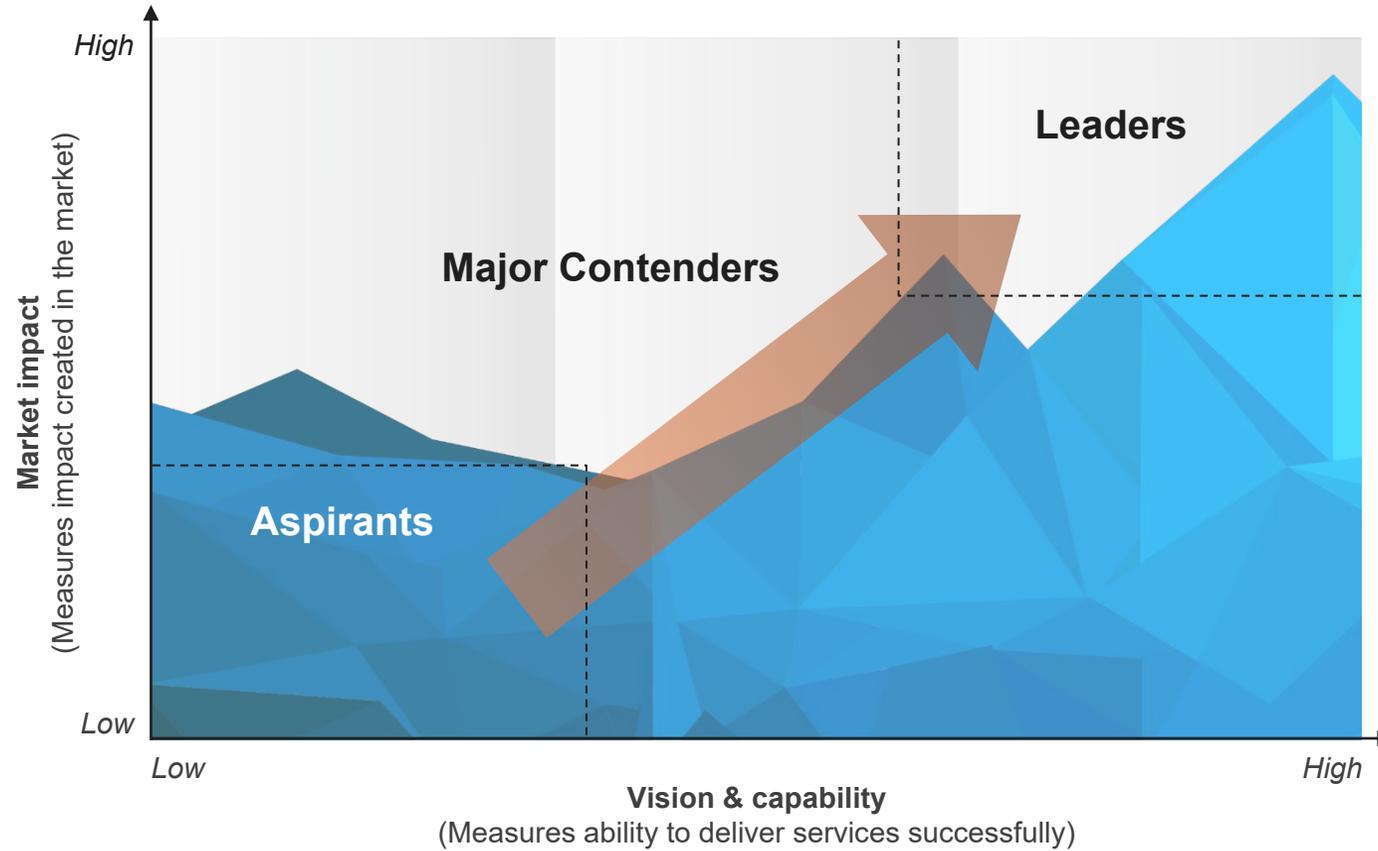
Limitations

- While it is focusing on value-add and innovation, it has scope to further enhance its consulting capabilities to emerge as an end-to-end partner for large-scale engagements
- Most of NTT DATA's current clients are organizations with revenue <US\$1 billion. Therefore, they now need to increase penetration in larger accounts

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

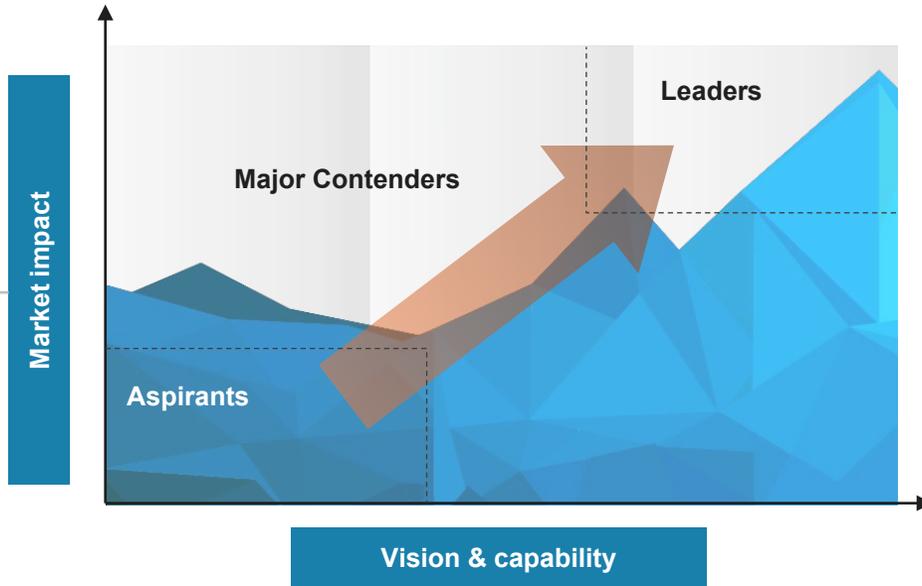
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YOY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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