ISG Provider Lens™

Healthcare Digital Services

Provider Digital Transformation Services

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

NTT DATA

March 2021

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of December 2020 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The lead author for this report is Ron Exler. The editors are Ipshita Sengupta, Ambrosia Sabrina and Sajina B. The research analysts are Ammar Mohammed and Sidhanth Prasad and the data analyst is Bhanwar Chauhan. The quality and consistency advisors are Bob Krohn, James Burke and Tony Mataya.

ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

The global pandemic of COVID-19 unquestionably accelerated the move to digital services in the healthcare industry. However, ISG considers this the acceleration of pre-pandemic activity by healthcare providers and payers to enhance operations, reduce costs and improve engagement with their stakeholders using digital services.

For years, new players have been entering the healthcare markets from the technology solutions business, including hyperscale cloud behemoths such as Amazon, Google and Microsoft. In October 2020, Microsoft released Microsoft Cloud for Healthcare, which includes data models, cross-cloud connectors, workflows, application programming interfaces (APIs) and built-in healthcare-specific components, along with its horizontal cloud apps and services. Salesforce Health Cloud is a popular healthcare customer relationship management (CRM) solution supported by most service providers in this study. At present, health technology stalwarts such as Allscripts, Cerner and Optum are expanding their service offerings, posing a competitive threat to traditional IT service providers.

The service providers in this industry are ready for a change not only because of new entrants and the shift to digital and cloud but also because of contract expiration. According to ISG Research, between 2021 and 2023, a total of 384 IT outsourcing (ITO) deals are expected to expire in the healthcare industry in North America. Application development and management (ADM) and infrastructure, as well as pure ADM services, account for about 74 percent of the total expiring deals by total contract value. As healthcare companies in the U.S. seek to control costs and change with the market, digital transformation is growing, along with business process as a service (BPaaS).

Interoperability remains a challenge for the industry, resulting in inadequate data sharing, especially between payers and providers. The Fast Healthcare Interoperability Resources (FHIR) standard was developed to exchange health information. In December, the U.S. Centers for Medicare and Medicaid Services (CMS) issued a proposed rule to require Medicaid, Children's Health Insurance Program (CHIP) and Qualified Health Plan (QHP) programs to build HL7 FHIR-based APIs to support data exchange and prior authorization. The rule also includes a proposed API standard for healthcare operations nationwide. The 21st Century Cures Act: Information Blocking, Interoperability, and the Office of the National Coordinator for Health Information Technology (ONC) Health IT Certification Program Final Rule (ONC Cures Act Final Rule) requires health IT developers to comply with a set of certifications, APIs and other data access improvements. In April, also to address interoperability Google Cloud rolled out the general availability of Cloud Healthcare API, a tool to make it easier for health systems and providers to connect data across different sources and share that data with patients. In December, Amazon Web Services (AWS) launched HealthLake for storage and analysis of data, automatically structured into the FHIR standard. All the service providers in this study embrace the FHIR standard in their digital transformation programs.

Automation is key to digital services as healthcare enterprises gradually adopt robotic process automation (RPA) and artificial intelligence (AI) technologies to improve specific processes, including claims processing, medical diagnosis and patient care management. With the ongoing COVID-19 pandemic, there is an increased adoption of telemedicine systems as doctors must overcome lockdowns and reduce in-person exposure risks to treat their patients. Healthcare providers are deploying connected healthcare monitoring devices at an explosive rate: According to the Consumer Technology Association, the U.S. shipment revenue rose by 73 percent in 2020 and is forecast to reach US$1.2 billion by 2024. Security is an essential component of a digital services ecosystem for employee productivity and patient record protection. In addition, ride-hailing platform companies are joining with their own services. Lyft Healthcare already provides non-emergency medical transportation (NEMT) services in the U.S., and it recently partnered with Anthem, JPMorgan Chase, United Way and others to get people in underserved communities to COVID-19 vaccination sites.

The COVID-19 pandemic will continue to influence the behavior of U.S. policymakers, citizens and companies in the healthcare ecosystem in 2021 as they take a fresh look at the business of healthcare management in the war against this disease that is dragging onward. In early January 2021, the U.S. Department of Health and Human Services (HHS) renewed the declaration of the public health emergency from the COVID-19 pandemic, extending key waivers for regulations on services such as telehealth until April. Recent executive actions from the new presidential administration to help quell the pandemic include commitments to government assistance in prevention, care and treatments for COVID-19 and to the supply chain and worker health. In the next few years, the healthcare industry services for all aspects of care will look radically different. Governmental and intergovernmental agencies are building new frameworks for disease response and data sharing. Public and private alliances and collaborations are emerging and will be mandated soon. Regulations, spending priorities and the current resiliency posture of healthcare ecosystems will determine the "new future" for healthcare payers and providers. It is against this backdrop that digital services will be central to positive outcomes in health and the health business.

Payer Digital Transformation Services

According to the U.S. Census Bureau, the percentage of people with health insurance coverage for all or part of 2019 (the most recent year studied) was 92 percent, and private health insurance continued to be more prevalent than public, covering 68 percent and 34 percent of the population, respectively. However, the insured are dissatisfied with their health insurance companies. The American Customer Satisfaction Index (ACSI) shows that Americans were less satisfied with their health insurance in 2020, and the discontent is permeating nearly the entire industry. Member satisfaction weakened by 2.7 percent to an ACSI score of 72, bringing the industry to its lowest point since 2016. Claims are becoming harder to submit and processing is taking longer. However, the U.S. payers seek to remedy these issues, and digital transformation helps them meet member service requirements, changing regulations and competitive pressures. Payers measure the success of technology investments based on business outcomes, so finance and other business leaders − not IT − often drive digital transformation.

Payers are using RPA to automate mundane back-end business processes such as price estimates using predefined rules, documentation of insurance contracts, claims notification and verification processes across their value chain. Many payers apply AI in the back office by combining multiple data sources to interpret clinical data to improve services. Healthcare payers require a frictionless flow of information between sales and service channels. By leveraging automation, payers can significantly lower costs, enable faster decision-making and focus on product and service innovations. More advanced technologies such as blockchain are rarely used, despite use cases such as sharing patient data records.

Accenture, Cognizant, HCL, IBM, Infosys, NTT DATA, Optum, TCS, UST and Wipro are identified as leaders, while EXL and Genpact are the Rising Stars.

Provider Digital Transformation Services

Healthcare providers are in crisis. In the U.S., the COVID-19 pandemic has overloaded hospitals, stalled elective procedures and reduced productivity, with many professionals are unable to do their jobs, all of which has erased profits. The ACSI measures patient satisfaction with hospitals (including inpatient, outpatient and emergency room services) as well as ambulatory care (office visits to doctors, dentists, optometrists and mental health professionals). Following a sharp drop last year of more than 5 percent, patient satisfaction with hospitals fell to the lowest level in nearly two decades. For ambulatory care, patient satisfaction retreated for the first time in five years, dropping to an all-time low.

In response, healthcare providers are changing from a fee-for-service to a value-based care (VBC) delivery model, as patients are increasingly expecting personalized and cost-effective care. Digital services are facilitating greater value at reduced cost with minimal touch interactions. In addition, VBC is shifting the healthcare paradigm from "disease care" to "health outcomes." The service providers in this study embrace VBC and help their clients move toward it through digital transformation. Investments in cloud solutions to help enable digital services are driven in part by the need for greater agility in the time of a pandemic, coupled with the growing expectation for transparency through easily accessible portals and mobile solutions.

Healthcare providers are increasingly introducing wearables and other sensors to monitor patient health and influence the course and choices of patient care. Digital channels that are centered around the patient can dramatically influence wellness, facilitate the capture of data to improve efficacy of treatments and feed other applications to monitor and better manage diseases.

Accenture, Cognizant, Genpact, IBM, NTT DATA, UST and Wipro are identified as leaders, while Conduent is a Rising Star.

Payer Business Process As A Service

Automating business processes is critical to payers seeking to reduce costs and streamline services. Business process as a service (BPaaS) reduces TCO by breaking silos and optimizing costs. It also helps payers modernize their operations and accelerate their transition to a VBC model. Operational flexibility is another benefit that is considered important in pandemic and post-pandemic times. Cloud infrastructure supports modernization of payer infrastructure as well as movement to enterprise agility, which will help the service providers in this study that excel in BPaaS to offer strong cloud migration services.

Accenture, Cognizant, HCL, IBM, Infosys, NTT DATA, Optum, TCS, UST and Wipro are identified as leaders, while EXL and Genpact are identified as Rising Stars.

Introduction

Simplified Illustration

Source: ISG 2020

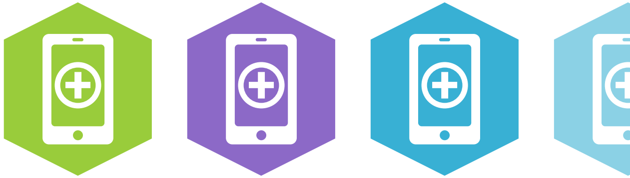
Definition

The healthcare and life sciences industries are, more than ever, under pressure to change. The COVID-19 pandemic and public demand for more effective outcomes are mandating the acceleration of actions needed to better meet care lifecycle requirements and build patient-centric business models. All segments of the industry are being compelled to comply with new regulations, integrate waves of competitive mergers and acquisitions and adapt to the needs of the aging population. However, blockbuster mergers have precipitated costly integration efforts. Also, consumers expect advanced and convenient digital service delivery. At the same time, many companies are struggling to keep pace with growing demands for their services and increasing competitive pressures.

Definition (cont.)

Scope of the Report

Digital transformation helps address many of the current and anticipated industry challenges. In the U.S. healthcare industry, digital transformation services help payer and provider segments evolve to better serve their constituents. As payers shift the focus of their purchase decisions to business outcomes, finance and other business leaders are driving digital transformation. While some enterprises do it themselves, others use BPaaS solutions. This report covers Healthcare Digital Services in the U.S. across three quadrants, shown below. A second report covers Healthcare Digital Services in Germany and a third covers Life Sciences Digital Services globally.



Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 US$20 million and US$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 US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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.

Leader

The Leaders among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average cover¬age of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly fall behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

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).

Rising Star

Companies that receive the Rising Star award have a promising portfolio 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. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: 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 qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

Healthcare Digital Services - Quadrant Provider Listing 1 of 2

	Payer Digital Transformation Services	Provider Digital Transformation Services	Payer Business Process as a Service
Accenture	Leader	Leader	Leader
Allscripts	Not in	Product Challenger	Not in
Atos	Product Challenger	Leader	Not in
Birlasoft	Not in	Contender	Not in
Cerner	Not in	Leader	Not in
CGI	Contender	Not in	Not in
Cognizant	Leader	Leader	Leader
Conduent	Contender	Not in	Rising Star
Deloitte	Contender	Market Challenger	Not in
DXC	Product Challenger	Product Challenger	Not in
emids	Product Challenger	Product Challenger	Not in
EPAM	Product Challenger	Product Challenger	Not in
EXL	Rising Star	Product Challenger	Not in
Firstsource Healthcare	Not in	Not in	Product Challenger
Genpact	Rising Star	Contender	Leader
HCL	Leader	Leader	Not in

Healthcare Digital Services - Quadrant Provider Listing 2 of 2

	Payer Digital Transformation Services	Provider Digital Transformation Services	Payer Business Process as a Service
Hexaware	Product Challenger	Product Challenger	Not in
IBM	Leader	Leader	Not in
Infosys	Leader	Not in	Contender
Leidos	Not in	Contender	Not in
LTI	Product Challenger	Not in	Not in
Mphasis	Product Challenger	Contender	Product Challenger
NTT DATA	Leader	Leader	Leader
Optum	Leader	Leader	Product Challenger
Persistent	Product Challenger	Rising Star	Not in
Sutherland	Contender	Contender	Not in
TCS	Leader	Market Challenger	Market Challenger
Tech Mahindra	Product Challenger	Product Challenger	Contender
UST	Leader	Rising Star	Leader
Virtusa	Contender	Not in	Not in
Wipro	Leader	Leader	Leader

Healthcare Digital Services Quadrants

ENTERPRISE CONTEXT

Provider Digital Transformation Services

This report is relevant to healthcare provider enterprises in the U.S. for evaluating suppliers of digital transformation services.

In this quadrant report, ISG highlights the current market positioning of providers that offer digital transformation services to healthcare providers in the U.S. and how each provider addresses the key challenges faced in the region.

Due to the COVID-19 pandemic, there has been a rapid evolution of government regulations, technology innovation and patient expectations. Starting right before the pandemic and expanding into it, healthcare providers have realized that running a medical practice is not just about patient treatment anymore. It is also about enriching the patient experience and driving improved health outcomes.

In the U.S., Population Health Management (PHM) is concerned with people's healthcare needs and offers services accordingly. Enterprises are focusing on technology-based services that leverage data-driven automation, analytics and artificial intelligence (AI) to build virtual assistants and co-create telehealth solutions. With a sense of urgency resulting from the pandemic, they are also looking for digital transformation services related to smart healthcare diagnosis, back-end operations, augmented reality (AR) and virtual reality (VR) to make timely and informed decisions.

Healthcare providers seek trustworthy and committed partners that can address the challenges and provide a roadmap for digital services.

Healthcare professionals and IT and technology leaders should read this report to understand the relative positioning and capabilities of service providers and thus effectively plan and select the appropriate services and solutions. The report also shows how the technical and integration capabilities of a service provider and its market presence compare with the rest in the market.

Digital transformation professionals should read this report to understand how suppliers of digital transformation services for healthcare providers fit their initiatives and how they compare with one another.

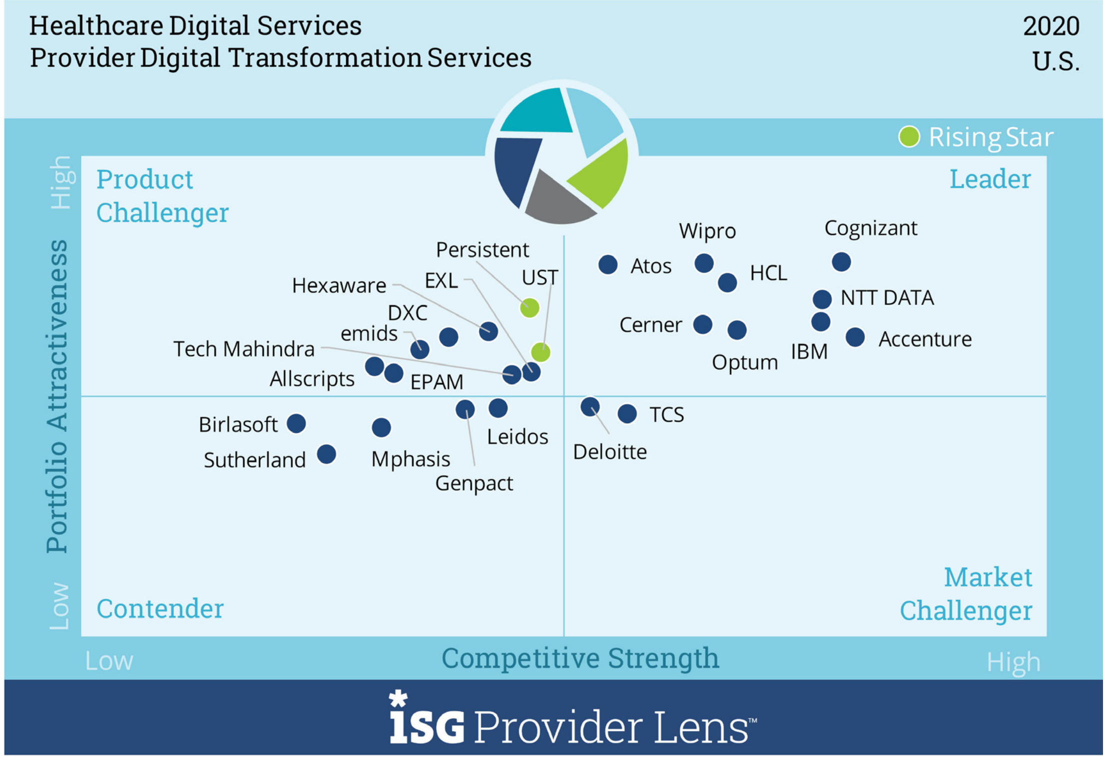
Government, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of providers offering digital transformation services to healthcare providers in the U.S.

Security leaders should read this report to see how service providers address the significant challenges of compliance and security without compromising the patient experience.

PROVIDER DIGITAL TRANSFORMATION SERVICES

Definition

This quadrant assesses service providers that offer digital transformation services to healthcare providers such as hospital systems and independent healthcare providers. They should be responsible for processes and systems for patient relations and care, such as intake, physician referral management, ambulatory and chronic care and post-acute care. The services should also include employee systems such as information portals, scheduling and collaboration.



Source: ISG Research 2020

PROVIDER DIGITAL TRANSFORMATION SERVICES

Eligibility Criteria

- Ability to plan, develop and implement consumer-grade interfaces of hospital and office systems as well as patient information and monitoring sources, including mobile apps for wellness, medical reference and fitness
- Capability to offer guidance on selecting and deploying telehealth solutions, including measures for cybersecurity
- Established or emerging basic/standard relationships with trusted partners, including emerging disruptors with new models of care delivery
- Ability to advise on workforce development, including upskilling to support digital and data privacy protection
- Consulting on the development of models using AI and analytics for screening, diagnostics and treatment
- Platform consulting for the use of the right emerging healthcare technologies, such as telehealth services, remote patient monitoring (through IoT and wearables), blockchain for data sharing, robotics and electronic prescription services
- Experience in large transition projects that include consolidation of merged companies and modernization of systems and applications

PROVIDER DIGITAL TRANSFORMATION SERVICES

Observations

- **Accenture** incorporates human-centered design into its healthcare provider services while focusing on privacy and security of patient data.
- **Atos** leads with a digital hospital model based on innovation and science, while enabling decarbonization. In 2020, Atos acquired several small companies in the U.S. that offer technologies and consulting services in various areas, including Salesforce, AI and data science.
- **Cerner** is a healthcare information technology company serving hospitals and health systems. It has been growing its services businesses and is competing now with the traditional service providers.
- **Cognizant** is not only based in the U.S., but its Healthcare and Life Sciences business also has a large presence in the country and contributes 29 percent of company revenues. It spent US$1.1 billion on nine acquisitions in 2020 in data and AI, cloud, digital engineering and the IoT.
- **HCL** acquired Strong-Bridge Envision, a Delaware company that provides digital transformation strategy consulting, digital/Agile program management and organizational change management, as well as Actian for healthcare data integration and analytics. Acquired IBM products enhance HCL's patient experience and digital transformation support.
- **IBM** remains one of the largest and most trusted providers of technologies and services. In response to the pandemic, IBM has set up telemedicine stations for doctors to handle remote diagnosis.
- **NTT DATA**, with partners, established Nucleus for Healthcare, a framework that incorporates best-in-class solutions to help accelerate clients' digital transformation journeys. NTT DATA recently acquired Hashmap, a data engineering firm; Flux7, a cloud consulting firm; and Acorio, a ServiceNow workflow company.
- **Optum** Analytics Managed Services applies experts and the OptumIQ tools and data to helping healthcare providers make informed, data-driven decisions that promote sustainable operations and success. Optum's services to providers will expand with the acquisition of Change Healthcare.

PROVIDER DIGITAL TRANSFORMATION SERVICES

Observations (cont.)

- **Wipro** gives providers a community hub strategy, along with its AssureCare Platform data integration for several devices/protocols, and necessary data security, encryption, compliance and reporting capabilities. It invested in Iora Health, a Boston-based primary care provider network.
- **Persistent** (Rising Star) offers digital front door and other capabilities to U.S. healthcare providers, especially via the Salesforce Health Cloud, to support digital transformations. Persistent is acquiring CAPIOT, which is based in Palo Alto, California, and specializes in enterprise integration with expertise in MuleSoft, Red Hat and TIBCO.
- **UST** (Rising Star) acquired Contineo Health, a New Jersey-based healthcare strategy and technology consulting firm that specializes in electronic medical record (EMR) implementation, optimization, health data reporting, analytics and interoperability. MyDoc is its digital healthcare platform that connects patients, payers and providers to deliver insights from healthcare data and help coordinate care.

NTT DATA

Overview

NTT DATA Corp. provides IT services worldwide, with 133,000 employees. It generates annual revenue of US$21 billion, making it a member of "The Big 15" in the ISG Index. It is part of Japan's NTT Group, the world's 55th-largest company. NTT DATA Services coordinates its U.S. services from Plano, Texas. Healthcare is one of the six focus industries, with 10,000 people dedicated to serving healthcare providers.

Strengths

Digital front door for healthcare: In July, NTT DATA announced a new alliance with Teladoc Health, Enli, VisitPay and R1 RCM to build Nucleus for Healthcare, a framework that incorporates best-in-class solutions to help accelerate clients' digital transformation journeys. Alliance partners enable virtual care, virtual real-time patient scheduling and intake, population health management and patient financial engagement. NTT DATA's cloud-based enterprise AI platform uses predictive analytics, automation and integration capabilities to provide a seamless digital fabric and user experience for the various personas within a health system.

AI in medicine: Image analysis is an area of medicine where AI is making early inroads in significantly improving diagnoses and patient outcomes. NTT DATA's Nucleus for Unified Clinical Architecture offers imaging and analytics collaboration to providers. One of the major partners of NTT Data is MD.ai, an emerging company in imaging research and AI delivery for the clinical imaging space. NTT DATA also collaborates with Google Cloud to develop and deliver solutions with AI, ML and IoT.

COVID-19 response: In addition to helping its clients rapidly move to remote work with healthcare service desk teams, NTT DATA works with Enli's population health management software to deliver COVID-19 patient care coordination. It also developed a mobile, end-to-end solution on the Salesforce platform to test and trace City of Austin residents, first responders and testing site workers.

Caution

Many recent acquisitions and partnerships to expand its business could make NTT DATA look a bit disjointed to healthcare providers.

2021 ISG Provider Lens™ Leader

NTT DATA is leading and growing in the U.S. with its Nucleus for Healthcare framework, which enables digital transformation for healthcare providers.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2020 – Healthcare Digital Services" 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

The study was divided into the following steps

1. Definition of Healthcare Digital Services
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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

Ron Exler, Author

Senior Advisor

Ron Exler is a Director and Principal Analyst with the ISG Provider Lens (IPL) service, a part of ISG Research, leading IPL studies including Internet of Things (IoT) and Healthcare Digital Services. Ron has led product management at enterprise software companies, run enterprise research advisory services, and advised, built and deployed innovative technology inside large enterprises. Ron holds a Master of Science degree in Cartography from the University of Wisconsin as well as a Bachelor of Science degree from Oregon State University. Ron also holds the ISG Digital Xpert certification.

Ammar Mohammed, Enterprise Context and Global Overview Analyst

Senior Analyst

Ammar is a lead analyst with ISG Provider Services. At ISG he works on provider workshops, thought papers and IPL studies focused on the Media, Healthcare and Life Sciences industries. He also tracks and assesses digital transformation trends and the impact of emerging technologies across the Healthcare and Life Sciences verticals. During his tenure, he has developed content for ISG Momentum™ and ISG Provider Lens™ in the areas of Healthcare, Life Sciences and Manufacturing industries. He is responsible for supporting research authors and authoring blogs, enterprise content and the Global Summary report with market trends and insights.

Authors and Editors

Sidanth Prasad, Enterprise Context and Global Overview Analyst

Research Analyst

Sidhanth Prasad is a research analyst at ISG and is responsible for supporting Provider Lens™ studies on Healthcare and Lifesciences. During his tenure, he has developed content for ISG Provider Lens™ in the areas of Healthcare and Life Sciences. He is responsible for supporting research authors and authoring blogs, enterprise content and the Global Summary report with market trends and insights.

Jan Erik Aase, Editor

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 research director, Partner and Global Head - 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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