



Healthcare Provider Digital Services – Service Provider Profile Compendium

Healthcare IT Services

Market Report – July 2020: Complimentary Abstract / Table of Contents

Our research offerings for global services

▶ Market Vista™ Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available	
▶ Application Services	▶ Human Resources
▶ BPS Banking & Financial Services	▶ ITS Banking & Financial Services
▶ BPS Healthcare & Life Sciences	▶ ITS Healthcare
▶ BPS Insurance	▶ ITS Insurance
▶ Catalyst™	▶ IT Services Executive Insights™
▶ Cloud & Infrastructure	▶ ITS Life Sciences
▶ Customer Experience Management Services	▶ Locations Insider™
▶ Data & Analytics	▶ PricePoint™
▶ Digital Services	▶ Procurement
▶ Engineering Services	▶ Recruitment & Talent Acquisition
▶ Enterprise Platform Services	▶ Service Optimization Technologies
▶ Finance & Accounting	

Membership information

- This report is included in the following research program(s)
 - [Healthcare IT Services \(ITS\)](#)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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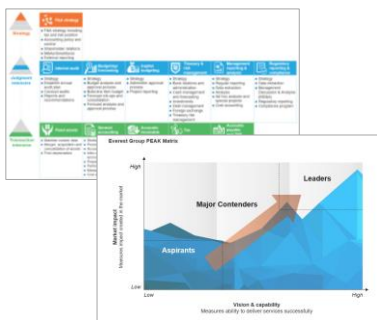
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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

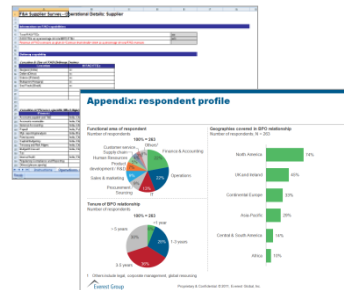
1 Robust definitions and frameworks

PEAK Matrix®, market maturity, and technology adoption/investment



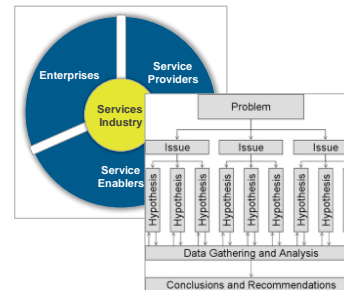
2 Primary sources of information

Annual contractual & operational RFIs, service provider briefings & buyer interviews, and web-based surveys



3 Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership



4 Fact-based research

Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers



- Proprietary contractual database of healthcare IT Services (ITS) contracts (updated annually)
- Round-the-year tracking of all major healthcare IT service providers and product vendors
- Dedicated team for healthcare outsourcing research, spread over two continents
- Over 20 years of experience in advising clients on ITS-related decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

Background of the research

Healthcare providers have historically been mired down by the legacy IT estate and regulations that have had the unfortunate consequence of incentivizing them to maintain the status quo. However, that is not an option anymore, particularly as healthcare providers scramble to meet the unprecedented needs of a world disrupted by the COVID-19 pandemic. Healthcare providers are now being forced to jump on the digital bandwagon to meet the demands faced by the healthcare ecosystem to battle this outbreak.

To support enterprises on their digital journeys, service providers are ramping up capabilities through healthcare-specific partnerships and acquisitions. This, in turn, is driving the need for research and market intelligence on demand and supply trends in healthcare provider digital services. Everest Group’s healthcare ITS research program addresses this market need by analyzing demand themes and service provider capabilities in healthcare provider digital services.

In this report, we analyze the capabilities of 22 IT service providers specific to the healthcare provider sector globally. These service providers are mapped on the Everest Group PEAK Matrix®, which is a composite index of a range of distinct metrics related to a provider’s capability and market impact. We focus on:



Assessment of the service providers on several capability- and market success-related dimensions



Detailed profiles of each service provider, featuring their solutions and recent developments

Scope of this report

- **Geography:** Global
- **Services:** Digital services
- **Industry:** Healthcare provider

This study offers distinct chapters providing a deep dive into the service provider offerings and capabilities; the exhibits below illustrate the depth of the report

Service Provider | Healthcare provider digital services profile (page 1 of 3)

Overview

Vision

Service Provider aims to be the preferred health services company, bringing intelligent solutions and global capabilities to improve healthcare for its clients and the communities they serve. Service Provider is focused on evolving its services across strategy, consulting, technology, interactive, and operations to help its clients address macro-level socioeconomic challenges, evolving consumer expectations, new landscapes of science and technology, industry convergence, and new business models for its healthcare clients as they prepare for the 'next' following the COVID-19 outbreak

Healthcare provider digital services revenue

<US\$50 million

US\$50- US\$100 million

US\$100- US\$150 million

>US\$150 million

Adoption by LOBs

High (>20%)

Medium (10-20%)

Low (<10%)

Large health systems

Stand-alone hospitals/clinics

Pharmacies

Diagnostic labs

Physician practices

Revenue by buyer size

High (>40%)

Medium (20-40%)

Low (<20%)

Small (annual revenue < US\$1 billion)

Medium (annual revenue = US\$1-US\$5 billion)

Large (annual revenue > US\$5 billion)

Key leaders

Global Senior Managing Director, Health, E
Senior Managing Director, Health, E
Managing Director, Health, E
Managing Director, Health, E

Provider IT services focus


Patient engagement

Care management

Revenue by geography

North America

Europe (excluding UK)



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Service Provider | Healthcare provider digital services profile (page 2 of 3)

Offerings

Proprietary solutions (representative list)


Solutions name	Details
Bookplan	It is a platform for resource scheduling, management of patient flows, and digital communications to make better use of capacity and provide real-time information to patients and practitioners
Click communicate	An open source, cloud-based/on-premise solution that offers a central repository for communication applications and supporting documentation, work intake, workflow, and task-based monitoring for all document work
Dioicare	It helps engage patients in their healthcare journey to better observe their treatment and care pathway. Dioicare services can be provided by any healthcare value chain stakeholder to better support patients in their care journey and daily life
Engagement blueprinting	It provides a detailed view of an engagement that brings together stakeholders from key functions across the journey. It identifies data redundancies and sources of record, provides a holistic view to diagnose root causes of problems and identify non-obvious relationships among people, processes, and technology, and increases visibility across experiential and functional areas
ThinkFast	An innovation-as-a-service offering that involves innovation workshops facilitated with clients to explore new and emerging technologies based on business challenges

Recent activities (representative list)

Development	Details
Acquisition	<ul style="list-style-type: none">In 2020, acquired WhiteSky Labs to improve API-led enterprise integration and digital transformation capabilitiesIn 2019, acquired Altran to enhance its capabilities across research and development strategy, digital design, product engineering, manufacturing services, software development, and integrationIn 2018, acquired LiquidHub and AdaptiveLab to strengthen its digital services offerings
Technology partnerships	<ul style="list-style-type: none">Partnered with multiple technological entities such as Mulesoft, Salesforce, SAP, AWS, Oracle, Microsoft, and Adobe to enhance technological solutions delivery and capabilities

COVID-19 initiatives (representative list)

Development	Details
Multiple developments	<ul style="list-style-type: none">In France, Service Provider is supporting the public assistance hospitals of Paris (AP-HP) through the deployment of an application allowing remote monitoring of COVID-19 patientsWith the Indian Institute of Technology Madras, India, Service Provider is developing affordable, field deployable, and rapid test kits for COVID-19, with a view to making the entire test result available in 10 minutes at a significantly lower costService Provider is providing support and technical expertise to the cybersecurity coalition Wij Hulp en Ziekenhuizen, the Netherlands, to ensure the continuity of the health sector and its care provision during these challenging times
StopCOVID	The StopCOVID project-team and the ecosystem of contributors are working together to develop a mobile contact tracing app for France



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Research calendar – Healthcare IT Services (ITS)

Published Planned Current release

Flagship Healthcare ITS reports	Release date
Healthcare Payer State of the Market – Key Trends, Service Provider Performance in 2019, and Outlook for 2020	February 2020
Healthcare Provider State of the Market – Key Trends, Service Provider Performance in 2019, and Outlook for 2020	March 2020
Healthcare Provider Digital Services PEAK Matrix® Assessment 2020	June 2020
Healthcare Provider Digital Services – Service Provider Profile Compendium	Q2 2020
Salesforce Health Cloud Services PEAK Matrix® Assessment 2020	Q3 2020
State of the Market – Salesforce Health Cloud services	Q3 2020
Salesforce Health Cloud Services – Service Provider Profile Compendium	Q3 2020
Healthcare Specialists PEAK Matrix® Assessment 2020	Q3 2020
Healthcare Specialists – Service Provider Profile Compendium	Q4 2020

Thematic Healthcare ITS reports	Release date
Big Tech in Healthcare: What it Means for CIOs?	November 2019
A Platform-based Roadmap for Healthcare Payers	February 2020
Data Monetization in Healthcare	July 2020
Unpacking the Rise of Telehealth	July 2020
Adoption of Cloud EHR in Healthcare	Q3 2020
State of Payer Healthcare Platform	Q3 2020

Note: For a list of all our published Healthcare ITS reports, please refer to our [website page](#)

Additional healthcare ITS research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

1. **Healthcare Provider State of the Market – Trends, Service Provider Performance in 2019, and Outlook for 2020** ([EGR-2020-45-R-3587](#)); March 2020. Challenges such as increasing costs, regulatory changes, physician burnout and shortage, fragmented patient data, and dated IT infrastructure are plaguing the healthcare provider industry. Providers are being forced to reimagine existing models of care, improve outcomes, and adapt to the changing regulatory landscape. To address these challenges, providers have realized the indispensable need to adopt digital technologies. In this report, we lay out the emerging trends for 2020, examine existing trends in the healthcare provider space, and evaluate how these trends will impact providers' future decisions
2. **A Platform-based Roadmap for Healthcare Payers** ([EGR-2020-45-V-3561](#)); February 2020. The key trends defining the healthcare industry include a seminal shift to value-based care, rise in consumerism, and regulatory uncertainty. As the industry navigates these changes, it also has to struggle with challenges such as siloed operations, fragmented member data, and legacy IT estates. With the emergence of digitalization, payers are realizing the undeniable need to leverage IT advances to deliver better care outcomes and remain competitive. In this viewpoint, we showcase the current state of payers, the need to modernize, and the urgency of adopting an as-a-service IT platform model to enable true digital transformation. We assert that payers need to adopt this approach to help restructure their cost models and take a consumption-linked approach to modernization
3. **Healthcare IT Security Services PEAK Matrix® Assessment with Service Provider Landscape 2020** ([EGR-2019-45-R-3456](#)); December 2019. Healthcare challenges, such as changing business and care delivery models to support patient-centricity and consumerism, growing competition from both within and outside the industry, and increasing regulatory pressures, are leading to increased investments in data and technology by enterprises. Point-to-point upgrades, coupled with high technical debt levels, have increased security vulnerabilities to a large extent. The past few years have seen some of the biggest attacks on healthcare enterprises resulting in theft of millions of patient records. In this research, we present fact-based trends impacting the IT security services market, along with assessment and detailed profiles of 13 healthcare IT service providers featured on the healthcare IT security services PEAK Matrix

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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