HFS Top 10 Healthcare Sector Service Providers

Excerpt for NTT DATA

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HFS Research authors:
Saurabh Gupta, Chief Research Officer
Mayank Madhur, Associate Research Director

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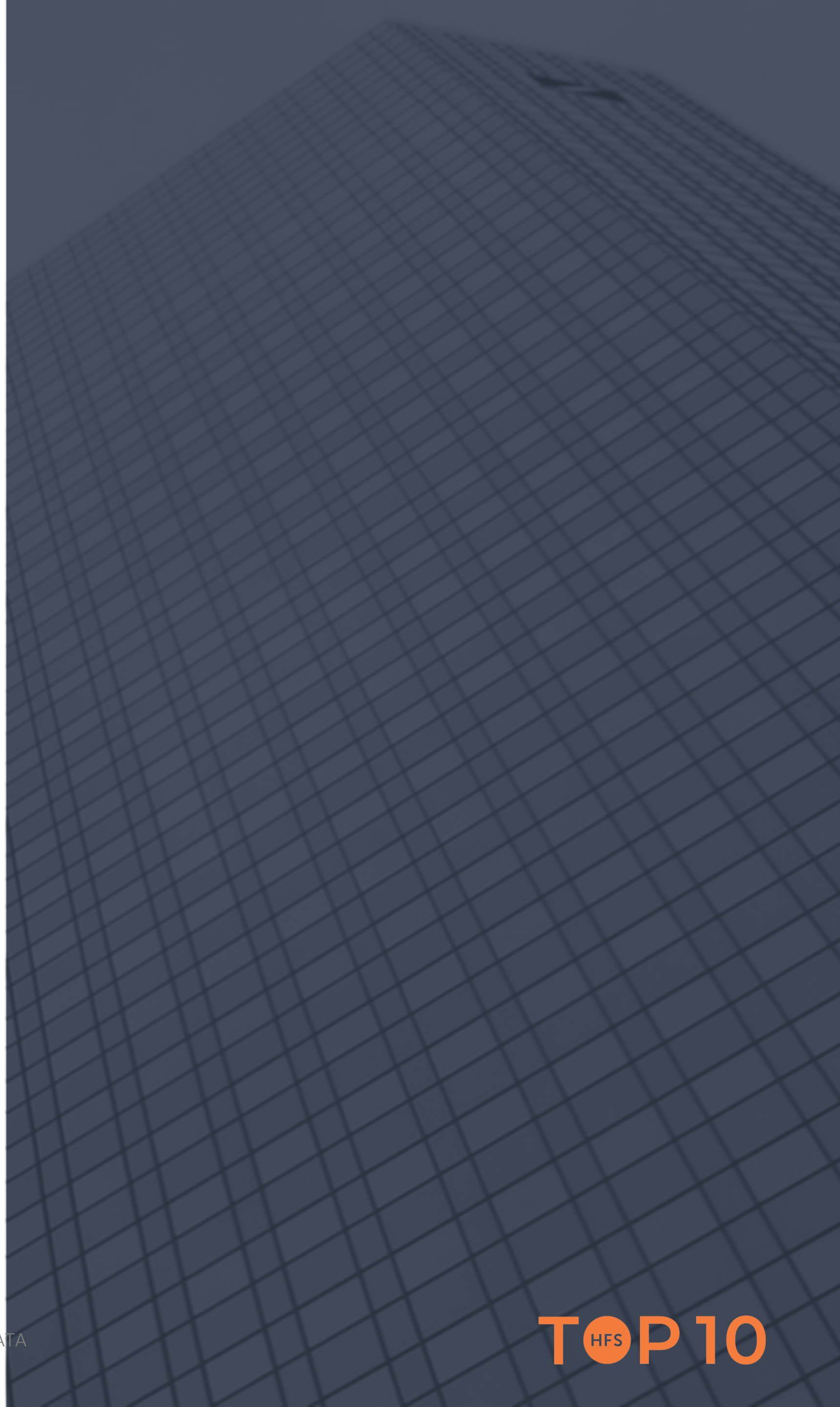
Improving patient experience is at the heart of healthcare transformation. COVID-19 has exacerbated the need to accelerate healthcare digital initiatives. However, internal silos and fragmented approaches are the Achilles heel to realize our digital dreams. Patient centricity requires us to connect the front, middle, and back offices to create a *OneOffice* experience.

—Saurabh Gupta, Chief Research Officer, HFS Research



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Introduction

- A trifecta of challenges—demand explosion, supply shortage, and the pandemic shock—has created a burning platform for the healthcare industry to embrace change. The role of third parties is no longer just supporting "business-as-usual," but helping payers and providers drive "meaningful change."
- The *HFS Top 10 Healthcare Sector Service Providers* report examines the role service providers play in the dynamic global healthcare industry. We assessed and rated the healthcare-specific service capabilities of 18 service providers across a defined series of innovation, execution, and voice of the customer criteria.
- The assessment in the report is based on services for healthcare payers and providers across the globe. It does not include life sciences (pharma, biotech, and med-tech) in scope.
- This report also includes detailed profiles of each service provider, outlining their overall and sub-category rankings, provider facts, and detailed strength and development opportunities.
- The report specifically focuses on industry-specific capabilities for the healthcare sector (payers and providers), as defined in our healthcare value chain. It does not focus on horizontal IT or BPS services such as application management or finance and accounting outsourcing, which may be delivered to healthcare clients.

The HFS healthcare operations value chain provides a comprehensive overview of services for the healthcare industry focused on healthcare payers, providers, and “payviders”

Primary report focus

Industry specific

Claims administration	Member management	Provider management	Health and care management	Administration
• Claims adjudication and processing • Payment integrity • Complaints and appeals	• Account setup • Eligibility and enrolment • Billing • Benefit management	• Provider credentialing • Provider data management • Contracting • Network management	• Population health and wellness • Utilization management • Care coordination and case management • Remote monitoring support	• Customer service • Marketing and sales • Finance and accounting and revenue cycle • Procurement and supply chain • Talent and HR

Horizontal

Enabling Technologies

RPA ● Artificial intelligence ● Smart analytics ● Blockchain ● IoT ● Cloud ● Mobility ● Social media ● Augmented/virtual reality

Horizontal Business Processes

Customer engagement ● Human resources ● Procurement ● Finance and accounting ● Payroll ● Legal and compliance

Horizontal IT Processes

Planning, design, and implementation ● Application development and maintenance ● Infrastructure management ● Security

Note: The assessment in the report is based on services provided to healthcare payers and providers across the globe. It does not include life sciences (pharma, biotech, and med-tech) in scope.
Source: HFS Research, 2020

The healthcare operations value chain defined

- HFS developed the industry value chain concept to graphically depict our understanding of the processes and functions that specific industries engage in to operate their businesses. HFS' industry value chain for healthcare operations provides a comprehensive overview of services for the healthcare industry focused on healthcare payers, providers, and "payviders."
- **Industry-specific processes** include the following specific value chain functions:
  - **Claims administration**: Processes related to administration and management of claims through the contract life cycle;
  - **Member management:** Processes related to the enrollment, administration, and management of members;
  - **Provider management:** Processes related to the management of provider information and relationships as well as contracting and management of the healthcare network;
  - **Health and care management**: This process deals with care management and remote monitoring, which includes a set of activities that is intended to improve patient care, reduce the need for medical services, and help patients effectively manage health conditions;
  - **Health intelligence**: Driving actionable insights around quality and compliance (e.g., STARS, CAHPS, HEDIS), patients, market segments, and waste, fraud, and abuse analytics.
- **Enabling technologies**: As core healthcare services revenue continues to increase, these change agents help in optimizing operations and even enabling new revenue streams. They include elements such as RPA and AI, IoT, and smart analytics. We view them as horizontal as they can be used across healthcare enterprises and leveraged for both horizontal and industry-specific processes. Our research on these topics will focus on how they are being utilized within healthcare firms, which service providers are bringing them to the table, and what real business impact is being realized.
- **Horizontal IT and business processes**: Enterprises in all sectors have a range of consistent business and IT processes that are essential to running their businesses but are executed similarly regardless of industry. We refer to these as horizontal processes and have segmented them by IT and business functions. Our industry-specific coverage of these areas will focus on instances where something unique has been developed for the healthcare industry, such as cloud-based services or cognitive agents supporting technical support. In addition to industry coverage of these horizontal topics, they will also be well covered as part of our functional research dimension.

2 Research and methodology

Service providers covered in this report

Sources of data

This report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on each of the participants in our study. Sources are as follows:

RFIs and briefings

- RFIs: Each participating provider completed a detailed RFI
- Vendor briefings: HFS conducted briefings with executives from each provider

Reference interviews and surveys

- HFS surveyed and interviewed 40+ healthcare client references of participating providers for direct feedback on performance across execution and innovation
- HFS augmented reference client interviews with non-reference clients of participating service providers leveraging its own healthcare network

Other data sources

- Public information such as white papers, websites, and press releases
- Ongoing interactions, briefings, virtual events, etc., with participants and their clients and partners

Research methodology

This Top 10 research is based on a comprehensive analysis of healthcare services and solutions. Participating organizations have been assessed on the following three dimensions: Voice of the Customer, Ability to Execute, and Innovation Capability. The assessment in the report is based on services for healthcare payers and providers across the globe. It does not include life sciences (pharma, biotech, and med-tech) in scope.

Voice of the Customer (VoC)

33%

- Direct feedback from both reference and non-reference enterprise clients via interviews and surveys

Ability to Execute

33%

- Size, scale, and growth based on headcount, revenues, # of clients, YOY growth (20%)
- Payer experience (10%)
- Provider experience (10%)
- IT services capability (10%)
- Business process services capability (10%)
- Global client portfolio based on revenue and client split across North America, Europe, and RoW (15%)
- Healthcare value chain coverage (15%)
- Delivery excellence based on global delivery centers, relationship management, and talent management (10%)

Innovation Capability

33%

- Strategy and vision (20%)
- Proprietary platforms and tools (20%)
- Investment and ecosystem based on M&A activity, IP investments, and partnerships (20%)
- Leveraging emerging technologies across the Triple-A Trifecta (automation, analytics, and AI), cloud, blockchain, and IoT and innovative solution combinations (20%)
- Commercial and engagement model based on co-innovation, pricing model, and demonstrated flexibility (20%)

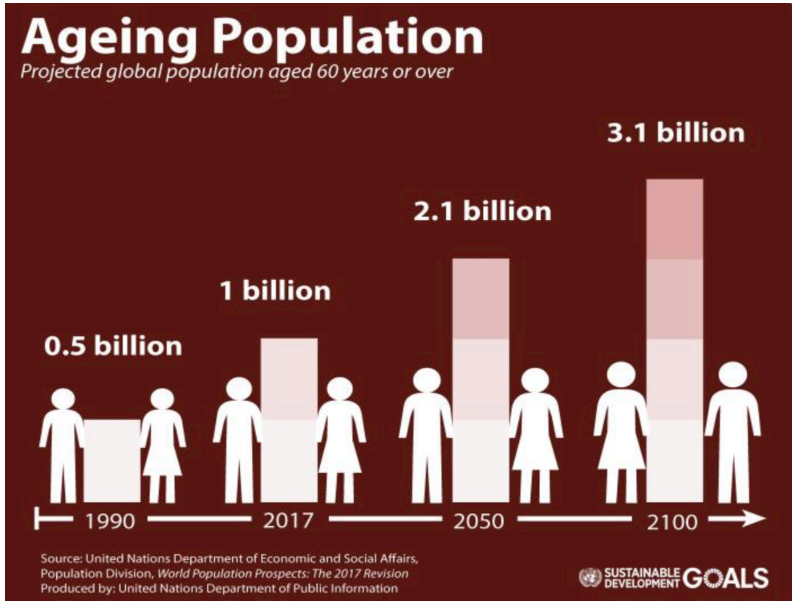
3 Market summary – key takeaways

Executive summary

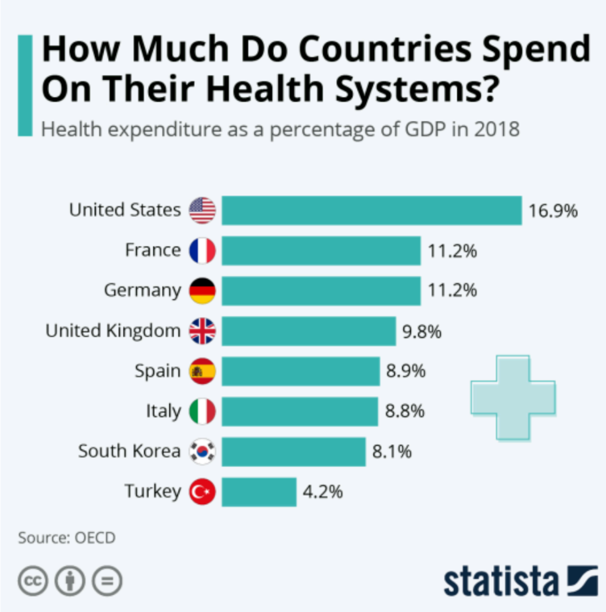
- A trifecta of challenges—demand explosion, supply shortage, and the pandemic shock—has created a burning platform for the healthcare industry to embrace change. The major innovations in the healthcare industry across the globe today focus on reducing cost of care (thereby improving the supply equation), shifting from illness to wellness (to manage rising demand), and driving resiliency and compliance to better manage risks.
- Improving the customer and patient experience is at the heart of healthcare transformation. COVID-19 has exacerbated the need to accelerate healthcare digital initiatives. However, internal silos and fragmented approaches are the Achilles heel to realizing our digital dreams. Patient centricity requires us to connect the front, middle, and back offices to create a OneOffice approach. Patient centric healthcare also requires structural changes and an ecosystem approach to bring together the multiple stakeholders of healthcare (payers, providers, life sciences, government) by ensuring aligned incentives and common goals.
- The outlook for IT and business process services in healthcare post the pandemic shock remains "bullish" as enterprises want to "do more with less." Cloud, the Triple-A Trifecta (automation, analytics, and AI), and overall IT modernization are the hottest technologies driving the healthcare industry's ambitions. While several traditional outsourcing services in healthcare are getting commoditized (e.g., revenue cycle management and claims management), there are significant opportunities for third-party services across the industry-specific value chain, such as health and care management, provider and member management, and health intelligence.
- While the demand for healthcare services is strong, the consumption and delivery of technical and business services is expected to change dramatically. We expect a significant rise in as-a-service offerings and other innovative commercial models as cash become kings. The cultural resistance to work-from-home (WFH) has also reduced significantly as work-from-anywhere (WFA) become a much more widely acceptable solution. But, at the end of the day, we are in a services economy, and quality of service delivery remains the #1 reason for clients to chose their service provider for technology and business services.
- We evaluated 18 service providers on a range of dimensions across execution, innovation, and voice of the customer. The top five service providers for the healthcare sector are 1) Accenture, 2) Cognizant, 3) Optum, 4) NTT DATA, and 5) Atos

Biggest challenges facing the healthcare industry

Increasing demand + Rising costs + Pandemic shock



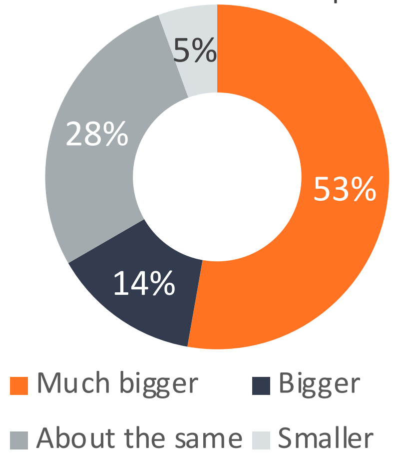
Source: United Nations Department of Economic and social affairs



Source: Statista

Do you expect COVID-19 to have a bigger or smaller impact on markets than the 2008 downturn?

% healthcare and life sciences respondents



Sample: 36 healthcare and life sciences executives across global 2000 enterprises

Source: HFS Research, 2020

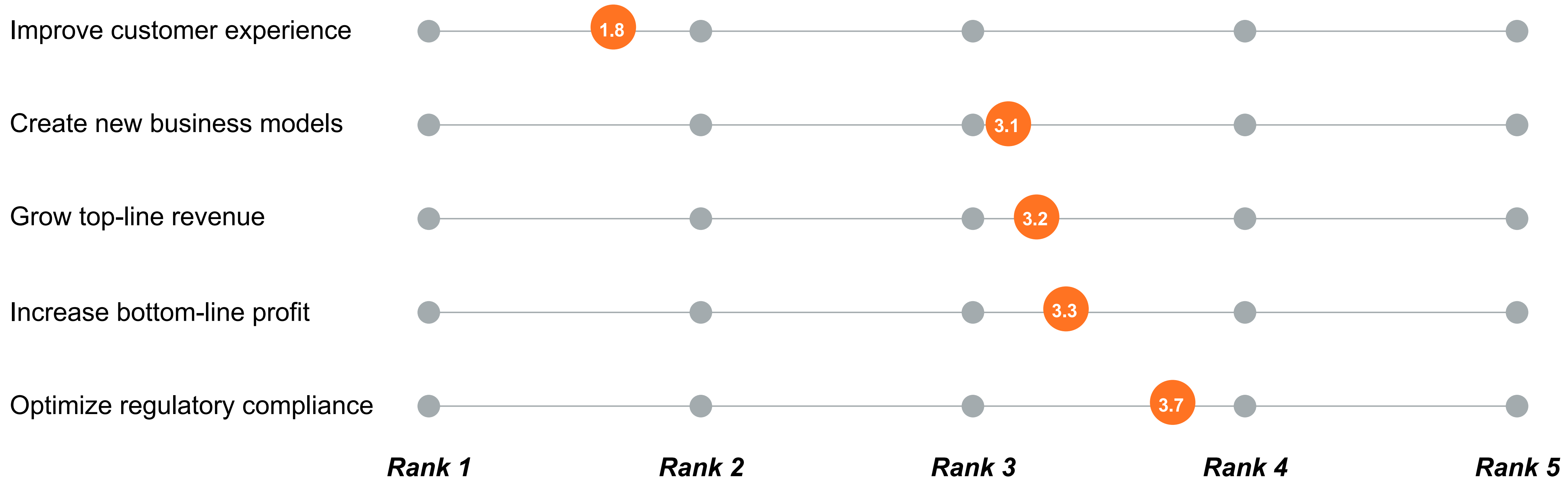
Major innovations in the healthcare industry

Reduce cost of care (Increase supply)	Shift from illness to wellness (Reduce demand)	Drive resiliency and compliance (Manage risks)
• Alignment of stakeholder incentives • Vertical integration and emergence of payviders • Administrative cost optimization (touchless claims, intelligent automation, BPaaS) • Optimizing broken processes, digitizing paper-based manual activities	• Virtualizing care (digital care and telehealth, remote care, home care, population-health management, wearables and IoT devices) • Encourage health and wellness (smart analytics, AI) • Patient experience (unified, seamless, personalized, omni-channel, digital front door)	• Access to health data (cloud, blockchain) • Modernize legacy health systems (cybersecurity, data privacy, resiliency, IT modernization) • Supply chain resiliency • Regulatory compliance (interoperability, value-based care)

Improving the customer and patient experience is at the heart of healthcare transformation

Rank the following statements about your organization's objectives for business operations transformation over the next three years

Average rank across respondents

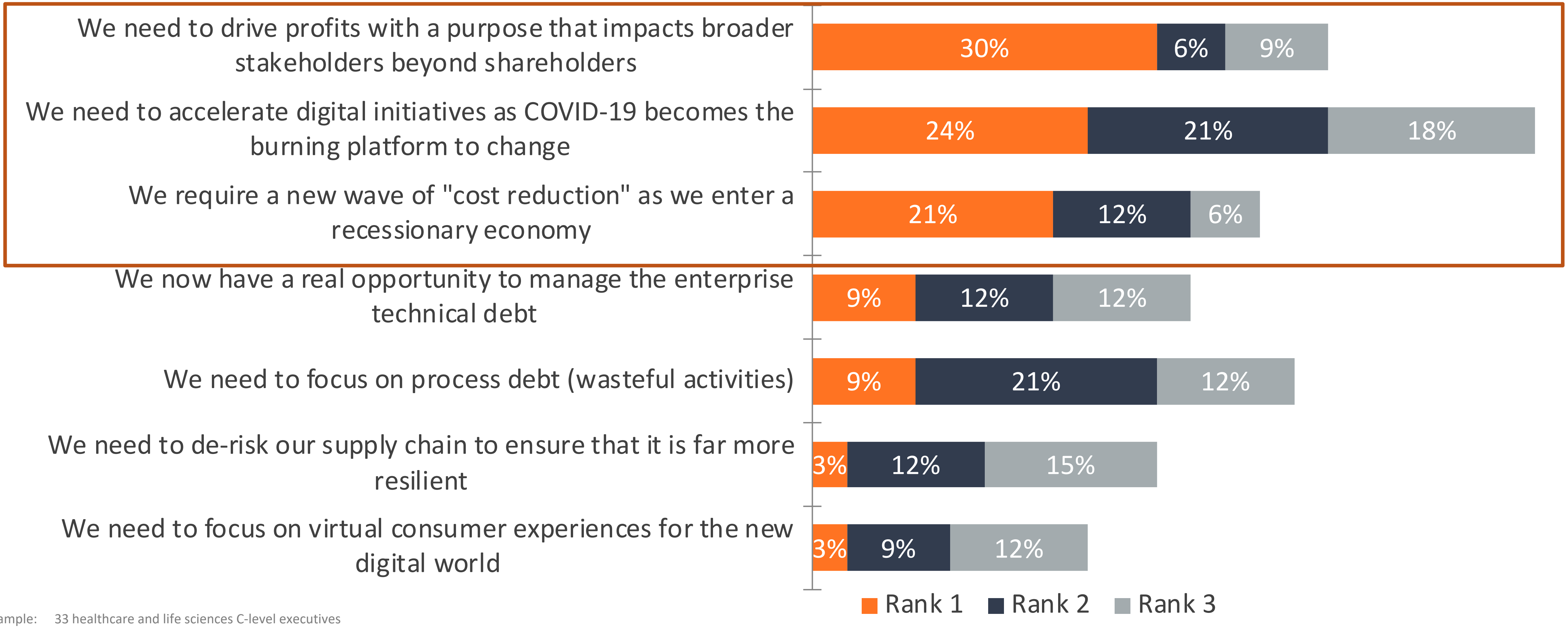


Sample: 41 healthcare clients
Source: HFS Research, 2020

COVID-19 mandates a new playbook for the healthcare: “purpose-driven profits” and “doing much more with far less”

Which of the following statements most accurately captures the current sentiment for your organization?

Percentage of healthcare and life sciences respondents



Sample: 33 healthcare and life sciences C-level executives
Source: HFS Research, 2020

However, internal silos and fragmented approaches are the Achilles heel to realizing our digital dreams

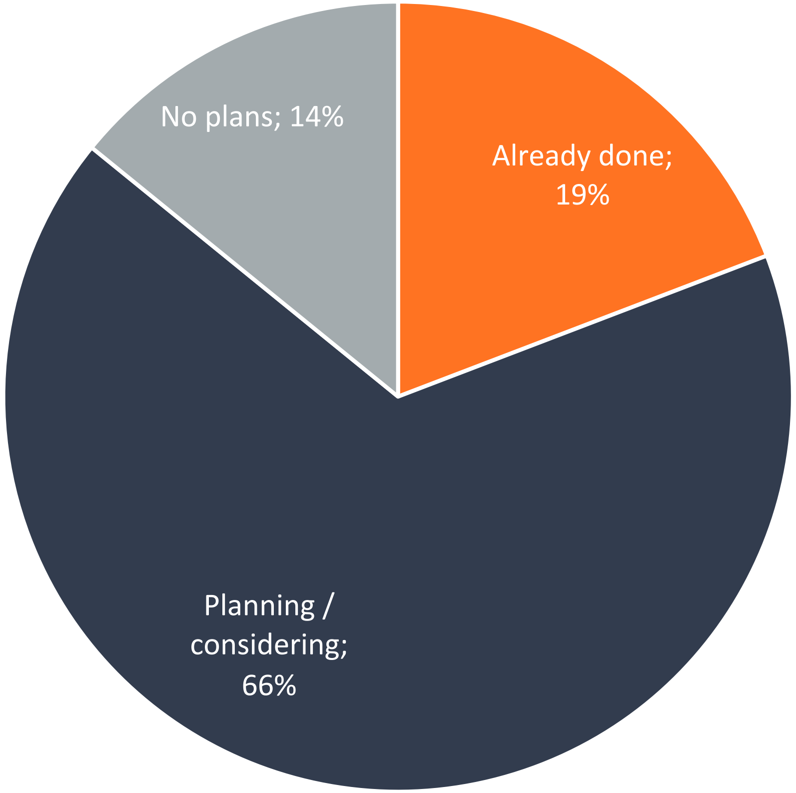
What are the top three inhibitors that are holding you back from achieving your digital transformation objectives?
Percentage of respondents

Sample: 35 healthcare clients
Source: HFS Research, 2020

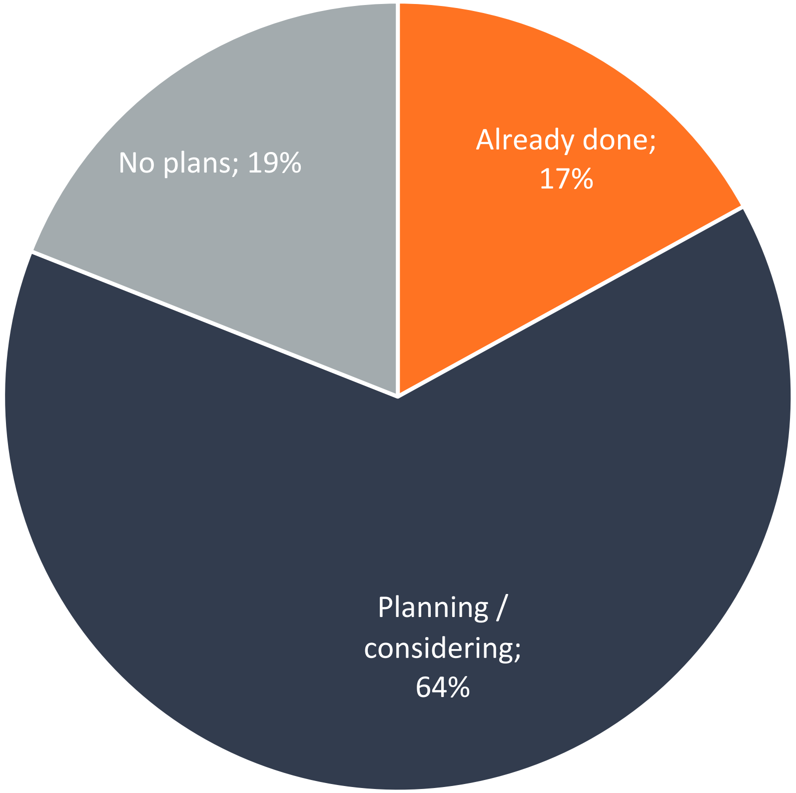
Patient centricity requires a OneOffice approach

The outlook for IT and business process services in healthcare post the pandemic shock remains “bullish” as **enterprises want to “do more with less”**

Increasing business process outsourcing in the next 12 months
Percentage of respondents



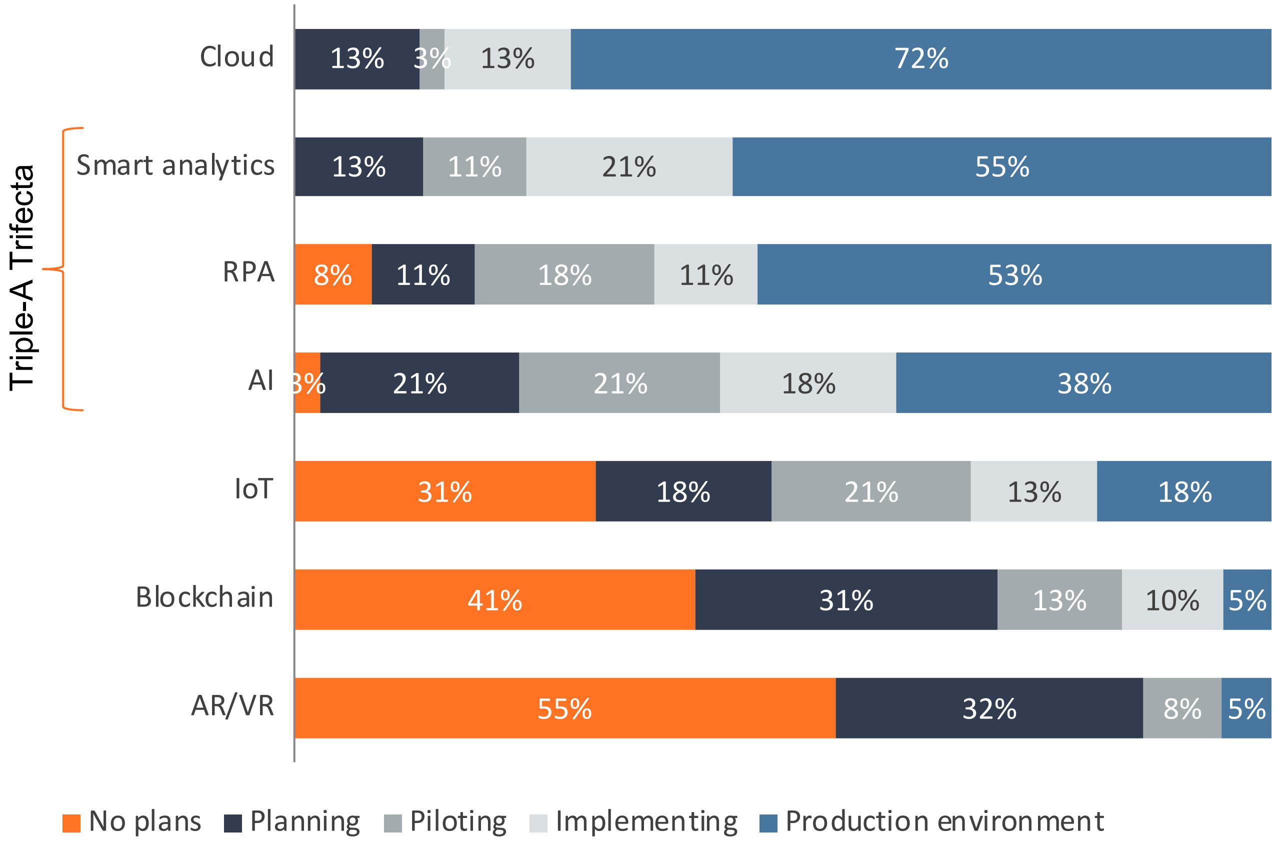
Increasing IT outsourcing in the next 12 months
Percentage of respondents



Sample: 36 healthcare and life sciences executives across global 2000 enterprises
Source: HFS Research, 2020

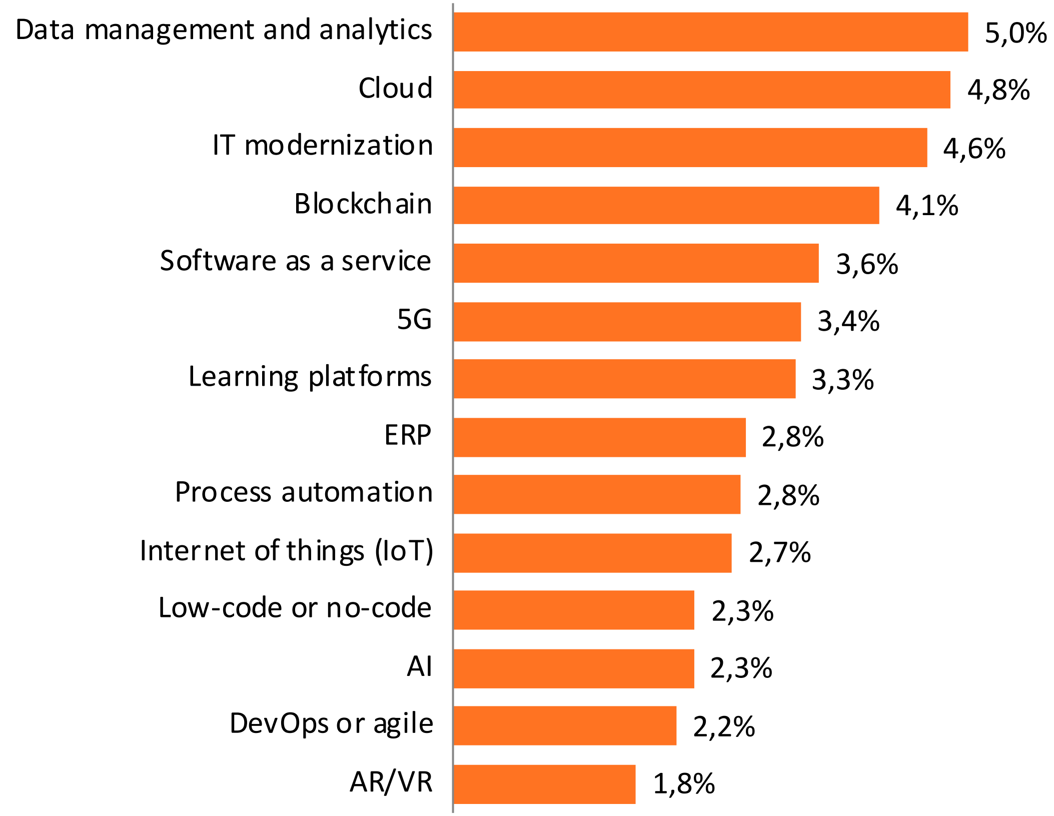
Cloud, the Triple-A Trifecta (automation, analytics, and AI), and overall IT modernization are the hottest technologies driving the healthcare industry's ambitions

Please characterize your organization's current use of the following emerging technologies?
Percentage of respondents



Sample: 39 healthcare executives
Source: HFS Research, 2020

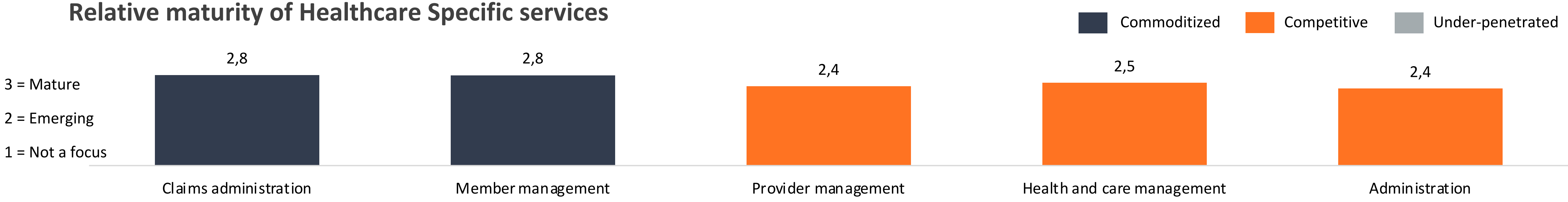
How do you anticipate investment changing over the next 12 months
Weighted average % increase by respondents

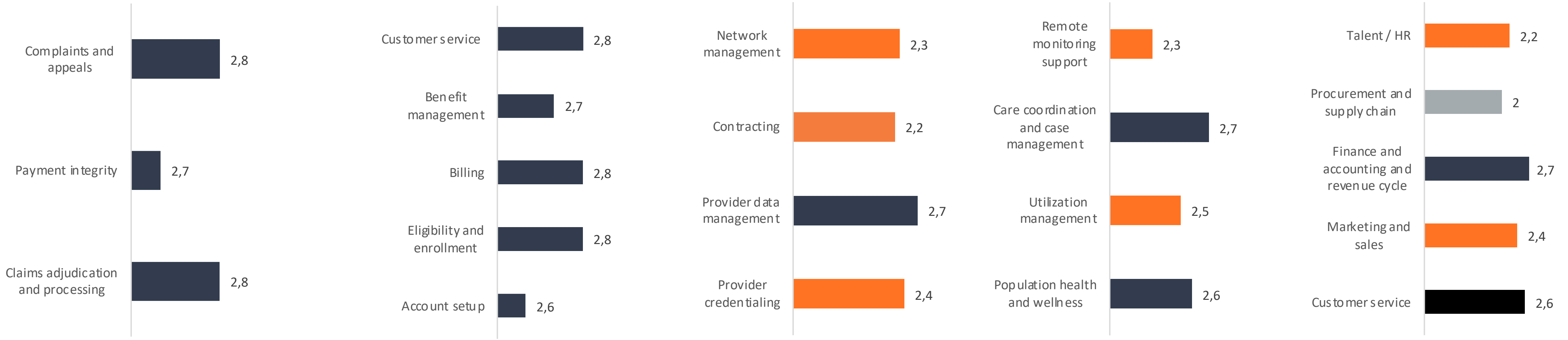


Sample: 36 healthcare and life sciences executives
Source: HFS Research, 2020

While several traditional outsourcing services in healthcare are getting commoditized, there are significant opportunities for third-party services across the industry-specific value chain of the industry, such as health and care management, provider and member management, and health intelligence.

Relative maturity of Healthcare Specific services



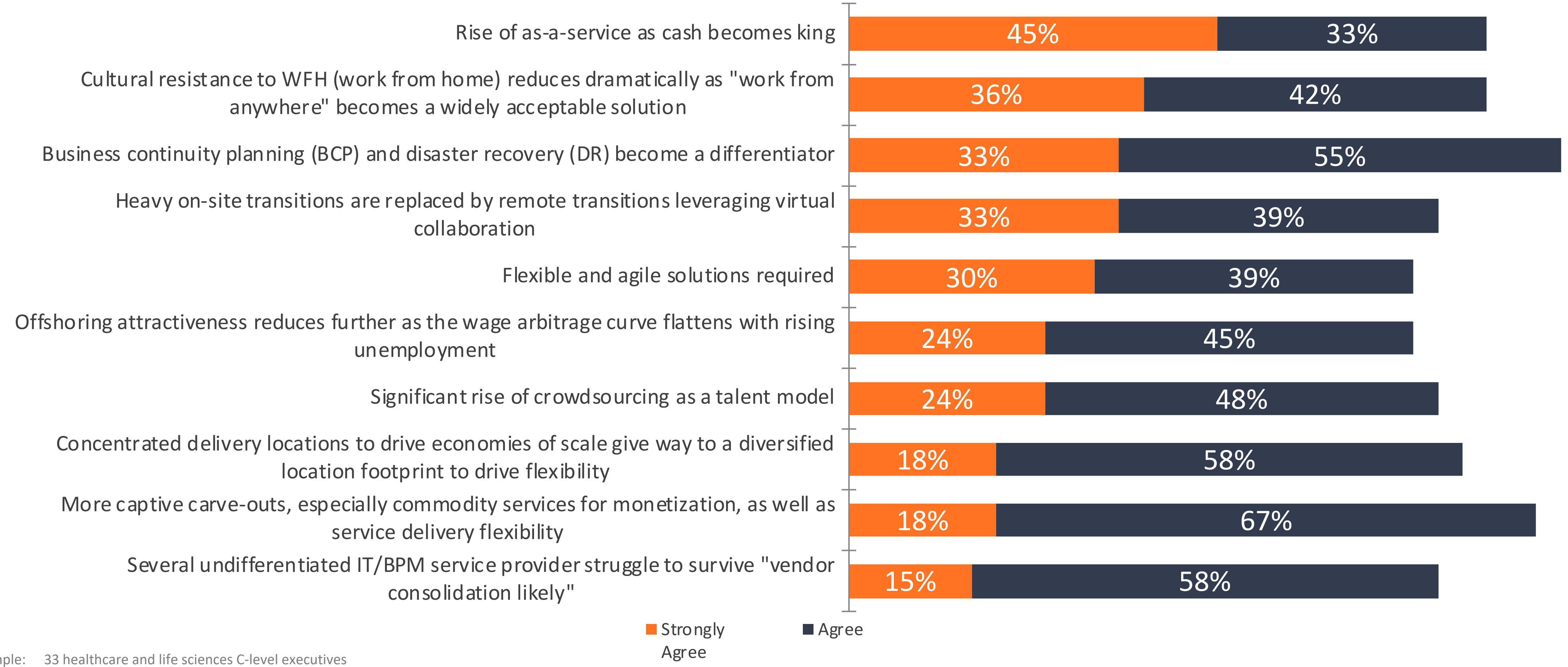


Source: HFS Research, 2020, Based on assessment of Healthcare offerings of 18 service providers

While the demand is strong, the consumption and delivery of technical and business services is expected to change dramatically

Consumption and delivery of tech and business services

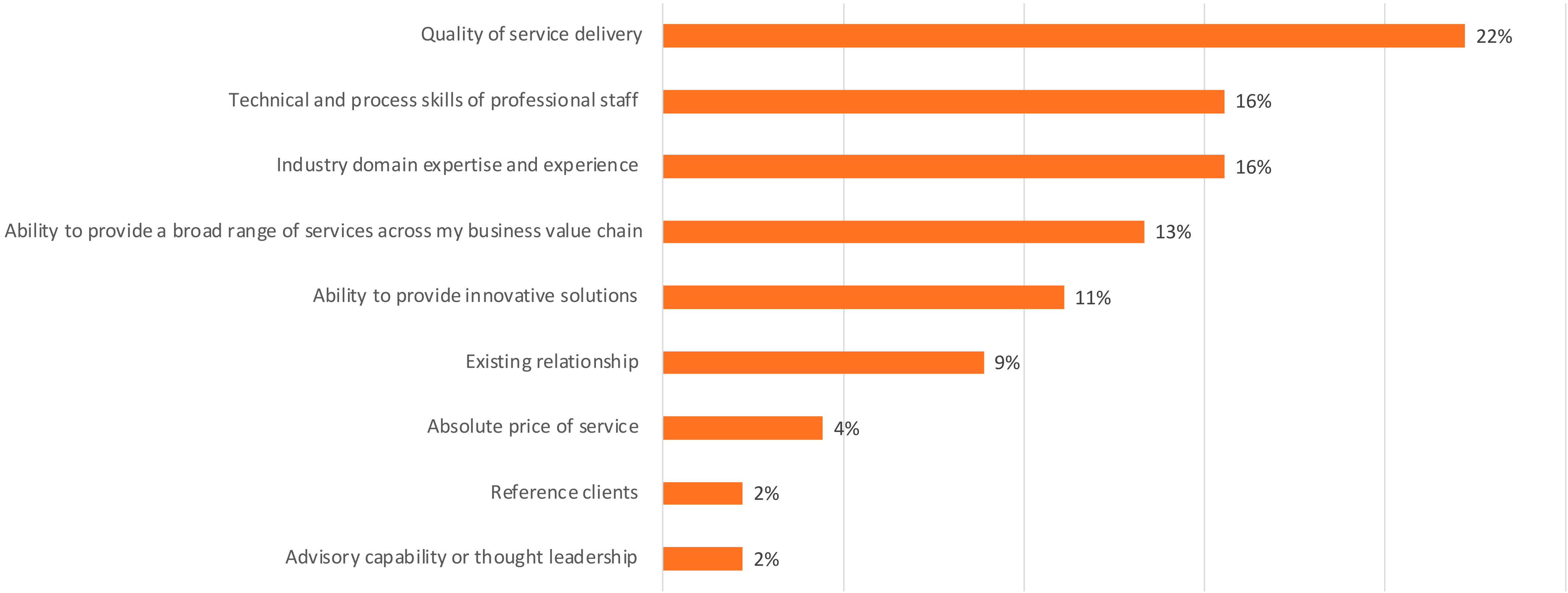
Percentage of respondents



Sample: 33 healthcare and life sciences C-level executives
Source: HFS Research, 2020

Remember: We are in the services industry, where service delivery is the king

What was the most important reason for selecting your healthcare technology/business service provider?
Percentage of respondents



Sample: 45 healthcare clients
Source: HFS Research, 2020

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Top 10 Results: Healthcare sector service provider rankings

Summary of service providers assessed in the report

Service providers (alphabetical order)	HFS point of view
Accenture	Insight-driven healthcare consulting and execution services at scale across the globe
Atos	Poised for growth in healthcare with a new verticalized structure and investments in virtual care, smart hospitals, interoperability, and quantum computing
Capgemini	Developing smart and differentiated healthcare offerings to address specific industry pain-points
Cognizant	Deep US client base across payers and providers with industrialized end-to-end healthcare offerings across consulting, digital, IT and business process services
Concentrix	Driving better customer experience in healthcare leveraging analytics and digital capabilities
Conduent	Large scale diversified BPO services across payers, providers, governments, employers, and other related healthcare businesses
EXL	Leveraging the Triple-A Trifecta of automation, analytics, and AI to deliver outcome-focused healthcare business process services
Firstsource	Financial outcomes-driven engagement options for healthcare clients backed by differentiated digital intake and digitally empowered contact center services
Genpact	Unique combination of process excellence and digital capabilities to drive healthcare outcomes powered by the Triple-A Trifecta of automation, analytics, and AI
HCL	Technology-led solutions driven by its Mode 1-2-3 strategy to help healthcare clients be future ready
HGS	Committed to healthcare-focused business services with a focus on client partnership and engagement flexibility
Infosys	Driving digital healthcare with an AI-powered, cloud-enabled go-to-market
NTT DATA	Industrializing the Triple-A Trifecta (automation, analytics, AI) to drive better healthcare outcomes
Optum	100% healthcare focus with a powerful combination of expertise, data, and technology assets
Persistent	*Patient-centric product and solution approach for healthcare backed by rich engineering experience*
TCS	*Growth and transformation partner for healthcare industry*
Tech M	*Leveraging emerging technologies to enable the convergence between payers and providers*
Wipro	*Design-led digital transformation for healthcare clients leveraging platforms, engineering heritage, and business services*

Note: The assessment in the report is based on services for healthcare payers and providers across the globe. It does not include life sciences (pharma, biotech, and med-tech) in scope.

Notable performances in healthcare sector services

HFS Winners Circle Top 5 providers overall across execution, innovation, and voice of the customer criteria				
#1	#2	#3	#4	#5
accenture	Cognizant	OPTUM	NTT DATA	Atos

Execution powerhouses Top 3 providers on execution criteria			Innovation champions Top 3 providers on innovation criteria			Outstanding voice of the customer Top 3 providers on voice of the customer criteria		
#1	#2	#3	#1	#2	#3	#1	#2	#3
OPTUM	accenture	Cognizant	accenture	Cognizant	OPTUM	accenture	Infosys	CONCENTRIX

Other notable performances

- **Atos** ranked #2 for global client portfolio, #3 for healthcare provider experience and #3 for IT services capabilities
- **Concentrix** ranked #3 for healthcare business services, #3 for global client portfolio, and #3 for commercial and engagement model
- **Conduent** ranked #2 for healthcare business services
- **HCL** ranked #2 on investments and acquisitions and #2 on commercial and engagement model
- **Infosys** ranked #2 on voice of the customer and #3 on delivery excellence
- **NTT DATA** ranked #2 for healthcare provider experience and #3 for leveraging emerging technologies
- **Wipro** ranked #3 for healthcare value chain coverage

Note: The assessment in the report is based on services for healthcare payers and providers across the globe. It does not include life sciences (pharma, biotech, and med-tech) in scope.

HFS Top 10 Healthcare sector services rankings

Rank	Overall HFS Top 10 position	Execution: Size, scale and growth	Execution: Payer experience	Execution: Provider experience	Execution: IT services	Execution: Business process services	Execution: Global client portfolio	Execution: Value chain coverage	Delivery excellence	Overall Execution	Innovation: Vision and strategy	Innovation: Leveraging emerging tech.	Innovation: Investment and ecosystem	Innovation: Proprietary tools and platforms	Innovation: Commercial and engagement model	Overall innovation	Voice of the customer
#1	accenture	OPTUM	Cognizant	OPTUM	Cognizant	OPTUM	accenture	accenture	Cognizant	OPTUM	accenture	accenture	accenture	Cognizant	accenture	accenture	accenture
#2	Cognizant	Cognizant	accenture	NTT DATA	accenture	CONDUENT	Atos	Cognizant	accenture	accenture	Cognizant	Cognizant	HCL	OPTUM	HCL	Cognizant	Infosys
#3	OPTUM	accenture	OPTUM	Atos	Atos	CONCENTRIX	CONCENTRIX	wipro	HCL	Cognizant	OPTUM	NTT DATA	Cognizant	accenture	CONCENTRIX	OPTUM	CONCENTRIX
#4	NTT DATA	NTT DATA	CONCENTRIX	Cognizant	NTT DATA	accenture	Capgemini	CONDUENT	CONCENTRIX	NTT DATA	Infosys	tcs TATA CONSULTANCY SERVICES	NTT DATA	Infosys	tcs TATA CONSULTANCY SERVICES	wipro	Cognizant
#5	Atos	EXL	NTT DATA	accenture	OPTUM	NTT DATA	Cognizant	Infosys	Infosys	Atos	wipro	Atos	wipro	wipro	NTT DATA	Infosys	HCL
#6	wipro	Capgemini	tcs TATA CONSULTANCY SERVICES	tcs TATA CONSULTANCY SERVICES	Tech Mahindra	Cognizant	NTT DATA	genpact	OPTUM	CONCENTRIX	HCL	wipro	OPTUM	Capgemini	Cognizant	HCL	OPTUM
#7	CONCENTRIX	Atos	CONDUENT	wipro	tcs TATA CONSULTANCY SERVICES	HGS	OPTUM	Atos	CONDUENT	wipro	CONCENTRIX	Infosys	Infosys	HCL	firstsource	NTT DATA	HGS
#8	Infosys	wipro	wipro	firstsource	wipro	Atos	wipro	CONCENTRIX	tcs TATA CONSULTANCY SERVICES	tcs TATA CONSULTANCY SERVICES	tcs TATA CONSULTANCY SERVICES	EXL	CONDUENT	CONDUENT	HGS	tcs TATA CONSULTANCY SERVICES	Atos
#9	HCL	CONDUENT	Infosys	HCL	Infosys	wipro	CONDUENT	TATA CONSULTANCY SERVICES	Atos	CONDUENT	NTT DATA	genpact	Atos	EXL	Atos	Capgemini	NTT DATA
#10	tcs TATA CONSULTANCY SERVICES	HGS	Atos	Capgemini	Capgemini	tcs TATA CONSULTANCY SERVICES	Tech Mahindra	NTT DATA	wipro	Capgemini	Atos	Capgemini	tcs TATA CONSULTANCY SERVICES	genpact	wipro	CONDUENT	wipro

Note: The assessment in the report is based on services for healthcare payers and providers across the globe. It does not include life sciences (pharma, biotech, and med-tech) in scope.

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Service provider profile

Industrializing the Triple-A Trifecta (automation, analytics, AI) to drive better healthcare outcomes

NTT DATA

Dimension	Rank
HFS Top 10 position	#4
Ability to execute	
Size and experience: Revenues	#4
Payer experience	#5
Provider experience	#2
IT services	#4
Business process services	#5
Global client portfolio	#6
Value chain coverage	#10
Delivery excellence	#12
Innovation capability	
Vision and strategy	#9
Leveraging emerging tech.	#3
Investments and ecosystem	#4
Proprietary tools and platform	#14
Commercial and engagement model	#5
Voice of the customer	#9

Strengths

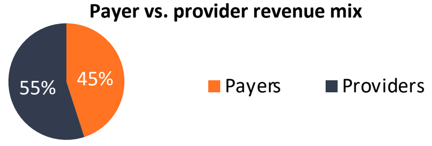
- **R&D spending**. NTT DATA has access to about $3.6 billion in R&D spending as part of its parent NTT Group, including major investments in areas like quantum computing and the creation of digital human twins. R&D investments enable NTT DATA to expose its clients to the art of the possible. As a result, it has launched several innovative solutions for the healthcare industry including COVID Lens (interactive COVID-19 screener to help the general public anonymously self-screen for the novel corona virus) and self-driving payment integrity operations.
- **Leveraging emerging technologies.** NTT DATA has launched multiple innovative platforms and solutions including NTT DATA Nucleus for Healthcare (integrated Digital Health accelerator provides a unified patient experience and clinician engagement through personalized communication, consolidated clinical and financial data, and predictive analytics), NTT DATA Healthcare AI Engine featuring a chronic disease prediction model and patient treatment optimization (combines very large customer payer [claims], pharma, lab and clinical data, uses explainable AI to help clinician with timely actionable insights for personalized patient care), and NTT DATA Digital Health Platform (a single experience platform that is both omni-constituent and channel to provide an integrated constituent experience).
- **Scaling automation.** NTT DATA is one of the few service providers that has been able to successfully scale automation initiatives. It has deployed 4,500+ bots, a multi-platform RPA ecosystem, and man-machine environments. NTT DATA's robotic context processor is a a cognitive automation engine utilizing built-in optical character recognition (OCR), natural language processing (NLP) technology along with self-learning capabilities for comprehending complex legal documentation like contracts, etc., and executing appropriate actions based on the directives.

Development opportunities

- **Potential to expand within existing clients** with an emphasis on digital transformation. NTT DATA has long-tenured relationships with its healthcare clients that position it well to support the rapid move to digital health.
- **Expanding in Europe and Latin America.** NTT DATA has a strong install base in US and APAC, but it has significant room to grow in Europe (especially post-COVID), which accounts for only 4% of its healthcare revenues.
- **Potential to expand in the US healthcare segment.** NTT DATA's client portfolio is dominated by long-term client relationships; however, there are several major health plans and provider systems that are not among its clients today. NTT DATA's digital health offerings are key to this growth.

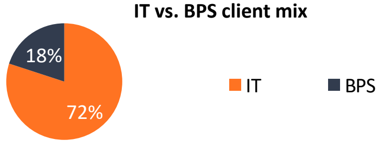
Payer vs. provider

Payer vs. provider revenue mix



IT vs. BPS

IT vs. BPS client mix



Capabilities across healthcare value chain

Claims administration	Member management	Provider management	Health and care management	Administration

Relevant acquisitions and partnerships

Recent Acquisitions:

- **Flux7:** Amazon Web Services (AWS) Premier Consulting Partner(2019)
- **NETE**: Digital services and health information technology firm (2018)
- **Cognosante**: Consulting firm {2018)
- **Sierra Systems**: Canadian IT services and consulting (2018)

Partnerships:

- **Health Plan:** DBPaaS
- **Core System:** Amisys (DST), Oracle OHI, Facets, HealthEdge, ikaSystems (Advantasure), Monument, Plexis, Aldera, Eldorado
- **Product Data Management**: Aldera, BenefitFocus, Continuum, Ebix, HighRoads, ValueMomentum, Cedargate, Simplify Healthcare
- **Network Data Management**: Availity, McKesson, Optum, VIIAD, Aperture, CredSimple
- **Data Management**: CitiusTech, ZeOmega, VitreosHealth, Tableau, SCIO Health, Mediquire and Zebra Med, Sema4
- **Consumer Engagement::** Enli, ZeOmega, Health Dialog, Teladoc, Visit Pay, SCI (R1), nference, DocASAP
- **Customer Service:** Teleperformance, SalesForce, MS Dynamics
- Nucleus for Healthcare: Enli, InTouch, R1, VisitPay

Key clients

Number of healthcare clients: ~1,100

Estimated revenue mix:
North America: 76%, Europe: 4%, Middle East: 10%, Asia Pacific: 8%, Latin America: 2%

Key clients:

- The largest payor in the world.
- Large, multinational healthcare services company based in Dallas, Texas
- Harvard Pilgrim Healthcare
- Second-largest nonprofit hospital chain in the US
- Community Health Plan of Washington

Operations

Headcount: ~15,000 FTEs

20 delivery locations across 7 countries:

- **United States:** Texas, Nebraska, Oklahoma, Kentucky, Massachusetts, work from home
- **India:** Bangalore, Noida, Chennai, Coimbatore, Gurgaon, Hyderabad,
- **Philippines:** Manila, Quizon City
- **Mexico:** Guadalajara
- **Canada**: Vancouver, Halifax
- **EMEA:** Spain, Portugal, Morocco
- **South America**: Chile, Argentina, Brazil

Products and platforms

- **NTT DATA Nucleus for Healthcare:** Integrated Digital Health accelerator that provides a unified consumer experience, consumer/clinician engagement, predictive analytics
- **NTT DATA HePA (Healthcare Provider Analytics):** Enables data and analytics use cases for healthcare provider
- NTT DATA health plan digital business process as a service (DBPaaS)
- **NTT DATA AFTE Generator:** Automated Full-time Equivalent/RPA
- NTT DATA Unified Clinical Architecture
- Eva, Virtual Nurse, ehCOS suite set of eHealth products developed by everis (an NTT DATA company) for the healthcare industry
- Chronic Disease Prediction Models and Patient Treatment Optimization (PTO)
- Digital health platform and marketplace
- NTT DATA's Connected Wellness Health

6 About the authors

HFS Research authors

Saurabh Gupta
Chief Research Officer | HFS Research
Saurabh.Gupta@hfsresearch.com

Mayank Madhur
Associate Director, Research
mayank.madhur@hfsresearch.com

Saurabh oversees HFS' global research function managing the global team of analysts across US, Europe, and Asia-Pac. He sets the strategic research focus and agenda for HFS Research, understanding and predicting the needs of the industry and ensuring that HFS maintains its position as the strongest impact thought leader for business operations and services research.

As an analyst, Saurabh leads our coverage for emerging technologies such as blockchain, business services (such as finance & accounting and supply chain) as well as our industry coverage of healthcare and life sciences.

Mayank Madhur is an Associate Director, Research at HFS Research, supporting different practice leads in area of Industry Research, IoT and Blockchain by working on, data analysis, PoVs and research writing.

He holds a certificate on "Strategic Management" from IIM Bangalore. He is certified by IIT & IBM on "Blockchain Architecture Design and Use Cases". Mayank holds a Master's in Business Administration from Birla Institute of Technology and Science College, Pilani (BITS, Pilani University) and a Bachelor of Engineering in Electrical and Electronics from Jawaharlal Nehru National College of Engineering (Visvesvaraya Technological University), Karnataka.

About HFS Research

The HFS mission is to provide visionary insight into major innovations impacting business operations, including: automation, artificial intelligence, blockchain, Internet of things, digital business models, and smart analytics.
HFS defines and visualizes the future of business operations across key industries with our Digital OneOffice^{TM} Framework.

HFS influences the strategies of enterprise customers to help them develop OneOffice backbones to be competitive and to partner with capable services providers, technology suppliers, and third-party advisors.

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