



## **TECHNOLOGIES DRIVING IMPROVED HEALTH CARE EXPERIENCES**

CONSUMER-CENTRIC SOLUTIONS FOR A NEW  
ERA OF CARE ADMINISTRATION

# ABOUT CHILMARK RESEARCH



Founded in 2007, **Chilmark Research** is a preeminent global research and advisory firm focused exclusively on tracking the market evolution of healthcare information technologies (health IT) and use cases.

Our team is united by the belief that new health IT tools are critical for improving the quality and efficiency of care in a modern world. It is therefore our mission to foster the effective adoption, deployment, and use of these new solutions (and enabled services) through objective, high-quality research into those technologies with the greatest potential to impact care delivery.

This laser-sharp focus allows us to provide our community with the most in-depth, future-forward research on the critical technology and adoption trends occurring throughout the healthcare sector.

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# KEY TAKEAWAYS



## Building a convenient and easy-to-use experience impacts every part of the patient care lifecycle

Engaged patients are healthier, proactively engage in healthy lifestyle habits, and on average utilize fewer healthcare resources. They report more satisfaction with their provider and will have better health outcomes measures.

For patients with multiple or complex diseases, or those who may struggle with a stigma associated with seeking care, a consumer-focused virtual experience can overcome these common obstacles and get patients access to the care they need.



## Multiple reimbursement models stand to benefit from improvements from patient experience

The gains that can be realized from targeted experiential enhancements are not limited to value-based-care (VBC) contracts and accountable care organizations (ACOs) alone. Fee-for-service (FFS) practices can also increase revenue and improve population health metrics by focusing on experience.

New patient recruitment and established patient retention is a source of revenue growth regardless of reimbursement model. Tools that facilitate and partially automate communications reduce operating costs, thereby increasing margin. They are also essential for helping to mitigate the burnout that is so pervasive among healthcare workers.



## There is no going back

Access to virtual care services, self-scheduling, and a more involved, engaged level of interaction are among the biggest reasons patients cite for choosing a provider. Offering these experiences and options is becoming mandatory to compete for new patients and to keep existing ones.

Consumer style tools which can automate more of the patient experience and assist with engagement and outreach will be essential to preventing even more burnout and provider strain.

# DEFINING THE CONSUMER EXPERIENCE

## Essential Capabilities for the 21st Century Patient

- ▶ Intuitive patient/user experience
- ▶ Guided self-triage and care navigation
  - ◆ Physician(s) quality scores
- ▶ Real-time price transparency/co-pay based on plan benefits
  - ◆ Omnichannel access to clinician
  - ◆ Online scheduling
- ▶ Synchronous and asynchronous access
- ▶ Patient engagement tools
  - ◆ Educational resources, patient forums, remote patient monitoring functionality and portals, easy access to medical records (including clinical encounter notes)



# DEFINING THE CONSUMER EXPERIENCE

## Essential Back-Office Capabilities to Enable

- ▶ Simple, seamless integration with clinical workflows
- ▶ Customizable workflows and pathways
- ▶ API hooks for integration and deployment
  - ◆ Educational tools, patient forum platform, scheduling, physician quality scores, etc.
- ▶ Robust data capture for billing and validation
- ▶ Use of transparent AI/ML for clinical decision-making



# PATIENT EXPERIENCE AND THE QUADRUPLE AIM

- ▶ Patient experience is integral to all four quadrants of the IHI/CMS quadruple aim
- ▶ Virtual care, revenue cycle, chronic care management, and provider workflows are interconnected
- ▶ Consumers expect options they can easily understand for scheduling, accessing care, communication, and out of pocket payment
- ▶ Consumer activation and automation are areas of focus for reducing administrative costs in particular

## Improve patient care

- > Enhance quality of care
- > Increase patient safety
- > Be the provider of choice

## Reduce cost

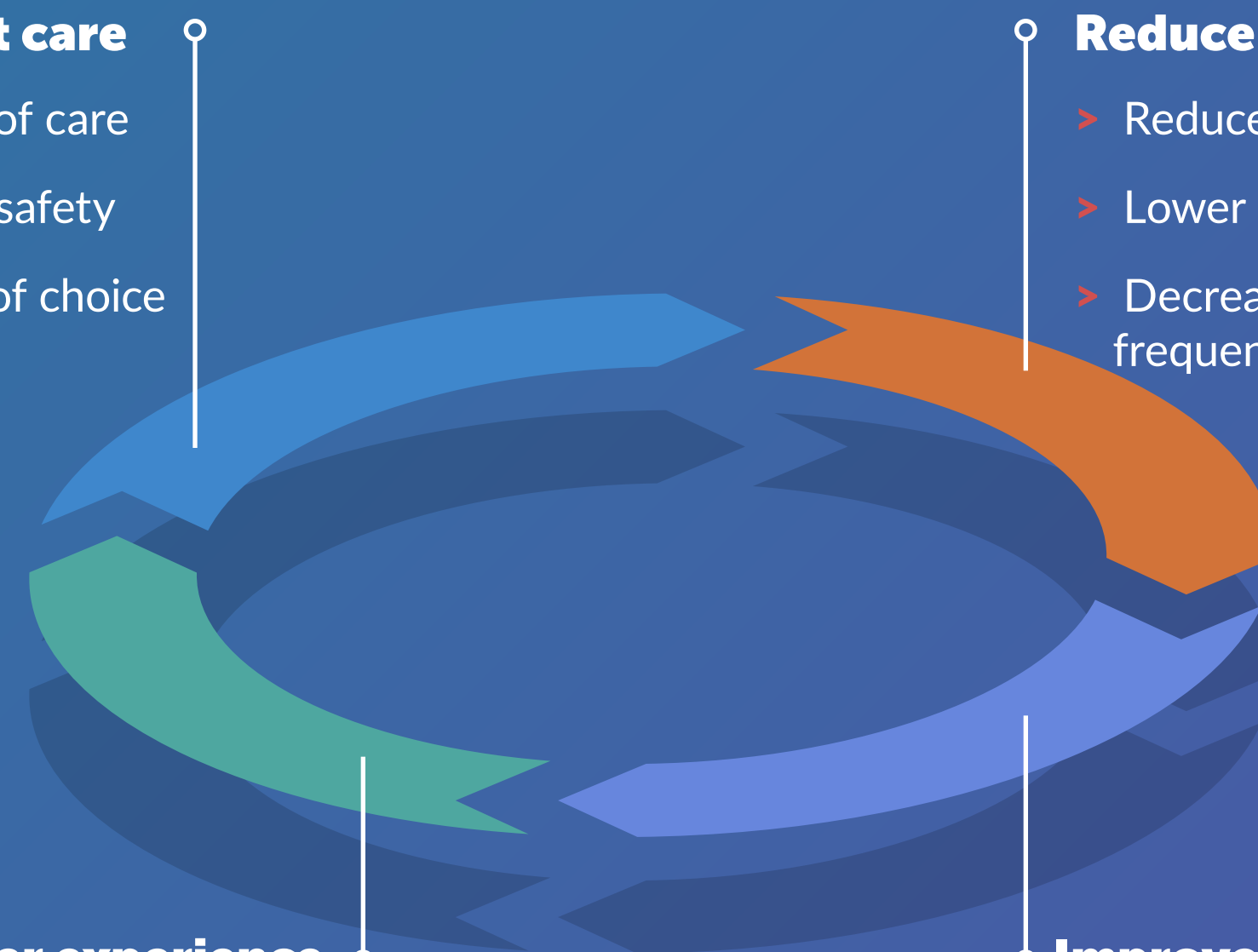
- > Reduce administrative task burden
- > Lower operating cost
- > Decrease average length of stay and frequency of ED visits

## Improve provider experience

- > Reduce burden of care
- > Enhance patient-provider interactions
- > Clinician resources working at highest level of license

## Improve population health

- > Promote access and decrease disparities
- > Close care gaps
- > Improve chronic disease management



# COMPONENTS OF THE CONSUMER EXPERIENCE

Engagement



Interop



Clinical



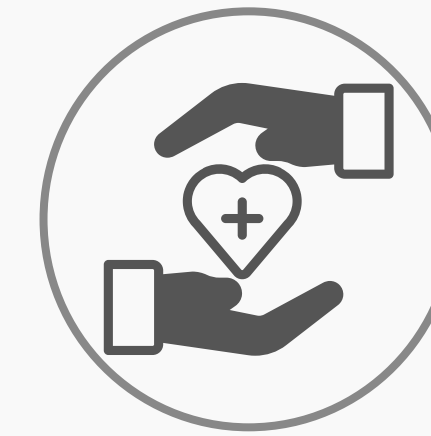
## Digital Front Door

- ▶ Self-triage
  - ◆ AI/chatbots
- ▶ Care navigation
- ▶ Eligibility
- ▶ Price transparency
- ▶ Self-scheduling
- ▶ Provider ratings



## Consumer-Clinician Engagement

- ▶ Virtual care
  - ◆ Telehealth, remote monitoring, etc.
- ▶ Shared decision making
- ▶ Referral & prior auth.
- ▶ Clinical trials
- ▶ AI/chatbots



## Patient Self-Care

- ▶ Patient-facing care management
- ▶ Patient-reported outcomes
- ▶ Educational tools
- ▶ Patient communities & forums



## Analytics & Benchmarking

- ▶ Consumer/patient profiling
- ▶ Organization effectiveness benchmarking
- ▶ Provider effectiveness benchmarking
- ▶ Utilization, total cost management



# BENEFITS AND ACTIONS TO IMPROVED CONSUMER EXPERIENCE



## Increase Market Share

**Proactively engage** with consumers drawing them to your institution with intuitive digital tools

**Be transparent** by providing care navigation, provider look-up, scheduling and costs



## Reduce Costs

**Automate consumer-facing** tools to reduce administrative costs

**Provide patient self-care** tools to reduce clinician burden

**Define benchmark metrics** to evaluate effectiveness of consumer engagement



## Facilitate Engagement

**Leverage omnichannel care** to improve access and enhance clinician-consumer interactions and perceptions

**Enable shared decision-making** capabilities with greater transparency into health status and activity

# DIGITAL FRONT DOOR MOST CRITICAL COMPONENT



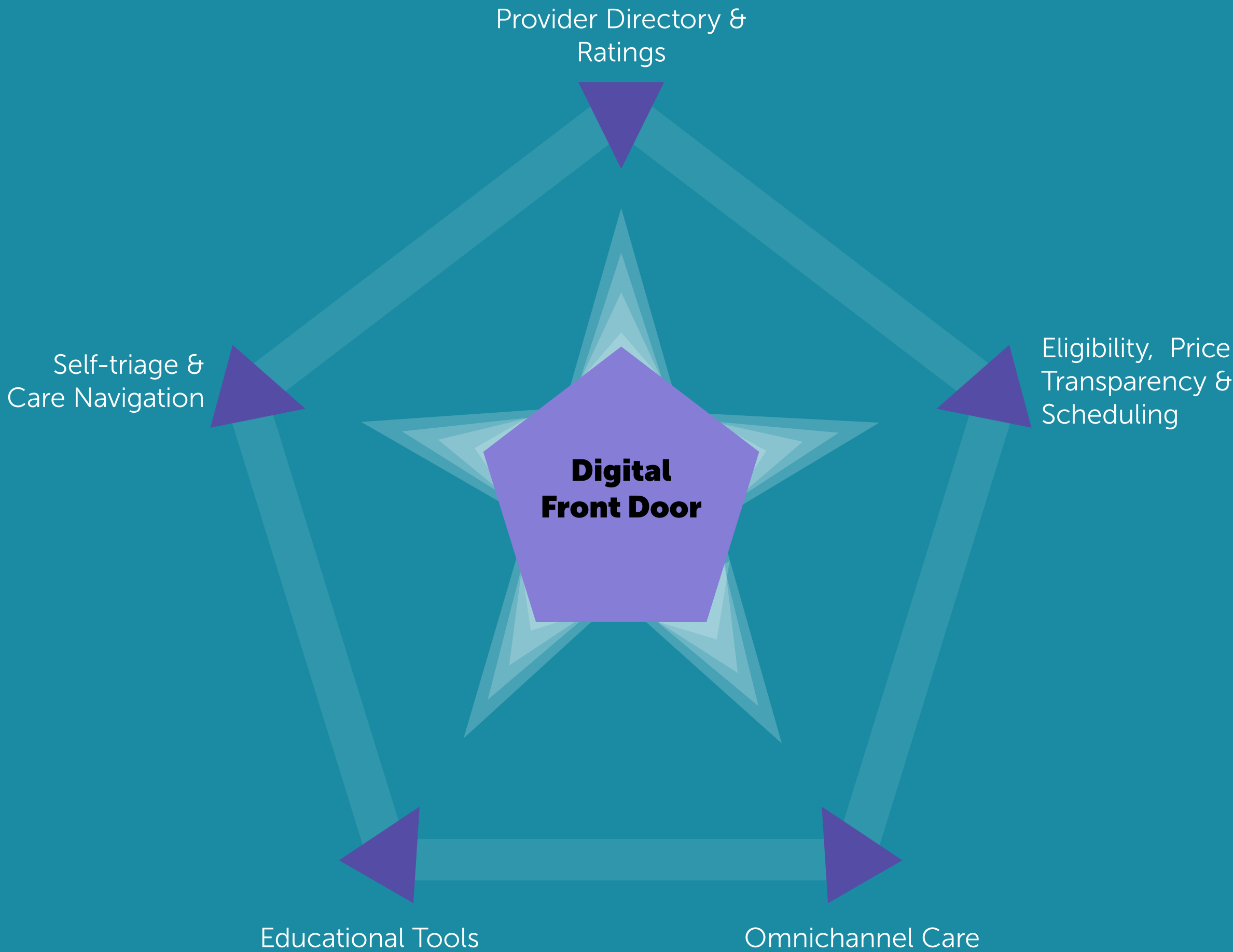
**Leverages multiple IT applications to create an engaging and cohesive experience**



**Guides consumer to best care options for them**



**Metrics to continuously capture data and optimize engagement**



# EVOLUTION OF CONSUMER-PATIENT EXPERIENCE

Organization Type	Conventional Approach	Future Approach
Provider Organizations	<ul style="list-style-type: none"> <li>&gt; Call centers for scheduling</li> <li>&gt; In-person check-in for access to physician</li> <li>&gt; EHR-hosted patient portal for records</li> <li>&gt; Non-interoperable, disparate Apps</li> <li>&gt; Patient struggles with unified view of PHI</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Digital automation tools for triage, scheduling and check-in</li> <li>&gt; Messaging for visit confirmation and wait time updates</li> <li>&gt; Platform model with integrated data for engagement</li> <li>&gt; Interactive tools, educational materials, etc. for patient self-care</li> <li>&gt; Online, curated support groups and forums</li> </ul>
Payers	<ul style="list-style-type: none"> <li>&gt; Modest, app/platform-based services</li> <li>&gt; Focused on specific chronic conditions</li> <li>&gt; Trust issues lead to low engagement and activity rates</li> <li>&gt; Care navigation, some cost estimators</li> <li>&gt; Focused on reducing utilization and overall cost of care</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Combined platform/app, real-time, and in-person services</li> <li>&gt; Broader sets of chronic conditions and co-morbidities</li> <li>&gt; Voice enabled, interaction driving improved engagement</li> <li>&gt; Improved data-sharing between provider, payer and patient to automate/facilitate access to appropriate care</li> </ul>
Retail (e.g., Pharmacies, retail clinics, urgent care)	<ul style="list-style-type: none"> <li>&gt; App/platform-based services</li> <li>&gt; Limited, same day, automated appointment scheduling</li> <li>&gt; Leverage competencies – Rx refill, immunizations, etc.</li> <li>&gt; PHI may not be readily available for PCP, or care team</li> <li>&gt; Be first-line service provider in locale</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Combined platform/app, real-time, and in-person services</li> <li>&gt; Ubiquitous, same day, automated appointment scheduling</li> <li>&gt; Expansion of service offerings for all first-line health needs</li> <li>&gt; Interoperable with other health service providers to provide unified care coordination</li> </ul>
Self-Insured Employers	<ul style="list-style-type: none"> <li>&gt; Mish-Mosh of apps and services</li> <li>&gt; Address limited range of specific conditions</li> <li>&gt; Extremely difficult engagement prospects</li> <li>&gt; Fragmented care offerings</li> <li>&gt; Focus on steerage/care navigation</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Care navigation and first-line virtual care tools to lower costs</li> <li>&gt; Expansion of disease specific apps and virtual care/coaching</li> <li>&gt; Full transparency and strong data governance to improve trust and engagement</li> <li>&gt; Migration to integrated data platform for fully interoperable apps and services to enhance value and foster engagement</li> </ul>

# GEN Z WILL DEMAND NEW LEVELS OF SERVICE



## More Global

"With how social media spreads news around, we are very educated in how the world is"

Female, 20, US



## Under the Influence

"I keep up with celebrities, influencers, and sometimes brands through Instagram"

Female, 17, US



## More Demanding

"Brands need to work more to retain their customers. I would like it if they increased their offerings and make it easier to find things that you're looking for"

Female, 20, US



## Eager to Stand Out

"Generation Z is more focused on innovation and uniqueness"

Male, 19, China



## After Experiences

"The experiences I have had, they do define me in a way - not so that I can show off about them, but what they have taught me is really valuable"

Male, 20, UK



## Pro Social (responsibility)

"Ethics and message are most important to me... you cannot expect people to buy your products if your ethics are trash"

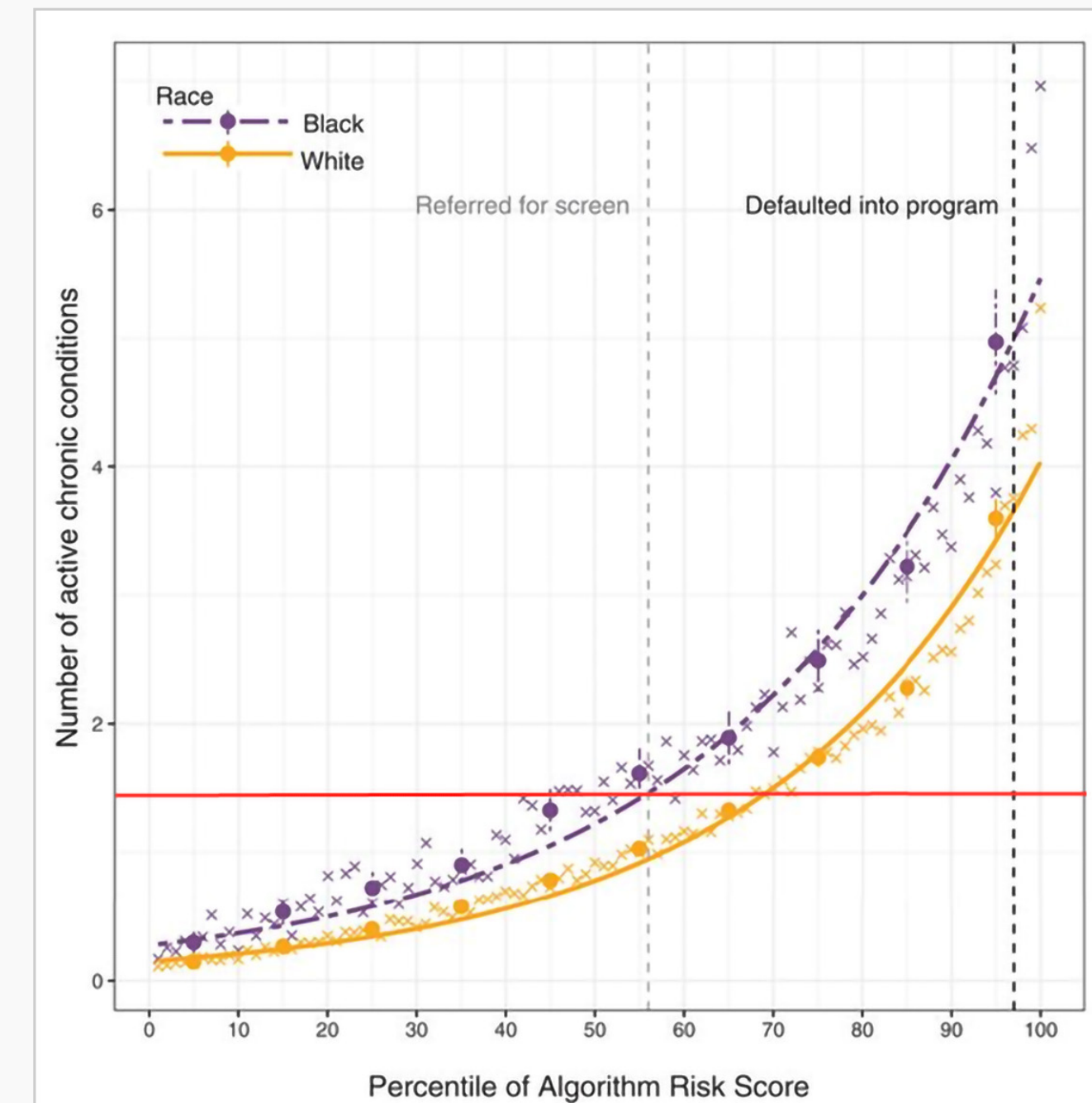
Female, 17, US

## Call to Action

# CAUTION: DIGITAL ENGAGEMENT, BIAS AND TRANSPARENCY IN AI

## Bias from many sources

- ▶ Algorithmic intensification of bias in historical data
- ▶ Bias within traditional 'best practices' or established institutional tools
- ▶ Flaws within AI/ML algorithmic design
- ▶ Poor choice of datasets as a representation of clinical or health outcomes
  - ◆ Increases overall cost, hurts clinical outcomes, damages provider trust in software, harms patient trust in providers
  - ◆ Explainability, transparency and a commitment to ongoing algorithm auditing are essential components needed to build and maintain patient and provider trust in solutions.
- ▶ Total cost of care risk score greatly underestimates the risk of African-American/Black patients compared to White patients.
- ▶ Clinically similar patients are left outside the referral/management conditions.



Obermeyer, Z., Powers, B., Vogeli, C., & Mullainathan, S. (2019). Dissecting racial bias in an algorithm used to manage the health of populations. *Science*, 366(6464), 447-453. doi: 10.1126/science.aax2342

# **VENDOR CATEGORIES**

# INCLUSION CRITERIA FOR PROFILING

- ▶ Market maturity - fully developed market vision and presence within this solution category
- ▶ Ability to present a development roadmap with a validated history of adding functionality
- ▶ At least 3 live customers and \$2 million in relevant annual revenue
- ▶ Can be effectively evaluated in the context of other similar solutions

<b>Vendor Category</b>	<b>Vendors Profiled</b>
EHR	Athenahealth, Cerner, Epic, Harris (formerly Allscripts)
Population Health	Change Healthcare, Innovaccer, Persivia
Best-of-Breed	Amwell, Bright.md, Gyant, Luma Health, Relatient, Salesforce, Qure4U, Teledoc/Livongo

### **Other Vendors to Watch**

Cured., Gozio, Health Catalyst, Healthfully, NeuroFlow, Orion Health, Xealth

# **MARKET FORECAST**



# FORECAST NOTES

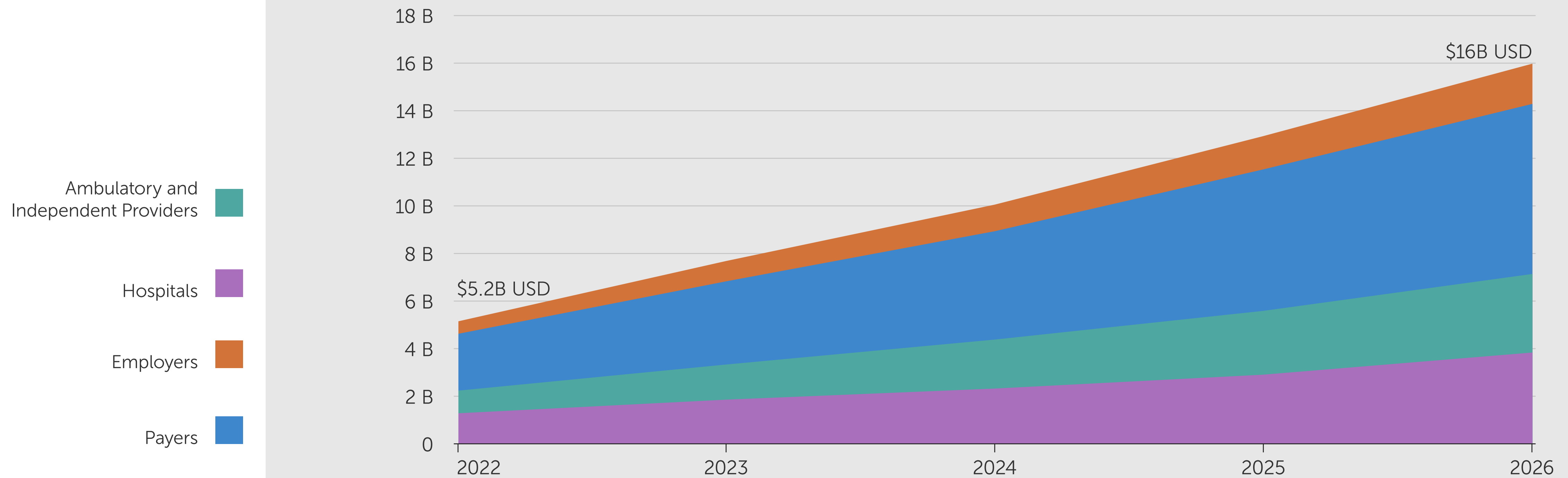
## Projecting CAGR of 25% over 5 years

- ▶ Payers are largest market representing over 45% of market over forecast period
  - ◆ Primary objective: steerage to lower utilization costs
- ▶ At a 29% CAGR over forecast period, ambulatory and independent practices are fastest growing sector
  - ◆ Leverage consumer out-of-pocket spend, gain local market share
- ▶ Hospitals and health systems maintain their second place in consumer experience spend
  - ◆ Reduce administrative costs, gain market share
- ▶ Employers are smallest market but will triple investment in consumer (employee) experience solutions over 5 years forecast period
  - ◆ Steerage to lower utilization costs, lower employee out-of-pocket spend



# FORECAST OF SPENDING ON THE CONSUMER EXPERIENCE

## Traditional Buyers of Experience Products and Services



# **PRODUCT CATEGORIES AND DESCRIPTIONS**

# CAVEATS AND QUALIFICATIONS



## 16 Product Categories

- ▶ Engagement & Enrollment (4 categories)
- ▶ Patient Engagement (4 categories)
- ▶ Patient Self-Care (4 categories)
- ▶ Reporting & Analytics (4 categories)

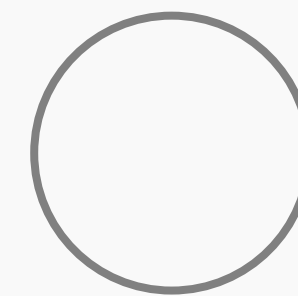


## Notes:

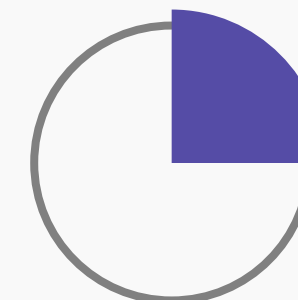
- ▶ The product categories we define in this market may not align exactly with existing offerings
- ▶ A vendor's offering may combine the functionality defined by us as discrete with other functionalities

# HARVEY BALL RATINGS KEY

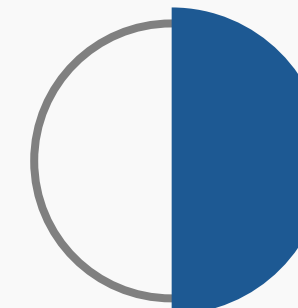
- ▶ Every vendor receives a rating in every product category
- ▶ Most vendors do not offer functionality in every category
- ▶ Harvey ball rating is relative to all other vendors in report and product requirements defined in the broadest sense
- ▶ Letter grades are calculated relative to other vendors within the same vendor category, not relative to all vendors included in report.



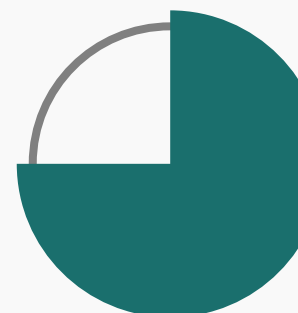
Not applicable



Meets Some Market Requirements



Meets Market Requirements

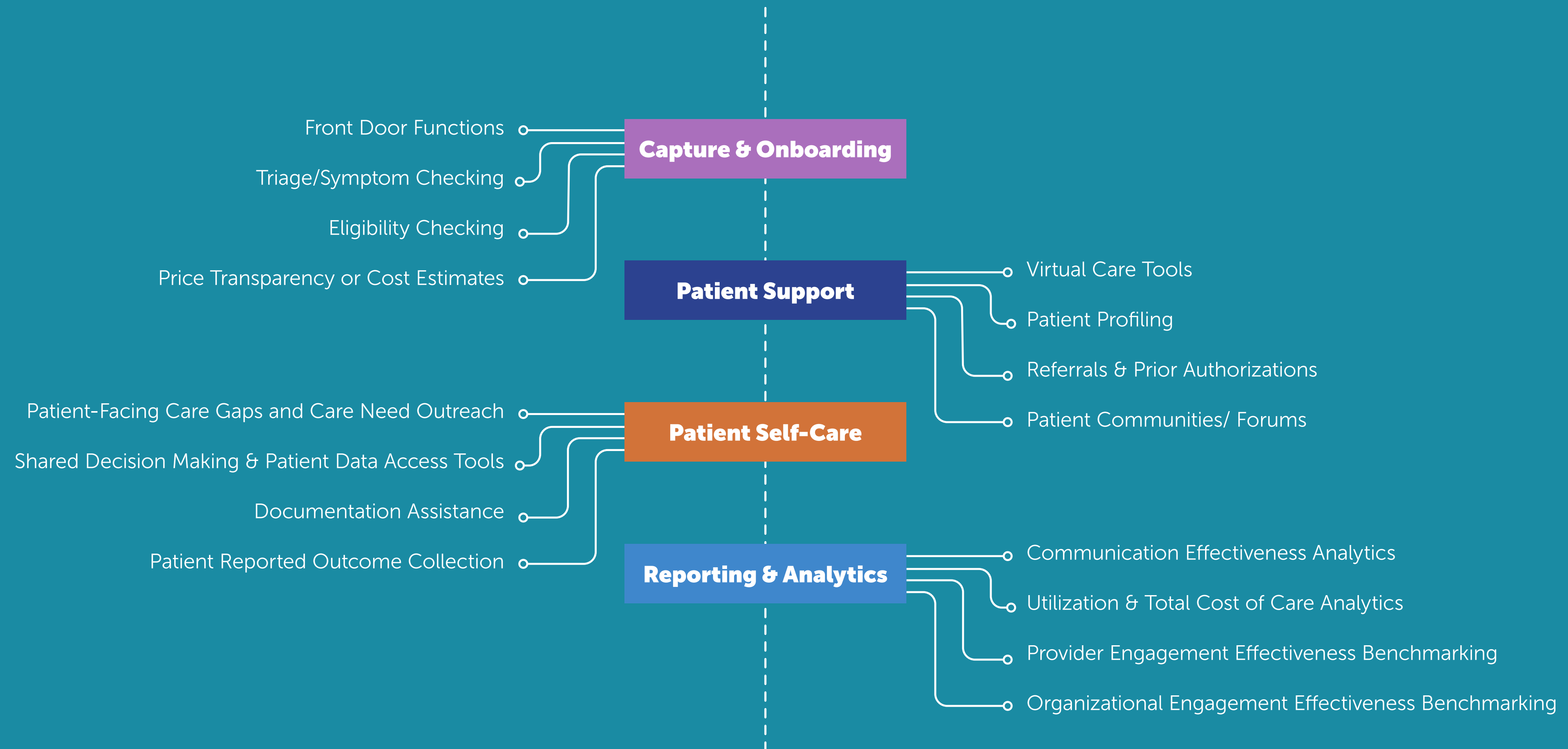


Exceeds Market Requirements



Market Leading

# PATIENT CONSUMER EXPERIENCE PRODUCT RATINGS CATEGORIES





# PATIENT CONSUMER EXPERIENCE: FLAGSHIP VENDORS

## Capture and Onboarding



- ▶ MyChart Mobile is becoming more than just a portal app to enable more patient-initiated and patient-directed experiences
- ▶ Integrations with 3rd party tools within a single UI/UX and data infrastructure are especially effective

## Patient Support



- ▶ EHR-integrated tools directly within provider/patient workflow
- ▶ Improving UI/UX both for providers in the EHR and patients in MyChart, esp MyChart Mobile
- ▶ Excellent combination of patient-facing, virtual care, education, outreach/engagement tools within an existing infrastructure

## Patient Self-Care



- ▶ Leverages automation for effective patient engagement. Excellent UI/UX
- ▶ Allscripts FollowMyHealth- A well-executed portal replacement app
- ▶ Good combination of scheduling, engagement, interactive tools

## Reporting & Analytics



- ▶ Combination of organizational reporting and broad cross-organizational benchmarking
- ▶ Easy to build and read dashboards and reporting on both excellence and potential improvements
- ▶ Applications of AI/ML to provide not just current state reporting, but recommendations for next actions and potential strategies

# PATIENT CONSUMER EXPERIENCE: RUNNER UP VENDORS

## Capture and Onboarding



- ▶ Combination of care, engagement, collaboration, and outreach driving patient enthusiasm and longitudinal use
- ▶ Joint focus on linking usability and familiarity with important clinical functions
- ▶ Engages patients with education, independent activity, and interactive learning and coaching for best possible longitudinal care outcomes

## Patient Support



- ▶ Excellent combination of front door tools and virtual care tools. Combines patient needs for scheduling, payment, engagement with RPM, coaching, asynchronous care
- ▶ Integration and rollout focus for long-term use and support of progression into virtual care
- ▶ EHR-agnostic platform to integrate workflows and experience within a single model

## Patient Self-Care



- ▶ Combination of chronic care management, acute needs, behavioral health, and virtual primary care
- ▶ Integrates interactive AI/ML driven activity with asynchronous messaging and responsiveness.
- ▶ Good design with emphasis on intuitive UI and usability

## Reporting & Analytics



- ▶ Strong AI/ML tools (but see above)
- ▶ Powerful CRM tools (but see above)
- ▶ Good organizational focus on home health/hosp@home enablement and patient-initiated interactions



# Capture and Onboarding

	<b>Innovation</b>	<b>Description</b>
Front Door Functions	Patient scheduling, check-in and arrival tools	Tools to direct patients to a care center or assist patients in selecting a doctor. Tools for allowing patients to check in for an appointment or procedure remotely. Can include COVID symptom clearances, needed documentation, pre-appointment screenings, virtual waiting rooms. Create patient and payer billing or integrate with billing systems to support billing for care activities. Allow appointment requests and/or self-scheduling for in-person or remote encounters. Tools for canceling or rescheduling appointments. Provides patients with appointment reminders or access points for remote care
Triage/Symptom Checking	On-demand recommendations or care suggestions	Provide remote symptom checking and triage tools using clinical algorithms or AI/ML models, including chatbots. Includes functions that direct patient activity or assist patients in navigating to a care setting. Does not include the aspects of a workflow which routes patient interactions to a provider for review
Eligibility Checking	Provide easy access to in-network providers and minimize unexpected costs	Tools offering either batched or real time eligibility checks to provide information to patients and staff about coverage and costs
Price Transparency or Cost Estimates	Provide total cost of care estimate	Tools providing estimates or actual billing amounts to patients prior to scheduling an appointment or procedure

# Patient Support

	<b>Innovation</b>	<b>Description</b>
Virtual Care Tools	Real-time remote encounters	Real-time appointments using voice or video technology. Includes telephonic, web, and chat encounters
Patient Profiling	Personalized patient outreach	Creation of a patient profile for analysis, communication, and risk assessment. May include clinical, SDoH, communication preferences, and other data to create a full patient context
Referrals & Prior Authorizations	Seamless referral/prior authorization workflow	Tools assisting in the process of referrals or prior authorizations, through automation, data collection, or other methods. Can also include tools which identify when additional insurance workflow is needed, informs patients or providers, and provides updates on processing and approval
Patient Communities and Forums	Automated communication customized to the specific needs of a group	Tools supporting provider-, vendor-, or patient-organized communities or other mutual communication based on diagnoses, care needs, or other factors

# Patient Self-Care

	<b>Innovation</b>	<b>Description</b>
Patient-Facing Care Gaps & Care Need Outreach	Provide education and assistance in personal healthcare needs	Communication, outreach, or other tools to communicate with patients about identified care gaps or needed patient activity. May assist with resolving the needs through appointments, scheduling, or other methods
Patient Reported Outcome Collection	Patient responses to changes in status or health	Allow patients to report symptoms, medication reactions, or changes in status to care teams, and/or prompts patients for feedback at clinically necessary points
Documentation Assistance	Leverage AI/ML or other tools to reduce provider workload and improve documentation	Assists providers or staff with suggestions for notes or other documentation, or automatically creates preliminary notes or documentation for provider review
Shared Decision Making & Patient Data Access Tools	Provide education, training, or activities to patients as part of an active care program	Allow patients to review treatment plans, diagnoses, histories and other data. Patient/caregiver access to test and exam results, provider notes. Access to medication list, refills, medication information. Deliver patient-specific and/or condition-specific educational materials or other interactive activities. Monitors consumption and use, and reports on efficacy. Suggests educational or interactive content based on efficacy. Tools for assisting patient enrollment in clinical trials or experimental treatments or allowing independent patient enrollments.

# Reporting & Analytics

	<b>Innovation</b>	<b>Description</b>
Communication Effectiveness Analytics	Provide transparency into the impact and effects of a software solution	Tools and reporting to communicate how effective campaigns, communication, and outreach are
Utilization & Total Cost of Care Analytics	Provide transparency in cost per patient	Ability to analyze and calculate the amount of services a patient is using and the effects of the total cost of care
Provider Engagement Effectiveness Benchmarking	Provide transparency into the providers to patients communication	Reporting and analytics showing how effective individual providers are at engaging with patients and/or comparing to benchmarks
Organizational Engagement Effectiveness Benchmarking	Provide transparency in educational and management software solution	Reporting and analytics showing how effective an organization or organizational subgroups are at engaging with patients, and/or comparing to benchmarks

# VENDORS TO WATCH



Marketing & CRM-built platform with the compliance, data model, and out of the box interactions needed to support every step of a healthcare consumers journey.

Built-in library of healthcare-focused content, audiences, and automations to create the engagement.



In-patient and in-office focused digital front door. Wayfinding, appointment directions along with traditional telehealth, scheduling and messaging functions.

Good analytics based on their focus: What do patients search for, what's being used.

Growth in integrations and APIs provides exciting opportunities, excellent example of eliminating the boundary between in-person and virtual care.



Health Catalyst is a data, analytics, and decision-support platform. Integration into Data Operating System offers excellent visibility into patient activity, needs, profile.

Twistle acquisition brings sophisticated care pathways, design tools, and automation functions.

DOS offers good care gap and care need analysis for outreach and engagement activity.



Pre-built integration platform allows seamless interoperability across an organization's existing enterprise solution. This includes EMRs, EHRs, ERPs, Payors, Payment Networks, Data Warehouses, and existing Identify and Access Management services.

Patient engagement functions including: intake and registration, scheduling and appointments, payments, patient activation, virtual care, telehealth and remote patient monitoring (RPM), behavioral health, social determinants of health, and wellness programs.

# VENDORS TO WATCH



Addresses a breadth of needs and care options in the behavioral health space. Excellent tools and UI for patients, providers, care teams.

Provides active insight into patient activities and recommends activities and strategies for both patients and providers.

Leverages AI/ML and NLP to analyze patient responses and engagement patterns. EHR data integration for workflows, data injection, assisted documentation.



ML/AI powered digital front door that addresses fragmented consumer experience by multi-channel interface through which all interactions can occur including symptom assessment, trusted health information, electronic referrals, access to complete medical records, virtual care and remote monitoring.

Leveraging the power of machine learning and analytics powers evidence-based decisions to guide people to appropriate care and resources, meaning precious clinician time is reserved for those who need it most.



A platform that aggregates and organizes digital health tools and patient monitoring while consolidating reporting and analytics across patient populations and physician groups.

Xealth Digital Command Center houses customized reporting and analytics of patient and provider engagement. Enables measuring outcomes collection of different prescribed content, apps, services, and connected medical devices across the entire system.

While not directly developing and marketing solutions that meet the definitions used to evaluate other vendors in this report, Xealth's digital formulary is very much an enabler of these capabilities and provides much needed insights into actual user engagement metrics.

# APPENDIX A

## Methodology

- ▶ To compile this report, Chilmark Research combined extensive primary and secondary research techniques to create a composite profile for each vendor.
- ▶ Primary research was divided into two distinct steps, beginning with soliciting targeted vendors for their involvement in the research.
- ▶ We asked participating vendors to complete a questionnaire whose purpose was to collect qualitative and quantitative information about the company and the markets it serves. Questions included among others: relevant revenue, number of employees, primary market, number of healthcare entities currently using its solution, and more in-depth questions regarding features and functions.
- ▶ When possible, upon receiving the completed questionnaire we conducted a follow-up interview with each vendor. These in-depth telephone interviews typically lasted 60 minutes and built on the responses to the questionnaire. This portion of the research effort also focused on topics that cannot easily be captured within the context of a written questionnaire including competitive positioning, product roadmap, partnership strategy, and which solution features are most attractive to prospective customers.
- ▶ Chilmark Research performed a final analysis of the vendors via secondary research and telephone interviews with end users and consultants that have advised on, deployed, or used a vendor's system. This information was compiled to provide the in-depth reviews and ratings of the profiled vendors. Prior to publication comments and feedback were considered and where relevant, incorporated into the final profile narratives.
- ▶ In developing this extensive report, Chilmark Research maintained absolute objectivity throughout the entire research process and it is our sincere hope that this report brings greater clarity to this evolving market.

# ABOUT THE ANALYST TEAM



**John Moore II** launched Chilmark Research in 2007. From those humble beginnings, John has built Chilmark Research into a respected analyst firm that provides market-leading coverage of the most transformative sectors of healthcare IT. Of great personal interest to John is the role that the consumer will ultimately play in the rapidly evolving healthcare market.



**Alex Lennox-Miller** joined the Chilmark Research team in 2018 as a Senior Analyst specializing in provider-payer-patient convergence. His work focuses on value propositions for HCOs and payers, particularly in the implementation and potential use cases of analytic and workflow packages for clinical, administrative, and financial areas.



**Elena Iakovleva** joined the Chilmark Research team in 2022 as a Research Analyst specializing in revenue cycle management and remote patient monitoring initiatives. Her major focus lays in healthcare accessibility and new technologies adoption among payers, providers and patients.





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