Rapid Advancements in AI – Opportunities for Healthcare to Leapfrog its Quadruple Aim

FEATURING RESEARCH FROM FORRESTER

Clinical Intelligence Will Power The Intelligent Healthcare Organization

IN THIS DOCUMENT

RAPID ADVANCEMENTS IN AI – OPPORTUNITIES FOR HEALTHCARE TO LEAPFROG ITS QUADRUPLE AIM

For over a decade, the Quadruple Aim has guided healthcare transformation. Yet, for most health systems, it continues to challenge the delicate balance of improving patient experience, elevating population health, empowering clinicians, and reducing per-capita costs when every thread in the system seems to counterbalance these goals in different directions.

Today, four disruptive forces are colliding—exposing the limits of the healthcare system as we know it.

- **The Demographic Mismatch:** Lifespans are increasing, thanks to modern science and access, but healthspans are on a tailwind. This widening gap continues to drive healthcare utilization, creating an unsustainable demand for high-acuity, high-cost care.
- **The Chronic Disease Epidemic:** The disease profile has shifted. We're now facing an epidemic of chronic and behavioral health conditions affecting younger populations—from a doubling of prediabetes among teens to 40% of children now living with a chronic illness.
- **The Workforce Depletion:** Our most critical asset—our clinical workforce—is at a breaking point. Facing a projected shortfall of up to 124,000 physicians by 2034 and record burnout rates, we cannot hire our way out of this crisis.
- **The Economic Squeeze:** Payer's face soaring Medical Loss Ratios, patients are burdened by out-of-pocket expenses, and new, high-cost therapeutics, such as GLP-1s and cell therapies, are adding unprecedented financial pressure.

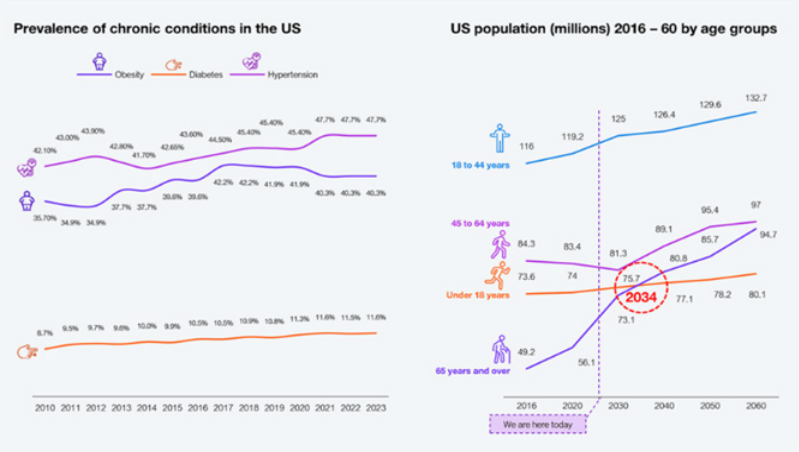

Figure 1: Projection of future patient profiles in the US

Despite spending nearly twice as much as peer nations, U.S. health outcomes remain stubbornly poor, with lower life expectancy and the highest burden of chronic disease[1].

This is no longer a problem of effort; it's a problem of architecture. And the rapid maturation of AI—particularly generative and agentic AI—offers a once-in-a-generation opportunity to leapfrog these legacy architectures. It's time to stop incrementally improving a broken system and start building an intelligent, sentient one.

A Blueprint for Sentient Healthcare

Instead of trying to outscale demand, leaders must reimagine healthcare with AI as a key lever for growth. This means evolving into a sentient health system—one that anticipates needs, personalizes interventions, and seamlessly augments the capabilities of both patients and clinicians.

This blueprint is built on three core strategies:

1. **Reimagine the Clinician Experience/Empower the Clinician: From Burnout to Empowerment**

   Imagine this: A physician finishes a complex patient visit. Before she even leaves the room, the complete clinical note is drafted in the EHR, relevant orders are queued, and a billing code is suggested—all generated automatically from her conversation. She spends 30 seconds reviewing and signs off. Her administrative work is virtually eliminated, and her focus returns to the patient, not the keyboard.

   We must use AI to offload the cognitive and administrative burden from our clinical workforce. This goes far beyond simple automation. It's about creating an intelligent ecosystem that supports clinicians at every step, allowing them to practice at the top of their license.

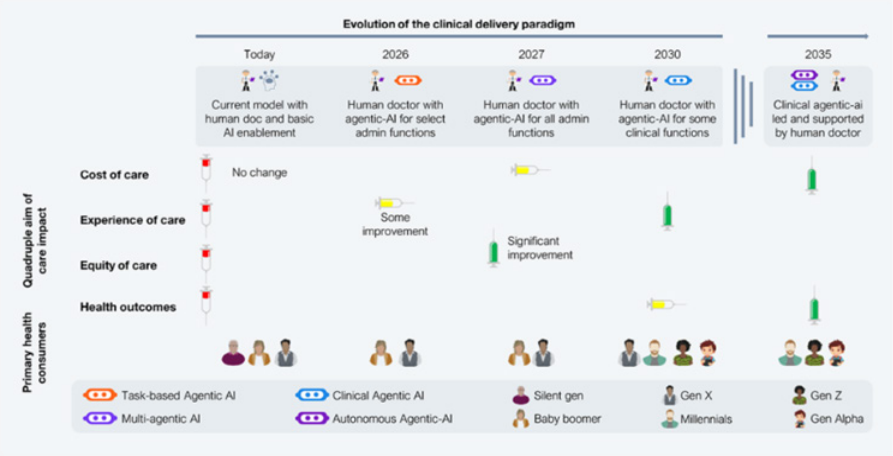

Figure 2: The agentic AI-driven future of healthcare

2. **Drive Proactive Population Health: From Lifespan to Healthspan**

   The only way to manage the chronic disease epidemic is to get ahead of it. Achieving this requires a "shift left," transitioning from reactive care to proactive prevention, powered by AI that can assess populations and flag risks well before symptoms appear.

   Imagine a population health manager's dashboard flagging 500 individuals with an 85% probability of developing Type 2 diabetes within 18 months, based on genetic, clinical, and lifestyle data. She doesn't make 500 calls. Instead, a single AI-driven campaign delivers personalized interventions to each individual—from virtual nutritionist consults to text nudges about local fitness classes—autonomously steering the group toward better health.

3. **Cultivate Holistic Health with Engaged Patients as Co-owners**

   Consider this: A patient with congestive heart failure steps on his smart scale. The data syncs to his health system, where an AI agent notes a slight three-day weight gain. It doesn't trigger a jarring alarm. Instead, it sends a conversational text: "Hi Mark, I noticed your weight is up slightly. This can be linked to sodium. Did you eat out yesterday?" Mark replies, "Yes." The agent responds with low-sodium meal suggestions and offers to schedule a brief check-in with his health coach, seamlessly preventing a potential ER visit.

   The ultimate goal is to transform care from a series of disjointed, episodic encounters into a continuous, supportive relationship. AI enables this by making healthcare more pervasive, personalized, and effortless for patients. This fosters true partnership, turning patients into engaged co-producers of their own health outcomes.

The AI Leapfrog: Achieving the Quadruple Aim

This sentient blueprint not only improves operations but also directly enables us to leapfrog the traditional barriers of each of the four aims as outlined below:

- **Improving Clinician Well-being:** By automating documentation and delivering insights at the point of care, AI addresses the primary drivers of burnout, allowing clinicians to reclaim their time and restore the joy of practicing medicine.
- **Improving Population Health:** AI's ability to predict risk and deploy personalized interventions at scale is the only viable way to shift the entire system from reactive care to proactive health promotion, effectively increasing the collective healthspan.
- **Enhancing the Patient Experience:** For patients, care becomes proactive, personalized, and seamlessly integrated into their daily lives. This fosters a deeply satisfying, trust-based relationship that empowers them to manage their own health effectively.
- **Reducing Per-Capita Cost:** Cost reduction becomes the natural outcome of success in the other three aims. When clinicians are more efficient, diseases are prevented, and care is managed in lower-cost settings, you are fundamentally driving the healthcare cost curve downward.

The Vision Realized: Boundaryless, On-Demand, and Pervasive Care

The culmination of this transformation is a boundaryless healthcare experience. For the patient, care is no longer a service delivered reactively but is woven into the fabric of their life. It is on-demand, proactive, and focused on their holistic well-being. Patient health is managed through continuous monitoring, virtual touchpoints, and intelligent agents that engage them when needed. The hospital and clinic are reserved for moments of high-acuity need, not routine management. This creates patient engagement at its highest level, where individuals co-own their outcomes thanks to a system built around them.

Starting the Journey to Sentient Healthcare

Bold yet achievable, this vision leaves no room for delay. C-suite leaders must act:

- **Target the Epicenter of Burnout First:** Don't boil the ocean. Start with a high administrative burden and utilize use cases like ambient listening. It solves a critical pain point of continuous documentation, delivers immediate value in reclaimed clinical time, and builds the organizational muscle for broader AI adoption.
- **Unify Your Data into a Strategic Asset:** AI is fueled by data. Invest in a modern data platform that can harmonize your structured and unstructured data assets. This goes beyond IT; it is the foundational investment for every future AI initiative.
- **Build an Enterprise AI Foundation, Not a Museum of Point Solutions:** Avoid a Fragmented Suite of Niche AI Tools. Develop a foundational AI platform with robust controls for governance, security, compliance, and ethics to ensure all applications are scalable, trustworthy, and enterprise-grade.

- **Mandate an AI-First Culture, Governed by Trust:** As a leader, you must champion a culture of continuous learning and experimentation while establishing rigorous frameworks for responsible AI. Trust is your most important currency.

The forces reshaping our industry are formidable, but our capacity for innovation is greater. For the first time, we have a technology powerful enough to resolve the paradoxes of the Quadruple Aim. The question is no longer if AI will reshape healthcare, but who will lead the charge?

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Ravinder leads end-to-end delivery for Tech Mahindra's Healthcare and Life Sciences (HLS), vertical, driving innovation through industry-centric solutions and harnessing AI to accelerate growth and transformation for global clients.

With over 27 years of domain expertise, Ravinder is a recognized thought leader in Digital Healthcare, AI-led transformation, and the broader healthcare value chain—including Providers, Payers, Pharma, and Medical Devices. He has made significant contributions to Clinical R&D and is well-versed in global healthcare regulations. His advisory work has helped shape digital healthcare standards and policies across India and other developing nations.

VISION REPORT

Clinical Intelligence Will Power The Intelligent Healthcare Organization

Transform Clinical Workflows To Prepare For Next-Gen Experiences And Operations

April 3, 2025

By Shannon Germain Farraher with David Hoffman, Tiffany Do, Peter Harrison

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Summary

In the future, all healthcare organizations (HCOs) will be intelligent entities. Becoming an intelligent healthcare organization (IHO) requires optimizing workflows and elevating employee and customer experiences. To do this, HCOs will need more than just technology investment; they'll also need high-quality personalized content, a resilience strategy, and a willingness to experiment with intuitive interactions. Healthcare technology and business leaders can use this report to transform their organization into an IHO by reimagining workflows and infusing clinical intelligence into every aspect of their enterprise.

Investments Alone Won't Yield Optimized Workflows

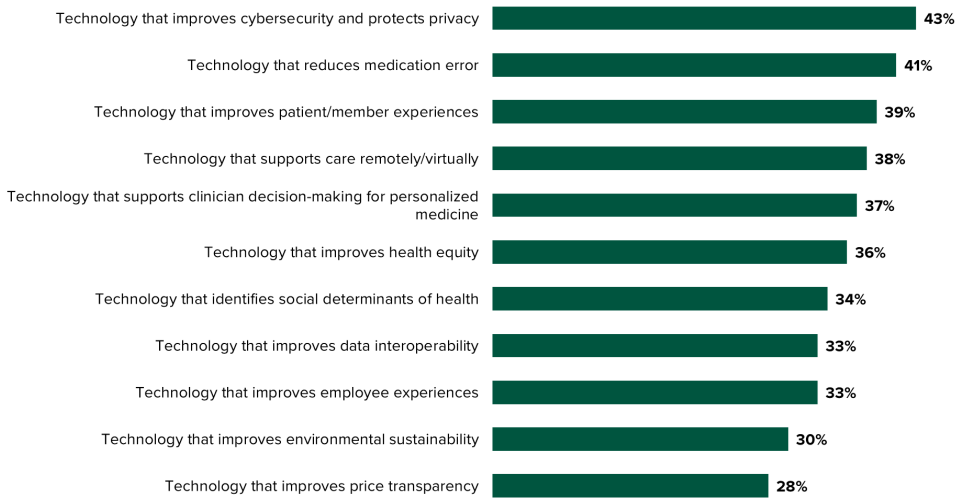
Significant percentages of healthcare organizations are investing in infrastructure and operations, security and risk management, and data and information management technologies (see Figure 1). However, these investments won't optimize clinical workflows and elevate customer experiences. The critical element that's absent in healthcare is *clinical intelligence*. Revamping an unmanageably complex HCO will take an enterprisewide cultural shift around data consumption and utilization that reshapes clinical workflows and the employee experience. Clinical intelligence that permeates clinical workflows, healthcare delivery, and management improves outcomes and optimizes the consumer and employee experience (see Figure 2). But HCOs face barriers to clinical intelligence:

- **Data governance models that prevent flexibility and scale.** HCO data governance programs often don't have strategic business initiatives and goals, or workflows and processes, at the enterprise level. Without processes and strategy, it's difficult for HCOs to realize flexibility and scale.
- **Technology that limits cost control.** Despite interoperability progress within many HCOs, siloed and legacy technology, tight IT budgets, and staffing shortages keep operational efficiencies modest.
- **A loss of social connection and lack of trust.** Consumers want the HCO to understand them. Unfortunately, HCOs seldom make human connections and often lack a holistic view of the consumer. Instead, they promote transactional encounters, with sparse or inaccurate information, that negatively impact consumer trust.

Figure 1

HCOs Are Investing In Infrastructure, Security, And Data Management Technologies

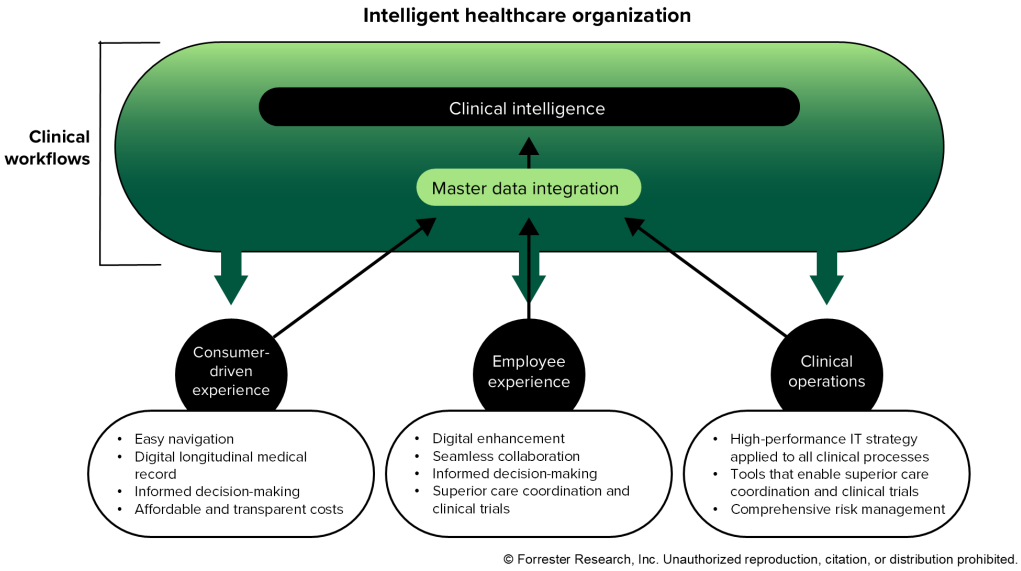
"What are your organization's investment plans for each of the following healthcare initiatives over the next 12 months?"
(5 on a scale of 1 [no investment] to 5 [increased investment])



Base: 293 business and technology professionals at healthcare organizations
Source: Forrester's Priorities Survey, 2024

Figure 2

Clinical Intelligence Improves Consumer And Employee Experience And Elevates Operations



Intelligent Healthcare Organizations Run On Clinical Intelligence

Envision a future where healthcare enterprises are digitally advanced, interactions are always convenient and productive, consumers and employees can seamlessly collaborate, and there's no resistance to meeting healthcare needs. In this future state, HCOs are easy to navigate and cultivate a democratized work style. Consumers easily find answers, and value-based strategies drive leadership motivations and decisions. Intelligent healthcare organizations make superior interactions possible because they align goals across the enterprise and make clinical insights readily available. Forrester defines an IHO as:

> A healthcare organization that perpetually captures, transforms, and delivers data at scale and creates and seamlessly disseminates clinical intelligence, maximizing clinical workflows and operations and the experience of employees and customers. IHOs operate in one connected system that empowers engagement among all stakeholders.

IHOs will use clinical intelligence to elevate operational performance as well as the employee and consumer experience. The hallmarks of IHOs include (see Figure 3):

- **Connected and validated clinical workflows.** IHOs' datasets will extend beyond the enterprise data warehouse. Multiple HCOs will collaborate to train powerful AI models on patient data and other information. IHOs will participate in a federated data network that continuously updates its clinical applications. As Dr. John Halamka, Dwight and Dian Diercks president of the Mayo Clinic Platform, said, "Federated data sharing allows HCOs to deidentify data and store it in cloud containers, which allows for collaborative algorithm development without data exfiltration." We see glimpses of these networks in solutions such as 4medica's Enterprise Master Patient Index, which helps remove inaccuracies and duplicates of patient data records, creating a validated dataset that HCOs can confidently leverage in workflows.

- **Superior employee experiences.** AI-powered knowledge management systems that aggregate data from various sources optimize knowledge transfer across the enterprise and eliminate the need to move in and out of multiple systems. They enhance employee productivity by rapidly democratizing access to specialized knowledge. Scientists, clinicians, and claims reviewers, for example, will use AI agents to provide comprehensive insights and treatment plans, enhance workflows, and improve patient care. IQVIA and NVIDIA are partnering to create custom, domain-specific models and AI agents for thousands of complex workflows.

- **Personalized healthcare.** Personalized healthcare will focus on predicting individual behaviors and addressing specific challenges. IHOs must have granular data (for example, individual social determinants of health, preferences, genetic makeup). Interoperability must mature from a structural and standard data format (FHIR and HL7) to semantic data interpretation. Graticule bridges data from health systems to clinical trial research and medical device organizations using FHIR-enabled e-sourcing to source data verification and support advanced research analysis. To succeed, it's crucial to focus on personalizing engagement and guiding individuals toward better health outcomes through a digital-first, consumer-driven strategy. Duke University has developed Personalized Health Planning, a method to involve patients actively, pinpoint their health needs and preferences, and provide them with therapeutic plans and support systems to help them reach their goals.

- **Consumer-owned data.** Healthcare will not only be personalized; individual health records will also be consumer owned. These longitudinal records will be portable, transferable, and perpetually updated with inputs from medical devices and other clinical applications. IHOs will digest and update this data as appropriate with consumer consent. OneRecord's app enables consumers to access, aggregate, and share their own healthcare data. Owning their data allows consumers to benefit

from the insights derived from their personal information, such as personalized experiences and targeted treatments. It also enables them to hold HCOs accountable for how they handle and protect consumer data, fostering a more transparent and trustworthy relationship between consumers and HCOs.

- **Automated clinical safety interventions.** IHOs will expand the current role of ambient technology and robots to automate clinical safety interventions using computer vision, motion sensors, and location intelligence. These technologies will be sensitive to physical environments and moving objects at a more nuanced level, such as monitoring the concentration, volume, and type of IV medication and the patient's response. They will often act without human-initiated prompting. GSK's Vision Robot Artificial Intelligence will use advanced deep learning to improve the inspection of injectable products, resulting in higher quality and safety — it will better detect defects and decrease the number of incorrect rejections. Artisight Smart Hospital Platform equips patient rooms with two-way audio and video, voice-activated services for real-time assistance, and ultra-wideband technology to track human movement, such as alerting staff when a patient falls.
- **Digital identities and verifiable credentials.** Identity management in an IHO extends beyond humans. It includes all devices, APIs, and even copilots. "Identity is the new security perimeter. Every entity, including AI agents, must be securely identified," said Shasta Turney, director of healthcare solution marketing at Ping Identity. Managing digital identities holistically is essential for IHOs and crucial for maintaining data integrity and security. Digital identity verification, including the use of verifiable credentials, will help ensure that only legitimate entities can access sensitive data. Turney emphasized that, "Data is only as trustworthy as the identities that handle it."

Figure 3

IHOs Infuse Clinical Intelligence Throughout The Healthcare Industry

Hallmark of an IHO	Example of clinical intelligence embedded in clinical workflows
Connected and validated clinical workflows	• All US health systems, health insurers, employers, and pharma companies automatically participate in a federated data network giving way to large-scale research and collaborative algorithm development that enriches health outcomes. • Life science firms leverage automated, aggregated, and deidentified data to support national trial data sourcing, planning, and delivery. • Health insurers continuously monitor health data repositories for inaccuracies, duplicates, omissions, exceptions and outliers, and trends. These repositories automatically correct or alert for higher-level intervention.
Superior employee experiences	• Multiple datasets integrate with a single interactive provider platform that monitors clinician activity and nudges clinicians to act (e.g., update credentials, review suggested treatments, prioritize patient cases). • Hospitals use AI agents to automate the admissions-discharge-transfer process by gathering patient data and providing personalized and prioritized information. Those AI agents communicate with a health insurer AI agent to coordinate benefits in real time. • Health systems use integrated clinical decision support tools to automatically assess medical necessity, identify and fill in incomplete data, and provide cost breakdowns of treatments, obviating a separate prior authorization process.
Personalized healthcare	• Genome sequencing is performed at birth to develop individual life care plans and help avoid and monitor diseases. Care plans are consistently updated and monitored by AI that tracks what consumers are exposed to (e.g., chemicals, experiences, food intake, medications, social determinants of health) throughout their lifetime. • Healthcare providers create consumer engagement plans to address individual social-determinant-of-health risks and personalize content to improve health outcomes.
Consumer-owned data	• A consumer urgently admitted to a hospital can easily share medical record data, health insurance, and preferences for communication after hospitalization. IHOs digest and update this data as appropriate with consumer consent. • Health systems can easily parse medical records to create condensed health-specific records via templates so consumers can choose to share only necessary data.
Automated clinical safety interventions	• Pharmacies apply AI to clinical applications (e.g., electronic health records, medication dispensing machines) and computer vision as medication is dispensed to create drug diversion intelligence and identify anomalies. • Home health agencies have visual AI programs that use cameras to identify pills for consumers who are hard of seeing or forgetful. • Hospital inpatient units prompt automated alerts to security teams, expediting response when clinical environments become unsafe (e.g., clinicians interacting with combative patients). • Robots keep pharmaceutical and clinical environments safe by inspecting packages, handling hazardous materials, and scanning surgical room cleanliness.
Digital identities and verifiable credentials	• Consumers use verifiable credentials from their medical digital wallet to access their individual treatment instructions. • While hospitalized, patients use verifiable credentials to display relevant data on a screen in their room. • All devices and agents (e.g., IV pumps, AI agents) have digital identities that are monitored and tracked.

Pockets Of Clinical Workflow Transformation Set The Stage For IHO Success

As healthcare consumerization takes off and advanced technologies infiltrate healthcare at various levels, we see several trends pulling the slow-to-change healthcare industry toward next-gen operations and experiences. Pockets of clinical workflow transformation are taking hold. Forward-thinking HCO leaders are experimenting with and integrating new ideas and modernized processes. They are exchanging cultural norms for divergent thinking and superior digital experiences and capabilities. The top drivers of transformation include:

- **Making interoperability, cloud, and edge table stakes.** With recent interoperability regulations, FHIR mandates, APIs, and accelerated cloud adoption in healthcare, HCOs can make better clinical decisions, share data securely, create insights, and adopt more automation and AI — and they plan to (see Figure 4). As cloud utilization matures and internet-of-medical-things (IoMT) and edge technologies

expand use cases to help bridge the physical gap in patient care, the transformative impact of cloud computing and advanced AI on healthcare is underway. Taha Kass-Hout, global chief science and technology officer at GE HealthCare, emphasized the potential of these technologies in conjunction with predictive analytics: “AI is being integrated into medical devices to enhance performance, automate processes, and reduce the burden on healthcare professionals.” These technologies collectively help HCOs become more intelligent, agile, responsive, and competitive.

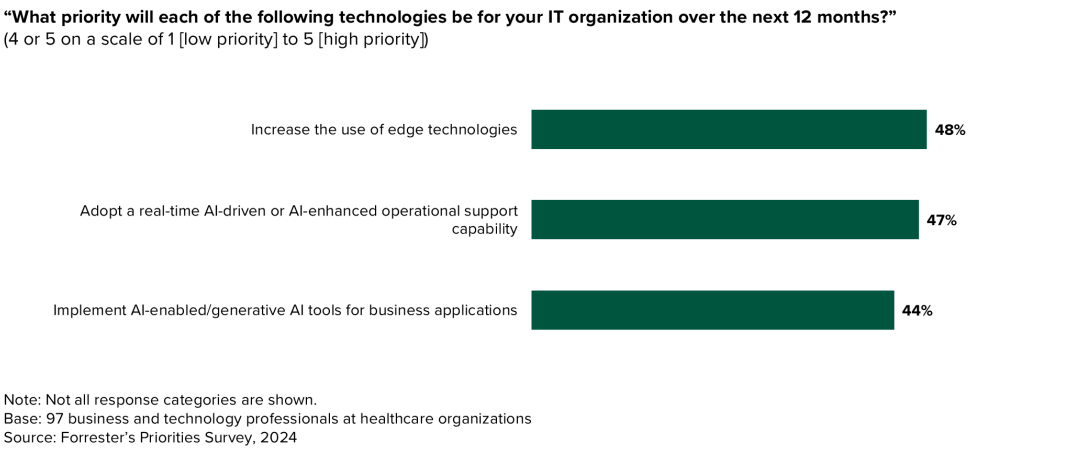
- **Pivoting to platforms that give way to cost efficiency and less disruption.** In Forrester’s Priorities Survey, 2024, 65% or more of healthcare business and technology professionals said that they expect their organization to significantly increase its investments in business insights and analytics, data and information management, AI, and business automation and robotics in the next 12 months. Manish Vazirani, vice president of product software engineering at Wolters Kluwer, stressed the “need for HCOs to invest in technology and infrastructure to handle large data volumes and provide real-time insights, ensuring system availability and efficiency.” But these efforts will be costly — and delayed — if technical infrastructure is required at every junction. This is why platforms such as Mphasis’ Javelina, Innovaccer, Edifecs Healthcare Cloud, and Microsoft Fabric are increasingly being adopted, albeit still in bits and pieces. Many are customizable out of the box with templates and capabilities readily available. InterSystems’ director of platform strategy, Jeff Fried, said, “HCOs are using data fabric as a migration mechanism under the hood with minimal disruption to the business.” Leveraging platforms and expanding use cases for cost efficiency and minimal disruption allow HCOs to develop into intelligent entities.

- **Value-based care leaning on transparency to muster support.** To truly embody value-based care, astute HCO leaders go beyond increased quality, better outcomes, and lower costs. They focus on increased price transparency for consumers, reduced administrative waste, and adoption of more performance-based models. Only 28% of healthcare business and technology professionals expect their organization to invest more in technology that improves price transparency in the coming year. Forrester’s Healthcare Practitioners Survey, 2024, shows that 48% of healthcare practitioners disagree that health insurers provide adequate support and resources to understand how they are performing in value-based arrangements. Edifecs leverages a cloud-native solution to create transparent contracting practices between payers and providers, including clear quality and performance metrics. HCOs that lead with transparency better position themselves for IHO transformation.

- **Consumers gaining more control of their health data.** Epic Systems recently rolled out a new feature that enables patients to release their medical records to health and wellness apps. This builds on existing efforts from Apple and Samsung to put control in the hands of consumers. Forrester's 2024 data shows that 50% of US consumers expect to be able to choose whom their medical record is shared with. And as consumer trust has taken a hit over the past three years, it is encouraging that 72% of healthcare business and technology professionals expect their organization to increase its investment in customer management technologies. Myriad factors will continue to accelerate the transformation of the consumer experience in healthcare: advances in the availability and affordability of data and technology, personalized medicine, and consumers' increased access to health information. HCOs that drive the industry toward a consumer-driven future, requiring all stakeholders to be customer obsessed, will pave the way for IHOs.

Figure 4

HCO Tech Priorities And Investments Set The Stage For IHO Success



Note: Not all response categories are shown.
Base: 97 business and technology professionals at healthcare organizations
Source: Forrester's Priorities Survey, 2024

Key Steps To Becoming An Intelligent Healthcare Organization

To set the stage for your own IHO emergence, you need to do more than simply reimagine current clinical workflows as well as data consumption and utilization. You must commit to a culture brimming with clinical intelligence and use it to propel the organization forward. To forge a future with meaningful connections, execute superior employee and consumer experiences, and deliver outstanding clinical outcomes, HCO

leaders must:

- **Experiment with intuitive interactions.** "Copilots are transforming healthcare by providing a conversational-first interface," said Kenn Harper, general manager at Microsoft — which reimagines how technology interacts with consumers, scientists, researchers, administrators, executives, and care team members. These new copilots enable more intuitive interactions by automatically bringing up relevant, contextual information instead of relying on traditional mouse-and-keyboard interfaces. Begin to experiment with copilots in safe environments, and prepare your organization to reshape workflows to deliver higher productivity.
- **Prioritize high-quality, personalized content over volume.** IHOs only use high-quality, personalized content for customers to enhance engagement, improve satisfaction, and drive better health outcomes. HCOs must not only deliver relevant content but also leverage technology to predict individual behaviors — such as access issues, relationships with doctors, and medication adherence — and build digital experiences that incorporate individual preferences. This high-quality, personalized content must connect with consumers when it matters. Saeed Aminzadeh, chief product officer at mPulse, emphasized that, "Organizations need to create personalized plans that address individual risks and barriers, moving beyond generic digital workflows."
- **Default to a resilience strategy.** Resilient IHOs understand the relationships between people and devices and are prepared to rapidly change in response to shifting needs or situations. Designing for optionality and security creates resilient organizations. HCOs need API-led integrations to enable different systems and applications to communicate and share data and to maintain business continuity during disruptions. And API security features can protect against unauthorized access or attacks. Salesforce's Amit Khanna, senior VP and GM of Health Cloud, believes that in the future, APIs will be smart enough to allow agents to connect to systems in the background seamlessly. During downtime or a disruption, AI-agent-driven APIs will allow systems to automatically retrieve relevant information and present it to users, improving efficiency and reducing manual effort.
- **Look outside the healthcare echo chamber for help.** "Organizations need to know their strengths and weaknesses," said Kasia Hein-Peters, CEO at Abante Scientific. "Healthcare leaders cannot leave innovation to chance." It's not enough to only look internally for the answer. To codesign and reimagine innovative clinical workflows, look to leaders outside of healthcare for their experiences and perspectives. Assess organizational readiness for incorporating AI using the

Forrester Artificial Intelligence Quotient Assessment instead of hoping that a team or organization is prepared to use AI effectively and appropriately. HCO leaders can then confidently invest in training to close the gap.

Supplemental Material

Companies We Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

Abante Scientific

Cohere Health

GE HealthCare

Imprivata

InterSystems

Luma Health

Rhonda J. Manns

Mayo Clinic

Microsoft

mPulse

Perficient

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Salesforce

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