

IDC MarketScape: U.S. Healthcare Data Platform for Providers 2024–2025 Vendor Assessment

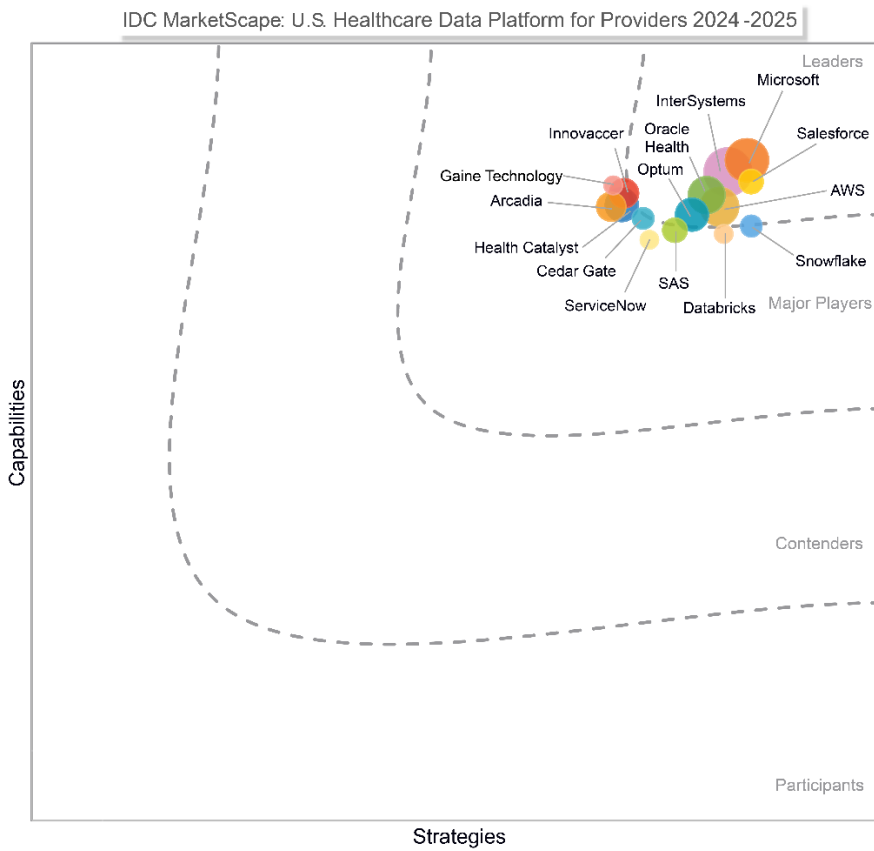
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THIS IDC EXCERPT FEATURES SALESFORCE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape U.S. Healthcare Data Platform for Providers Vendor Assessment



Source: IDC, 2024

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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: U.S. Healthcare Data Platform for Providers 2024–2025 Vendor Assessment (Doc #US50494523).

IDC OPINION

This IDC MarketScape evaluates vendors in the U.S. healthcare data platform for providers market based on their strategies and capabilities, offering insights into how these platforms address evolving industry needs. This study provides critical guidance for technology buyers striving to address the multifaceted challenges facing U.S. healthcare providers through healthcare data platforms. Healthcare provider organizations often operate within tight resource constraints, making strategic technology investments challenging. The most effective platforms are those that optimize data usability, enhance efficiencies, and provide a foundation for change and innovation rather than simply layering new tools on top of existing systems. With the shift to value-based care (VBC), workforce shortages, cyberattacks, and technology disruption impacting the complex U.S. healthcare ecosystem from all angles, these platforms must enable seamless integration, reduce redundancies, increase resiliency, and provide actionable insights to ensure adoption and maturity are meaningful.

Key Findings from the Research

The U.S. healthcare data platform for providers market is a competitive and rapidly evolving space, with leaders demonstrating an effective balance between current execution and future innovation. According to IDC, 37.8% of U.S. healthcare provider organizations prioritize quality improvement, and 36.5% invest in AI technologies, emphasizing the need for platforms that deliver actionable clinical and operational insights. This dynamic market presents opportunities for vendors to address the growing complexity of healthcare provider needs by offering advanced data platform solutions that can equip them with means of enhancing care delivery and optimizing performance. By selecting data platform solutions tailored to their unique challenges, healthcare providers are not only navigating current market complexities but setting a foundation for the future of how they will deliver care and perform their operations.

Market Dynamism and Diversity

The healthcare data platform market for providers has a dynamic and diverse set of vendors vying for leadership. Figure 1 illustrates a mix of well-established technology and healthcare-focused firms, each bringing unique strengths. For example, some

vendors bring a blend of cloud and IT mastery to their platforms, while others are more vertical-centric, emphasizing deep expertise in addressing the complex needs of healthcare providers. This diversity reflects the breadth of challenges and opportunities within the market, highlighting the need for solutions that integrate data, streamline scalability, and enable compliance with healthcare regulations. The presence of big tech powerhouses alongside vertical specialists demonstrates a robust competitive landscape where innovation and specialization intersect.

Consolidation of Capabilities

The central clustering of vendors suggests that many players are effectively addressing foundational requirements such as integration, data governance, and operational efficiency. However, this tight grouping indicates that differentiation in the market is becoming increasingly dependent on highly advanced capabilities. Vendors must go beyond offering the baseline functionalities that may have brought their platforms to the limelight to succeed, focusing on innovations such as generative AI (GenAI)-driven analytics, real-time decision support, and seamless integration across hybrid and multicloud environments. This consolidation signifies that many platforms may appear similar for buyers, but nuanced differences in execution, innovation, and scalability will play a critical role in determining long-term success.

The Emergence of Leaders and Strategic Innovators

Vendors in the Leaders' quadrant combine a solid strategic vision with well-rounded capabilities. This indicates that vendors address healthcare providers' current and future challenges, from integrating data across care settings to enabling advanced analytics and predictive capabilities. Some leverage their enterprise cloud expertise, while others demonstrate a deep focus on healthcare data integration and interoperability. These vendors are solving current provider needs and shaping the market by setting benchmarks for innovation and adaptability. The positioning underscores the importance of aligning strategic vision with execution to stay ahead in an evolving market. The market is not static or slow-moving but cutthroat, and it will be interesting to see how the positioning of these vendors today changes in the future.

Potential for Growth Among Powerful Niche Players

The Major Players' quadrant comprises vendors with considerable potential for additional growth, with some demonstrating market excellence in catering their platform to specific areas of domain interest. For example, some vendors focus on niche platform offerings related to VBC analytics or advanced interoperability. As providers increasingly seek platforms beyond traditional capabilities, these vendors can capitalize on this trend by expanding their offerings, strengthening partnerships, or scaling their operational reach. These niche players can become stronger competitors

and potentially leaders in the industry, and their success will hinge on their ability to balance innovation with execution while responding to broader market needs.

Balancing Industry-Specific Expertise and IT Strengths

The presence of major IT platform vendors competing alongside specialized healthcare platform vendors highlights a significant trend: the growing need to merge technical expertise with healthcare-specific capabilities. While tech giants provide exceptional knowledge in data infrastructure, cloud computing, and analytics, they are customizing their solutions to meet the unique requirements of healthcare providers, particularly from a workflow perspective and regarding regulatory compliance as well as interoperability standards such as Fast Healthcare Interoperability Resources (FHIR). Meanwhile, healthcare vertical specialists must either partner with some of the more advanced IT vendors or advance their own IT functionalities and capabilities to compete effectively with the tech giants. The ability to combine these strengths — utilizing the scalability and capabilities of modern IT while addressing the specific vertical needs of healthcare providers — will continue to determine market leaders and shape the future of the healthcare data platform industry.

Future Trends and Opportunities

The IDC MarketScape indicates that the U.S. healthcare data platform market for providers is dynamic and set for rapid evolution. The clustering of vendors in the competitive middle tier of Figure 1 resembles a flat checkmark or swoosh shape, highlighting the diversity and complexity of the market landscape spanning those with advanced capabilities on the left to those with advanced strategies on the right. As healthcare provider organizations increasingly emphasize advanced analytics and real-time insights while adapting to emerging care models, platforms that innovate alongside demonstrating strong scalability and governance will stand out. Vendors have ample opportunities to differentiate themselves by enhancing their AI capabilities, strengthening data governance frameworks, and improving interoperability. The growing demand for platforms that support home care and virtual care initiatives will drive innovation in data integration and accessibility. Healthcare provider organizations should closely monitor vendor road maps and investments to identify those likely to lead the market in addressing these priorities through 2025.

Data as the Core Enabler

Healthcare data platforms prioritizing data enablement are becoming essential for U.S. healthcare providers because they recognize data as a critical asset. By focusing on strong data governance, integration, security, and usability, these platforms help providers meet the growing demand for scalable and interoperable systems. According to IDC, 44% of healthcare provider organizations prioritize increased technology

capacity and scalability through 2025, making unified data platforms a necessity rather than a luxury. These platforms must integrate diverse data sources, including clinical, operational, and administrative data, into a single cohesive system. This integration enables seamless information flow within organizations and the broader healthcare ecosystem.

Eliminating data silos is crucial for unleashing precision medicine and advancing patient-centered care. With 29% of U.S. healthcare providers aiming to improve access to care, comprehensive data integration will help facilitate decision-making based on intelligent insights. In addition, platforms with robust data integration capabilities enhance AI readiness, which will be increasingly critical in the coming years, as 50.8% of U.S. healthcare provider organizations plan to increase their spending on GenAI alone by 2025. These platforms will support the next generation of AI-powered agents and applications across use cases, such as clinical documentation summarization and hyper-personalized patient engagement, ultimately helping to drive better outcomes, reduce operational costs, and enhance decision-making.

Striving for Data Excellence

Data duplication and inconsistencies present significant challenges for healthcare providers in the United States, with profound implications for patient safety and workflow efficiency. According to IDC, 32.9% of healthcare organizations prioritize patient safety as a topmost goal through 2025, making the elimination of duplicate and inconsistent data an urgent necessity. Healthcare data platforms can help address these issues by implementing enhanced, centralized governance frameworks tailored to the fragmented nature of the U.S. care delivery system. By standardizing data management processes, these platforms can reduce redundancies and ensure the availability of accurate, reliable information across various care settings.

Advanced data governance will enhance efficiency and support regulatory compliance, a key priority for healthcare providers in 2025. The emphasis on compliance comes with important CMS deadlines taking effect that impact the interoperability ecosystem, and following the latest U.S. election, as is often the case, a new administration will introduce shifts in policies that will alter the timing and scope of new mandates. Features focused on compliance, such as encryption, audit trails, and secure data sharing, are essential to adhere to regulations, whether these be related to the CMS mandates or broader policies such as HIPAA, which aim to protect patient information while promoting transparency. Platforms that can unify patient data across various care settings — from hospitals to outpatient clinics and telehealth services — will facilitate better care coordination and empower healthcare professionals to deliver higher-quality care. With 38.4% of U.S. providers aiming to improve the patient experience, these platforms are crucial for enhancing patient journeys and supporting clinical excellence and operational optimization throughout the care continuum.

Efficiency as the Priority

Workflow efficiency is a major concern for healthcare providers in the United States, particularly as they grapple with operational bottlenecks and clinical burdens amid workforce shortages. According to IDC, 33.6% of U.S. providers utilizing clinical decision support tools actively seek actionable insights to help reduce clinicians' cognitive overload. Advanced healthcare data platforms with automation capabilities, such as real-time alerts and touchless workflows, can effectively address these challenges. By streamlining repetitive tasks, these platforms allow staff to concentrate on higher-value activities.

In addition, platforms offering self-service automation align with the goals of 48.2% of U.S. healthcare provider organizations looking to integrate automation by 2025 to enhance scheduling and administrative processes. These platforms must improve system responsiveness to succeed, enabling providers to act swiftly in urgent situations while maintaining high care standards and patients to address their needs as care-seeking consumers. AI-powered analytics will increasingly be utilized to transform clinician and patient-facing workflows as well as back-end operations by predicting needs, flagging potential issues, and converting raw data into actionable insights. Furthermore, low- and no-code customization tools in platforms will empower providers to further tailor their workflows to specific requirements without heavy IT involvement, ensuring agility in an ever-evolving healthcare landscape.

Scalability with Compliance

The ability to scale while maintaining compliance is increasingly recognized as a defining feature of a successful healthcare data platform. Nearly half (49.2%) of U.S. healthcare providers will prioritize IT modernization initiatives extending into 2025. This emphasizes the need for platforms that scale effectively and integrate seamlessly with existing and emerging systems in the healthcare ecosystem. Multicloud adaptability will be essential to achieving this. By enabling platforms to function across various cloud environments, healthcare providers can ensure they remain versatile amid evolving technological landscapes. In addition, secure API integration will facilitate the connection of diverse applications and services, enhancing data interoperability without compromising security. Robust encryption measures are crucial, ensuring the safety of sensitive patient information against potential breaches and building trust between providers and patients.

With 30.9% of providers emphasizing the importance of preparedness for future crises, scalability and security will be vital for fostering resilience. Healthcare organizations must be agile enough to respond to changing demands, whether due to public health emergencies, regulatory changes, or shifts in patient care paradigms. By proactively addressing these areas, scalable and secure platforms empower providers to deliver

high-quality care in a dynamic and often unpredictable environment, ultimately improving patient outcomes and operational efficiency. This holistic approach meets current needs and positions healthcare providers for sustainable growth and innovation in the future.

Support for Emerging Care Models

Emerging care models such as home, retail, virtual, and urgent care and the paradigm shift into VBC will heavily influence the evolving healthcare landscape. As healthcare providers navigate the rise of consumerism and the industry's future direction, the demand for platforms that manage everything from more convenient care delivery options to value-based payments, including bundled payments and capitated models, becomes critical. The growth in care-anywhere initiatives highlights the need for systems that support seamless data-driven care delivery, accommodating the complexities of virtual and in-person interactions. With nearly half of U.S. healthcare providers planning to expand their virtual care initiatives by 2025, integrating clinical, operational, and administrative data is essential. This integration ensures alignment between provider performance and organizational objectives, not only on premises but also virtually and remotely, facilitating effective resource management across different care settings.

Moreover, integrating GenAI into healthcare platforms aligns closely with these emerging care models. Predictive analytics and clinical summarization capabilities enable a proactive approach to patient care, enhancing personalization and empathy as an outcome. As these technologies evolve through training and inference, they will support a better understanding of patients, ensuring timely and more contextually appropriate interventions. In summary, the shift toward VBC, the evolution of emerging care models, and the rise of GenAI are all interconnected trends shaping the future for U.S. healthcare providers. By addressing these elements, healthcare data platforms will be vital tools for the ongoing transformation of the U.S. healthcare system.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

IDC leverages its unique insights into vendor selection processes in healthcare provider organizations, drawn from extensive client interactions and the continuous monitoring of healthcare industry trends. For this IDC MarketScape, IDC carefully designed the vendor inclusion criteria to ensure the inclusion of the most relevant and representative vendors operating within the U.S. healthcare data platform market for providers. The vendors in this research meet specific criteria reflecting their significance, market presence, and ability to address the unique challenges U.S. healthcare providers face.

For inclusion in this study, IDC stipulated vendors should meet the following minimum criteria:

- **Geography:** The vendor has an established corporate presence (e.g., main/branch office) in the United States that manages or supports the sales, delivery, and implementation of health IT solutions.
- **Market:** The vendor sells the solution (e.g., healthcare data platforms for providers) in the U.S. health IT market.
- **Vertical:** The vendor delivers the solution (e.g., healthcare data platforms for providers) to healthcare provider organizations.
- **Offering:** The vendor provides a healthcare data platform.
 - **Definition:** IDC defines a healthcare data platform as "a modern, cloud-based environment that offers seamless integration, extensibility, and orchestration of health information and data."
 - **Function:** Healthcare data platforms deliver modular, scalable solutions, providing integrated capabilities that cater to digital experiences in compliance with healthcare regulations. Typically, healthcare platforms integrate various applications with platform-as-a-service (PaaS) capabilities and real-time data processing to scale, adapt, and drive clinical, operational, and administrative healthcare functions.
 - **Description:** Healthcare platforms typically consist of three core layers:
 - **Distributed data plane:** Collects and integrates data from various sources, including clinical and operational healthcare applications, third-party solutions, and connected devices
 - **Data control plane:** Focuses on data governance, ensuring that healthcare professionals and patients interact with data safely and comply with HIPAA and GDPR
 - **Business capabilities and orchestration toolkit:** Leverages clinical applications and health data to develop new functionalities and patient care solutions

The evaluation in this IDC MarketScape uses data collected through primary and secondary research methods. Primary research includes direct company briefings, customer reference interviews, and data from participating vendors. Secondary research includes publicly available information such as company filings, press releases, official websites, and other reputable sources. IDC collected and reviewed research data for vendors in this study from July to November 2024.

IDC invited vendors who met the inclusion criteria to participate in this assessment through direct and indirect outreach. Vendors excluded from the study fell into one of the following categories:

- Those that did not meet the inclusion criteria outlined in this research
- Those whose solutions did not unequivocally align with IDC's market definition and study parameters
- Those who declined to participate and for whom insufficient secondary data existed to form a well-researched judgment about their strategies and capabilities

It is important to note that vendors meeting the inclusion criteria could not exclude themselves from the study, even if they declined to participate. In such cases, IDC utilized publicly available data and independent research to evaluate the vendor's strategies and capabilities to ensure a fair and comprehensive assessment.

ADVICE FOR TECHNOLOGY BUYERS

Technology buyers can leverage this IDC MarketScape study to make informed decisions when selecting healthcare data platforms. This study can assist buyers in navigating the complexities of the U.S. healthcare data platform market, providing a comprehensive evaluation of available solutions while offering insights into the strategies and capabilities of various vendors. In a landscape where the term "platform" is often loosely applied and specific market segments assert themselves as representative of healthcare data platforms, IDC sought to create a rigorous and meaningful framework when defining and evaluating the market, given the diversity of vendor approaches and capabilities. The result aims to serve as a balanced and rational methodology that provides a clear lens to assess vendor offerings, ensuring technology buyers have the tools to identify solutions that best align with their strategic goals and operational needs.

This assessment takes a forward-looking approach by analyzing how vendors are developing their platforms to meet the unique needs of U.S. healthcare providers today and in the future. It emphasizes the importance of remaining relevant in an ever-evolving healthcare environment. Selecting a healthcare data platform is about addressing current challenges and investing in a solution that aligns with the future trajectory of the healthcare industry. When it comes to healthcare data platforms, U.S. healthcare providers should make bold choices and plan strategically, as the best platform should not only fulfill today's needs but also help redefine the future of care. This includes connecting, scaling, innovating, and transforming every aspect of the healthcare mission. In detail:

- **Break down the walls through seamless integration:** The future of U.S. healthcare and the success of its provider organizations rely heavily on the willingness to move away from data silos and into an increasingly AI-infused and consumer-centric future. Achieving this will depend on platforms that unify clinical, operational, and administrative data into a single system alongside powerful traditional and GenAI capabilities. Integration goes beyond compatibility; it involves creating a real-time, connected ecosystem where data flows freely between systems, locations, and care teams. Therefore, technology buyers should select platforms emphasizing integration and interoperability, transforming fragmented data into actionable insights for improved outcomes and more intelligent decisions at the enterprise and national levels.
- **Scale with resiliency and without compromise:** Scalability and security are interconnected, and a platform must excel at both. Platforms that can handle growing volumes incorporate the latest technologies and support multicloud architectures, setting the benchmark for growth. However, scaling alone is not sufficient — security is also paramount. The platform must reflect a zero-trust architecture that includes end-to-end encryption, secure APIs, and compliance with regulations to protect sensitive patient data while remaining agile and prepared for the future.
- **Harness intelligent automation and next-generational AI:** AI is evolving faster than ever, offering intelligent automation and generative capabilities that tech buyers must prioritize. The new wave of AI in healthcare goes beyond traditional models by inferring contextual understanding and combining it with real-time training and adaptability. But do not let the bells and whistles distract you. Look for platforms that embed responsible AI that augments real-time risk assessment alongside any useful features like summarization. Also, keep an eye on other technologies that can help automate, but that may be more cost effective and relatively easier to deploy, like RPA. Look at intelligent automation and AI adoption not just as a technology upgrade but as a strategic imperative to elevate clinical outcomes, de-risk operations, and optimize efficiency and stake your claim as a leader in the next era of patient-centered care.
- **Turbocharge efficiency by making every workflow count:** The status quo involves overworked clinicians and limited resources, making efficiency essential. Healthcare data platforms with automation and real-time data will save valuable time, minimize human error, and ensure quick decision-making. Low- and no-code tools further this by allowing providers to customize workflows to meet their needs. These platforms should save time and transform the art of healthcare by enabling clinicians to focus on what truly matters — their patients and professions.

- **Propel system and location-agnostic healthcare forward:** The era of tethered systems and isolated care settings is behind us. Healthcare now occurs across various technology and care environments. Platforms must adapt to this by acting as a central hub that enables consistent, location-independent care, bridging systems, and physical or digital environments. These platforms must integrate and synchronize data to ensure continuity of care, minimize treatment gaps, and improve patient outcomes, regardless of the locations of patients and healthcare workers or the technologies they use. This agnosticism is not merely about convenience; it represents the future of the healthcare industry and will be the future of healthcare work.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While IDC evaluates every vendor against the criteria outlined in the Appendix, the description summarizes each vendor's strengths and challenges.

Salesforce

Salesforce is positioned in the Leaders category of the 2024–2025 IDC MarketScape for U.S. healthcare data platform for providers vendor assessment.

Salesforce, headquartered in San Francisco, California, was established in 1999 and has evolved into a leading cloud-based software solutions company. In early 2016, the company made a strategic move into healthcare by introducing Health Cloud, leveraging its established dominance and credibility in customer relationship management (CRM). Over the years, Salesforce has continually advanced its health IT offerings, notably through acquiring MuleSoft, to enhance API and data integration capabilities. This move has proven crucial in enabling more seamless data exchange and connectivity for its customers. Furthermore, Salesforce has forged strategic alliances with well-known technology providers such as AWS, enhancing its data integration capabilities and broadening its reach in the healthcare technology market. These efforts reflect Salesforce's commitment to data integration, AI-driven insights, and secure, patient-focused experiences.

Salesforce delivers a robust and comprehensive suite of solutions in the U.S. healthcare provider landscape. These solutions offer a holistic, 360-degree view of the patient, harnessing the power of AI, automation, and integrated data to optimize workflows, enhance engagement, and elevate clinical outcomes. Central to Salesforce's mission is the elimination of data silos, a commitment that reassures healthcare providers of the platform's effectiveness in promoting more informed and real-time decisions and collaboration across the care continuum. The company's go-to-market strategy strongly

emphasizes its CRM, AI, and analytics capabilities, which can drive efficiency, minimize burdens, and facilitate more personalized experiences. By addressing pain points such as fragmented care coordination, inefficient patient segmentation, and the manual nature of routine processes, Salesforce aims to promote a vision for a customer-first platform that inspires confidence in its performance and value through its technologies and partner ecosystem.

Platform

Salesforce's healthcare journey took a pivotal turn with the launch of Health Cloud in early 2016, setting the stage for a more comprehensive and forward-thinking suite of healthcare-centric solutions. Alongside its Data Cloud, the platform goes beyond core functions to provide advanced mechanisms for integrating, harmonizing, and activating data from many sources. This holistic approach is essential for using data to drive more sophisticated clinical and operational workflows.

Agentforce, a key component of Salesforce's healthcare strategy, embodies the concept of "trusted AI for health deployed in the flow of work." It delivers an "agentic" platform framework that enables healthcare organizations to build agents to meet their specific needs, ranging from benefits verification and patient recruitment to financial assistance and appointment scheduling. These agents can seamlessly integrate into existing workflows, making them easy to deploy, customizable, and scalable within healthcare organizations. The emphasis on trust and scalability aligns with the healthcare sector's stringent data privacy and security requirements.

The Customer 360 framework amplifies Salesforce's healthcare proposition. It enables seamless interactions across healthcare functions, such as medical sales, patient services, health insights, and order management, by offering a comprehensive, real-time view of each patient. The ecosystem includes consumer health agents, care team productivity tools, and HCP engagement capabilities to deliver a unified and personalized experience for patients and healthcare professionals.

Through its interoperability capabilities, dedicated healthcare APIs, and MuleSoft Direct prepackaged integrations, the platform seamlessly integrates data from various channels, including native Salesforce solutions, external cloud storage environments, and third-party systems, creating a unified and coherent data ecosystem. This comprehensive data harmonization is critical for enabling efficient and effective downstream workflows. In addition, the platform's FHIR R4 Data Model significantly enhances its interoperability capabilities, driving better 360-degree experiences for its users. This model supports the latest healthcare data exchange standards and ensures that Salesforce's platform seamlessly integrates with various healthcare systems, creating a unified and coherent data ecosystem.

Data Cloud generates AI-driven analytics from raw data, facilitating smarter, faster decision-making across clinical and administrative functions. Notably, Salesforce has kept pace with cutting-edge innovations by incorporating recent advancements such as vector databases, which offer more efficient and scalable data retrieval processes. Moreover, implementing retrieval-augmented generation capabilities has bolstered support for GenAI models, allowing healthcare organizations to leverage predictive and prescriptive analytics in groundbreaking ways.

The target users for the platform include care providers, coordinators, and population health managers. These users, often operating in high-stakes environments across major U.S. regions and global markets, require reliable, real-time access to integrated data to perform their duties effectively. Salesforce's strategic partnerships enhance the platform's value proposition. For example, collaboration with AWS ensures data residency compliance, a critical requirement for healthcare organizations navigating complex regional and international regulations. Similarly, the integration with MCG delivers evidence-based care guidelines directly into care workflows, reducing the gap between data and action, exemplifying Salesforce's dedication to eliminating inefficiencies, and easing the burden for healthcare providers.

Strengths

Integration prowess: Customers praise Salesforce's platform for its robust data integration capabilities, underpinned by MuleSoft's advanced API management and harmonization technology. The platform facilitates seamless interoperability between legacy and modern healthcare systems by supporting essential industry standards such as the current and emerging iterations of HL7 FHIR. This integration strength is crucial for healthcare providers that require real-time, holistic patient views to drive coordinated and informed care delivery. The platform's ability to harmonize disparate data sources translates into a higher likelihood of delivering actionable insights to drive more effective, patient-centric decision-making for Salesforce's customers. Furthermore, the integration of Agentforce empowers organizations with AI-driven agents that streamline key processes, from benefits verification to appointment scheduling, directly within existing workflows.

Automation expertise: Salesforce's strong advantage in automation is evident through its suite of cutting-edge features across its platform that go beyond mere efficiency improvements. Solutions such as AI-generated pre-call summaries, predictive models for utilization management, and smart care coordination tools transform how its customers operate. These features automate time-consuming tasks, freeing up clinical and administrative resources while enabling proactive and personalized patient engagement. Noteworthy future advancements, such as the release of flexible care teams and integrated

quoting capabilities, underscore Salesforce's ongoing commitment to optimization. These innovations reflect a strategic focus on leveraging AI to streamline complex healthcare workflows and elevate patient and staff experience. The comprehensive capabilities of Customer 360 enhance this automation by delivering a unified, 360-degree view of each patient, enabling more efficient, personalized, and informed care interventions.

Comprehensive ecosystem: One of Salesforce's distinguishing strengths lies in the extensive ecosystem the company has built through strategic partnerships and collaborations. By integrating with ISVs and system integrators such as KPMG, Deloitte, and Accenture, the platform becomes highly adaptable and capable of meeting a broad range of healthcare provider needs. These partnerships extend the platform's reach and functionality, allowing healthcare organizations to tailor solutions to their specific challenges. This ecosystem approach provides a diverse range of implementation and customization options and enhances the overall impact of Salesforce's healthcare solutions by facilitating seamless collaboration and co-innovation.

Challenges

Salesforce's platform takes on an orientation that emphasizes use cases that extend naturally from its CRM foundation. This focus enhances efficiency in care coordination, patient engagement, and utilization management but may not address the breadth of clinical workflows or complex analytics some healthcare providers require. While Salesforce excels in automating and streamlining operations closely tied to consumer-centric capabilities, organizations seeking broader functionality may need to supplement the platform with additional solutions. Nevertheless, Salesforce's investments in areas such as AI-driven pre-call summaries demonstrate a commitment to expanding its impact within its existing strengths, and clients should assess how well these capabilities align with their overall platform objectives.

Consider Salesforce When

Large healthcare systems, multispecialty networks, and provider organizations seeking advanced data integration and AI-driven operations should consider Salesforce. The platform is particularly well-suited for environments where comprehensive, real-time patient data and automated care coordination are mission-critical. Healthcare organizations that are data rich but experience operational fragmentation will find Salesforce's solutions transformative, especially in breaking down silos and enabling coordinated care across the patient journey. For a successful implementation, these organizations should be ready to dedicate internal resources and actively engage with Salesforce's ecosystem of partners to fully leverage the platform's potential. Continuous staff training, change management, and engagement with Salesforce's

support resources are crucial to maximizing the platform's impact and ensuring long-term success.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. This study aims to redefine how technology buyers evaluate healthcare data platform vendors by delivering a dynamic and comprehensive view of the competitive landscape. Unlike traditional rankings, it leverages a breadth and depth of subject matter expertise derived from a meticulously designed research framework, including a combination of highly granular vendor RFIs, in-depth briefings, solution demonstrations, customer interviews, and other critical data inputs, providing unparalleled insight into current capabilities and future strategies.

For technology buyers, this analysis should be viewed as more than just a ranking but a strategic compass that cuts through market complexities. It should empower them to make informed decisions about solutions that align with organizational goals and the evolving dynamics of the market.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users.

Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC defines a healthcare data platform as "a modern, cloud-based environment that offers seamless integration, extensibility, and orchestration of health information and data." These solutions deliver modularity and scalability to support clinical, operational, and administrative workflow functions while ensuring compliance with healthcare regulations. They are typically composed of three core architectural layers: the distributed data plane, which aggregates and integrates data from diverse sources, including clinical systems, third-party applications, and connected devices; the data control plane, which governs and secures data interactions while ensuring compliance with regulations such as HIPAA and GDPR; and the business capabilities and orchestration toolkit, which facilitates the development of new functionalities and patient care solutions by leveraging integrated clinical applications and health data.

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Related Research

- *IDC FutureScape: Worldwide Healthcare Industry 2025 Predictions* (IDC #US52217524, October 2024)
- *IDC Survey: Strategic Investment Trends in Healthcare Provider IT Solutions for 2024–2025* (IDC #US52221124, September 2024)
- *IDC Survey Spotlight: Healthcare Provider IT Goals for 2024–2025* (IDC #US52221024, August 2024)
- *IDC Survey Spotlight: Healthcare Provider Business Goals for 2024–2025* (IDC #US52220924, August 2024)
- *IDC TechBrief: Healthcare Data Platforms* (IDC #EUR151908223, March 2024)

Synopsis

This IDC study evaluates vendors delivering U.S. healthcare data platforms for providers based on their strategies and capabilities. IDC defines these platforms as "modern, cloud-based environments that seamlessly integrate, orchestrate, and enable the intelligent use of health information." These platforms transcend traditional data

management by creating a comprehensive foundation for advanced interoperability, data-driven decision-making, and data excellence. Designed to support critical initiatives such as AI-powered workflows, VBC, hyper-personalized patient engagement, and integrated care delivery, healthcare data platforms shift the focus from storing data to harnessing it for actionable insights and improved outcomes.

"Healthcare data platforms are not just infrastructure modernization investments — but the strategic enablers of a new era in healthcare, where data and AI meet to redefine patient and employee experiences, power next-level workflow efficiencies, and accelerate the shift toward innovative care models that transcend traditional paradigms," says Mutaz Shegawi, senior research director, IDC Health Insights. "As U.S. healthcare providers face mounting pressures to integrate care across diverse settings and deliver hyper-personalized experiences, these platforms will help shape the future industry trajectory through actionable intelligence, more seamless ecosystems, and workflows that redefine what is possible in healthcare."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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