North American Value-Based Care Compliance Enabling Technology Leadership Award
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Background and Company Performance

Industry Challenges

The Medicare Access and CHIP Reauthorization Act of 2015 (MACRA) marks the onset of new care delivery and payment reforms for physician services under Medicare. MACRA replaces the old Sustainable Growth Rate (SGR) formula which was put into place in 1997 to control Medicare cost inflation. The Quality Payment Program (QPP), the key initiative under MACRA, is based on a comprehensive value-based reimbursement methodology which establishes a physician payment system emphasizing cost, quality, information technology advancement, and clinical improvement as key levers of healthcare transformation.

The QPP officially began in January 2017 and will ultimately impact payments for most U.S. clinicians including physicians, physician assistants, nurse practitioners, clinical nurse specialists, and certified registered nurse anesthetists. Clinicians can choose one of two tracks for QPP – 1) Advanced Alternative Payment Models (APMs) which provide extra incentive payments for participation in innovative payment models such as Medicare Shared Savings or other new payment and care delivery models developed by CMS that require clinicians to accept financial risk for providing coordinated, high-quality care; or 2) The Merit-based Incentive Payment System (MIPS) which provides performance-based payments for clinicians participating in Medicare Part B. CMS sets yearly performance thresholds for MIPS. A single MIPS score will factor in performance in four weighted performance categories—Quality, Cost, Improvement Activities, and Advancing Care Information (or use of Electronic Health Records)—on a 0-100 point scale. The first couple of years of MIPS, that is, 2017 and 2018, will be transition years and clinicians will be offered a degree of flexibility in reporting and performance. Medical practices must submit data on performance measures to get incentive payments. Zero data submission will result in a negative adjustment for annual Medicare reimbursement.

Most clinicians in the U.S. will be subject to MIPS and the types of Medicare Part B eligible clinicians affected by MIPS will likely expand in the future to encompass other professionals like physical or occupational therapists, nurse midwives, social workers, and more. The good news about MIPS is that it marks the first value-based reimbursement approach under Medicare. This will drive needed health system improvements for patient outcomes and cost efficiency. It’s also good that MIPS streamlines multiple quality reporting programs such as PQRS and Meaningful Use and emphasizes the use of open, flexible and patient-centric health IT systems. But it’s also important to understand that CMS is taking a carrot and stick approach to help get providers on board with compliance for MIPS. CMS considers the move to value-based care to be so important that if clinicians do not participate in MIPS they face a financial penalty from CMS amounting to a 9% reduction in reimbursement by 2022.

MIPS entails a complex mix of measures and scores, and, today, many providers are still unclear about the full extent of potential opportunities and challenges represented by the
new program. While CMS has recently exhibited additional flexibility in its timeline for rolling out MIPS for some types of providers, medical practices cannot delay the inevitable and continue to procrastinate on MIPS preparation.

There’s a lot of confusion in the market. Consequently, increasing numbers of healthcare providers will require the assistance of trusted vendor partners to help them decipher, navigate and keep current with the complex alphabet soup of performance measures that must be complied with and reported on for MIPS and other payment reform initiatives.

SA Ignite provides software solutions that automate, accelerate, and simplify the transition to value-based care. The company’s unique combination of technology and expert advisory services enables a high standard of customer value and exceptional ROI.

*Technology Leverage and Customer Impact*

**Matched to Market Needs: Healthcare Providers Must Adopt New Approaches to Meet Value-Based Care Challenges**

For most healthcare providers across the U.S., MIPS and other value-based reimbursement programs being rolled out by government and commercial payers represent sweeping changes that will require implementing a whole new approach to tracking, measuring and reporting on clinical and financial performance. Value-based care reporting requirements can be highly disruptive and stressful, placing a strong administrative burden on healthcare organizations that can lead to increased staff burnout and turnover. In addition, the financial impacts of the shift to value-based care are significant. A recent article in *Health Affairs* claims that, on average, medical practices allocate 785 hours per physician and $15.4 B annually in complying with value-based program reporting requirements.\(^1\) The potential impact of QPP on both physicians and hospitals cannot be overestimated. Increasing numbers of physicians (over 500,000) are employed by hospitals or integrated delivery networks (IDNs). Clearly, MIPS ramifications will be system-wide and profound.

Unfortunately, many medical practices and health systems have yet to put in place efficient, automated processes for quality and performance compliance and reporting. In fact, there are still many things that even large health systems are still doing on a manual basis. This situation is not sustainable in an environment where scalability, flexibility, and adaptability are crucial capabilities needed for survival and growth in the increasingly competitive healthcare provider landscape.

Frost & Sullivan’s ongoing research of the U.S. healthcare market has found significant and growing market opportunities associated with helping healthcare organizations adapt to the dramatic shifts arising from pay for performance. Consequently, growing numbers of technology vendors are emerging touting all range of solutions designed to help providers manage the transformation. Many of these vendors have quickly jumped in to

\(^1\) *Health Aff March 2016 vol. 35 no. 3 401-406*
add a module or two for MACRA reporting. But providers need more than that—they need full service vendor partners that can shepherd them along the path from MU to MIPS to whatever comes next.

Frost & Sullivan has identified SA Ignite as a leading software vendor specialized in the value-based care market. SA Ignite offers end-to-end technology and services as opposed to limited solutions that only address part of the problem. SA Ignite, founded in 2009, offers compliance management and predictive analytics tools that are expertly designed to simplify the many complexities medical practices face in the evolving world of value-based initiatives. The Chicago-based company serves more than 80 healthcare organizations including large medical groups, health systems, academic medical centers, care organizations, and EHR consultancies.

SA Ignite recognized early on the extent of complexities involved with reporting on Meaningful Use measures and other value-based initiatives and have devoted their entire business operations to solving these problems for providers. Since its founding, SA Ignite has followed market developments and steadily added on new capabilities designed to help healthcare organizations of all sizes and types to succeed in the various and evolving dimensions of value-based care.

**Technology Solution Suite That Offers Step-by-Step, Expert Guidance for Value-Based Care Compliance and Reporting**

The IgniteQ platform is a single, integrated SaaS-based solution designed to help providers manage the full range of steps and processes associated with value-based care program compliance and reporting. Solutions on the IgniteQ platform, including IgniteMIPS, provide expert and comprehensive guidance along the full path from eligibility, to program management and monitoring, and on through report generation and submission of performance scores to CMS or other payers. The platform is enabled with vigorous predictive analytics capabilities that produce a continuous stream of performance data that can be leveraged throughout the year to engage and encourage clinicians with in-depth, highly specific, and comparative feedback. User-friendly data visualization tools and performance scorecards allow healthcare organizations at every level of familiarity with technology to quickly and easily implement and deploy the tools they need to comply with a range of value-based care initiatives. With SA Ignite’s solutions, healthcare providers are empowered to optimize quality scores through actionable insights. Higher quality scores ultimately drive the organization’s improved reputation, business growth, and increased revenue opportunities.

The IgniteMIPS solution component of the IgniteQ platform brings predictive analytics and regulatory compliance together to manage every stage of the MIPS program management process. The IgniteMIPS solution stack is built on three core functionalities—**Data and Infrastructure** which brings together individual clinician data for identification and performance measurement with MIPS program rules; **Analytics** to calculate scores, run eligibility, and create scenarios; and **Program Management** which provides an array of
tools to manage the program workflow including reporting and auditing among other tasks.

**Regulatory Expertise in Value-Based Programs Compliments a Robust Technology Suite**

While enabling information technology tools like the IgniteQ platform are essential for the shift to value-based care, it’s the combination of technology and expert advisory services that drives the greatest and longest lasting customer benefit. Many provider organizations are increasingly recognizing their need for comprehensive and multi-faceted assistance to successfully transition to value-based care programs like MIPS. Unfortunately, many of these organizations end up turning to consultants that have limited field experience in the actual implementation of the full set of tools needed to meet program requirements. SA Ignite has unique and very deep regulatory compliance knowledge. This knowledge is not derived by simply reading and regurgitating final rules from CMS but is based on constant engagement with CMS and ongoing, live field experience with 17,000 clinicians across the country. SA Ignite has been doing advisory work since the early days of the CMS EHR Incentive Program and today employs a highly experienced team of value-based care experts. These experts are constantly monitoring the highly dynamic environment and shifting landscape of value-based care. In fact, it’s all they do.

Directed, guided knowledge that’s useful in the field can only be derived from an entity that has felt the many bumps and bruises of healthcare reform and worked through myriad challenges with providers. The SA Ignite team has been exposed to the real problems and challenges that come with value-based care program management. Consequently, its expert advice for healthcare organizations is highly actionable and highly valuable relative to its competitors in the market.

**Technology and Services Provide Strong ROI by Maximizing Revenue Opportunities While Minimizing Program Costs**

A fast, demonstrable ROI can be hard to come by with some health IT solutions such as electronic health records (EHRs) or applications for population health management. These tools are essential for healthcare reform but the economic value is likely to be realized in a longer time frame. The wait for positive ROI can seem interminable for many healthcare providers who are frustrated with having to shell out more and more dollars for various IT needed to manage their business. Fortunately, the IgniteQ platform can show a fairly fast return on investment for most customers—generally less than 12 months. The ROI for SA Ignite’s solutions are realized through two mechanisms. First is revenue maximization. SA Ignite offers proven solutions that, since 2009, have earned more than $187M in incentives for its 80+ customer organizations. Even in this first year of QPP reporting where the MIPS incentive curve is flat, the potential impact of 5 or 10 points added to the performance score through proactive program management could be significant enough that SA Ignite more than pays for itself due to positive revenue maximization. The second lever for ROI for SA Ignite is through internal program management cost reduction. SA
Ignite’s strong growth trajectory is driven by the need for healthcare organizations to more easily manage the complexities of the QPP. The automation of complex program management via SA Ignite helps health providers save money though operational and workflow efficiencies. Simply put, with SA Ignite’s tools, healthcare organizations can avoid expenses associated with hiring additional staff to manage the QPP. Furthermore, good technology like SA Ignite helps ease burdens and frustrations of existing staff, thereby preventing added costs and burdens that come with staff turnover.

Finally, many of SA Ignite’s customers have multiple programs and initiatives for value-based care. With SA Ignite, healthcare organizations can manage all those various programs on one platform, thus eliminating the need to buy additional IT solutions.

Alignment with C-Suite Goals for Growing Revenues and Managing Reputations

The annual goals of C-Suite executives are set by the Executive Board, and, increasingly, the top three to five goals for health system executives pertain to enabling success in the QPP and other value-based programs. Today, everyone is focused on obtaining the highest possible MIPS scores to maximize reimbursement opportunities and minimize the potential for financial penalties. In addition, performance scores are seen as increasingly critical for reputation management. This is because MIPS scores will be posted on the CMS Physician Compare website for all to see and made freely available to third party consumer ratings sites. For physicians, a negative reputation can have a significant financial impact in the era of engaged and empowered healthcare consumers, increasing numbers of whom are leveraging social media rating tools like Healthgrades, Yelp, and Google to share their perceptions and experiences with healthcare providers. Thus, QPP program managers and executives need ongoing insights to understand how to manage their programs and monitor needed workflows to achieve their goals and realize the best possible performance scores. Being able to do this in a proactive way provides more control over the process well ahead of the actual year-end submission thus allowing providers to address gaps and shortcomings along the way.

With SA Ignite, clinician performance data is at the fingertips of QPP program managers and analysts, providing healthcare providers with a comprehensive, data-driven engine to comply with all their value-based care initiatives.

Unique Competitive Differentiators Drive Strong Growth Potential

SA Ignite provides products and services that help health systems, hospitals, clinics and group practices address the many challenges that come with the shift to value-based reimbursement. As MIPS incentives and similar programs grow with time, SA Ignite is ideally suited to take advantage of significant business opportunities across the U.S. healthcare provider landscape. Strong market opportunities will drive a more competitive vendor landscape and increasing numbers of new and established technology companies will jump in. So why choose SA Ignite? The SA Ignite difference spans five key areas that set it apart from its competitors: the single end-to-end platform; robust analytics and
compliance technologies; focus on enabling optimal clinician performance through data transparency and scorecards; vast regulatory expertise with value-based initiatives; and laser focus. SA Ignite is not a population health company and it does not have its own EHR—it’s just focused on value-based care program management. Through that commitment and focus, SA Ignite has developed a combination of technology and services that goes deeper to provide comprehensive and proactive tools and insights that drive QPP program success. Furthermore, SA Ignite is adaptable and flexible and, through its market expertise, can quickly add new functionalities for new value-based programs or changes in existing programs.

Conclusion

The shift to value-based care creates new financial risks for healthcare organizations. In addition, the wave of regulatory uncertainty and constantly shifting requirements increases administrative burdens and costs for providers, making value-based care compliance a frustrating and time-consuming endeavor for all involved. Healthcare providers are increasingly turning to trusted vendor partners like SA Ignite to lessen the burden and achieve success in healthcare’s new reality.

With its strong overall performance in providing cutting-edge IT solutions and strong potential for continued penetration in the growing market for value-based care compliance and reporting technology, SA Ignite has earned Frost & Sullivan’s Enabling Technology Leadership Award for 2017.
Significance of Enabling Technology Leadership

Ultimately, growth in any organization depends upon customers purchasing from a company and then making the decision to return time and again. In a sense, then, everything is truly about the customer—and making those customers happy is the cornerstone of any long-term successful growth strategy. To achieve these goals through enabling technology leadership, an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.

Understanding Enabling Technology Leadership

Product quality (driven by innovative technology) is the foundation of delivering customer value. When complemented by an equally rigorous focus on the customer, companies can begin to differentiate themselves from the competition. From awareness, to consideration, to purchase, to follow-up support, best-practice organizations deliver a unique and enjoyable experience that gives customers confidence in the company, its products, and its integrity.
Key Benchmarking Criteria

For the Enabling Technology Leadership Award, Frost & Sullivan analysts independently evaluated two key factors—Technology Leverage and Customer Impact—according to the criteria identified below.

Technology Leverage

Criterion 1: Commitment to Innovation
Criterion 2: Commitment to Creativity
Criterion 3: Stage Gate Efficiency
Criterion 4: Commercialization Success
Criterion 5: Application Diversity

Customer Impact

Criterion 1: Price/Performance Value
Criterion 2: Customer Purchase Experience
Criterion 3: Customer Ownership Experience
Criterion 4: Customer Service Experience
Criterion 5: Brand Equity

Best Practices Award Analysis for SA

Decision Support Scorecard

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation. Ratings guidelines are illustrated below.

RATINGS GUIDELINES

The Decision Support Scorecard is organized by Technology Leverage and Customer Impact (i.e., These are the overarching categories for all 10 benchmarking criteria; the definitions for each criterion are provided beneath the scorecard.). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.
The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, we have chosen to refer to the other key participants as Competitor 2 and Competitor 3.

<table>
<thead>
<tr>
<th>Enabling Technology Leadership</th>
<th>Technology Leverage</th>
<th>Customer Impact</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>SA Ignite, Inc.</td>
<td>10.0</td>
<td>10.0</td>
<td>10.0</td>
</tr>
<tr>
<td>Competitor 2</td>
<td>9.0</td>
<td>9.0</td>
<td>9.00</td>
</tr>
<tr>
<td>Competitor 3</td>
<td>8.5</td>
<td>8.0</td>
<td>8.25</td>
</tr>
</tbody>
</table>

**Technology Leverage**

**Criterion 1: Commitment to Innovation**
Requirement: Conscious, ongoing adoption of emerging technologies that enables new product development and enhances product performance

**Criterion 2: Commitment to Creativity**
Requirement: Technology leveraged to push the limits of form and function in the pursuit of “white space” innovation

**Criterion 3: Stage Gate Efficiency**
Requirement: Adoption of technology to enhance the stage gate process for launching new products and solutions

**Criterion 4: Commercialization Success**
Requirement: A proven track record of taking new technologies to market with a high rate of success

**Criterion 5: Application Diversity**
Requirement: The development and/or integration of technologies that serve multiple applications and can be embraced in multiple environments

**Customer Impact**

**Criterion 1: Price/Performance Value**
Requirement: Products or services offer the best value for the price, compared to similar offerings in the market.

**Criterion 2: Customer Purchase Experience**
Requirement: Customers feel they are buying the most optimal solution that addresses both their unique needs and their unique constraints.

**Criterion 3: Customer Ownership Experience**
Requirement: Customers are proud to own the company’s product or service and have a positive experience throughout the life of the product or service.
**Criterion 4: Customer Service Experience**
Requirement: Customer service is accessible, fast, stress-free, and of high quality.

**Criterion 5: Brand Equity**
Requirement: Customers have a positive view of the brand and exhibit high brand loyalty.

**Decision Support Matrix**
Once all companies have been evaluated according to the Decision Support Scorecard, analysts then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.

![Decision Support Matrix Diagram](image-url)
Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan analysts follow a 10-step process to evaluate Award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

<table>
<thead>
<tr>
<th>STEP</th>
<th>OBJECTIVE</th>
<th>KEY ACTIVITIES</th>
<th>OUTPUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Monitor, target, and screen</td>
<td>Identify Award recipient candidates from around the globe</td>
<td>Pipeline of candidates who potentially meet all best-practice criteria</td>
</tr>
<tr>
<td>2</td>
<td>Perform 360-degree research</td>
<td>Perform comprehensive, 360-degree research on all candidates in the pipeline</td>
<td>Matrix positioning of all candidates’ performance relative to one another</td>
</tr>
<tr>
<td>3</td>
<td>Invite thought leadership in best practices</td>
<td>Perform in-depth examination of all candidates</td>
<td>Detailed profiles of all ranked candidates</td>
</tr>
<tr>
<td>4</td>
<td>Initiate research director review</td>
<td>Conduct an unbiased evaluation of all candidate profiles</td>
<td>Final prioritization of all eligible candidates and companion best-practice positioning paper</td>
</tr>
<tr>
<td>5</td>
<td>Assemble panel of industry experts</td>
<td>Present findings to an expert panel of industry thought leaders</td>
<td>Refined list of prioritized Award candidates</td>
</tr>
<tr>
<td>6</td>
<td>Conduct global industry review</td>
<td>Build consensus on Award candidates’ eligibility</td>
<td>Final list of eligible Award candidates, representing success stories worldwide</td>
</tr>
<tr>
<td>7</td>
<td>Perform quality check</td>
<td>Develop official Award consideration materials</td>
<td>High-quality, accurate, and creative presentation of nominees’ successes</td>
</tr>
<tr>
<td>8</td>
<td>Reconnect with panel of industry experts</td>
<td>Finalize the selection of the best-practice Award recipient</td>
<td>Decision on which company performs best against all best-practice criteria</td>
</tr>
<tr>
<td>9</td>
<td>Communicate recognition</td>
<td>Inform Award recipient of Award recognition</td>
<td>Announcement of Award and plan for how recipient can use the Award to enhance the brand</td>
</tr>
<tr>
<td>10</td>
<td>Take strategic action</td>
<td>Upon licensing, company is able to share Award news with stakeholders and customers</td>
<td>Widespread awareness of recipient’s Award status among investors, media personnel, and employees</td>
</tr>
</tbody>
</table>
The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry participants and for identifying those performing at best-in-class levels.

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages more than 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.