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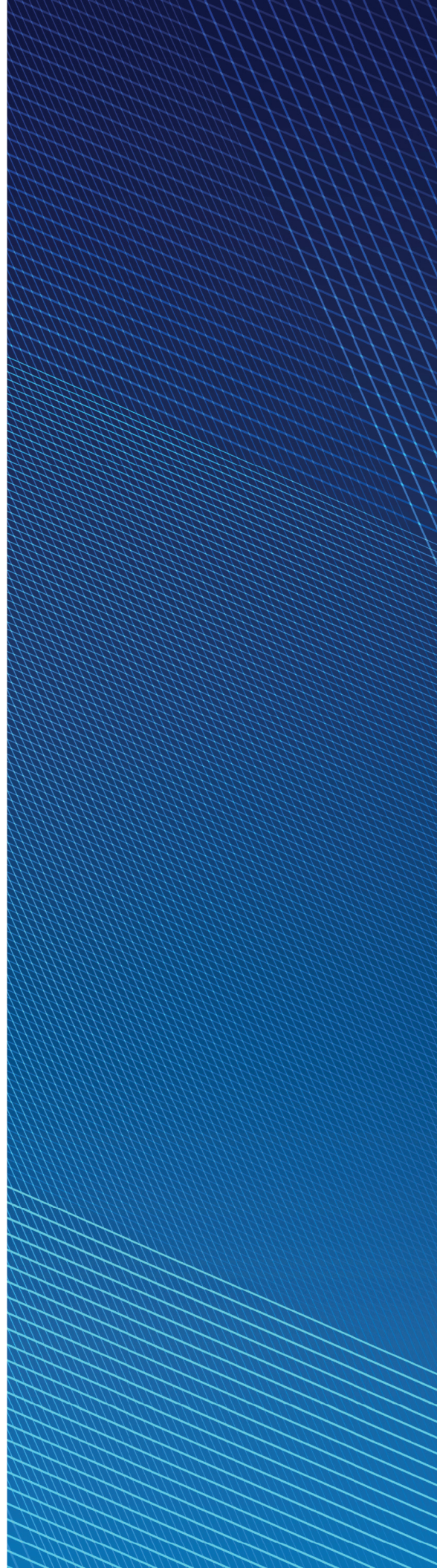
AGFA HEALTHCARE RECEIVES THE 2023 CUSTOMER VALUE LEADERSHIP AWARD

Identified as best in class in the global cloud-based enterprise imaging industry

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Agfa HealthCare excels in many of the criteria in the cloud-based enterprise imaging space.

AWARD CRITERIA

Business Impact	Customer Impact
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

The Evolving Cloud-Based Medical Imaging Informatics Market

As the global medical imaging and informatics market witnesses the advent of sophisticated technologies, the changing consumer landscape, and evolving clinical and administrative needs, market participants explore alternatives to preserve their competitive advantage.

Institutions worldwide are recovering from the COVID-19 pandemic, which overstretched financial resources and prompted a drastic change in enterprises' engagement with vendors. For this reason, hospitals and vendors will seek to leverage cloud-based artificial intelligence (AI) integration to increase workflow effectiveness and quality within outpatient settings and health systems.

Frost & Sullivan estimates that the global cloud-based medical imaging informatics market will reach $4.21 billion in revenues in 2026, with a compound annual growth rate of about 23.4% from 2021 to 2026[1]. Within this framework, Agfa HealthCare uniquely leverages its expertise to meet customer needs, positioning itself to capitalize on new growth opportunities and cementing its leadership.

Agfa HealthCare: A Unified Enterprise Imaging Platform

Agfa HealthCare is a division of the Agfa-Gevaert Group, a publicly traded multinational corporation founded in 1897. With over a century of healthcare experience in diagnostic imaging, Agfa HealthCare has pioneered healthcare IT since the early 1990s.

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[1] *Growth Opportunities in the Global Cloud-based Medical Imaging Informatics Market, Forecast to 2026* (Frost & Sullivan, February 2023)

Agfa HealthCare's IMPAX platform was one of the market's first picture archiving and communication system (PACS) solutions. Subsequently, the company introduced its XERO Universal Viewer. The company brought its flagship Enterprise Imaging platform to the market in 2014. The Enterprise Imaging platform is a converged, modular, and scalable solution that aims to simplify access through a single comprehensive patient imaging health record (IHR).

Agfa HealthCare's unified Enterprise Imaging platform helps clients manage resource allocation, improve productivity, and provide clinical confidence with patient-centric contextual intelligence. The technology satisfies multispecialty needs and securely standardizes workflows to enable smooth collaboration between departments and geographical locations.

From product development to implementation, the company's Enterprise Imaging platform reduces organizational complexity and redundancy, supporting healthcare providers in achieving their clinical, operational, and business strategies. The converged medical image management solution meets the challenge of increasing growth while lowering complexity and supporting the internal and external development of the healthcare network. Regardless of the customers' size and resources, Agfa HealthCare's unified platform perfectly fits their real-time image-management needs.

A Customer-centric Approach Driving Unmatched Client Experiences

Agfa HealthCare's comprehensive patient imaging record expedites image acquisition, sharing, and retrieval within fewer databases, operating systems, maintenance contracts, and interface systems. It manages everything in one administrative backend with centralized security and data privacy. Additionally, the company integrates its Enterprise Imaging's XERO Viewer into the organization's electronic health records (EHR), providing clinical context. The unified Enterprise Imaging platform also incorporates a vendor-neutral archive (VNA) architecture, ensuring it can store images and documents in a standard format with a common interface so that other systems can access them in a vendor-neutral manner. Finally, the company can deploy all hardware servers for its Enterprise Imaging VNA and XERO Viewer web server solutions off-premises on a cloud service.

> *"Moreover, the company provides exceptional 24/7 service through its dedicated team of experts supporting customers with system optimizations and comprehensive managed services to relieve them from system administration burnout. Remote monitoring systems in every installation notify Agfa HealthCare of potential issues, allowing it to remedy problems before they arise."*
>
> *- Manuel Albornoz,*
> *Best Practices Research Analyst*

Agfa HealthCare's Enterprise Imaging platform operates in over 800 healthcare facilities globally, with the Xero Universal Viewer supporting around 400 care organizations[2]. Moreover, the company provides exceptional 24/7 service through its dedicated team of experts supporting customers with system optimizations and comprehensive managed services to relieve them from system administration burnout. Remote monitoring systems in every installation notify Agfa HealthCare of potential issues, allowing it to remedy problems before they arise.

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[2] "Anywhere, anytime" access to patient images, enhanced with powerful specialty tools, and the option of diagnostic-quality image viewing. (Agfa Healthcare website: https://global.agfahealthcare.com/universal-viewer-xero-xtend-and-full-fidelity/)

Due to COVID-19, Agfa HealthCare moved to a remote work model, providing a customer excellence program to deploy immediate global assistance at both existing customers and towards new system implementations[3]. It provides customers easy access to the support ecosystem through phone, e-mail, and web-based ticketing communication systems. Furthermore, the company offers customers essential resources, including a self-service knowledge base web portal and a video-learning library to assist them in autonomously resolving issues. Above and beyond, the Agfa HealthCare customer experience program runs regular seminars to spread best practices findings within its customer community base.

"We've been with Agfa HealthCare since 2005, so it has been a long journey together. We feel confident that Agfa HealthCare supports us in our ongoing ambition to deliver 'all care for all patients and all images accessed anywhere' (…). With the platform, we can drive the workflow in a much more granular way. The radiologists appreciate that it 'feeds' them what they need, sorts tasks to their preferences, enables them to prioritize studies, support escalation of care, and more."

RJ Merck - Radiology IT Supervisor, Zuckerberg San Francisco General Hospital[4].

Customer Feedback: A Roadmap to Success

Customer feedback and industry trend monitoring guide Agfa HealthCare's strategies, continuously evolving the Enterprise Imaging platform to maintain its innovative edge. The company assembles advisory boards that engage client physician champions to discuss the product roadmap and attends every industry-wide event to stay ahead of market trends. Recently, it launched a program where clients test updates early in the development cycle before market release[5]. With this initiative, Agfa HealthCare built and validated prototypes by actual customers, increasing their fit to industry requirements and generating premature demand.

The company fosters yearly user group gatherings where customers converse and share their experiences and hosts a customer community forum where users exchange best practices, issues, and solutions. Agfa HealthCare receives feedback through many channels, such as project delivery surveys and complaint management systems. Once its platform goes live, it measures the end user's experience with the implementation, addressing these inputs through optimization programs.

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Best Practices Research Analyst

Ultimately, the company gauges customer satisfaction with automated, implicit (complaint handling system), and explicit (face-to-face) feedback. Over and above, Agfa HealthCare also has customer advocates investigating strategic client pain points to resolve their specific needs.

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[3] Frost & Sullivan Interview with Agfa HealthCare (Frost & Sullivan, February 2023)
[4] Frost & Sullivan Interview with Agfa HealthCare (Frost & Sullivan, February 2023)
[5] Ibid

Proven Customer Journey Support Leads to More Customers

Agfa HealthCare integrates, adapts, and customizes the Enterprise Imaging platform to the client's organizational needs throughout purchasing. It successfully leads customers from volume-based to value-based imaging by cleverly combining AI and modules for precise workflow orchestration. In addition, the platform adjusts end users' diverse experiences by providing a tailored layout based on their roles.

The company sees its clients as partners for deep adoption. To sustain engagement, it builds relationships through several channels, e.g., in-person, phone, e-mail, and web-based ticketing.

Agfa HealthCare brings positive non-clinical and clinical organizational outcomes, ensuring value proposition precise delivery through advisory boards and meetings. The company involves special professional teams in complex projects that conduct frequent follow-ups and monitor client satisfaction.

As one of the first companies offering Enterprise Imaging as a strategy, not just a theory, Agfa HealthCare works closely with customers during the pre-and post-purchase, securing their position as a consultative partner. Flexible financial and purchasing models ensure deployment at a reasonable cost, and its standardized customer journey alignment decreases IT expenses while achieving client success. This ONE platform approach resonates with many customers, enabling them to reduce implementation complexity.

Customers looking for cloud-based medical imaging informatics are attracted to Agfa HealthCare's remarkable scalability, reduced complexity, and robust rule-based engine. To complement this interest, the company interacts with many customers through word-of-mouth accolades, conferences, trade shows, and network events fueled by its exceptional customer-centric design and technological performance.

A Promising Outlook for 2023 and Beyond

Agfa HealthCare incorporates customer feedback into its product roadmap to maximize short-term growth opportunities while providing a path to future revenues. This method led to the company pioneering the market with the one-platform concept. Since then, it has driven innovations around this comprehensive view and core value. As it sits on a solid foundation, Agfa HealthCare can address the growing, fast-evolving global needs and customer-specific challenges.

Agfa's RUBEE for AI embeds "augmented intelligence" capabilities (advanced visualization, workflow orchestration, automated triage, smart hanging protocols, automated reporting, critical finding notifications, and specialty imaging packages) into the solution. Combining this AI-driven automation with disease-oriented AI analytics helps customers generate more insight and practice better evidence-based medicine than traditional imaging workflows. At the start of 2023, the company announced that the Dubai Academic Health Corporation (DAHC) plans to use Agfa HealthCare's RUBEE for AI framework and Lunit INSIGHT MMG algorithm to modernize its breast cancer diagnostic and screening program[6]. The Breast AI Analysis Package solution will seamlessly integrate into its Enterprise Imaging system (currently running in the DAHC).

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[6] AGFA HealthCare announces the successful GO LIVE of Breast Imaging AI solution at Dubai Academic Health Corporation (DAHC) Dubai Hospital (AGFAAgfalthCare press release, February 2023)

On top of that, Agfa HealthCare delivered Enterprise Imaging beside on-premises from the beginning as a managed service in private cloud environments. But in 2021, the company released Enterprise Imaging in the cloud with the support and partnership of public cloud providers such as Microsoft Azure and AWS. A long-time Agfa HealthCare customer, Heilig Hart Ziekenhuis Lier, in Belgium, will implement the Enterprise Imaging solution for radiology in Microsoft's Azure public cloud platform to support current and future image-management requirements[7].

With its corporate guiding principles, Agfa HealthCare measures its success through customer adoption excellence. This vision translates into corporate execution goals, driving fantastic customer experiences. The leadership team always puts customers first, accompanying the imaging community and reinventing the company's business model to get close to market needs. Given today's landscape, Frost & Sullivan believes that Agfa HealthCare is in a prime position to increase its market share in this highly competitive industry.

Conclusion

Customer-centric strategies help companies safeguard leading positions in markets, but only if the approach is authentic and the implementation is seamless. Agfa HealthCare incorporates customer-focused strategies and exemplifies best practices implementation. Agfa HealthCare's Enterprise Imaging vendor-neutral archive strategy involves close collaboration with customers during the pre-and post-purchase stages. Its adaptable financial and purchasing modules guarantee affordable deployment, and its standardization of the customer journey lowers information technology costs while committing to its client's success.

The company uses automated, implicit (complaint handling system), and explicit (face-to-face) feedback to gauge client satisfaction. As it sits on a solid foundation, Agfa HealthCare can address the growing, fast-evolving global needs and customer-specific challenges. Its overall customer-first approach offers immense value to existing and new customers and solidifies its leading reputation in the market.

With its strong overall performance, Agfa HealthCare earns Frost & Sullivan's 2023 Customer Value Leadership Award in the global cloud-based enterprise imaging market.

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[7] Agfa HealthCare and HeiligHart hospital, Lier, Belgium, sign agreement for a hospital-wide Cloud-based Enterprise Imaging solution (Agfa HealthCare press release, January 2023)

What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership Award recognizes the company that offers products or services customers find superior for the overall price, performance, and quality.

Best Practices Award Analysis

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Business Impact

Financial Performance: Strong overall financial performance is achieved in terms of revenues, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

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■ **Innovation Culture:** *Optimized Customer Experience*

■ **ROI & Margin:** *Implementation Excellence*

■ **Transformational Growth:** *Industry Leadership*

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Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

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■ **Business Model (BM)**

■ **Technology (TE)**

□ **Industries (IN)**

□ **Customer (CU)**

■ **Geographies (GE)**