



**20
25**

**TRANSFORMATIONAL
INNOVATION LEADER**

*Accelerating Innovation to Zero Across the
Global Ecosystem*

*RECOGNIZED FOR BEST PRACTICES IN THE
NORTH AMERICAN ACUTE CARE VIRTUAL
HEALTH INDUSTRY*

Table of Contents

Best Practices Criteria for World-class Performance	3
From Tradition to Transformation: Virtual Solutions in Acute Care	3
Pioneering Leadership	5
Blazing the Trail	5
Solving Critical Pain Points for Exceptional Client Experiences	6
Positioned for Growth	7
Conclusion	9
What You Need to Know about the Transformational Innovation Leadership	
Recognition	10
Best Practices Recognition Analysis	10
Transformational Innovation	10
Customer Impact	10
Best Practices Recognition Analytics Methodology	11
Inspire the World to Support True Leaders	11
About Frost & Sullivan	12
The Growth Pipeline Generator™	12
The Innovation Generator™	12

Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Andor Health excels in many of the criteria in the acute care virtual health space.

AWARD CRITERIA	
<i>Transformational Innovation</i>	<i>Customer Impact</i>
Market Disruption	Price/Performance Value
Competitive Differentiation	Customer Purchase Experience
Market Gaps	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Passionate Persistence	Brand Equity

From Tradition to Transformation: Virtual Solutions in Acute Care

The acute care sector is rapidly transforming as virtual solutions and digital platforms become integral to delivering modern healthcare. Healthcare systems are leveraging virtual care technologies and integrated digital workflows to improve patient outcomes, control costs, and respond to changing needs. These innovations enhance both clinical and operational efficiency within hospitals, while also enabling care models that extend beyond traditional settings.

Among the most impactful advancements are integrated platforms for predictive insights. These systems ensure the timely allocation of assets and resources, empowering staff to take proactive, patient-centered measures. At the same time, generative artificial intelligence solutions contribute by providing advanced data categorization, summarization, and actionable insights that further improve workforce efficiency. Consolidating data from disparate platforms into a unified space allows organizations to streamline operations and make more informed decisions.

Building on these digital advancements, the development of edge devices—specialized hardware that processes data close to its source—creates additional opportunities to optimize care delivery. For example, integrating cameras into in-room devices supports virtual care pathways, further enhancing collaboration and continuity of care across the healthcare ecosystem.

Acute care represents the largest application area for virtual interactions, offering significant benefits such

“Andor Health’s virtual care collaboration platform stands out in the market because it delivers a unified solution that covers the entire care continuum, from ambulatory to acute and home settings. By bringing together virtual nursing, remote patient monitoring, and team collaboration into one system, the platform eliminates the need for multiple point solutions. As a result, this approach reduces vendor overload and streamlines the clinical workflow.”

**- Nitin Manocha,
Senior Industry Analyst, Health and
Life Sciences**

as quicker access, shorter wait times, and more cost-effective interventions. Virtual collaboration solutions enable patients to connect rapidly with healthcare professionals via audio, video, or chat-based assistance for needs such as virtual nursing, teleneurology (remote neurological care), telepsychiatry (remote psychiatric services), tele-intensive care unit, or emergency consultations.

AI-driven virtual interactions for chronic care management at home facilitate timely patient check-ins, lifestyle tracking, mental health counseling, and medication reviews. Frost & Sullivan expects the increasing burden of chronic conditions to drive further growth in virtual tools for home-based chronic care. In response, technology companies are developing integrated solutions that span acute,

chronic, and post-acute care, aiming to address provider challenges such as communication gaps between patients and providers. Virtual interactions also help bridge gaps in transitional care by enabling virtual follow-up consultations, recovery monitoring, post-surgery care, teletherapy services, and rehabilitation support. These solutions play a critical role in maintaining coordination and continuity of care after a patient transitions from a healthcare facility to home. As the home care industry evolves, virtual visits will continue expanding their use cases across a wide range of applications.

Frost & Sullivan recognizes Andor Health as a transformative innovator. ThinkAndor®, the company’s artificial intelligence (AI)-driven virtual care collaboration platform, enables a wide range of services, including digital front door, virtual hospital, patient monitoring, care team collaboration, and transitions in care capabilities. This comprehensive approach reduces costs, improves clinician productivity, and increases patient throughput. As the healthcare landscape evolves, Andor Health is setting new standards for efficient, patient-centered care.

“ThinkAndor® has been an essential piece to our unified approach to virtual health. As we were operationalizing our virtual health strategy, it became apparent that our siloed technologies were disjointed providing unpredictable experiences for our patients and providers. We needed a unified approach that could provide world-class experiences that our patients are accustomed to.”

- Sr. Vice President Sunil Desai MD, president of Orlando Health Medical Group.

“By implementing ThinkAndor, we were able to maintain our LWBS rates under 4%, below the national average, even when capacity at each campus was greater than 100%.”

- Jeanhyong “Danny” Park, M.D., assistant professor and director of ED Clinical Informatics, Department of Emergency Medicine, Medical University of South Carolina.

Pioneering Leadership

Andor Health's origin is the story of a visionary leadership team with more than 15 years of experience building innovative healthcare solutions. Their journey began with HealthGrid, a groundbreaking patient engagement platform that transformed how patients connected with care and caught the attention of industry leaders, leading to its acquisition by Allscripts. Prior to this, the team launched Galvanon—an early pioneer in patient kiosk and mobile bill pay solutions, adopted by over 1,000 hospitals and later acquired by National Cash Register. In 2019, the team embarked on a new chapter by collaborating closely with Microsoft. Inspired by advancements in AI and cloud technology, they recognized an opportunity to tackle emerging challenges in care team collaboration and capacity management. This partnership culminated in 2019 when Andor Health developed one of the first AI-powered clinical co-pilots to enable first of its kind, AI-enabled virtual interactions. Recognizing the transformative potential of this work, M12, a Microsoft venture capital fund, invested in Andor Health, fueling the evolution of a comprehensive, AI-driven virtual care platform that is reshaping the healthcare landscape.

The company leverages AI to optimize last mile clinical workflows, strengthen care team collaboration, and improve capacity management. Its platform is built around three core domains: patient **observation**, which uses AI to monitor and curate distinct events from electronic health record (EHR), camera feeds with vision, and device data; **workflow orchestration**, which ensures events and information reach the right clinical resources; and **documentation**, with a focus on nurse-driven voice notes that update discrete EHR fields, not just summaries. As a result, it offers a unified, cloud-agnostic, and hardware-independent platform that enables healthcare organizations to streamline operations, reduce costs, and deliver better patient and provider experiences. Most importantly, Andor Health meets customers where they are, delivering flexible, configurable solutions that adapt to each organization's needs and drive measurable value through responsible, return on investment (ROI)-focused use of AI.

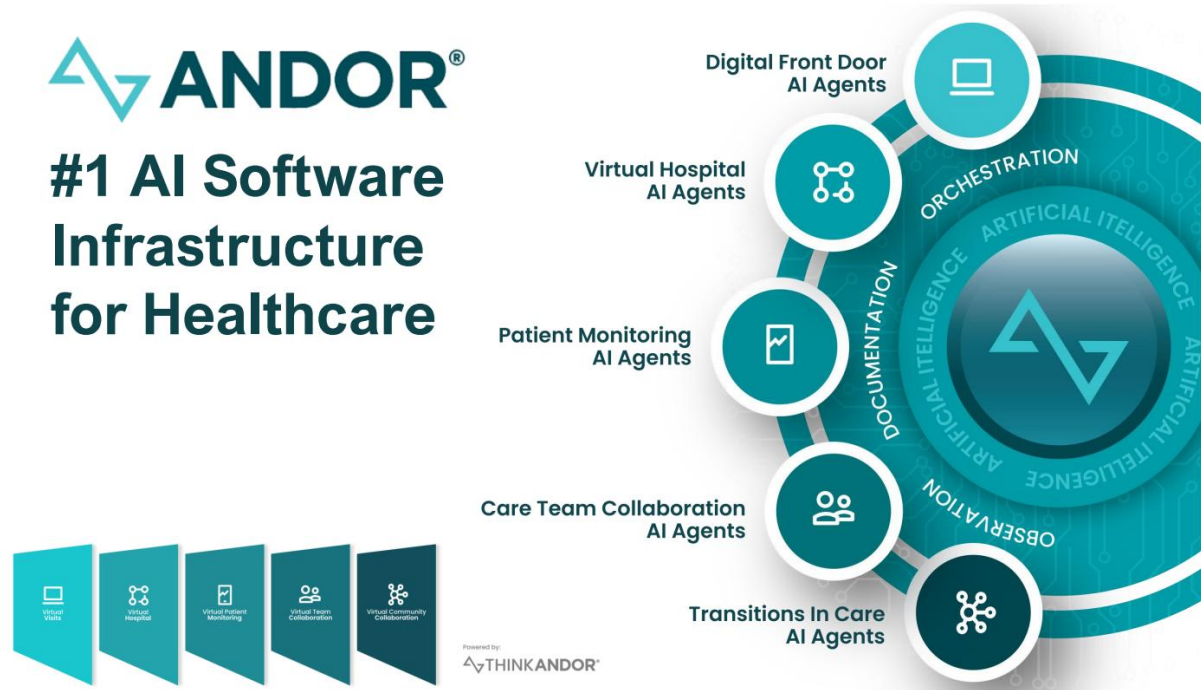
Blazing the Trail

Andor Health's virtual care collaboration platform, ThinkAndor®, stands out in the market because it delivers an AI software infrastructure for healthcare that provides a unified solution that covers the entire care continuum, from ambulatory to acute and home settings. By bringing together digital front door, virtual hospital, patient monitoring, care team collaboration, and transitions in care into one system, the platform eliminates the need for multiple point solutions. As a result, this approach reduces vendor overload and streamlines the clinical workflow.

The company builds its platform on proprietary AI agents that drive observation, workflow orchestration, and documentation. Importantly, the system remains cloud-agnostic and brokers the best large language model for each workflow, whether from OpenAI, Google, or other providers. Organizations can choose or change models as their needs evolve, which future-proofs their investment.

The platform integrates seamlessly with any standard camera or device, so organizations avoid vendor lock-in and leverage their existing infrastructure. In addition, Andor Health's solution embeds directly within major EHRs and is listed in many partner marketplaces (e.g., Epic and Oracle), or operates independently, optimizing workflows and delivering notifications to clinicians wherever they work.

Customers configure workflows rapidly using configuration capabilities similar to an “if this, then that” (IFTTT) framework, which allows them to adapt the platform to their operational needs without lengthy development cycles. Peer-reviewed studies from Andor Health’s customers demonstrate significant improvements in clinical and operational outcomes. Furthermore, Andor Health enables organizations to scale the platform across multiple sites and use cases, empowering them to innovate and expand their workflows as their needs grow. This combination of unified design, AI-driven flexibility, hardware independence, deep EHR integration, and proven results distinguishes Andor Health from more fragmented or rigid solutions in the market. With its unique approach, the company benefits from a first-mover advantage. Frost & Sullivan believes Andor Health stands to reap the rewards of abundant demand.



Solving Critical Pain Points for Exceptional Client Experiences

Andor Health’s platform delivers an AI software infrastructure that meets organizations where they are in their digital transformation journey. The company provides rapid, configurable workflow solutions that adapt to each client’s needs, enabling quick deployment and expansion without lengthy custom development. Users can start with basic virtual care capabilities and, as readiness grows, progressively adopt more advanced AI-driven features like observational AI, which monitors clinical activity, and nurse-based documentation. Furthermore, the system’s flexibility and ease of integration with existing EHRs and devices ensure a smooth onboarding process, empowering healthcare teams to innovate and expand use cases over time. For example, one organization reported a significant reduction in onboarding time for new clinical workflows. Many also note that the solution allows them to drive workflow innovation, fostering a sense of empowerment and partnership for clinicians, administrators, and patients alike.

Notably, the unified platform approach reduces the need for multiple point solutions, which lowers the total cost of ownership by approximately 30% to 40%.¹ Organizations avoid the expense and complexity of managing several single-purpose technologies, as the platform consolidates digital front door, virtual hospital, patient monitoring, care team collaboration, and transitions in care capabilities into one system. The hardware-agnostic design allows customers to leverage existing infrastructure, further reducing capital expenditures.

In particular, Andor Health places customer-driven ROI at the center of its platform strategy by ensuring that every deployment delivers measurable, real-world value to healthcare organizations. The company defines “last-mile ROI” as the tangible, operational improvements that directly impact clinical teams, patient outcomes, and organizational efficiency. Rather than relying on generic vendor case studies, Andor Health uses outcomes published by its own customers in peer-reviewed journals—such as the *Annals of Emergency Medicine* and *The New England Journal of Medicine*—to validate its impact. These studies document results like a 64% reduction in unnecessary emergency department visits, a gain of 3.5 hours per nurse shift returned to bedside teams, a 70% increase in physician productivity, and a 53% improvement in door-to-provider time.² These metrics reflect improvements that matter most at the point of care and in day-to-day operations, translating into cost savings and enhanced resource utilization.

Andor Health achieves this last-mile ROI by designing its AI agents and workflows to address specific, high-value pain points like reducing the clinical documentation burden, optimizing patient throughput, and automating routine tasks. The platform’s flexible framework allows organizations to configure workflows that fit their distinct needs, ensuring that the technology adapts to their environment rather than forcing a one-size-fits-all approach. By focusing on customer-driven, peer-validated outcomes and enabling rapid, configurable workflow optimization, Andor Health ensures that its platform delivers ROI where it matters most: in the daily work of clinicians and the operational performance of healthcare organizations.

Positioned for Growth

Andor Health drives market adoption by forming strategic partnerships with prominent group purchasing organizations (GPOs), such as Vizient and Premier. These collaborations grant access to an extensive network of hospitals and health systems that rely on GPOs for technology sourcing. Through national contracts, Andor Health simplifies procurement, enabling clients to deploy its platform swiftly and without prolonged negotiations. These relationships broaden Andor Health’s reach and further accelerate the adoption of its virtual care collaboration solutions.

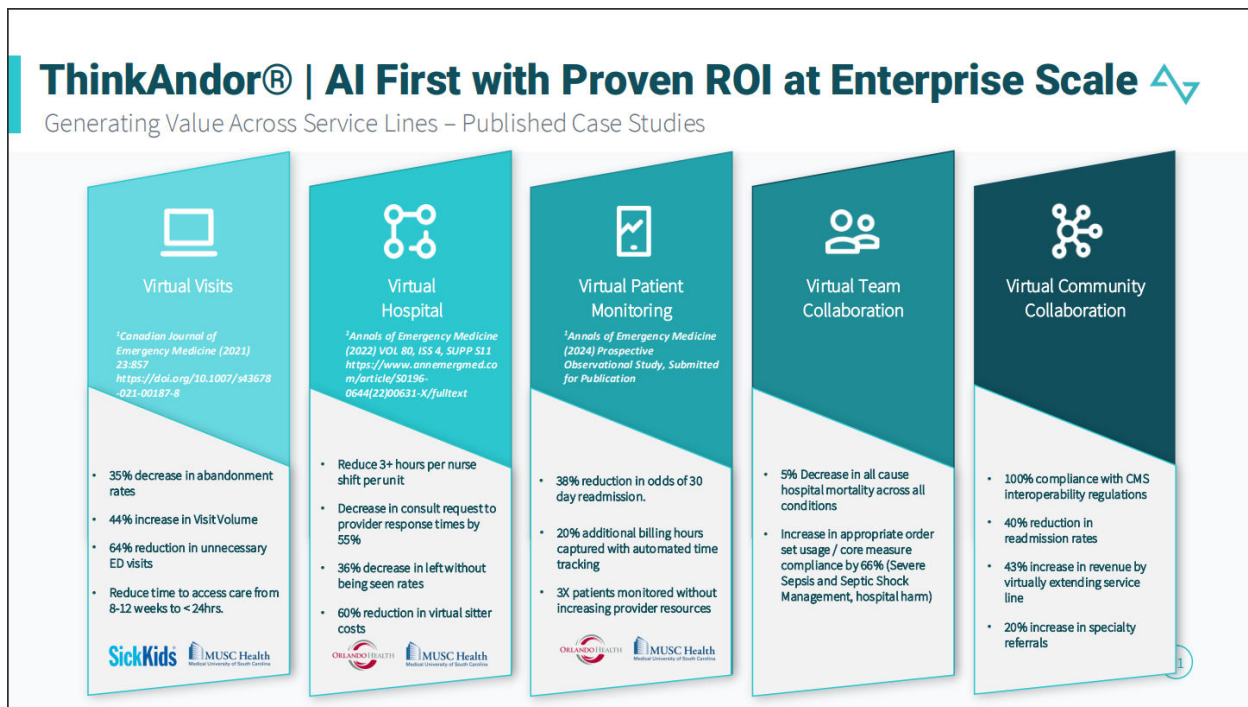
“We have partnered with Andor Health for more than four years, leveraging their AI-first approach for collaboration, observation, and documentation all on their digital front door platform. Each capability has demonstrated significant outcomes both financially and clinically, including savings of 3.5 hours of nursing time per shift, and reductions in patient falls and elopements.”

- Novlet Mattis, Chief Digital and Information Officer, Orlando Health Inc.

Channel partners such as Microsoft and Google are also vital to customer acquisition. As a marketplace transactable partner with both, Andor Health receives direct referrals and leads from healthcare

¹ Interview with Frost & Sullivan (July 2025)

² Ibid.



organizations that already utilize these platforms. The common preference for established technology marketplaces further streamlines procurement. Collectively, these partnerships extend Andor Health's market presence, accelerate customer acquisition, and propel its rapid growth.

Frost & Sullivan finds that Andor Health has built exceptional brand equity through industry recognition, strategic partnerships, and a consistent record of customer success, which reflects real-world relevance and value for healthcare organizations.

Notably, the company exemplifies responsible AI by emphasizing robust governance and achieving meaningful real-world outcomes. Its leadership understands that responsible AI goes beyond technical safeguards such as bias detection and hallucination prevention—though these remain essential. For this reason, its AI models operate within a framework that ensures data integrity, transparency, and ethical standards. In particular, the company defines responsible AI by its ability to deliver measurable, positive outcomes for healthcare organizations. It assesses its AI by how effectively it optimizes workflows, improves patient care, and yields a clear ROI. This approach unites strong governance with a focus on delivering tangible, beneficial results for clinicians, patients, and healthcare systems, thus affirming the platform's impact and credibility.

Overall, Andor Health's profitability, rapid growth, and reputation for responsible, ROI-driven AI solidify its standing as a trusted leader in virtual care collaboration.

Conclusion

The acute care sector continues to grapple with challenges such as limited access to specialist care, inefficiencies in patient flow and resource management, and fragmented communication among healthcare teams. Andor Health bridges these gaps through its innovative artificial intelligence-driven virtual care collaboration platform, which delivers an AI software infrastructure for healthcare for an exceptional price-to-performance value. By streamlining clinical operations, enhancing coordination, and ensuring timely, high-quality interventions, the platform drives substantial cost savings and operational efficiencies. This leads to improved patient satisfaction and provider effectiveness. Andor Health's success is a testament to its strong brand equity, bolstered by positive customer feedback, industry recognition, strategic partnerships, and peer-reviewed validation of outcomes.

With its strong overall performance, Andor Health earns Frost & Sullivan's 2025 North American Transformational Innovation Leadership Recognition in the acute care virtual health industry.

What You Need to Know about the Transformational Innovation Leadership Recognition

Frost & Sullivan's Transformational Innovation Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Transformational Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Transformational Innovation

Market Disruption: Innovative new solutions have a genuine potential to disrupt the market, render current solutions obsolete, and shake up competition

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Market Gaps: Solution satisfies the needs and opportunities that exist between customers' desired outcomes and their current market solutions

Leadership Focus: Companies' focuses are on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Passionate Persistence: Tenacity enables the pursuit and achievement of seemingly insurmountable industry obstacles

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT			
STEP		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

