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# **NEW PRODUCT INNOVATOR**

*Pioneering New Features and Functionality to  
Exceed Customer Expectations*

*RECOGNIZED FOR BEST PRACTICES IN THE  
NORTH AMERICAN AI-BASED  
AMBULATORY DOCUMENTATION INDUSTRY*

F R O S T & S U L L I V A N

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## 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. athenahealth excels in many of the criteria in the AI-based ambulatory documentation space.

RECOGNITION CRITERIA	
<i>New Product Attributes</i>	<i>Customer Impact</i>
Match to Needs	Price/Performance Value
Reliability	Customer Purchase Experience
Quality	Customer Ownership Experience
Positioning	Customer Service Experience
Design	Brand Equity

### The Transformation of the AI-Based Ambulatory Documentation Industry

The artificial intelligence (AI)-powered ambulatory documentation industry is undergoing transformative growth as healthcare providers seek scalable solutions to alleviate the persistent administrative burden on clinicians. Increasing complexity in outpatient care—driven by diverse specialties, variable encounter types, and evolving regulatory standards—demands documentation tools that are both flexible and deeply integrated. Ambient AI solutions have emerged as frontrunners by leveraging advanced natural language processing (NLP) to convert patient-provider conversations into structured clinical notes in real time, dramatically reducing manual data entry and cognitive load. These platforms prioritize configurability, enabling clinicians to customize note structure, select among multiple NLP engines, and adapt documentation protocols without interrupting clinical workflows. Multilingual support, error detection, and real-time confidence scoring enhance transcription accuracy and usability across diverse user profiles and care settings. Additionally, seamless integration with electronic health records (EHR), billing, and practice management systems is critical to ensure compliance, minimize duplication, and optimize revenue cycle management.

A hallmark of leading solutions is their commitment to iterative, clinician-centered product development. By embedding continuous user feedback loops and performance telemetry, these platforms refine AI-driven outputs—ranging from history of present illness to diagnosis coding and order generation—aligning technology with the nuanced demands of real-world practice.

In this dynamic and complex landscape, athenahealth stands out by offering Ambient Notes, a modular, fully embedded ambient AI documentation solution within its cloud-native athenaOne platform. athenahealth combines multi-model NLP flexibility, deep clinical configurability, and a vertically integrated service model to deliver a seamless, high-accuracy, and customizable workflow. This approach empowers providers across specialties to transform ambulatory documentation from a time-consuming obligation into a streamlined, AI-augmented process that enhances both clinical quality and operational outcomes.

### Integrated Operating Layer

athenahealth addresses a critical point of failure in modern ambulatory care: the overwhelming burden of clinical documentation, which continues to drive physician burnout, workflow fragmentation, and attrition across outpatient practices.<sup>1</sup> The company's Ambient Notes solution leverages ambient AI to transform natural patient-provider conversations into structured clinical notes, eliminating the need for

*“As generative AI and ambient intelligence become foundational to next-generation care delivery, athenahealth positions Ambient Notes as more than a productivity solution.”*

**-Ana Victoria Dominguez  
Best Practices Research Analyst**

manual documentation. Unlike generic scribing tools or transcription overlays, Ambient Notes operates within athenahealth's unified cloud-native platform, athenaOne. This tight integration across the EHR, practice management, and revenue cycle layers ensures seamless adoption across high-variability ambulatory environments, where care complexity and documentation standards differ dramatically by specialty, encounter type, and physician preference.<sup>2</sup>

Ambient Notes addresses these divergences with a model-agnostic architecture that allows clinicians to choose from multiple NLP engines and switch between them monthly, ensuring alignment with individual documentation styles and output formats without disrupting the underlying clinical workflow.<sup>3</sup>

A vertically integrated product development model that centers clinical feedback at every stage—from initial design research and alpha prototyping to beta deployment and production—reinforces the system's configurability. Physicians participate directly in testing output accuracy, shaping note structure preferences, and optimizing ambient interaction protocols. The documentation generated by Ambient Notes includes structured sections such as history of present illness, review of systems, physical exam, assessment and plan, and ICD-10-mapped diagnoses. The platform identifies the level of diagnostic specificity and prompts clinicians to refine it, streamlining downstream coding accuracy and improving claims readiness. This same infrastructure will extend to automatically generating draft prescriptions, lab orders, and clinical nudges (e.g., recommending vaccine counseling when relevant terms appear in the transcript). These enhancements, developed with input from practicing physicians, transform Ambient Notes from a documentation tool into a foundational clinical support layer that anticipates provider needs in real time.

<sup>1</sup> <https://www.businesswire.com/news/home/20241030050913/en/athenahealth-Launches-AI-Powered-Ambient-Notes-a-Unique-Fully-Integrated-Documentation-Solution-Designed-for-Ambulatory-Practices> Accessed August 2025

<sup>2</sup> <https://www.athenahealth.com/solutions/electronic-health-records> Accessed August 2025

<sup>3</sup> <https://www.athenahealth.com/solutions/ambient-notes> Accessed August 2025

Ambient Notes also capitalizes on athenahealth's robust data lake, which aggregates patient-level data across its 170,000+ clinician network.<sup>4</sup> The solution uses this longitudinal data to deliver point-of-care insights, including pre-visit chart summarization, suspected diagnoses from out-of-network hospitalizations, and AI-generated alerts for abnormal labs or new medications added since the last encounter. This depth of real-time patient intelligence—summarized and visualized through the athenaOne mobile app—reduces cognitive load, eliminates manual chart review, and ensures that physicians enter every visit with full situational awareness. Importantly, all AI-generated content adheres to clinician oversight requirements. Furthermore, the provider reviews and signs off on each note, order, or recommendation, preserving medical-legal accountability while accelerating documentation speed.

To maintain transcription fidelity across diverse user profiles and accents, the system supports multilingual input and includes error flags for audio anomalies or low-confidence summaries. These safeguards—paired with regular performance audits and iterative model tuning—ensure consistent, high-accuracy output even in challenging recording environments.

The system's low infrastructure requirements further accelerate adoption. Providers only need a smartphone with the athenaOne app to activate Ambient Notes. The recording begins and ends with a single tap, and the AI-generated note appears directly in the EHR. There are no external devices, third-party portals, or VPNs. This frictionless experience enables one-minute onboarding for existing athenaOne users, with a more guided pathway available for clinicians unfamiliar with conversational documentation protocols.<sup>5</sup> During initial onboarding, physicians receive tailored coaching on effective verbal cues, structured phrasing, and clarity of language—factors that significantly influence note quality and NLP performance. In cases where clinicians need refinement, athenahealth's team tracks real-time user feedback and model interactions to identify points of friction and deploy updates within days. As a result, Ambient Notes delivers sustained performance improvements across a diverse user base without requiring long-term vendor lock-in or high-cost licensing models.

This approach to ambient clinical documentation stands apart from the market. Competing vendors either operate as third-party integrations that require dual interfaces and redundant logins or offer static NLP models that underperform in specialty-specific scenarios. In contrast, athenahealth offers a single-pane experience fully embedded within its EHR, billing, and scheduling systems, with Ambient Notes output automatically synchronized into the patient's medical record. This direct pipeline minimizes error propagation, eliminates the risk of copy-paste discrepancies, and ensures compliance with regulatory documentation standards. Furthermore, athenahealth's multi-model framework allows rapid onboarding of new AI partners as technologies evolve, ensuring that clinicians always have access to the most performant transcription engines without incurring additional migration costs or retraining time. Ambient Notes, therefore, does not serve as a bolt-on feature but rather as an integrated operating layer that combines ambient listening, clinical summarization, AI-supported diagnosis, and chart automation—designed specifically for ambulatory use cases.

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<sup>4</sup> <https://www.medicaleconomics.com/view/athenahealth-bridge-join-on-ai-clinical-documentation-venture> Accessed August 2025

<sup>5</sup> <https://www.athenahealth.com/solutions/ambient-notes> Accessed August 2025

As generative AI and ambient intelligence become foundational to next-generation care delivery, athenahealth positions Ambient Notes as more than a productivity solution. It functions as a core enabler of clinical quality, safety, and patient-centered care. The system facilitates richer in-room conversations by removing screens and keyboards from the physician's line of sight, enabling more eye contact and real-time empathy. Patients report feeling heard and present, and physicians describe the restoration of work-life balance (e.g., completing all clinical notes before leaving the office for the day) as transformative. This alignment between technical innovation and human impact is not coincidental but stems from athenahealth's disciplined commitment to ambient-first design, feedback-driven development, and platform-native deployment. With Ambient Notes, athenahealth establishes a new operational standard for documentation in ambulatory care—one where efficiency, clinical intelligence, and provider experience converge in a single, mobile-native, AI-powered workflow.

### Clinical Precision, High-speed Support and In-platform Responsiveness

athenahealth delivers an ownership experience defined by control, configuration depth, and clinical return on investment. Rather than imposing a static ambient AI model or outsourcing key documentation tasks to third parties, the company architected Ambient Notes as a modular, physician-directed system embedded natively within athenaOne. Providers maintain full control over which ambient engine they use, how they structure notes, and when they implement changes—supported by a configurable backend that enables monthly model switching without requiring system resets or downtime. This modularity ensures that each user aligns the platform's capabilities with the demands of their specific workflow, encounter type, and documentation protocol.

The company embeds customer-centric principles into every layer of system operation, beginning<sup>6</sup> with technical configurability and extending to transparency in performance and output. Physicians do not rely on opaque black-box outputs or off-platform editing. Instead, they receive real-time control of their

*“Across all touchpoints, athenahealth transforms customer ownership from a license model into a performance partnership.”*

**-Pooja Suresh**  
**Research Analyst**

generated notes, with complete visibility into AI confidence scores, transcription anomalies, and diagnostic suggestion rationale. Output sections—ranging from history of present illness to ICD-10-mapped assessments—remain fully editable within the athenaOne mobile app. This design eliminates the need for rework or secondary review cycles, supporting physician trust and reinforcing a sense of co-ownership between user and

system. Because each output traces directly to the provider's spoken input and configuration preferences, the platform promotes accountability without compromising autonomy.

athenahealth further distinguishes its customer experience through clinical precision, high-speed support, and in-platform responsiveness. The Ambient Notes team proactively monitors telemetry on note completion rates, correction patterns, and clinician engagement across hundreds of unique ambulatory configurations.

<sup>6</sup> <https://www.athenahealth.com/resources/blog/ai-in-healthcare-springfield-clinic> Accessed August 2025

Based on these signals, they launch automated nudges and surface best-practice recommendations like optimizing verbal cue timing or adjusting ambient engine settings to reduce parsing errors. When physicians encounter friction, support engineers resolve issues using session-level speech logs and AI confidence metrics<sup>7</sup>, often identifying root causes and deploying updates within 24–72 hours. This level of responsiveness avoids escalation lag and maintains platform reliability across high-volume usage peaks.

Multiple client success pathways illustrate athenahealth's service agility. In a fast-growth primary care group scaling Ambient Notes to over 200 clinicians within four months, the team mapped physician speech styles to output performance and used this dataset to refine their onboarding sequence, enabling average encounter documentation time to drop below two minutes. In a large, multi-specialty orthopedic network, support engineers collaborated with internal IT and compliance leaders to configure specialty-tuned ambient prompts that triggered only during specific procedural workflows. These workflows incorporated automatic chart summarization and flagged pain score changes between visits, improving visit prep time and alignment with documentation policies. In both cases, service delivery extended beyond troubleshooting—it drove sustained, measurable clinical efficiency improvements without interrupting the daily cadence of care.

athenahealth aligns its service model with the tempo and variability of outpatient practice environments. Unlike vendors that depend on third-party field reps or generalized service desks, the company maintains a vertically integrated support structure that keeps ambient product teams, implementation specialists, and performance analysts in continuous communication. Physicians submit feedback through in-app tools that route directly to responsible teams, while account managers coordinate quarterly reviews that assess not just uptime, but user-level efficiency, satisfaction, and documentation completeness. These reviews provide a closed feedback loop, enabling targeted platform enhancements grounded in real practice data rather than theoretical workflows.

Across all touchpoints, athenahealth transforms customer ownership from a license model into a performance partnership. Providers shape, adjust, and scale their use of ambient technology as clinical and operational needs evolve without facing platform fatigue, configuration friction, or support bottlenecks. The Ambient Notes experience integrates flexibility with accountability, delivering an owned, optimized, and continuously improving workflow that elevates both patient care and physician satisfaction.

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<sup>7</sup> <https://www.athenahealth.com/resources/blog/ai-in-physician-workflows> Accessed August 2025

## Conclusion

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athenahealth has set a new standard for efficiency, accuracy, and clinician-centered design in outpatient healthcare delivery. By seamlessly integrating advanced natural language processing within its unified cloud-native electronic health record, practice management, and revenue cycle platform, athenahealth empowers providers to significantly reduce administrative burdens while improving clinical quality and patient engagement. Its modular and highly configurable system, combined with a vertically integrated support model, ensures adaptability across diverse medical specialties and variable clinical workflows. With its strong overall performance, athenahealth earns Frost & Sullivan's 2025 North American New Product Innovation Recognition in the AI-based ambulatory documentation industry.



## What You Need to Know about the New Product Innovation Recognition

Frost & Sullivan's New Product Innovation 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 New Product Innovation Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### New Product Attributes

**Match to Needs:** Customer needs directly influence and inspire the product portfolio's design and positioning

**Reliability:** Product consistently meets or exceeds customer performance expectations

**Quality:** Product offers best-in-class quality with a full complement of features and functionality

**Positioning:** Product serves a unique, unmet need that competitors cannot easily replicate

**Design:** Product features an innovative design that enhances both visual appeal and ease of use

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

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

## About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

# The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

**Key Impacts:**

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



# The Innovation Generator™

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:***

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

