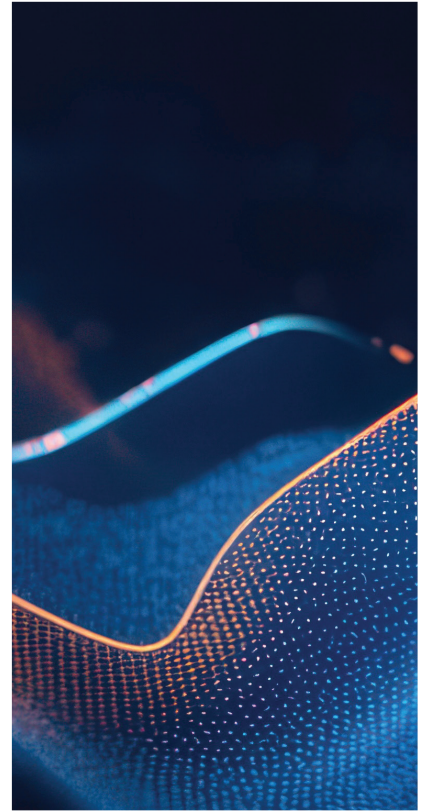
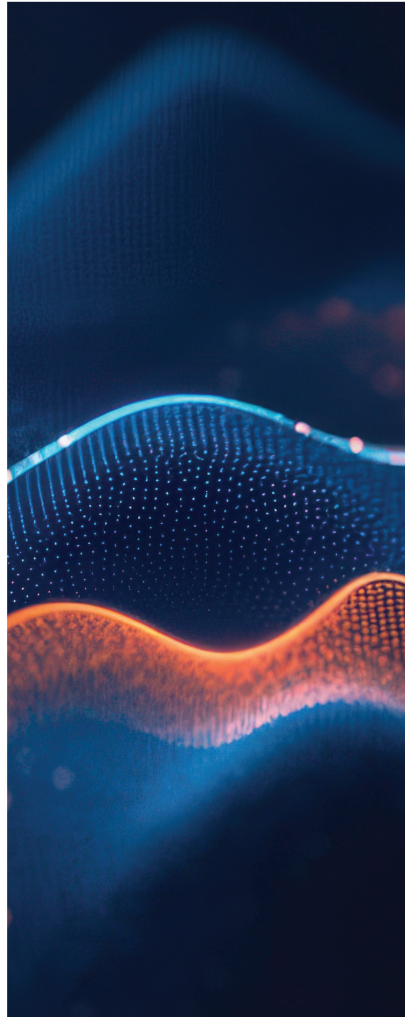


FROST & SULLIVAN
BEST PRACTICES



2026

UNITED STATES TECHNOLOGY-ENABLED
CARE PLATFORMS

**TECHNOLOGY INNOVATION
LEADERSHIP**

amwell 

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. Amwell® excels in many of the criteria in the technology-enabled care platforms space.

RECOGNITION CRITERIA	
Technology Leverage	Customer Impact
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

The Transformation of Virtual Delivery

The digital healthcare delivery landscape has evolved from early telehealth solutions into an integrated ecosystem supporting virtual care models. The COVID-19 pandemic accelerated telemedicine adoption,

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- Sagar Mukhekar
Industry Analyst

and the industry has progressed beyond simple video consultations. Stakeholders now expect digital care platforms that unify capabilities, enable anytime-anywhere access, and connect healthcare journeys seamlessly.

Traditional digital care models operate in silos, resulting in fragmented point solutions, disjointed experiences, operational complexity, and administrative burden. Today, health plans and healthcare organizations require integrated platforms that coordinate member engagement and clinical delivery within a unified framework. Amwell addresses

this shift through the Amwell Platform—a connected, flexible, technology-enabled care platform that strengthens member relationships, simplifies operations, and enables continuous innovation. The platform blends technology, services, and clinical intelligence to deliver orchestrated, personalized interactions across the continuum rather than isolated virtual encounters.

Purpose-Built Architecture for Next-Generation Care

The Amwell Platform addresses one of healthcare's most persistent challenges: integration. Unlike aggregating separate applications, the platform brings together Amwell Medical Group® programs, integrated partner programs, and customer-preferred programs within a unified experience. Spanning virtual primary care, urgent care, behavioral health, chronic condition management, and specialty care, the platform serves as the connective foundation that unifies member interactions, clinician workflows, partner ecosystems, and data exchange across programs. The result is a more coordinated, personalized healthcare experience that simplifies access, strengthens engagement, and helps health plans reduce fragmentation across the care journey.

By leveraging advanced interoperability frameworks, the platform ensures secure exchange of member data and clinical insights across programs and providers, enabling care teams to manage longitudinal journeys, reduce redundancy, and optimize coordination. The open, modular ecosystem supports programs across behavioral health, women's health, diabetes, hypertension, and musculoskeletal care while preserving cohesion and experience within the health plan's brand.

This approach transforms the digital care platform into an operating layer that orchestrates healthcare complexity into a frictionless, navigable experience for all stakeholders.

Demonstrated Customer Impact and Measurable Outcomes

The value of the Amwell Platform is evident in measurable clinical and business outcomes for healthcare organizations and their populations. Amwell's enterprise impact is demonstrated through its support of the Defense Health Agency and Military Health System, helping enable connected virtual and in-person care experiences for approximately 9.6 million beneficiaries. The same platform foundation supports care coordination, program engagement, access expansion, and connected care delivery across complex healthcare environments.

A landmark National Institute of Mental Health (NIMH)-funded iAIM study, published in *Nature Human Behaviour* and among the largest studies of its kind, followed more than 6,200 students across 26 U.S. colleges and universities over two years. The study found that students offered SilverCloud® by Amwell® engaged in mental healthcare at more than double the rate of traditional care, experienced lower rates of mental health disorders, and generated an estimated \$1.18 million in avoided costs for the study population. This modeled estimate reflects avoided costs associated with treatment, productivity loss, disability, and other direct and indirect impacts and was not a direct finding of the iAIM study.

Combining reliability, flexibility, and clinically integrated workflows, the Amwell Platform serves as a strategic enabler for population health, while supporting more equitable, sustainable healthcare delivery.

Distinct Differentiation in Orchestration and Navigation

In a marketplace crowded with point solutions that promise integration but rarely deliver, Amwell distinguishes itself through true orchestration. Rather than functioning as a marketplace of disconnected tools, the platform provides a centrally managed coordination layer that delivers a single, coherent care journey across conditions and access points. Customized intake and smart navigation guide

members to appropriate programs, while clinicians maintain oversight through a 360-degree view of each care plan.

A key enabler of this model is Amwell Medical Group, a multidisciplinary national medical group of

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approximately 2,200 clinicians supporting urgent care, virtual primary care, therapy, psychiatry, nutrition, lactation, and other care needs across all 50 states. By combining broad clinical coverage with a connected digital experience, Amwell helps members access the right care while supporting continuity across programs and care settings. Reflecting the strength of that experience, Amwell achieved a member Net

Promoter Score® (NPS®) of 81 in 2025 across all customers on the Amwell Platform following visits with Amwell Medical Group clinicians.

The same commitment to coordination and quality extends across the broader ecosystem. Every third-party solution integrated into the platform undergoes a four-dimensional validation process covering clinical effectiveness, business sustainability, technical scalability, and enterprise-level security compliance. This guarantees each addition enhances user experience, trust, and regulatory integrity.

The outcome is a digital care environment that simplifies complex workflows, improves operational efficiency for health plans, strengthens technology cohesion for healthcare organizations, and delivers a streamlined patient and member experience.

Ready for the Future: AI and Optimization

The Amwell Platform is designed for continual innovation, embedding capabilities that will define the next era of digital health engagement. AI plays a pivotal role, with Amwell prioritizing practical applications that automate administrative burdens, identify care needs, and enable proactive outreach while preserving human clinical oversight.

Amwell is advancing data-driven analytics and smart escalation models to support care delivery that is proactive, personalized, and connected. Combined with deep interoperability and scalable architecture, these innovations position the platform as core infrastructure for digital care and a foundation for sustainable healthcare transformation.

Conclusion

Backed by 20 years of technology-enabled care innovation, more than 90 million covered lives, over 38.7 million virtual visits, approximately 50 health plan partners, and enterprise customers such as the Defense Health Agency serving approximately 9.6. million beneficiaries, Amwell has demonstrated the scale, trust, and infrastructure required to support the next generation of connected healthcare.

Amwell addresses healthcare's most critical digital challenge: fragmentation. Through the Amwell Platform, the company delivers an open, orchestrated, and unified ecosystem that connects health plans, clinicians, and members within a seamless care experience. Its ability to drive measurable ROI, improve access, and integrate validated partners reinforces its position as a transformative force in modern healthcare.

Amwell earns Frost & Sullivan's 2026 United States Technology Innovation Leadership Recognition for its strong overall performance in the technology-enabled care platforms segment.

What You Need to Know about Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Leadership Recognition is a top honor and recognizes the company that has developed the most effective underlying technology to drive exceptional product performance and customer success.

Best Practices Recognition Analysis

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

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, 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: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

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

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 fueled 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)

