Guidehouse®

2026

HEALTHCARE AI TRENDS REPORT

Hospitals and health systems are increasingly interested in adopting AI at scale, but barriers stand in the way.

"Execution paralysis" is plaguing America's healthcare organizations. A lack of organizational readiness and internal alignment in deploying AI is stifling implementation and threatening return on investment (ROI), according to a Guidehouse analysis of a HIMSS survey. While many healthcare organizations have already begun investing in AI, it's not uncommon for leaders to cite obstacles in identifying use cases, designing processes, and implementing the technology effectively. Executive sentiment can be a boon or a drag—with interest and commitment to AI differing greatly based on role and level.

This report, based on a survey of HIMSS members, explores how 50 provider decision-makers are thinking through their AI strategies, from integrating current technologies to implementing solutions and meeting compliance requirements. Our findings reveal leaders' priorities for AI usage and investments, readiness to operationalize AI strategies, and current cybersecurity and regulatory status for AI usage.

Executive Summary

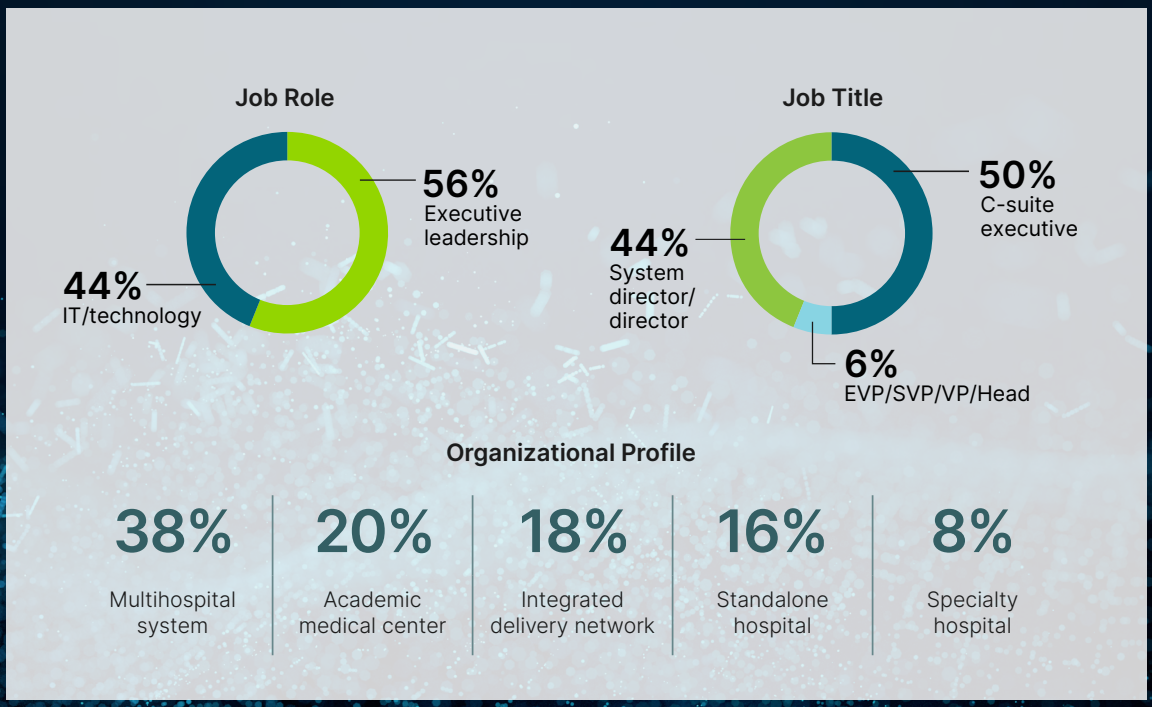
Health systems are increasingly investing in AI capabilities, with 78% of those surveyed by HIMSS sharing that their organizations are currently engaged in AI projects. Respondents, surveyed by HIMSS in the summer of 2025, included 50 qualified healthcare leaders who addressed their organizations' perspectives on adopting and implementing AI and other technology strategies.

The vast majority of leaders from these health systems reported they are already leveraging technology to address care delivery and coordination challenges. This includes patient engagement tools, telehealth and virtual care platforms, electronic health record enhancements, clinical decision support tools, and revenue cycle, where AI is already helping health systems reduce and resolve costly claims denials. Not surprisingly, adoption is higher within larger health systems and hospitals than smaller organizations.

While there may be interest in investing in AI, leaders acknowledge being held back by data quality, standardization, availability, and governance issues. Notably, only 52% of those surveyed felt operationally ready to deploy AI solutions. That doesn't mean it won't happen, but executives are thinking strategically about how they can facilitate a holistic approach that avoids disruption to current operations and addresses cybersecurity and compliance concerns. Protecting personal health information is, of course, top of mind, along with abiding by government regulations.

Our findings demonstrate that, without the proper infrastructure, processes, and user training, leaders may find it challenging to implement AI and achieve their expected ROI. This report highlights leaders' concerns and priorities, recommends best practices for AI implementation, and offers a wider perspective on how leaders should envision the AI planning process to achieve strategic goals.

Health System Survey Respondents



The state of AI integration

While widespread use of AI among consumers is relatively new, hospitals and health systems have been exploring the technology for some time now. Today, C-suite leaders are disproportionately interested in leveraging AI for clinical and administrative workflows, as compared to non-executive IT leaders (64% versus 20%). Stakeholders, from the board of directors to clinicians to frontline administrative staff—and everyone in between—must come together to discuss how work is done today, determine the best initial uses for AI in these workflows, and discuss what data is needed for models to complete relevant tasks. Without that collaborative process, the design and implementation of AI solutions can lack a holistic perspective, rely on incomplete data, and be less useful than anticipated.

Pain Points

Pushing past execution paralysis

Healthcare organizations are traditionally cautious in adopting new technologies, in part because of the dire consequences of errors in care delivery—a simple error could lead to irreparable patient harm. In healthcare, technology has a higher burden of proof to show it works effectively, and it must meet strict privacy requirements. Leaders are also under significant pressure to show the financial outlays for innovative tools. Investments must show their value, especially as performance-based reimbursement continues to expand.

For these reasons, healthcare leaders may invest more conservatively in new technologies, leading to "execution paralysis." AI solutions add a new level of complexity as they can operate in a black box—platforms are not always able to explain how they arrived at outputs. AI has unprecedented promise, but it's still in the early stages of showing ROI—understanding how best to incorporate it still feels like a mystery to many. This is why many healthcare organizations are adopting point solutions for AI for complex processes like revenue cycle, rather than investing in complex clinical use cases or end-to-end process automation.

KEY TAKEAWAYS

Like most software, AI solutions aren't plug and play—they require thoughtful configuration, alignment with processes, and training of staff.

Deploy AI use inventories: Taking an inventory can help the health system maintain a responsible AI (RAI) governance program. If AI is deployed in a scattershot or unorganized approach, agents may duplicate efforts and lack tracking mechanisms.

Standardize key performance metrics to measure success: The adage "you can't manage what you can't measure" rings true when it comes to AI. Metrics can be tweaked, but knowing the initial results while designing and implementing the AI projects can help with prioritization and ongoing improvement.

Guidehouse guided Garnet Health through a $91M turnaround that included the redesign and automation of Garnet Health's revenue cycle processes to improve revenue metrics, reduce costs, and shift staff to higher-value responsibilities. Learn more

In the next two years, healthcare organizations plan to:

58%	46%	44%	36%
Implement AI-driven workflow automation or productivity tools	Deploy wearables and home-based diagnostic tools	Use care coordination or case management platforms	Invest in remote patient monitoring tools

Optimize existing technologies for a strong ROI

While AI is increasingly important, healthcare organizations have already made major investments in technology over the past several years—and leaders who answered our survey told us they're not ready to throw that money away. All healthcare organizations exploring AI adoption come into the process with an existing tech stack. These technologies cannot and should not be sidelined or ignored, and the AI implementation process offers a good time to review the tech stack holistically.

Guidehouse's Tech Guide emphasizes leveraging core tech to turn efficiency into value. AI does not have to be an all-or-nothing approach—in fact, a rip-and-replace is rarely the most cost-efficient choice. As healthcare systems begin moving towards and adding agentic AI solutions and models, they will need to take a holistic approach that incorporates existing technologies. This allows LLMs to incorporate data from current platforms, while helping users, including clinicians, understand how these updated solutions can improve goals and patient outcomes.

Top technology strategies and investments to reduce costs and improve access

66% Optimize the value and utilization of existing technologies

42% Automate clinical and administrative workflows with AI

38% Implement digital front door solutions

30% Strengthen expense management through technology-driven insights and controls

KEY TAKEAWAYS

IT leaders should assess whether AI models will work with existing technologies, and confirm that those systems are still needed. They should continue providing value, but to do so, they need to be considered as part of this bigger picture:

- **Enterprise strategy:** Adopting a broad, enterprise-wide AI implementation strategy can help organizations understand where AI solutions can provide the greatest ROI. What will AI add that current technology cannot do or does too slowly?
- **Technology ecosystem:** Evaluate your health system's software portfolios to eliminate outdated and redundant applications. This frees up labor and budgetary resources for other projects, including AI, and presents an opportunity to confirm that new AI solutions will work with existing technology and incorporate their data.
- **Communicate the strategy:** Clinicians are already overworked, and ineffective technology can add burden. After an organization creates its AI strategy, it's vital to communicate not only how it works, but the vision for what it should accomplish and how it will help users.

Guidehouse helped a leading regional health system reenvision its IT strategy and modernize its electronic health record (EHR) and enterprise resource planning (ERP) systems. Our solution helped leaders improve interoperability and strengthen staff productivity. Learn more

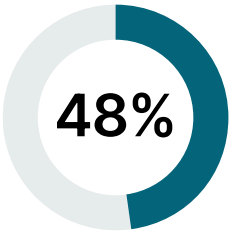
Opportunities for growth

Overcome barriers to AI implentation

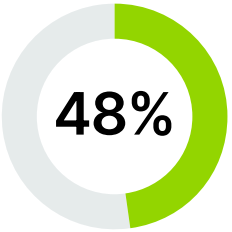
There are always challenges when implementing AI or any technology, and the challenges will be different for each organization. General themes, though, persist. Because AI implementation rarely replaces an entire tech stack, a solid strategy must consider the limitations and compatibility of existing technologies that will continue to be used. Leaders also must consider government regulations, cybersecurity risks, and data privacy concerns.

In all industries, it's vital to keep data protected, but in healthcare even more so. Personal health information is highly sensitive. Our survey shows health system executives are understandably concerned about this risk when considering strategies for adding AI. Leaders are also battling budgetary issues and competing priorities, while trying to identify the best experts to define and help carry out a comprehensive AI strategy.

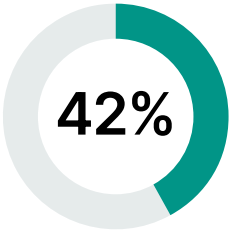
Top organizational barriers to implementing AI for automating repetitive tasks and enhancing operational efficiency



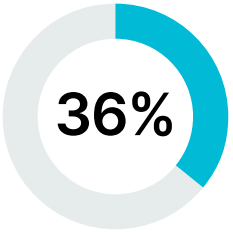
Cybersecurity and data privacy concerns



Limited budget or competing financial priorities



Concerns about data quality, standardization, availability, or governance



Lack of internal expertise, leadership alignment, or strategic vision to support AI deployment or scaling

KEY TAKEAWAYS

A thorough change management process allows leaders to consider where obstacles may exist and identify the best performance metrics to assess success. Determining which projects to begin with may be half the battle.

Include all key stakeholders: Technology is not only the remit of the IT department. To be fully effective, decision-making and implementation should include those using and contributing to the data, including billing, finance, and clinical roles.

Bring in outside expertise: External expertise can mean the difference between an organization spending significant time on a project that may not meet its goals versus moving quickly but thoroughly on a workflow that not only meets but exceeds those goals.

Review and rethink budgets: Budgets can be tricky, especially if an organization is not considering potential cost savings from AI. Those savings can come from recouped payments, labor diverted to other projects, or refined processes.

Identify initial projects: Consider starting with easier wins that boost savings while reducing administrative time and hassles. More complex projects, like clinical use cases, can wait until you've built up competency.

Engage payers: AI and data can enhance payer-provider collaboration and improve this often-adversarial relationship. Seek out preferred partnership models that have mutual benefit—higher returns and limits on overutilization, with data sharing that can prevent denials.

Guidehouse helped a major health system use conversational AI and intelligent automation to decrease payer denials by millions of dollars. The strategy and technologies also returned more than 2,000 hours of time to employees for other value-added tasks. Learn more

Conclusion

About three-quarters of health systems are already investing in artificial intelligence—but with no proven roadmap to implementation, the path to ROI can feel murky. Leaders should internalize these key points:

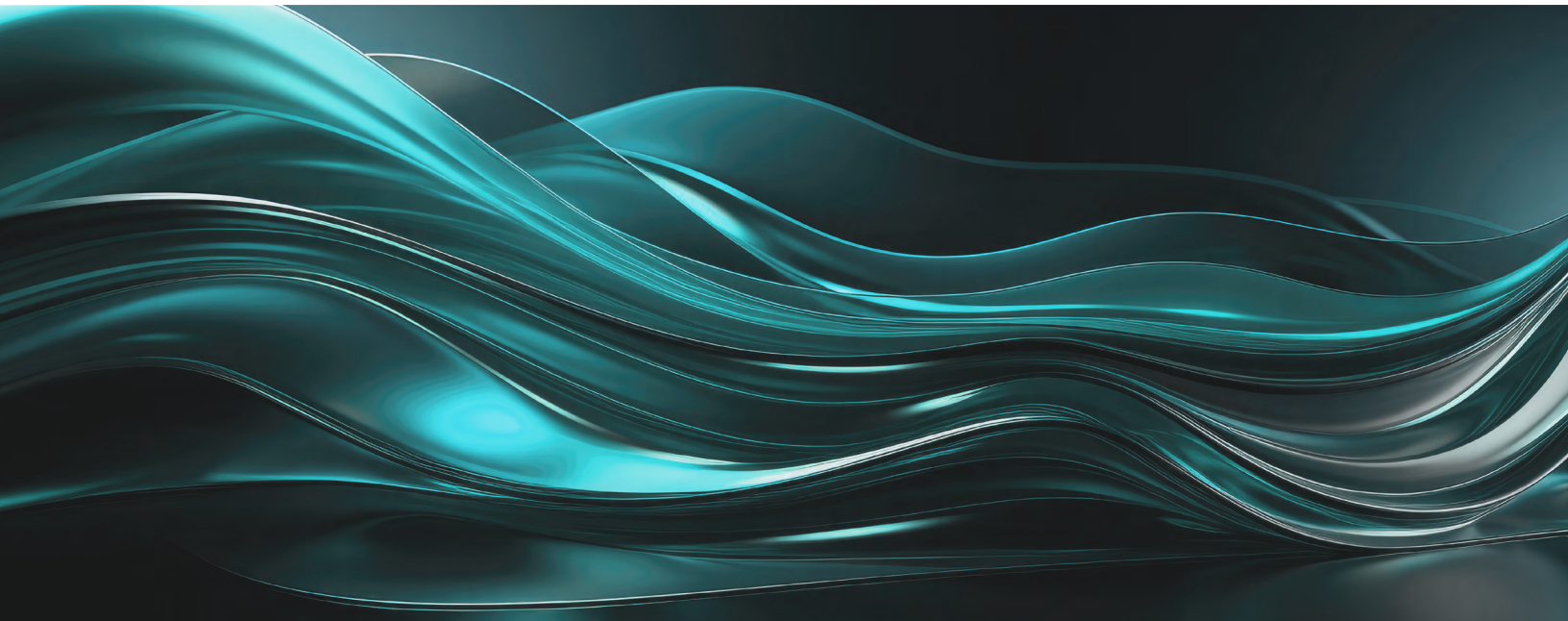
- **Take a holistic approach:** Combining strategy, clinical operations, and revenue cycle operations as part of AI strategic planning and execution is critical to success.
- **Align stakeholders:** Successful AI implementation requires input from stakeholders across your enterprise, including those who produce data, maintain it, and use it.
- **Document everything:** Develop a tracking system to identify and monitor all usage now and going forward. Governance and RAI programs rely on this knowledge.
- **Measure success:** Defining and tracking meaningful key performance metrics will guide leadership on how well the AI strategy is working. Develop KPIs early and stay on top of them.

Health system resources can be scarce, but leaders who don't think intentionally about their AI strategy now may fall behind competitors in the not-so-distant future. With planning and forethought, patients, providers, and staff can all benefit from adding AI carefully and thoughtfully into the organizational processes.

About Guidehouse

Guidehouse is a global AI-led professional services firm delivering advisory, technology, and managed services to the commercial and government sectors. With an integrated business technology approach, Guidehouse drives efficiency and resilience in the healthcare, financial services, energy, infrastructure, and national security markets. Built to help clients across industries outwit complexity, the firm brings together approximately 18,000 professionals to achieve lasting impact and shape a meaningful future.

Learn more at guidehouse.com



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