

CASE STUDY

From Digital Ordering to an Intelligent Platform

CWH Advisors helped a leading healthcare technology company define a market-validated AI and automation strategy to expand platform capabilities, strengthen enterprise adoption, and support sustainable growth.



CLIENT SNAPSHOT



CLIENT TYPE

National Healthcare Technology Company



INDUSTRY

Healthcare Technology



ENGAGEMENT FOCUS

AI, Automation & Platform Expansion



ABOUT THE CLIENT

A leading digital ordering platform connecting hundreds of thousands of healthcare providers with thousands of medical equipment suppliers nationwide.

THE BUSINESS CHALLENGE

Leadership sought to understand how AI and automation could expand the platform beyond order intake and increase its strategic value to enterprise customers.

- Needed greater visibility into evolving AI and automation market dynamics.
- Faced product gaps across downstream supplier workflows.
- Sought to understand customer buying priorities and adoption drivers.
- Faced increasing pressure to establish durable differentiation as AI-enabled competition increased.
- Required a scalable packaging and monetization approach.

OUR APPROACH



ASSESS

Evaluated the AI and automation landscape, customer buying dynamics, and competitive environment.



DISCOVER

Engaged suppliers and AI vendors to understand workflow realities, economics, and adoption priorities.



DEFINE

Developed a partnership-based product expansion strategy focused on durable differentiation and growth.



DESIGN

Created a phased roadmap, packaging architecture, and measurable value framework to support enterprise growth.

OUTCOMES & VALUE DELIVERED



MARKET CLARITY

Greater visibility into AI, automation, and competitive dynamics shaping enterprise adoption.



EXPANSION STRATEGY

A market-validated framework for expanding platform capabilities across high-value workflows.



COMMERCIAL MODEL

A tiered packaging and monetization architecture designed to support enterprise growth.



STRATEGIC ROADMAP

Clear priorities, investment implications, and a phased path for platform expansion.



WHY IT MATTERS

Healthcare technology companies must determine where AI and automation can create meaningful customer value while strengthening their broader platform strategy. Our approach helps leaders translate emerging technology and market opportunities into differentiated, scalable growth strategies.



FACING A SIMILAR CHALLENGE?

Let's connect to discuss how CWH Advisors can help turn emerging technology into actionable growth strategies.



cwhadvisors.com



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