Clinical and Care Management (CCM) Business Process Services (BPS) Service Provider Compendium 2019

Healthcare & Life Sciences Business Process Services (HLS BPS) Market Report – December 2019: Complimentary Abstract / Table of Contents

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  – Healthcare & Life Sciences Business Process Services (HLS BPS)
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- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Overview and abbreviated summary of key messages

This report uses Everest Group's proprietary PEAK Matrix™ to assess and rate service providers on various dimensions of their capabilities. It also includes market share analysis of service providers and Everest Group's remarks on service providers highlighting their key strengths and development areas.

Some of the findings in this report, among others, are:

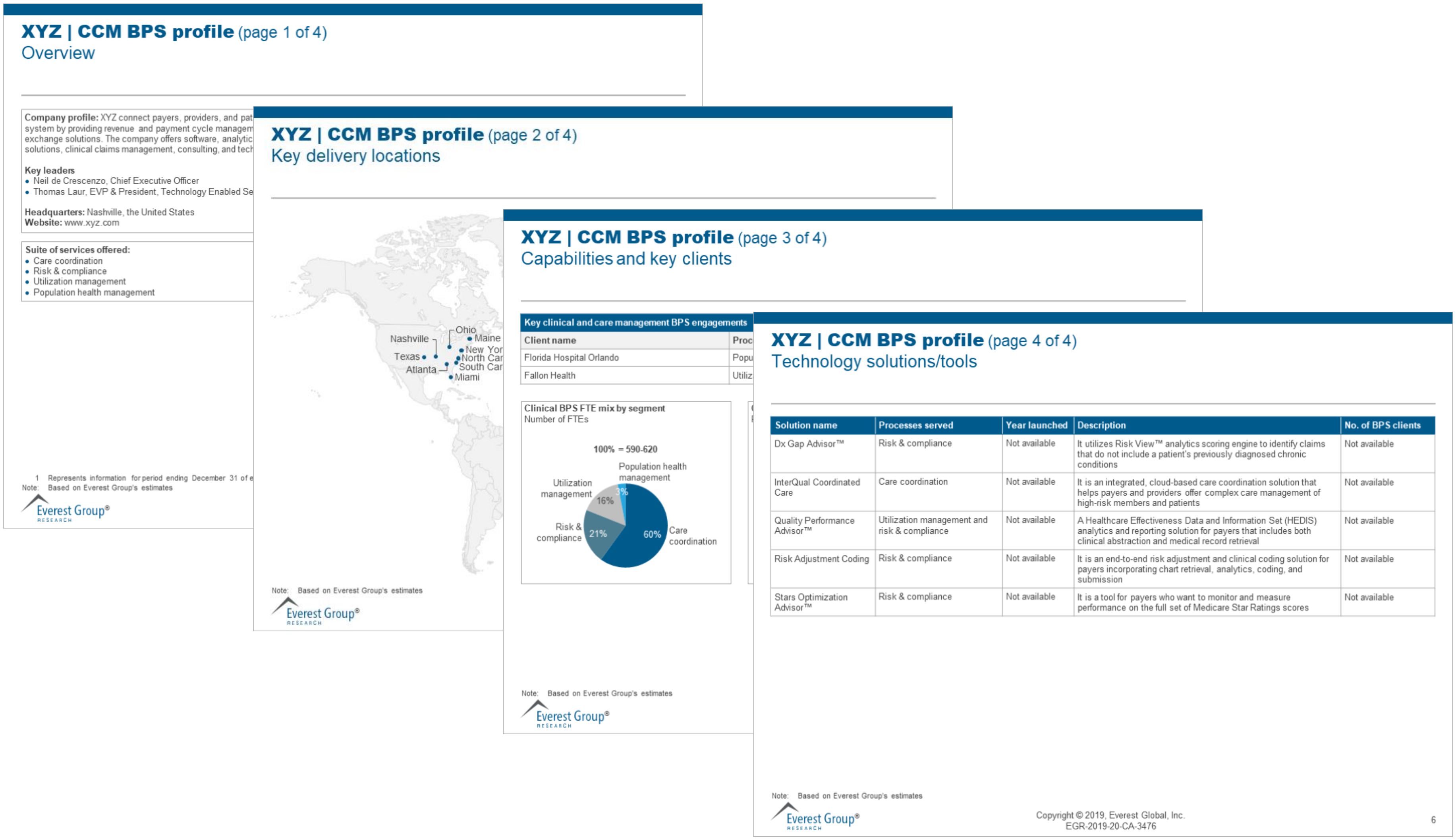
Everest Group PEAK Matrix for CCM BPS

- Everest Group classified 16 CCM BPS service providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework to assess the absolute market success and overall capability of service providers
- Leaders: There are three service providers in the Leaders category – Accenture, Cognizant, and EXL
- Major Contenders: The Major Contenders category has nine service providers – CareCentrix, Change Healthcare, Conduent, DXC Technology, eQHealth Solutions, HGS, Magellan Health, Shearwater Health, and WNS
- Aspirants: Accolade, Health Dialog, Kepro, and Visionary RCM are Aspirants on the PEAK Matrix for CCM BPS

Key insights on CCM BPS market shares

- The top five service providers – Magellan Health, Cognizant, Conduent, CareCentrix, and WNS – account for more than 50% of the revenue of the CCM BPS market
- EXL, HGS, and WNS were the highest contributors to the overall CCM BPS market growth, accounting for more than 60% of the market growth
- Cognizant, Change Healthcare, EXL, and Shearwater Health accounted for almost 65% of all the clients
- Cognizant, EXL, HGS, and Shearwater Health accounted for most of the new client logos added
- Accenture, Cognizant, EXL, Magellan Health, and Shearwater Health have a dominant presence across most of the CCM BPS processes

This study offers four distinct chapters providing a deep dive into key aspects of CCM BPS market; below are the charts to illustrate the depth of the report



Solution name	Processes served	Year launched	Description	No. of BPS clients
Dx Gap Advisor™	Risk & compliance	Not available	It utilizes Risk View™ analytics scoring engine to identify claims that do not include a patient's previously diagnosed chronic conditions	Not available
InterQual Coordinated Care	Care coordination	Not available	It is an integrated, cloud-based care coordination solution that helps payers and providers offer complex care management of high-risk members and patients	Not available
Quality Performance Advisor™	Utilization management and risk & compliance	Not available	A Healthcare Effectiveness Data and Information Set (HEDIS) analytics and reporting solution for payers that includes both clinical abstraction and medical record retrieval	Not available
Risk Adjustment Coding	Risk & compliance	Not available	It is an end-to-end risk adjustment and clinical coding solution for payers incorporating chart retrieval, analytics, coding, and submission	Not available
Stars Optimization Advisor™	Risk & compliance	Not available	It is a tool for payers who want to monitor and measure performance on the full set of Medicare Star Ratings scores	Not available

Note: Based on Everest Group's estimates

Research calendar – Healthcare and Life Sciences BPS

Published | Planned | Current release

Flagship HLS BPS reports	Release date
Healthcare Report Card 2018 – Outlook for 2019, and Enterprise Initiatives and Service Provider Performance in 2018	March 2019
Life Sciences Report Card 2018 – Outlook for 2019, and Enterprise Initiatives and Service Provider Performance in 2018	March 2019
Healthcare Payer BPO PEAK Matrix™ with Service Provider Landscape – 2019	April 2019
Healthcare Payer BPS Service Provider Compendium	June 2019
Revenue Cycle Management (RCM) Business Process Services PEAK Matrix™ Assessment 2019	June 2019
Revenue Cycle Management (RCM) Business Process Services (BPS) Service Provider Profile Compendium 2019	September 2019
Clinical and Care Management (CCM) BPS Services PEAK Matrix™ Assessment 2019	September 2019
Clinical and Care Management (CCM) Business Process Services (BPS) Service Provider Compendium 2019	**December 2019**
CCM Annual Report	Q1 2020
Makings of a Successful Sourcing Relationship – Deal Trends in RCM	Q1 2020
Comprehending the Buyer's Sourcing Mindset	Q2 2020

Thematic HLS BPS reports	
Innovation in Pharmacovigilance (PV): How to Spend Smarter Not Higher?	June 2017
Rising Cost of Healthcare in the United States: Can Analytics Help?	August 2017
Pharma Sales & Marketing: Old Strategies Into New Methods | Focus on Transmutation Rather Than Transformation	June 2018
The Digitalization Rhapsody: Enabling Clean Claims Through Digital Means	March 2019
The Quintessential Case for the Amazonization of the Health Plan Enrollment Process	May 2019
The Revenue Cycle Management (RCM) BPS Market: Unstoppable Juggernaut or Overhyped Fad?	September 2019
RCM 2.0 – What's Next for the BPO Industry	Q1 2020

Note: For a list of all of our published HLS BPS reports, please refer to our website page

Additional Healthcare and Life Sciences BPS research references

The following documents are recommended for additional insights into the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

1. **Clinical and Care Management (CCM) BPS Services PEAK Matrix™ Assessment 2019** (EGR-2019-20-R-3342); 2019. While clinical and care management as a segment has existed for a while now, its importance has increased exponentially post ACA. With the US already being the highest spender in the world on healthcare, ensuring care to reduce readmissions and denials of members is the need of the hour. Also, with ACA shifting the focus from volume-based care to value-based care, the healthcare stakeholders are taking proactive measures to ensure quality care at lower cost for members. This shift is supported by the seepage of consumerism in healthcare, motivating the customers or members to be more involved in their care lifecycle. All this is putting pressure on the payers as well as providers to make investments in clinical and care services and at the same time reduce their costs. With the stakeholders struggling to find the right talent, domain, and technology expertise in house, they are looking for the outsourcing route to help them in their journey.

2. **Healthcare Payer Business Process Services PEAK Matrix™ Assessment 2019** (EGR-2019-20-R-3141); 2019. With multiple M&As and partnerships being announced, healthcare payers have had a busy last couple of years. Quest for consolidation across the value chain has led payers to merge with PBMs, acquire providers, and invest in technology consortia. Additionally, entry of technology firms, such as Amazon, Apple, and Microsoft, and the rise of new-age digital health insurers further complicates the market scenario for traditional health insurers. All these, when coupled with ongoing perennial challenges related to transition to value-based care, regulations, rise of consumerism, provider consolidation, and increasing medical costs, continue to push payers to look for ways and means to not only survive in this space but also thrive. With this slew of changes, the healthcare in the United States is at an inflection point, with everything from member engagement to administrative management to care management being transformed. For payers, the path ahead lies in transforming the way they, typically, work by imbibing technology

3. **Makings of a Successful Sourcing Relationship – Deal Trends in Healthcare Payer BPS Market** (EGR-2019-20-R-3119); 2019. Healthcare payers have always been sluggish in making sweeping technology changes and this year is no different. However, the digital solutions have provided payers the perfect combination of investments and the associated ROIs. This report discusses some of the digital adoption trends by payers and their leverage of third-party service providers in doing so. In addition to leveraging digital assets, payers are also looking for support in areas beyond the traditionally-outsourced claims-associated processes. From creating meaningful member touchpoints to driving higher quality of care, several initiatives have been taken up by all classes of healthcare payers in the US. This report provides initial adoption trends around some of these services as well as matches payer types to areas of interests

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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