Healthcare Payer BPO – Service Provider Profile Compendium 2017

Healthcare & Life Sciences BPS
Market Report – April 2017 – Preview Deck

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio

- 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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*   Banking, financial services, and insurance

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Table of contents (page 1 of 2)

Table of contents (page 2 of 2)

XYZ (page 1 of 5)

Healthcare payer BPO – overview

Company profile: [redacted]

Key leaders

- [redacted]
- [redacted]
- [redacted]
- [redacted]

Headquarters: [redacted]
Website: [redacted]

	2014	2015	2016
Revenue (US$ million)	[redacted]	[redacted]	[redacted]
Number of FTEs	[redacted]	[redacted]	[redacted]
Number of clients	[redacted]	[redacted]	[redacted]

Recent acquisitions and partnerships

- [redacted]
- [redacted]
- [redacted]

Suite of services

- [redacted]
- [redacted]
- [redacted]
- [redacted]

Recent developments

- [redacted]

Source: Everest Group (2017)

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Healthcare payer BPO – key delivery locations

Healthcare payer BPO – capabilities and key clients

Key healthcare payer BPO engagements			
Client name	**Processes served**	**Region**	**Client since**
▨▨▨▨▨	▨▨▨▨▨	▨▨▨▨▨	▨▨▨▨▨
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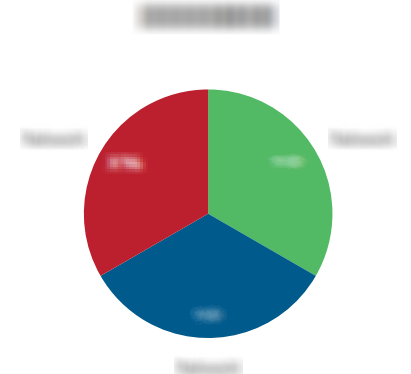**Healthcare payer BPO FTE mix by segment**
FTEs in numbers
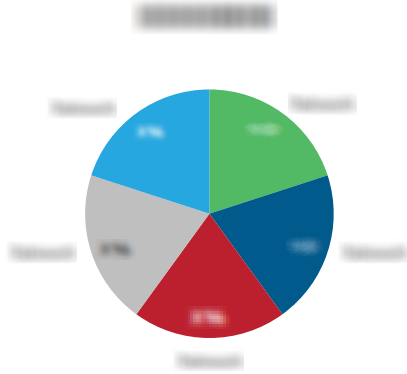
Healthcare payer BPO revenue mix by geography
Revenue in US$ million
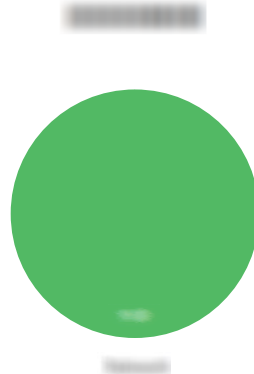
Healthcare payer BPO FTE split by delivery location
FTEs in numbers

Healthcare payer BPO number of contracts by buyer size[1]
Number of active clients

1   Buyer size is defined as large (>US$10 billion in revenue), medium (US$5-10 billion in revenue), and small (<US$5 billion in revenue)
Note: Based on contractual and operational information till June 2016
Source: Everest Group (2017)

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Healthcare payer BPO – technology solutions/tools

Solution name	Processes served	Year launched	Description		No. of BPO clients

Source: Everest Group (2017)

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Healthcare payer BPO – Everest Group assessment

Measure of capability / market success: ● Best-in-class ◗ Very high ◖ High ◐ Medium high ◑ Medium ◒ Medium low ◔ Low ○ Not mature

☐ Leaders   ☐ Major Contenders   ☐ Aspirants

Delivery capability						Market success
Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall	
◕	◕	◕	◕	◕	◕	◕

Strengths

- [illegible]
- [illegible]
- [illegible]

Areas of improvement

- [illegible]
- [illegible]
- [illegible]

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Healthcare & Life Sciences BPS research calendar

Topic	Release date
Viewpoint – Wipro Bets Big on Healthcare through the HealthPlan Services Acquisition	February 2016
Healthcare Payer BPO – Annual Report: From cost reduction to value-driven outsourcing – Moving on up	August 2016
Viewpoint – Medicare/Medicaid Version 2.0: Exploring the Next Growth Wave in the Market	November 2016
RCM Outsourcing Annual Report 2016: Growth on the Back of Declining Provider Margins	December 2016
Healthcare Payer BPO – Service Provider Landscape with PEAK Matrix™ Assessment 2016	January 2017
Healthcare Payer BPO – Annual Report: Value-Based Sourcing Helping Payers Stay Afloat in an Era of Uncertainty	March 2017
Healthcare Payer BPO – Service Provider Profile Compendium 2017	April 2017
Life Sciences BPO – Service Provider Landscape with PEAK Matrix™ Assessment 2017	Q2 2017
Life Sciences BPO – Viewpoint on Trump and Effect on Offshoring of Jobs	Q2 2017
Life Sciences BPO – Viewpoint on Pharmacovigilance BPO	Q2 2017
Healthcare BPO – Viewpoint on ACA vs. AHCA	Q2 2017
Healthcare BPO – Viewpoint on Blockchain in Healthcare	Q2 2017
Life Sciences BPO – Annual Report 2017	Q3 2017
Life Sciences BPO – Service Provider Compendium 2017	Q4 2017

Additional BPS research references

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

1. **Healthcare Payer BPO – Service Provider Landscape with PEAK Matrix™ Assessment** (EGR-2017-12-R-2082); 2016. Amid political uncertainties, the market for third-party BPO in healthcare payer space continues to grow, albeit at a slower pace vis-à-vis previous years. 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

2. **Healthcare Payer BPO – Annual Report: Value-Based Sourcing Helping Payers Stay Afloat in an Era of Uncertainty** (EGR-2017-12-R-2129); 2017. Healthcare payer BPO market grew strongly during 2013-2015, reaching US$9.1 billion (including government business) in 2016. Obamacare contributed to a large extent in this growth story. However, with the election of Donald Trump as the President of the United States, this market is likely to witness a downturn in short-term, owing to the anti-ACA stand of the new President and uncertainty surrounding the changes he could bring in the market. The market grew at ~9% in 2016 reaching US$9.9 billion.

1. **Medicare/Medicaid Version 2.0: Exploring the Next Growth Wave in the Market** (EGR-2016-12-V-1971); 2016. During 2010-2015, regulations such as PPACA and ARRA revitalized growth in the market by significantly enhancing the scope of healthcare coverage in the country. The increased scope led to fast paced increase in enrollment of both the plans. With the onset of the second wave of regulations (such as MACRA), the Medicare/Medicaid market in the country is expected to witness another overhaul during 2015-2020. Additional factors such as uncertain political scenario, fast growth in the number of elderly people (65+ age), and industry shift towards value-based care would also be driving the market growth

2. **Revenue Cycle Management (RCM) Outsourcing Annual Report 2016: Growth on the Back of Declining Provider Margins** (EGR-2016-12-R-2029); 2016. Market for the traditionally outsourced RCM functions such as post-service is now maturing. However, opportunities in pre-service and service functions are gaining traction. A key driver for growth in the market is the incident of rising administrative cost, which is significantly affecting profitability of hospitals. Also, automation is becoming the flavor of the industry, with buyers asking for solutions that are integrated across different functions and involve automation

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