Healthcare Payer BPO – Service Provider Profile Compendium 2018

Healthcare & Life Sciences Business Process Outsourcing
Market Report – February 2018: Complimentary Abstract / Table of Contents

EGR-2018-20-CA-2546

Our research offerings for global services

- **Market Vista™**
  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available
- **Application Services**
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Subscription information

- The full report is included in the following subscription(s)
  – **Healthcare & Life Sciences BPS**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**

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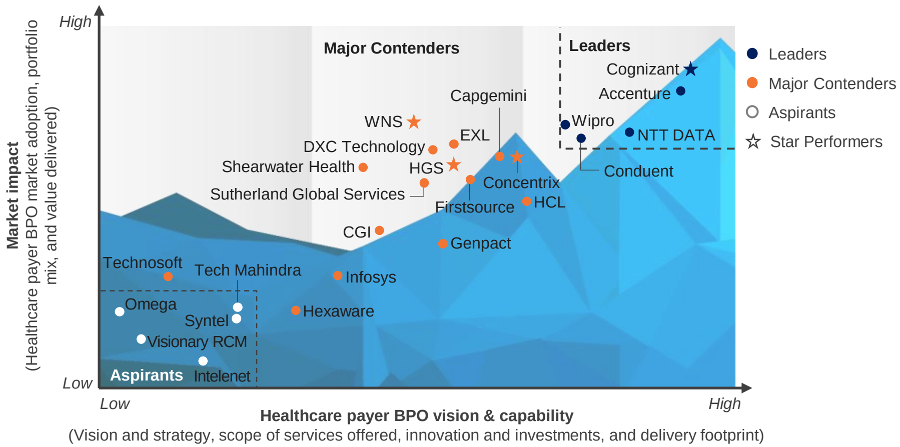
This study offers four distinct chapters providing a deep dive into key aspects of healthcare payer market; below are four charts to illustrate the depth of the report

Everest Group PEAK Matrix™ for healthcare payer BPO

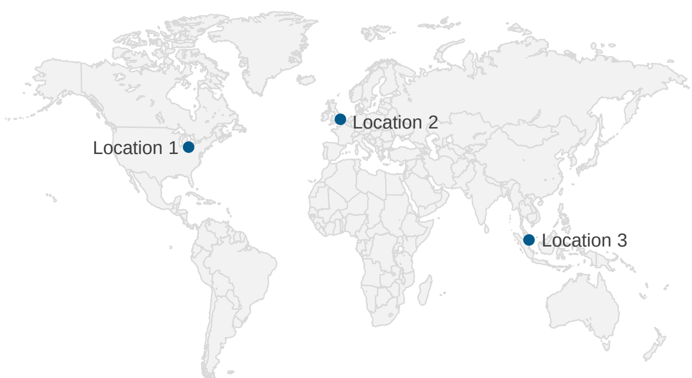


Capability assessment

Measure of capability: Best-in-class, Very high, High, Medium high, Medium, Medium low, Low, Not mature

	Market impact				Vision and capability				
Service provider	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service Provider 1	Medium high	Very high	Very high	High	High	Medium high	Medium high	Medium high	Medium high
Service Provider 2	Medium high	Medium high	Medium	Medium high	Medium low	Medium high	Not mature	Very high	Medium
Service Provider 3	High	Medium high	High	High	Medium high	Medium high	Medium high	High	High
Service Provider 4	Very high	Very high	Medium high	High	Very high	Medium high	Low	Medium high	Medium high
Service Provider 5	High	Medium high	Very high	High	Medium high	Medium high	Medium	High	Medium high
Service Provider 6	Medium	Best-in-class	High	Medium high	High	Medium	High	High	Medium high
Service Provider 7	Medium low	High	High	Medium high	Medium high	Medium	Medium high	High	Medium high
Service Provider 8	Medium high	High	High	Medium high	Very high	Medium high	Medium	Very high	High

Mix of locations leveraged by service providers



Everest Group's remarks on service providers

Measure of capability: Best-in-class, Very high, High, Medium high, Medium, Medium low, Low, Not mature

Market impact			Vision and capability				
Market adoption	Portfolio mix	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Medium high	Very high	High	High	Very high	Medium high	Best-in-class	High

Strengths

- XXX is one of the few service providers that have end-to-end capabilities across the healthcare payer BPO value chain, serving both member and claims-focused pieces
- Investments into digital assets such as analytics and automation have led to higher client satisfaction and eventually enhanced client stickiness
- Buyers prefer their consulting-led approach instead of an offering-led approach that is generally employed by most of the other service providers operating in this space

Areas of improvement

- XXX needs to enhance its focus on SMBs, as the large-sized buyers' market is relatively saturated and as larger health plans are plateauing with respect to outsourcing
- With increasing focus towards state Medicaid and SMBs, it will require an onshore presence, as these buyers generally have a state-focused agenda. Less than XX% of its FTEs are located stateside, which is significantly less compared to its peers

Research calendar – Healthcare and Life Sciences BPS (HLS BPO)

Published | Planned | Current release

Flagship reports	Release date
Healthcare Payer BPO Annual Report: Value-Based Sourcing Helping Payers Stay Afloat in an Era of Uncertainty	March 2017
Healthcare Payer BPO Service Provider Compendium 2017	April 2017
Healthcare Provider BPO Service Provider Landscape with PEAK™ Matrix Assessment	November 2017
Healthcare Payer BPO – Service Provider Landscape with PEAK Matrix™ Assessment 2018	December 2017
Healthcare Provider BPO Service Provider Compendium 2018	December 2017
Healthcare Payer BPO – Service Provider Profile Compendium 2018	**February 2018**
Healthcare Payer BPO Annual Report	Q1 2018
Healthcare Provider BPO Annual Report	Q1 2018

Thematic reports	Release date
Viewpoint – Wipro Bets Big on Healthcare through the HealthPlan Services Acquisition	February 2016
Viewpoint – Medicaid/Medicare Version 2.0: Exploring the Next Growth Wave in the Market	November 2016
Viewpoint – Will Big Pharma Heed the Call to Bring Jobs Home?	April 2017
Webinar Deck – Trump Cards: Driving Healthcare Innovation During Uncertainty	June 2017
Viewpoint – Innovation in Pharmacovigilance (PV): How to Spend Smarter Not Higher?	June 2017
Viewpoint – Rising Cost of Healthcare in the United States: Can Analytics Help?	August 2017
Viewpoint on Member Engagement of the Future	Q1 2018

Note: For a list of all Healthcare and Life Sciences BPS (HLS BPO) reports published by us, please refer to our website page

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Additional BPS research references

The following documents are recommended for additional insight into the topic 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 2018** (EGR-2017-12-R-2455); 2017. Inability of new administration to either replace or decide upon keeping the ACA is leading to high degree of uncertainty. This report uses Everest Group's proprietary Services 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. **Rising Cost of Healthcare in the United States** (EGR-2017-10-V-2301); 2017. The cost of healthcare in the United States is rising significantly as compared to other geographies. This has led both payers and providers to eat into each other's margin in the process of optimizing costs for their business. However, the efficient use of analytics can help them to significantly reduce these costs while achieving quality of care. This viewpoint talks about the potential of big data analytics in healthcare, the challenges faced by different segments of payers and providers in the industry, and probable solutions to those challenges in the short and long term

3. **The Rise of Medicare Advantage** (EGR-2017-12-V-2395); 2017. Amidst falling profitability, declining margins, and persistent regulatory uncertainty, healthcare payers are aggressively looking for opportunities to sustain their business. With most of the large payers strategically prioritizing growth in the Medicare Advantage (MA) market, it is evident that they believe MA is one such opportunity to make profits, even in these uncertain market conditions

4. **Healthcare Payer BPO – Annual Report: Value-Based Sourcing Helping Payers Stay Afloat in an Era of Uncertainty** (EGR-2017-12-R-2189); 2017. This report examines the global non-voice, third-party, industry-specific healthcare payer BPO industry. It provides detailed analysis of the service provider landscape including market size & growth, key drivers & challenges, and solution characteristics

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