



Healthcare Payer Operations – Service Provider Compendium 2020

Healthcare & Life Sciences Business Process Outsourcing
Market Report – July 2020: Complimentary Abstract / Table of Contents

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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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Background and methodology of the research

Background of the research

Consumerism, the rise of digital, margin pressures, regulatory uncertainty, and value-based care are increasingly pushing healthcare payers to rethink their business models. Many payers – especially larger ones with multi-state presence – are strengthening their market positions by controlling as many pieces in the healthcare ecosystem as possible, as seen in the big-ticket acquisitions in recent years.

With M&A activity now subsiding, the next logical step for payers to deal with growth/competitive challenges is to invest in differentiating their capabilities in terms of smoother member engagement, streamlined network management, transparent claims administration, and meaningful care support.

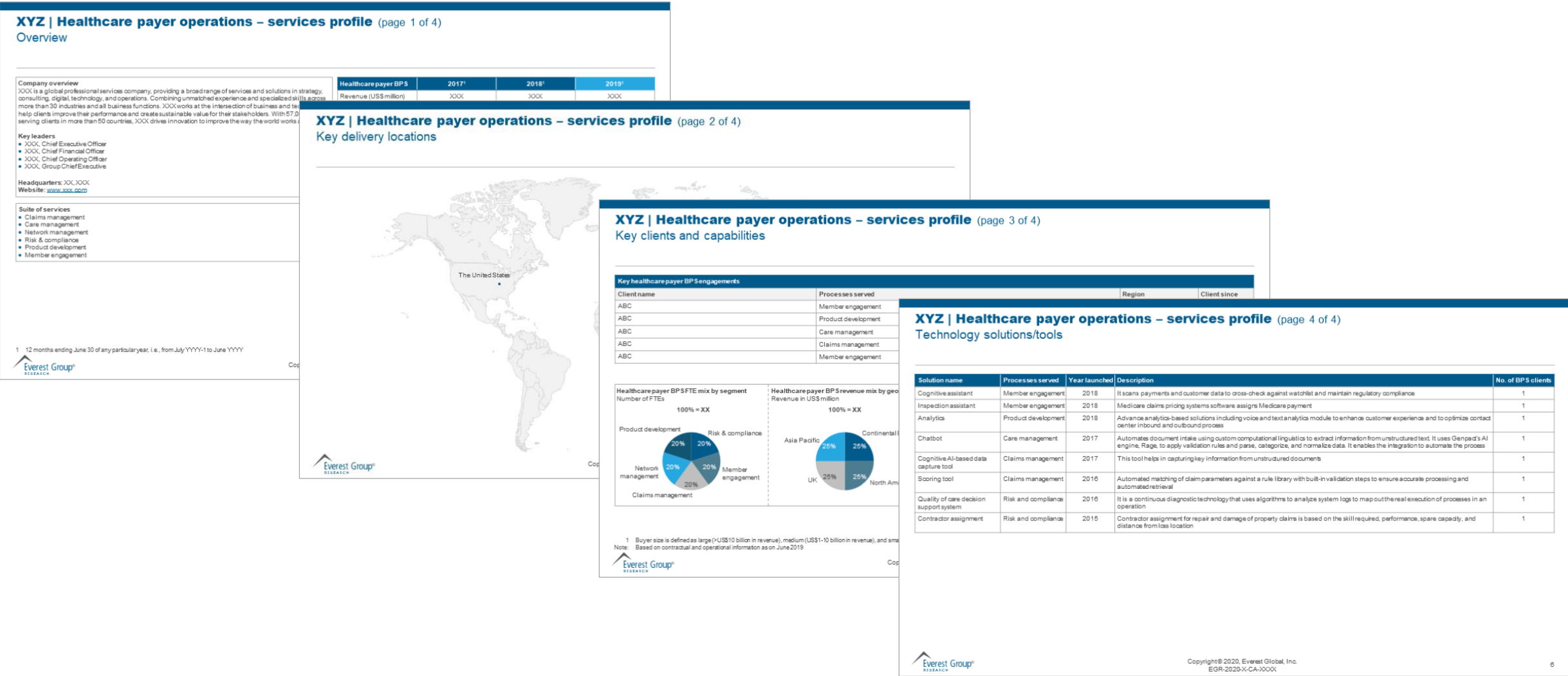
To achieve their objectives in this regard, third-party support is vital, and, hence, it becomes extremely important for healthcare payers to identify the right service providers to transform and differentiate themselves. This report studies leading healthcare payer BPO service providers and compares their capabilities in detail.

Scope and methodology

In this research, we analyze the global healthcare payer operations – services provider landscape. We focus on:

- Relative positioning of 29 service providers on Everest Group's PEAK Matrix® for healthcare payer operations
- Service provider capability assessment across key dimensions
- Everest Group's analysis of service providers' strengths and areas of improvement

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



Research calendar – Healthcare & Life Sciences Operations

Published Planned Current release

Flagship HLS BPS reports	Release date
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	June 2019
Clinical and Care Management (CCM) BPS Services PEAK Matrix® Assessment 2019	September 2019
Clinical and Care Management (CCM) BPS Service Provider Profile Compendium	December 2019
Life Sciences (LS) Operations – Services PEAK Matrix® Assessment 2020	December 2019
Clinical and Care Management (CCM): Is the Value-based Elixir Really Working?	January 2020
Healthcare Payer Operations – Services PEAK Matrix® Assessment 2020	June 2020
Healthcare Payer Operations – Service Provider Compendium 2020	July 2020
Revenue Cycle Management (RCM) Operations – Services PEAK Matrix® Assessment 2020	Q3 2020

Thematic HLS BPS reports	
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	Q3 2020

Note: For a list of all of our published HLS Operations reports, please refer to our [website page](#)

Additional Healthcare Operations research references

The following documents are recommended for additional insight on 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 Operations – Services PEAK Matrix® Assessment 2020** ([EGR-2020-20-R-3749](#)). Consumerism, the rise of digital, margin pressures, regulatory uncertainty, and value-based care are increasingly pushing healthcare payers to rethink their business models. Many payers – especially larger ones with multi-state presence – are strengthening their market positions by controlling as many pieces in the healthcare ecosystem as possible, as seen in the big-ticket acquisitions in recent years. For healthcare payers in the US grappling with issues such as increased healthcare expenditure, regulatory changes, and consumerism, it is imperative to leverage third-party service providers to address their needs and differentiate themselves. This report studies and evaluates leading healthcare payer BPO providers and assesses their areas of expertise
- 2. Clinical and Care Management (CCM) BPS Services PEAK Matrix® Assessment 2019** ([EGR-2019-20-R-3342](#)). 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
- 3. Healthcare Business Process Automation Solutions PEAK Matrix® Assessment 2019** ([EGR-2019-20-R-3057](#)). Healthcare enterprises have traditionally relied on outsourcing and offshoring to improve their business across multitude of parameters such as reducing costs, improving productivity and efficiency, and gaining access to talent and enhanced business continuity. Now with most of these benefits being realized and slowly reaching the saturation stage, when coupled with some of the market changes, healthcare enterprises are looking at other ways to extract incremental benefits. This is where digital solutions play a critical role and within digital, automation (RPA and AI) is one such solution that has garnered maximum mindshare of enterprises during the last few years

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