

Salesforce Healthcare Services – State of the Market

March 2021: Complimentary Abstract / Table of Contents



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- 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 of the research

Early adopters of Salesforce services were looking to effectively manage customer relationships, market targeted products, explore sales performance, and drive cost efficiencies riding on the cloud wave. As the Salesforce technology landscape broadened, enterprises' approach toward Salesforce has evolved from a “reactive” relationship management to a “proactive” approach toward Customer Experience (CX).

Healthcare enterprises are looking to leverage Salesforce for not just engaging with patients, but for their end-to-end business functions as well as addressing the broader healthcare trends, such as reducing technical debt, cost containment, driving patient centricity, and data interoperability. Healthcare enterprises seek to create a 360-degree patient/member view by leveraging advanced analytics to better engage and offer personalized experience to patients/members, improve care outcomes, and drive cost efficiencies. They are integrating customer data across Sales, Service, Marketing, and Commerce Cloud to provide a unified customer experience and achieve data interoperability mandates.

With these changing enterprise expectations and evolving Salesforce technology landscape, service providers are investing in building strong healthcare-specific solutions to expedite time-to-market for their clients and are taking a strong, inorganic approach with tuck-in acquisitions to fill gaps across their Salesforce services portfolio and further enhance their geographic footprint.

Scope of this report:



Geography
Global



Industry
Healthcare






Services
Salesforce
services

Everest Group’s definition of the scope of Salesforce healthcare services



Salesforce healthcare services

 Core products	 Other products	 Industry products
Service Cloud Case management, omnichannel routing, lightning service console, field service, etc.	Experience Cloud Suite of integrated tools to establish a community – connecting all the stakeholders	Health Cloud Healthcare services for payers and providers such as patient engagement and care management
Marketing Cloud Suite of tools to understand end-user behavior and engage them with personalized experience.	Einstein Analytics / Tableau AI-powered analytics platform to generate real-time insights and drive smarter decisions	
Sales Cloud Account & contact management, opportunity management, lead management, etc.	MuleSoft Platform that enables integration capabilities within SFDC ecosystem and beyond	
Commerce Cloud Platform to build comprehensive e-commerce solutions for B2B and B2C enterprises	Customer 360 Platform Platform to build mobile-ready applications leveraging next-generation technologies	

Overview and abbreviated summary of key messages

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

Market trends

- The high level of scalability, agility, customization, and in-depth functionality offered by Salesforce, as well as the ease of usage, make it a clear leader in the Customer Relationship Management (CRM) space
- Focus on implementing better care strategies, producing greater value, and refining patient and member experiences are the key drivers for Salesforce adoption in healthcare over the past few years

Spend characteristics

- Health Cloud has seen a high adoption by healthcare enterprises due to its industry contextualized nature, high number of healthcare-specific functionalities, ability to provide more streamlined access to patient/member data, and capability to drive more personalized and effective care
- Both payers and providers have adopted Salesforce platform. The adoption of Health Cloud has been high in the case of providers due to the high degree of maturity of use cases in Health Cloud for the provider line of business

Buyer expectations

- Lack of real-time support from the Salesforce team and high need of customization before adoption are preventing healthcare enterprises from maximizing value creation
- Technical expertise and talent management are areas where service providers are not able to meet enterprise expectations

Research calendar

Healthcare IT Services (ITS)

■ Published
 ■ Planned
 ■ Current release

Flagship healthcare ITS reports

	Release date
Healthcare Provider Digital Services PEAK Matrix® Assessment 2020	June 2020
Provider Digital Services – Service Provider Profile Compendium	July 2020
Salesforce Healthcare Services PEAK Matrix® Assessment 2021	December 2020
Salesforce Healthcare Services – Service Provider Profile Compendium	December 2020
Healthcare Specialists PEAK Matrix® Assessment 2021	December 2020
Healthcare Specialists – Service Provider Profile Compendium	January 2021
Salesforce Healthcare Services – State of the Market	March 2021
Healthcare Automation Services Peak Matrix® Assessment 2021	Q2 2021
Healthcare Automation Services – Service Provider Profile Compendium	Q2 2021

Thematic healthcare ITS reports

	Release date
Big Tech in Healthcare: What it Means for CIOs?	Nov 2019
Unpacking the Rise of Telehealth	July 2020
Data Monetization in Healthcare	July 2020
Platform-based Modernization of Healthcare Payer	September 2020
Interoperability in Healthcare	Q2 2021

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