Everest Group®

Market Report | Healthcare BPS
Healthcare ITS

Intelligent Automation in Healthcare – Solutions PEAK Matrix® Assessment 2022

November 2021: Complimentary Abstract / Table of Contents

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Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

Contents

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Background and/or Introduction of the research

Although healthcare payer and provider enterprises have traditionally relied on outsourcing services and offshoring their delivery footprint to improve their business across multitude of parameters; they have reached a saturation stage and have been looking for other ways to extract additional benefits. Many healthcare enterprises have garnered maximum traction in the past couple of years by employing automation solutions such as cloud, RPA, NLP, AI/ML and more, to improve performance delivery in claims management, patient engagement, risk adjustments, etc. The need for automating processes is now more than ever as the global pandemic has brought to light the glaring inadequacies and inefficiencies of the healthcare systems across the globe. The aim of automation is not to de-humanise the healthcare systems, but rather, to support the working of the stakeholders in the value chain to optimize processes, reduce costs and wastage, improve patient care and experience and enhance business resilience. The scope of integrating intelligent automation with the existing healthcare functions exists in almost all segments of the healthcare value chain and provides ample opportunity to the healthcare payers and providers to upgrade themselves and cater to the growing demand for value-based care. Automation offers a huge ROI due to limited investments and upfront gain realization in the long term and is expanding like never before in the healthcare industry.

Scope of this report:

Geography
Global

Industry
18 providers

Services
Intelligent automation in healthcare

Overview and abbreviated summary of key messages

This report examines the adoption of intelligent automation in healthcare across global enterprises. It uses Everest Group's proprietary PEAK Matrix® to assess and rate service providers on various dimensions of their capabilities. It also includes Everest Group's remarks on service providers highlighting their key strengths and development areas.

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

Intelligent Automation in Healthcare – Solutions PEAK Matrix®

Everest Group classified 18 Healthcare BPS providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework to assess the overall vision and capability and market impact of service providers

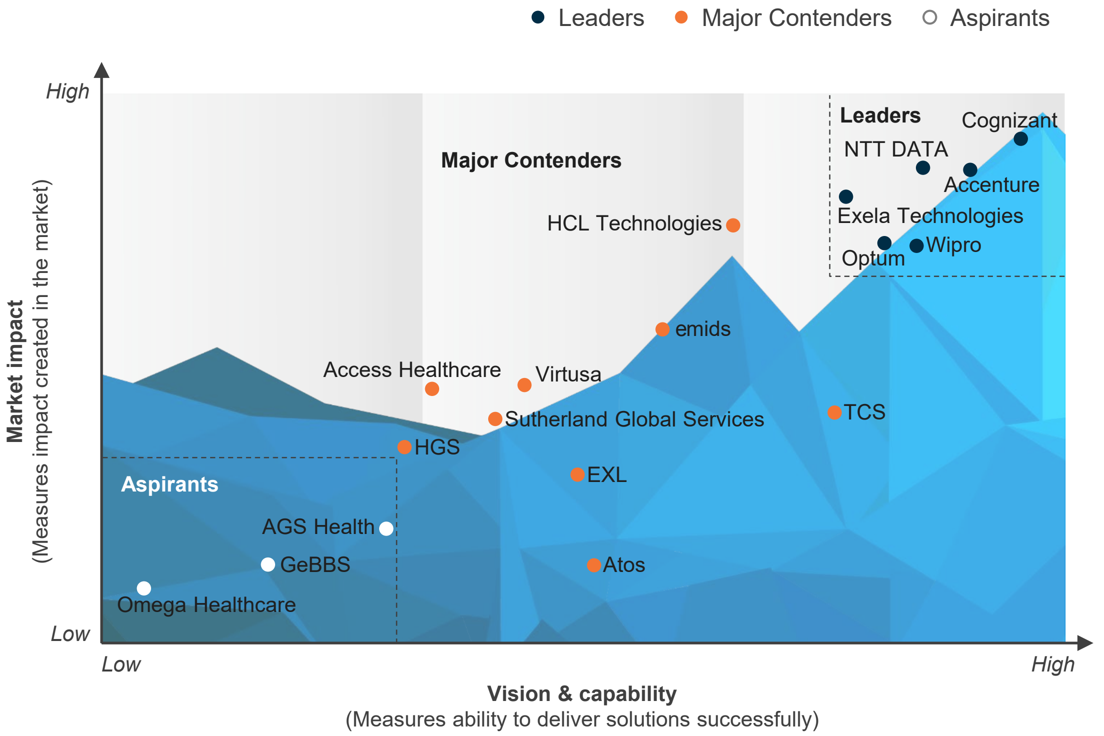
- Leaders: There are six service providers in the Leaders category – Accenture, Cognizant, Exela Technologies, NTT DATA, Wipro, and Optum
- Major Contenders: The Major Contenders category has nine service providers – Access Healthcare, EXL, HCL Technologies, HGS, emids, TCS, Sutherland Global Services, Atos, and Virtusa
- Aspirants: There are three service providers in the Aspirants category – AGS Health, GeBBS, and Omega Healthcare

Key trends in intelligent automation

- Leaders have been successful in establishing close collaborations with best-in-class third party automation vendors to augment their automation offerings
- Leaders have increased their investments across niche segments such as process mining to distinguish themselves from their peers
- Leaders have identified care management and risk & compliance as the upcoming areas garnering maximum traction and are increasingly deploying solutions augmented with RPA and cognitive automation to enhance patient delivery
- Remaining pro-active in the COVID-19 period and deploying situation-specific solutions in telehealth and remote care delivery, for instance, have helped service providers to scale up and add significantly to their client base
- Strategic acquisitions and development of automation CoEs have further led to the advancement of technological capabilities of service providers

This study offers three distinct chapters providing a deep dive into key aspects of adoption of intelligent automation; below are three charts to illustrate the depth of the report

Intelligent Automation in Healthcare – Solutions PEAK Matrix® Assessment 2022[1]



1 Assessments for Sutherland, Atos and GeBBS excludes service provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of the service providers, their public disclosures, and interaction with buyers.

Source: Everest Group (2021).

Capability assessment

Illustrative example

Measure of capability: Low High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Innovation and investments	Services capability	Engagement & Commercial Model	Overall
Service provider 1										
Service provider 2										
Service provider 3										
Service provider 4										
Service provider 5										
Service provider 6										
Service provider 7										
Service provider 8										
Service provider 9										

Everest Group's remarks on service providers

Illustrative example

Measure of capability: Low High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Innovation and investments	Services capability	Engagement & Commercial Model	Overall

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific and North America with multiple delivery centers in India, the Philippines, and US, enabling it to service client requirements efficiently
- Service provider 1 has invested in augmenting its automation capabilities through strategic acquisitions of healthcare IT firm.

Limitations

- Service provider 1 has a low penetration of RPA bots among clients
- Service provider 1 has not leveraged collaborations with third party technology vendors to increase its automation offerings

Research calendar
Healthcare BPS

Published | Planned | Current release

Flagship reports	Release date
Healthcare Payer Operations – Services PEAK Matrix® Assessment 2020	June 2020
Revenue Cycle Management (RCM) Operations – Services PEAK Matrix® Assessment 2020	September 2020
Exploring Technology Frontiers to Unlock Superior Value from Operations: Revenue Cycle Management (RCM) Solutions State of the Market Report 2021	December 2020
Revenue Cycle Management (RCM) Operations – Services PEAK Matrix® Assessment 2021	July 2021
Revenue Cycle Management (RCM) Operations Services Provider Compendium	September 2021
Intelligent Automation (IA) in Healthcare – Solutions PEAK Matrix® Assessment 2022	**November 2021**
Healthcare Analytics – Services PEAK Matrix® Assessment 2022	Q4 2021
Revenue Cycle Management (RCM) Operations State of the Market Report	Q4 2021

Thematic reports	Release date
The Revenue Cycle Management (RCM) BPS Market: Unstoppable Juggernaut or Overhyped Fad?	September 2019
The Next Growth Frontier for RCM Service Providers: Looking beyond Initial Arbitrage Opportunities	August 2020
Open Enrolment 2021 Primer: What to Expect and How to Navigate in the Wake of COVID-19	August 2020
Breaking Viewpoint: UnitedHealth Group's Optum Acquires Change Healthcare	January 2021
Modularity in Medicaid Management Information Systems – Has the Silver Bullet Hit its target?	March 2021
Business Process as a Service (BPaaS) in Healthcare: The Way Forward to Maximize Value and Improve Outcomes	June 2021
Technology/Digital Adoption in Revenue Cycle Management (RCM): A Tectonic Evolution	November 2021

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

Research calendar
Healthcare IT Services (ITS)

Published | Planned | Current release

Flagship reports	Release date
Healthcare Provider Digital Services PEAK Matrix® Assessment 2020	June 2020
Salesforce Healthcare Services PEAK Matrix® Assessment 2021	December 2020
Healthcare IT Services Specialists PEAK Matrix® Assessment 2021	December 2020
State of the Market – Salesforce Cloud Healthcare services	March 2021
Intelligent Automation (IA) in Healthcare – Solutions PEAK Matrix® Assessment 2022	**November 2021**
Healthcare Analytics – Services PEAK Matrix® Assessment 2022	Q4 2021
Healthcare Analytics Services – Service Provider Compendium 2022	Q4 2021
Healthcare Cloud Data Platforms PEAK Matrix® Assessment 2022	Q4 2021

Thematic reports	Release date
Digital Healthcare Trailblazers: Top Start-ups Transforming the US Healthcare System	July 2021
The Future of Healthcare: Accelerating Your Cloud Journey	July 2021
Healthcare Member Experience Transformation	July 2021
Healthcare Provider Enterprise Insights – Q4 2020 & Q1 2021	August 2021
Interoperability Beyond Regulatory Compliance	September 2021
Healthcare Payer Enterprise Insights – H1 2021	September 2021
BigTechs in Healthcare Industry	Q4 2021

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