

Healthcare Customer Experience Management (CXM) Services in North America PEAK Matrix® Assessment 2023

November 2022 : Complimentary Abstract / Table of Contents



Our research offerings

This report is included in the following research program(s):

Healthcare Business Process, Customer Experience Management Services

- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Conversational AI
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms (DAP)
- ▶ Digital Engineering Services
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Services
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ Global Business Services
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ Human Resources Outsourcing
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing (IDP)
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Executive Insights™
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

Learn more about our
custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

Contents

For more information on this and other research published by Everest Group, please contact us:

Rananjay Kumar, Practice Director

Ankur Verma, Practice Director

Sanket Anshuman, Senior Analyst

Divya Baweja, Senior Analyst

Lloyd Fernandes, Senior Analyst

Uday Gupta, Analyst

1. Introduction and overview	05
• Research methodology	06
• Healthcare CXM value chain	07
• Key information on the report	08
• Background of the research	09
• Focus of the research	10
2. Executive Summary	11
• Summary of key messages	12
3. Healthcare CXM in North America PEAK Matrix® characteristics	14
• PEAK Matrix framework	15
• Everest Group PEAK Matrix for healthcare CXM in North America	17
• Characteristics of Leaders, Major Contenders, and Aspirants	18
• Provider capability summary dashboard	19
4. Enterprise sourcing considerations	23
• Leaders	23
– Cognizant	24
– Concentrix	25
– Conduent	26
– Optum	27

Contents

• Major Contenders	29
– Alorica	30
– EXL	31
– Firstsource	32
– Mphasis Ltd.	33
– ResultsCX	34
– Sagility (formerly HGS Healthcare)	35
– Sitel Group®	36
– Sutherland Healthcare Solutions	37
– TTEC	38
– Wipro	39
• Aspirants	40
– Arise	41
– Qualfon	42
– Shearwater Health	43
– Startek®	44
5. Appendix	45
• Glossary	46
• Research calendar	47

Introduction

With the increasing focus of healthcare enterprises on member and patient experience, driven largely by its impact on reimbursement payments by government programs in the US, the CXM market in the healthcare domain has shown steady growth in the post-pandemic phase. The rising demand for customer engagement touchpoints for a more frictionless experience for the end-user has led many healthcare payers and providers to look for digital-led CX services, either by building in-house capabilities or strategic partnerships with CXM service providers. The service providers have strengthened their non-traditional and non-voice channel offerings such as chat, e-mail, and social media and invested to enhance their digital CX toolkit in areas such as automation, analytics, conversational AI/chatbots, omnichannel delivery, and cloud-based contact centers. While the past and current contracts largely include contact center staff augmentation, enterprises look for more strategic and transformative long-term CXM services and solutions to support the increasing enrollment, the need for a better-quality experience, and to address the attrition-caused workforce shortages.

In this research, we present an assessment and detailed profiles of healthcare CXM BPS providers featured on the Healthcare Customer Experience Management (CXM) Services in North America PEAK Matrix® Assessment 2022. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group’s annual RFI process for the calendar year 2022, interactions with leading healthcare CXM service providers, client reference checks, and ongoing analysis of the healthcare CXM services market.

This report includes the profiles of the following 19 leading healthcare CXM BPS providers featured on the Healthcare Customer Experience Management (CXM) Services in North America PEAK Matrix® Assessment 2022 :

- **Leaders:** Cognizant, Concentrix, Conduent, Optum, and Teleperformance
- **Major Contenders:** Alorica, EXL, Firstsource, Mphasis Ltd., ResultsCX, Sagility (formerly HGS Healthcare) , Sitel Group®, Sutherland Healthcare Solutions, TTEC, and Wipro
- **Aspirants:** Arise, Qualfon, Shearwater Health, and Startek®

Scope of this report



Geography
North America



Providers
19



Services
Healthcare CXM BPS

Overview and abbreviated summary of key messages

This report examines the 2021 Healthcare Customer Experience Management (CXM) service provider landscape in the North America region and provides an analysis of providers' key strengths and limitations. It focuses on provider position and growth in the Healthcare CXM market, changing market dynamics and emerging provider trends, and assessment of provider delivery capabilities. It also identifies the key implications of the research findings for buyers and providers.

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

Healthcare CXM service provider landscape in North America and PEAK Matrix® 2022

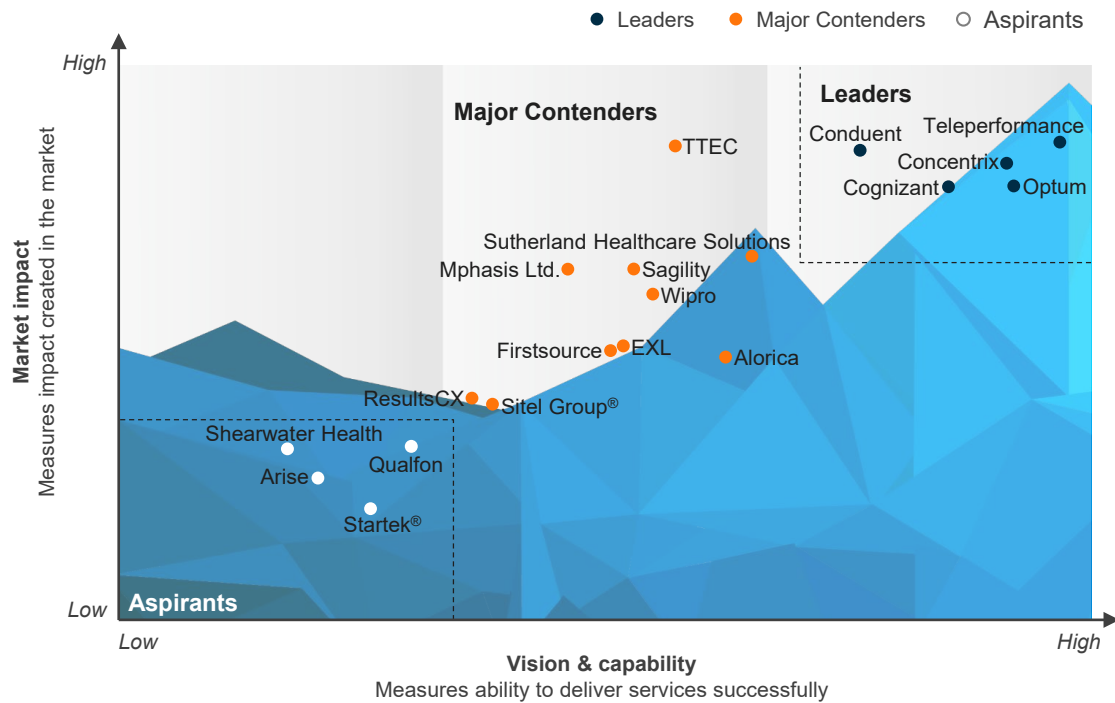
- The 2023 North America Healthcare CXM PEAK Matrix® positioning is as follows:
 - **Leaders:** Cognizant, Concentrix, Conduent, Optum, and Teleperformance
 - **Major Contenders:** Alorica, EXL, Firstsource, Mphasis Ltd., ResultsCX, Sagility (formerly HGS Healthcare) , Sitel Group®, Sutherland Healthcare Solutions, TTEC, and Wipro
 - **Aspirants:** Arise, Qualfon, Shearwater Health, and Startek®

Key insights on PEAK Matrix® dimensions

- Healthcare CXM Service providers in the North American region have experienced strong growth in 2021. Digital disruption induced by the pandemic has brought about a drastic shift in enterprise behavior with an enhanced focus on digital customer experience management and business continuity planning for both healthcare payers and providers
- Introduction of “Interoperability Rule” and “No Surprise Act” regulations in 2022 which focus on greater transparency and customer satisfaction, is expected to further propel growth in the healthcare CXM space
- There has been a surge in demand for digitally enabled healthcare services such as Telehealth and Telemedicine, leading to greater digital transformation deals with a significant focus on design thinking, process consulting, and customer journey mapping
- Leaders have been able to develop more sophisticated digital solutions and have been more successful than their peers in supporting end-to-end operations across the healthcare CXM value chain
- Leaders have focused on talent innovation through investments in WAHA, Gig-CX, security, employee engagement solutions, workforce management, and recruitment practices to offer increased flexibility and scalability to their healthcare clients

This study offers three distinct chapters providing a deep dive into key aspects of the Healthcare CXM market in North America; below are three charts to illustrate the depth of the report

Healthcare CXM Services in North America PEAK Matrix® Assessment 2022^{1,2}



1 Assessments for Alorica, Arise, Qualfon, Sitel Group®, and Startek® excludes provider inputs and are based on Everest Group’s proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group’s interactions with insurance buyers
2 During the assessment year January 2021 – December 2021, Sagility was HGS Healthcare. It was rebranded in 2022

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🟡 Low 🟢 High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Technology and innovation	Delivery footprint	Overall
Provider 1	🟡	🟡	🟢	🟢	🟢	🟡	🟢	🟡	🟡
Provider 2	🟡	🟡	🟡	🟡	🟡	🟡	🟢	🟡	🟡
Provider 3	🟡	🟢	🟢	🟢	🟢	🟡	🟡	🟡	🟡
Provider 4	🟡	🟡	🟡	🟡	🟢	🟡	🟡	🟡	🟡
Provider 5	🟡	🟢	🟡	🟡	🟢	🟡	🟡	🟡	🟡
Provider 6	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 7	🟡	🟡	🟢	🟡	🟢	🟡	🟢	🟡	🟡
Provider 8	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 9	🟡	🟡	🟢	🟡	🟢	🟡	🟡	🟡	🟡

Everest Group’s remarks on providers

Illustrative example

Measure of capability: 🟡 Low 🟢 High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Technology and innovation	Delivery footprint	Overall
🟡	🟡	🟢	🟢	🟢	🟡	🟢	🟡	🟢

Strengths

- Service provider 1 has developed a strong EMEA footprint with experience serving clients in geographies such as the United Kingdom, France, Germany, and Spain. It caters to clients across telecom, BFSI, retail, and energy & utilities
- Service provider 1 has made investments in areas such as omnichannel solutions, interaction analytics, customer acquisition platforms, and conversational assistants

Limitations

- It has low adoption of outcome-based pricing constructs, which may inhibit its value proposition for buyers looking for risk-sharing options, especially in deals involving a significant component of digital transformation
- Clients in the EMEA region emphasized the need to be proactive, employing a skilled workforce, and boosting more collaboration in their engagement as focus areas for Service provider 1

Research calendar

Customer Experience Management (CXM) Services

Published Planned Current release

Reports title	Release date
Delivering Happy Customers in the Experience Economy	March 2022
The Increasing Role of Bring Your Own Device (BYOD) in CXM – Trends, Challenges, and Opportunities	April 2022
Enterprise Technical Support	June 2022
Transforming Customer Experience (CX) Operations	July 2022
Catering to Global Customer Experience Management (CXM) Requirements: What It Means to Be a Truly Global Service Provider	July 2022
Navigating the Digital CXM Transformation Journey	August 2022
Customer Experience Management (CXM) in the Americas – Service Provider Landscape with PEAK Matrix® Assessment 2022	August 2022
Customer Experience Management (CXM) in APAC – Service Provider Landscape with PEAK Matrix® Assessment 2022	August 2022
Customer Experience Management (CXM) in EMEA – Service Provider Landscape with PEAK Matrix® Assessment 2022	August 2022
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2022	September 2022
Healthcare Customer Experience Management (CXM) Services in North America PEAK Matrix® Assessment 2023	November 2022
Customer Experience Management (CXM) in the Americas – Service Provider Compendium 2023	Q4 2022
Customer Experience Management (CXM) in APAC – Service Provider Compendium 2023	Q4 2022
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2023	Q4 2022
Customer Experience Management (CXM) State of the Market Report 2023	Q4 2022

Note: [Click](#) to see a list of all of our published Healthcare BPS reports

Research calendar

Healthcare Business Process

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Intelligent Automation (IA) in Healthcare – Solutions PEAK Matrix® Assessment 2022	December 2021
Healthcare Analytics – Services PEAK Matrix® Assessment 2022	December 2021
Intelligent Automation (IA) in Healthcare – Service Provider Compendium 2022	January 2022
Healthcare Payer Operations PEAK Matrix® Assessment 2022	February 2022
Healthcare Payer Operations – Service Provider Compendium 2022	April 2022
The State of Healthcare Payers in the Post-pandemic World: Healthcare Payer Operations State of the Market Report	April 2022
Revenue Cycle Management (RCM) Operations PEAK Matrix® Assessment 2022	June 2022
Revenue Cycle Management (RCM) Operations – Service Provider Compendium 2022	September 2022
Medical Coding Operations PEAK Matrix® Assessment 2022	October 2022
Healthcare Customer Experience Management in North America – PEAK Matrix® Assessment 2023	November 2022
Healthcare Customer Experience Management in North America – Service Provider Compendium 2023	Q4 2022
Medical Coding Operations – Provider Compendium 2023	Q4 2022
The Next Big Healthcare Opportunity: Pharmacy Benefits Management (PBM)	Q1 2023
Clinical and Care Management (CCM) Services PEAK Matrix® Assessment 2023	Q2 2023
Clinical and Care Management (CCM) Services Provider Compendium 2023	Q2 2023

Note: [Click](#) to see a list of all of our published Healthcare BPS reports



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Stay connected

Website

everestgrp.com

Social Media

 @EverestGroup

 @Everest Group

 @Everest Group

 @Everest Group

Blog

everestgrp.com/blog

Dallas (Headquarters)

info@everestgrp.com

+1-214-451-3000

Bangalore

india@everestgrp.com

+91-80-61463500

Delhi

india@everestgrp.com

+91-124-496-1000

London

unitedkingdom@everestgrp.com

+44-207-129-1318

Toronto

canada@everestgrp.com

+1-647-557-3475

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.