

# Healthcare Customer Experience Platforms PEAK Matrix® Assessment 2023

December 2022: Complimentary Abstract / Table of Contents



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## Introduction

The rise in digitization in healthcare with modern care delivery models and evolving customer expectations have driven the need for providing personalized engagements to customers across pre-care, care, and post-care interactions. To cater to these evolving customer expectations, healthcare enterprises are increasingly leveraging customer experience platforms that enhance the patient and member experience across multiple interaction touchpoints, which spans sales and marketing, services management, patient administration, care management, and billing and payments.

In this research, we present an assessment of 16 healthcare customer experience platform providers featured on the Healthcare Customer Experience Platforms PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading healthcare customer experience platform providers, client reference checks, and an ongoing analysis of the healthcare customer experience platforms market.

**This report includes the profiles of the following 16 leading healthcare customer experience platform providers featured on the Healthcare Customer Experience Platforms PEAK Matrix®:**

- **Leaders:** Adobe, Microsoft, Pegasystems, and Salesforce
- **Major Contenders:** Change Healthcare, Infinite Computer Solutions, League, Medallia, Optum, Oracle, Phreesia, Qualtrics, and Zipari
- **Aspirants:** CareCloud, Health Catalyst, and Luma Health

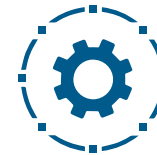
### Scope of this report



**Geography**  
Global



**Providers**  
Healthcare  
(payers and providers)



**Provider offerings**  
Healthcare customer  
experience platforms

## Overview and abbreviated summary of key messages

This report examines the healthcare customer experience platform provider landscape and its impact on the healthcare market. It focuses on healthcare customer experience platform provider position and growth in the healthcare market, changing market dynamics and emerging trends, and assessment of platform provider delivery capabilities.

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

### Emerging enterprise trends

- Healthcare customers are increasingly looking for personalized engagements across various touchpoints such as during enrollment, care management, and billing. To drive personalized engagements, enterprises are providing tailored communication to its customers across multiple channels
- Post Covid, the need for providing care remotely has increased. Health systems are increasingly providing remote care delivery (e.g., telehealth and virtual care) capabilities to patients by adopting platforms to enhance the overall care delivery process and patient experience

### Emerging platform provider trends

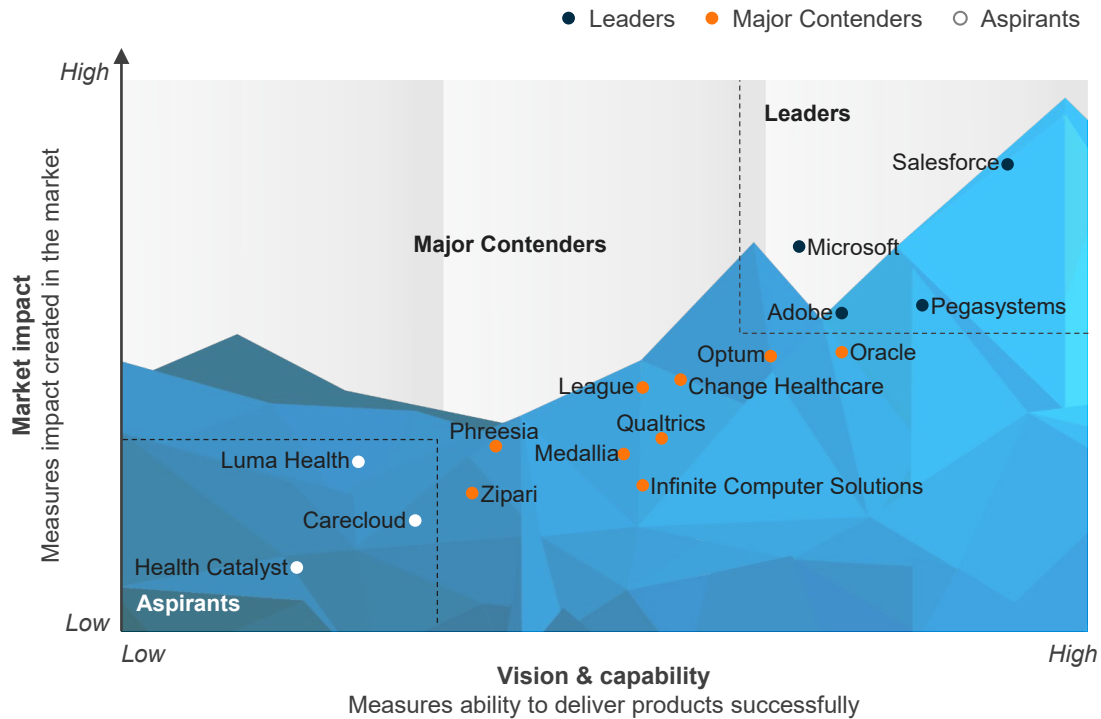
- Healthcare customer experience platform provider landscape is constantly evolving as a broad range of players (including BigTechs, health technology organizations, industry-agnostic platform providers, and enterprise platform providers) are emerging in this space
- Platform providers are increasingly focusing on unifying data and improving analytics capabilities to provide actionable insights for enterprises to enhance the customer experience across various touchpoints

### Platform provider capability

- Healthcare customer experience platform providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Adobe, Microsoft, Pegasystems, and Salesforce are the current leaders in the healthcare customer experience platforms market

# This study offers distinct chapters providing a deep dive into key aspects of healthcare customer experience platform market; below are three charts to illustrate the depth of the report

Healthcare Customer Experience Platforms PEAK Matrix® Assessment 2022<sup>1,2</sup>



- 1 Assessments for Adobe, CareCloud, Health Catalyst, Infinite Computer Solutions, Luma Health, Microsoft, Oracle, Phreesia, and Zipari excludes platform provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, platform providers' public disclosures, and Everest Group's interactions with buyers
- 2 The assessment for Optum and Change Healthcare is based on their capabilities prior to the completion of Change Healthcare's acquisition by Optum

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	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	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	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support	Overall
●	●	●	●	●	●	●	●	●	●

**Strengths**

- Company has made strategic partnerships with tech vendors and hyperscalers for augmenting its healthcare-specific capabilities
- It offers deployment flexibility to clients by supporting on-premise, single-cloud, and hybrid-cloud deployments

**Limitations**

- It can look to expand its clientele by engaging with more clients outside of the North America region to enhance its market presence
- Clients have cited customer support services as a key area of improvement for the vendor

# Research calendar

## Healthcare Information Technology

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Healthcare Provider Enterprise Insights – Q4 2020 & Q1 2021	August 2021
Interoperability in Healthcare	September 2021
Healthcare Payer Enterprise Insights – H1 2021	September 2021
Effective Claims Operations Through Scaled Digital Adoption	November 2021
Cloud for Healthcare – Data Platforms Peak Matrix® Assessment 2022	December 2021
Healthcare Payer Digital Services PEAK Matrix® Assessment 2022	May 2022
Healthcare Payer Digital Services – Service Provider Compendium 2022	August 2022
Value-based Care – State of the Market Report 2022	September 2022
Big Tech’s Foray into Healthcare – State of the Market Report 2022	October 2022
Revenue Cycle Management Platforms PEAK Matrix® Assessment 2023	November 2022
<b>Healthcare Customer Experience Platforms PEAK Matrix® Assessment 2023</b>	<b>December 2022</b>
Cloud-based Core Administration Platform PEAK Matrix® Assessment 2023	Q4 2022
Healthcare Provider Digital Services PEAK Matrix® Assessment 2023	Q4 2022
Healthcare Provider Digital Services – Service Provider Compendium 2023	Q4 2022

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