

Intelligent Automation (IA) in Healthcare – Service Provider Compendium 2022

January 2022: Complimentary Abstract / Table of Contents



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- ▶ Service Optimization Technologies
- ▶ Supply Chain Management (SCM) Services
- ▶ Talent Excellence GBS
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- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

Total Value Equation (TVE), PEAK Matrix®, market maturity

02

Primary sources of information

Annual contractual and operational RFIs, service provider briefings and buyer interviews, web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers

Proprietary database of healthcare automation capabilities of 18+ broad based BPS providers

Year-round tracking of 60+ healthcare service providers

Large repository of existing research in intelligent automation adoption by healthcare BPS providers

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, service providers, technology providers, and industry associations

This report is based on three key sources of proprietary information

- Proprietary database of healthcare automation capabilities of 18 broad-based BPS providers
- The database tracks the following for each service provider:
 - Number of AFTEs deployed and their split by scope of services
 - Number of healthcare clients leveraging automation
 - Bot deployment and penetration
 - Investments specific to healthcare automation
 - Top healthcare automation solutions
- **Service provider briefings**
 - Vision and strategy for healthcare automation
 - Annual performance and future outlook
 - Adoption of automation in solutions
- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Drivers and challenges for adopting automation in healthcare
 - Deployment details such as scope of services, scale, type of automation, etc.
 - Assessment of overall service provider performance including strengths and improvement areas
 - Service provider performance across parameters such as expertise in RPA and cognitive automation, implementation and maintenance services, enablement of automation CoEs, proactiveness, and flexibility
 - COVID-19 response

Service providers assessed¹



¹ Assessments for Sutherland, Atos, and GeBBS excludes service provider inputs on this 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
The source of all content is Everest Group unless otherwise specified.

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion.

Background of the research

Intelligent Automation in Healthcare 2021

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.

This report includes the profiles of the following 18 leading ABC service providers featured on the the Intelligent Automation in Healthcare PEAK Matrix®:

- **Leaders:** Accenture, Cognizant, Exela Technologies, NTT DATA, Wipro, and Optum
- **Major Contenders:** Access Healthcare, EXL, HCL Technologies, HGS, emids, TCS, Sutherland Global Services, Atos, and Virtusa
- **Aspirants:** AGS Health, GeBBS, and Omega Healthcare

Scope of this report:



Geography
Global



Service providers
18 providers



Services
Intelligent automation
in healthcare

This study offers 18 distinct chapters providing a deep dive into key aspects of IA market; below are four charts to illustrate the depth of the report

Intelligent Automation (IA) in Healthcare – Service Provider Compendium 2022

Service provider | IA in healthcare profile (page 1 of 4) Overview

Company overview

A global provider of IA products and solutions, XXX helps brands to build stronger relationship with their customers by creating connections that boost brand value. With XXX people around the globe, XXX securely connects best-loved brands with their customers over XXX million times every day in XXX languages. XXX from XXX is a flexible solution with complete cloud capability, designed to simplify delivery of end-to-end IA services, while boosting efficiency, effectiveness, and customer satisfaction.

Key leaders

- XXX: President & Chief Executive Officer
- XXX: Founder & Global Chief Operating Officer

Headquarters: XXX

Website: www.serviceprovider.com

Recent developments (not exhaustive)

- 2021: opened XXX, a hybrid co-working center in XXX
- 2021: opened first XXX in the Americas, a hybrid co-working center in XXX
- 2020-2021: introduced XXX at-home security solutions such as geolocation, multi-factor authentication, facial recognition, and schedule adherence matching
- 2020: launched XXX, a flexible solution with complete cloud capability, designed to simplify delivery of end-to-end CX services, while boosting efficiency, effectiveness and customer satisfaction

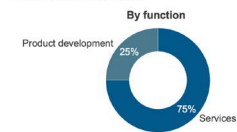
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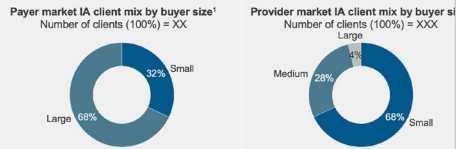
Service provider | IA in healthcare profile (page 2 of 4) Capabilities and client mix

Split of healthcare IA FTEs

Total FTEs (100%) = XXX



Split of IA clients mix



1 Buyer size is defined as large (>US\$5 billion in revenue), medium (US\$1-US\$5 billion in revenue) and small (<US\$1 billion in revenue).

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Service provider | IA in healthcare profile (page 3 of 4) Solutions portfolio

	RPA	Intelligent document processing	Intelligent virtual agent
Third-party solutions vendor	xxx	xxx	xxx
Proprietary solutions offered	xxx	xxx	xxx
Solutions developed jointly with technology vendor	xxx	xxx	xxx

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Service provider | IA in healthcare profile (page 4 of 4) Key IA solutions

Top healthcare-specific IA solutions	Value chain process area served	Year launched	Development type	Description	No. of clients
XXX	Claims management	xyz	Proprietary	It facilitates clinical documentation review (medical records, case notes, itemized bills, etc.) received in a variety of formats (scanned/faxed documents, lab reports, images, etc.). The solution enables technology-driven guided decision support for inpatient and physician claims validation.	N/A
XXX	Claims management	xyz	Proprietary	This solution supports risk adjustment – predicting codes from medical charts in support of chart reviews. IA enables Optum to predict the coding results automatically, which results in reducing the number of charts that need to be manually coded, and routing those charts to the most appropriate clinical coder, thus optimizing efficiency.	N/A
XXX	Claims management	xyz	Proprietary	The services are powered by the AI-enabled XXX Case Advisor, offering a combination of automated initial patient record assessments, key data signpost identification, and evidence-based medical research. This combination allows for efficiency, accuracy, and defensibility of medical necessity determinations, and optimizes other UR and case management activities.	N/A
XXX	Claims management	xyz	Proprietary	It supports claims processing – identification, quantifiable risk score generation, and pre-payment review of claims that have a high risk of being billed improperly. The solution reduces medical expenses for payers by detecting high-risk claims before they are paid.	N/A
XXX	Claims management	xyz	Proprietary	It supports facility and professional coding across inpatient and outpatient facilities – xxx automatically reviews medical charts to suggest relevant codes to be documented on the claim. A workflow feature creates a workflow for coders to accept/reject code suggestions.	N/A

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Research calendar

Healthcare Business Process

■ Published
 ■ Planned
 ■ Current release

Flagship reports

	Release date
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	November 2021
Intelligent Automation (IA) in Healthcare – Service Provider Compendium 2022	January 2022

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 Information Technology

■ 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 – Service Provider Compendium 2022	January 2022
Healthcare Analytics – Services PEAK Matrix® Assessment 2022	Q1 2022
Healthcare Analytics Services – Service Provider Compendium 2022	Q1 2022
Healthcare Cloud Data Platforms PEAK Matrix® Assessment 2022	Q1 2022

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	Q1 2022

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



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