

Life Sciences Operations – Provider Compendium 2022

September 2022: Complementary Abstract / Table of Contents



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- ▶ Sustainability Technology and Services
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- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

Contents

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1. Introduction and overview	06
• Research methodology	07
• Key information on the report	08
• Background of the research	09
• Life sciences operations value chain	10
2. Summary of key messages	11
• Summary of key messages	12
3. Life sciences operations – services PEAK matrix® characteristics	13
• PEAK matrix framework	14
• Everest Group PEAK Matrix for the life sciences operations market	17
• Characteristics of Leaders, Major Contenders, and Aspirants	18
• Characteristics of Star Performers	19
• Service provider capability summary dashboard	20
4. Profiles of life sciences operations	24
• Leaders	24
– Accenture	25
– Axtria	31
– Cognizant	36
– Genpact	41
– HCL Technologies	47
– ICON	53

Contents

• Leaders (Continued)	24
– IQVIA	59
– TCS	66
– Wipro	72
– ZS	78
• Major Contenders	83
– Atos	84
– Charles River Laboratories	90
– Clario	95
– Conduent	100
– DXC Technology	107
– Ergomed plc	113
– Indegene	118
– Labcorp Drug Development	124
– Medpace	129
– NAMSA	134
– Navitas Life Sciences	139
– Parexel	144
– PharmaLex	150
– PPD	156

Contents

• Major Contenders (Continued)	83
– Syneos Health	161
– Tech Mahindra	166
– WNS	171
• Aspirants	176
– APCER Life Sciences	177
– Ashfield	182
– Freyr	187
– Lash Group	192
– ProPharma Group	197
5. Appendix	202
• Glossary	203
• Research calendar	204

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

01

Robust definitions and frameworks

Function specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

Primary sources of information

Annual contractual and operational RFIs, 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 providers

Proprietary contractual database of over 300+ life sciences contracts (updated annually)

Year-round tracking of 30+ life sciences operations service providers

Large repository of existing research in life sciences operations

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

Background of the research

The post-pandemic era has brought about several changes in the operating dynamics of the life sciences industry. There is a movement from centralized trials to hybrid and decentralized modes of operations and face-to-face Healthcare Professional (HCP) interactions are being replaced with a coordinated omnichannel outreach approach. Apart from an increased focus on safety from both regulators and consumers leading to a continued focus on Pharmacovigilance (PV), enterprises have increased their appetite for digital tools and technologies to realize efficiencies and cost savings.

To effectively cater to the evolving enterprise needs, service providers have invested in increasing the breadth and depth of their functionalities/offerings across the life sciences operations value chain. They have invested in a host of avenues such as the enhancement of their virtual trial capabilities, augmentation of the automation-enabled platform-based PV service offerings, and the use of intelligent automation and predictive analytics for personalized HCP targeting, among other investments, to keep pace with the rapidly evolving needs of the market.

In this research, we present an assessment and detailed profiles of 32 life sciences BPS service providers featured on the [Life Sciences Operations PEAK Matrix® Assessment 2022](#). Each service provider profile provides a comprehensive picture of its service focus, core capabilities, key Intellectual Property (IP) / technology solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2021-22, interactions with leading life sciences BPS services providers, client reference checks, and ongoing analysis of the life sciences BPS market.

Scope of this report



Geography
Global



Providers

Accenture, APCER Life Sciences, Ashfield, Atos, Axtia, Charles River Laboratories, Clario, Cognizant, Conduent, DXC Technology, Ergomed plc, Freyr, Genpact, HCL Technologies, ICON plc, Indegene, IQVIA, Labcorp Drug Development, Lash Group, Medpace, NAMSA, Navitas Life Sciences, Parexel, PharmaLex, PPD, ProPharma Group, Syneos Health, TCS, Tech Mahindra, Wipro, WNS, and ZS



Services
Life sciences operations

The Life Sciences Operations Compendium report has 31 provider profiles

Life Sciences Operations – Provider Compendium 2022

Provider | Life Sciences Everest Group assessment

Market

Market adoption	Portfolio mix

Strengths

- Provider is a specialized service provider access and support functions
- Lash Group service offerings include patient assistance programs (including reimbursement experience in operating over 100+ PSF strengthens in credentials in effectively
- From a tech-enabled service offering sales leveraged to improve access to therapy

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Life Sciences Operations – Provider Compendium 2022

Provider | LS operations Overview

Company overview
 Provider, a part of XYZ, is a patient support service centricity to help patients gain access to, afford, and develop four key services – reimbursement support services. The company offers a range of solutions for therapy, medication affordability, and operational efficiency.

Headquarters:

Key leaders

- XYZ, President
- XYZ, Vice President, Business Optimization
- XYZ, Senior Director, XYZ
- XYZ, Senior Vice President, XYZ

Suite of services
 Marketing and sales

1 12 months ending December 31 of any particular period.
 Note: Based on Everest Group's estimates

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Life Sciences Operations – Provider Compendium 2022

Provider | Life Sciences Capabilities and key client engagements

Key life sciences operations engagements

Client name
Client 1
Client 2

LS operations FTE mix by segment
 Number of FTEs
 100% = XYZ

100%
Sales and Marketing

Note: Based on Everest Group's estimates

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Life Sciences Operations – Provider Compendium 2022

Provider | Life Sciences operations profile (page 4 of 4)

Technology solutions/tools

Solution name	Processes served	Year launched	Description	No. of clients
Solution 1	Marketing and sales	2017	The solution offers analytics and combines multiple technologies with workflows that are customized for patient support services. It helps speed access to therapy, streamlines patient enrollment through a provider portal, and unlocks insights with reporting and analytics consultants – remaining flexible to scale.	N/A
Solution 2	Marketing and sales	N/A	It leverages artificial intelligence and machine learning to drive faster speed to therapy and provide a seamless experience for patients and providers.	N/A
Solution 3	Marketing and sales	N/A	It allows for automated eligibility checks and determinations in less than a minute – freeing up counselors' time to work on complex cases. To ensure compliance and mitigate risk, it provides real-time income validation, management of complex eligibility criteria, and monthly reporting on XX enrollees.	N/A
Solution 4	Marketing and sales	N/A	It verifies government payer exclusions even when full benefit verification is not required.	N/A
Solution 5	Marketing and sales	N/A	It recommends a specific intervention type and cadence, such as motivational text messages, multi-channel dosage reminders, and/or targeted clinician touchpoints. XYZ is the only AI platform validated through peer-reviewed Randomized Control Trial, which reported 5.5x greater adherence compared to traditional programs.	N/A
Solution 6	Marketing and sales	N/A	It helps patients to benefit from dosage and refill reminders via the XYZ app, creating an end-to-end solution that combines digital alerts with human support from licensed clinicians.	N/A
Solution 7	Marketing and sales	N/A	It connects to all major payers and guides the provider through each step of the prior approval form to make the process as seamless as possible. An integrated provider portal keeps providers up-to-date on the patient's status, while experienced counselors manage the workflow and appeals.	N/A

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Research calendar

Life Sciences Business Process

Published
 Planned
 Current release

Reports title	Release date
Life Sciences Operations: Changing Market Dynamics Ushering In a New Wave of Digitization	September 2021
Innovation in Pharmacovigilance (PV): How to Spend Smarter Not Higher?	January 2022
MedTech - The Next Colossal Wave in Life Sciences Outsourcing	April 2022
Life Sciences Operations PEAK Matrix® Assessment 2022	June 2022
Life Sciences Operations – Provider Compendium 2022	September 2022
The Evolving Pharmacovigilance Landscape	Q3 2022
The Changing Role of CROs in the Pharma World	Q4 2022
Life Sciences Sales and Marketing Operations PEAK Matrix Assessment with Provider Landscape	Q1 2023
Life Sciences Sales and Marketing Operations Provider Compendium	Q1 2023

Note: [Click](#) to see a list of all of our published Life Sciences Business Process reports




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