Healthcare Customer Experience Platforms – Provider Compendium 2023

April 2023: Complimentary Abstract / Table of Contents

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- CXM Technology
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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® Assessment 2023**:**

- **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

The healthcare customer experience platforms – provider compendium report covers detailed profile of 16 vendors

Provider 1 | healthcare customer experience platforms profile (page 1 of 5)
Overview

Company mission/vision statement for clinical develop...
Provider 1's goal is to empower its clients through digital transfo... experience by providing tools and solutions that enable organiz... experience across the spectrum. The product aims to digitize e... activate healthcare data, create new service offerings, and per... experiences.

Overview of the client base
Provider 1 offers its customer experience platforms to multiple... within the healthcare sector. Some of the larger clients in its po... Healthcare, while the midsize enterprises include Mercy Health... healthcare space include Benefytt and Alma, to name a few.

Key partnerships
- XYZ
- XYZ
- XYZ
- XYZ
- XYZ
- XYZ
- XYZ
- XYZ

1 All the revenue components add up to a total of 100%
2 Based on analyst estimates

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Provider 1 | healthcare customer experience platforms profile (page 2 of 5)
Case studies

| Case study 1 | Provider 1 champions Mercy Health's innovation |

Business challenge
Mercy Health wanted to address the COVID-19 pandemic thro... technological ingenuity. Addressing the pandemic by rolling ou... personalized solutions to the patients was the problem stateme...

Solution
- "Digital COVID-19 front door" was developed by Provider 1. ... source for patients and enabling Mercy Health to put forward... emergency. This was the first step taken by Provider 1 that e... Health's website
- A product was leveraged to build the landing page within a d...
- Established a COVID-19 screening experience with a produ... screened before proceeding further

Impact
- The COVID-19 health screener improved conversion rates w...
- A total of 35,000 individuals were addressed by Mercy Healt... process, to determine if testing was required. Unexpectedly, ... health along with serving individuals, at a larger scale, throu...

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Provider 1 | healthcare customer experience platforms profile (page 3 of 5)
Offerings

Proprietary healthcare customer experience products (repr...

Product	Details
Product 1	A customer data platform that ...
Product 2	An experience platform that pr... the right time.
Product 3	A platform that has integration... satisfaction.
Product 4	A solution that helps to manag... insights.
Product 5	A solution which helps clients ...

Provider 1 | healthcare customer experience platforms profile (page 4 of 5)
Recent developments

Key events (representative list)

Event name	Type of event	Details
Event 1	Solution	In 2022, Pro... personalized...
Event 2	Partnership	In 2022, sho... to deliver the... online audie...
Event 3	Solution	In 2022, the... Provider 1 is...
Event 4	Partnership	In 2020, Pro... enterprises,... engagement...
Event 5	Launch	In 2021, Pro... surface min... better custo...

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Provider 1 | healthcare customer experience platforms profile (page 5 of 5)
Everest Group assessment – Leader

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
- Provider 1 has focused on strengthening its healthcare story through the development of a healthcare-specific cloud platform – a platform for Healthcare. This platform enables healthcare enterprises to augment their clinical and business outcomes while also providing a personalized experience to customers
- As part of the cloud platform, it leverages HIPAA-ready customer experience-driven solutions such as CX data analytics to stitch and analyze data from multiple sources in order to understand customer preferences and drive omnichannel engagement through targeted communication
- Clients cite its user-friendly interface and support services as the key strengths of the company

Limitations
- After having expanded its platform capabilities to healthcare with its industry cloud offering recently, Provider 1 should now focus on building brand recall in the healthcare market, which is backed by relevant case studies and proof points
- While the Provider 1 platform's capabilities are good, Provider 1 can look to provide some customization flexibility for clients, so that the clients can create tailored reports/views based on their requirements
- While Provider 1 has a strong partner ecosystem to augment its horizontal capabilities, it can look to forge more healthcare-focused partnerships with HealthTech organizations to enhance its vertical capabilities

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Research calendar
Healthcare Information Technology

Reports title	Release date
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
RCM Platforms PEAK Matrix® Assessment 2023	November 2022
Healthcare Customer Experience Platforms PEAK Matrix® Assessment 2023	December 2022
Healthcare Provider Digital Services PEAK Matrix® Assessment 2023	December 2022
Healthcare Cloud-based Core Administration Platform PEAK Matrix® Assessment 2023	March 2023
Healthcare Provider Digital Services – Provider Compendium 2023	March 2023
Risk Adjustment Solutions in Healthcare – State of the Market Report 2023	March 2023
Healthcare Customer Experience Platforms – Provider Compendium 2023	**April 2023**
Healthcare Cloud-based Core Administration Platforms – Provider Compendium 2023	Q2 2023
Healthcare Data & Analytics Services PEAK Matrix® Assessment 2023	Q2 2023
Healthcare Data & Analytics Services – Provider Compendium 2023	Q3 2023

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