

Patient Engagement Platforms PEAK Matrix[®] Assessment 2023

October 2023: Complimentary Abstract / Table of Contents



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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Background of the research

In the ever-evolving healthcare landscape, patient engagement has emerged as a paramount catalyst for transformation. As the industry embarks on a profound shift toward patient-centric care, the active participation of patients in their healthcare journeys has gained heightened importance. In response to these evolving patient expectations, healthcare enterprises are progressively harnessing the power of patient engagement platforms to elevate the overall patient experience across various interaction touchpoints. This encompasses not only patient administration and services management but also extends to encompass extended modules encompassing care management and billing, all of which collectively contribute to a more holistic and patient-focused healthcare ecosystem.

In this research, we present an assessment of 19 patient engagement platform providers featured on the Patient Engagement Platform PEAK Matrix®. The assessment is based on Everest Group’s annual Request for Information (RFI) process for the calendar year 2023, interactions with leading healthcare patient engagement platform providers, client reference checks, and an ongoing analysis of the patient engagement market.

This report includes the profiles of the following 19 leading patient engagement platform providers featured on the Patient Engagement Platform PEAK Matrix:

- **Leaders:** Microsoft, Optum, Pegasystems, and Salesforce
- **Major Contenders:** Athenahealth, Buddy Healthcare, CareCloud, Cognizant, eClinicalWorks, Epic, Innovaccer, League, Luma Health, Oracle, Phreesia, and Zyter TruCare
- **Aspirants:** AdvancedMD, Experian Health, and Health Catalyst

Scope of this report



Geography
Global



Providers
Healthcare provider



Provider offerings
Healthcare patient engagement platforms

Overview and abbreviated summary of key messages

This report examines the patient engagement platform provider landscape and its impact on the healthcare market. It focuses on patient engagement 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 providers 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 patients across multiple channels
- Healthcare providers expect a variety of functionalities such as appointment scheduling, platform customization, awareness and educational content, and access to health records to improve patient experience and provide more coordinated, accessible, and patient-centric care
- The need for smooth EHR integration with existing systems is the top-most challenge faced by healthcare providers in enabling best-in-class patient experience

Emerging platform provider trends

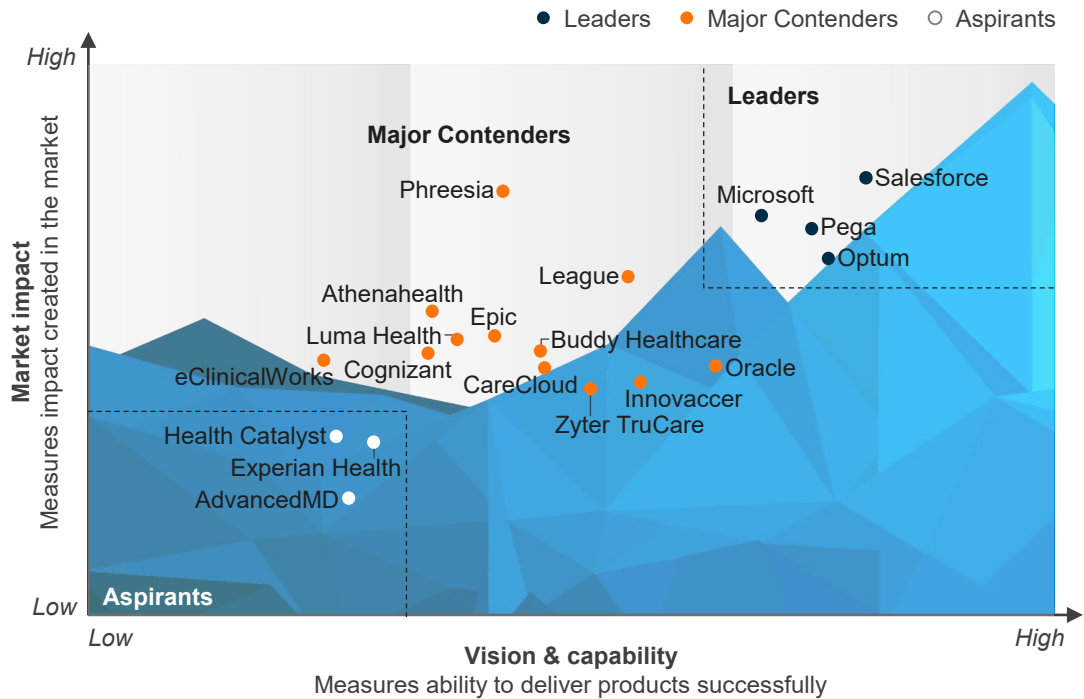
- Patient engagement platform provider landscape is constantly evolving as a broad range of players (including BigTechs, health technology organizations, niche patient engagement platform providers, industry-agnostic platform providers, and enterprise platform providers) are emerging in this space
-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

Platform provider capability

- Patient engagement platform providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Microsoft, Optum, Pegasystems, and Salesforce are the current leaders in the patient engagement platforms market

This study offers three distinct chapters providing a deep dive into key aspects of patient engagement platforms market; below are three charts to illustrate the depth of the report

Everest Group Patient Engagement Platforms PEAK Matrix® Assessment 2023¹



¹ Assessments for AdvancedMD, Athenahealth, CareCloud, eClinicalWorks, Epic, Experian Health, Health Catalyst, Innovaccer, Luma Health, Microsoft, Oracle, and Phreesia exclude platform provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with patient engagement platform buyers
Source: Everest Group (2023)

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	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

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

- Provider 1 offers a platform which excels in low-code capabilities and offers comprehensive process automation, including an embedded AI/ML recommendations engine across functions. This significantly enhances performance in areas such as patient registration and scheduling
- It offers deployment flexibility to clients by supporting on-premise, single-cloud, and hybrid-cloud deployments

Limitations

- While Provider 1 has significant capabilities in services and care management, it can look to expand its offerings in the patient administration space as well, leading to better coverage across the patient engagement value chain
- It can look to expand its capabilities beyond North America, especially to the developing provider markets such as Europe and APAC. Some of these regions are expanding their usage of patient engagement technology

Research calendar

Payer and Provider Information Technology

■ Published ■ Planned ■ Current release

Reports title	Release date
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 Market – State of the Market Report 2022	March 2023
Healthcare Customer Experience Platforms – Provider Compendium 2023	March 2023
Healthcare Cloud-based Core Administration Platform – Product Vendor Compendium 2023	May 2023
Healthcare Data & Analytics Services PEAK Matrix® Assessment 2023	May 2023
What Drives Payers' Expenditures on Care Management?	June 2023
Care Management Trailblazers	July 2023
Healthcare Data & Analytics Services – Provider Compendium 2023	Aug 2023
Rising adoption of Home-based Healthcare Solutions	Sept 2023
Patient Engagement Platforms PEAK Matrix® Assessment 2023	October 2023
Emerging Trends and Applications of Generative AI in Healthcare	Q4 2023
Revenue Cycle Management (RCM) Platforms PEAK Matrix® Assessment 2023	Q4 2023
Healthcare Payer Digital Services PEAK Matrix® Assessment 2023	Q4 2023
Rising adoption of Behavioral and Mental Health Services by Healthcare Enterprises	Q4 2023

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