Patient and Member Engagement Platforms PEAK Matrix® Assessment 2024

November 2024: Complimentary Abstract / Table of Contents

PEAK
MATRIX®

Payer and Provider Information Technology

Everest Group®

Our research offerings

This report is included in the following research program(s):

Payer and Provider Information Technology, HealthTech

- ▶ Advanced SciTech
- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Contract Research Organization Services
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Cyber Threat Detection and Response
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies

- ▶ Finance and Accounting
- ▶ Financial Crime and Compliance
- ▶ Financial Services Technology (FinTech)
- ▶ Forces & Foresight
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Lending and Mortgages
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)

- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Payment Integrity Solutions
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

Learn more about
our custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

Contents

For more information on this and other research published by Everest Group, please contact us:

Abhishek Singh, Partner

Priya Sahni, Vice President

Kaushik Sundar, Practice Director

Hanupriya Nangia, Senior Analyst

Rushil Goel, Analyst

Introduction

The era of standardized, one-size-fits-all healthcare is now a thing of the past. Today, personalized communication is essential for enhancing user satisfaction and ensuring adherence to treatment plans. Tailoring this age-old approach not only meets diverse customer expectations but also drives better outcomes. To serve these needs, healthcare enterprises are increasingly leveraging patient and member engagement platforms, driving the shift to personalized, patient- and member-centric care.

The patient and member engagement ecosystem is evolving with a wide range of suppliers, from BigTechs to niche HealthTech startups. While core offerings such as appointment scheduling and omnichannel communication are standard, differentiators such as digital payments and integrated telemedicine set some vendors apart. The significance of personalized engagement in healthcare is shifting from reducing administrative tasks to enhancing patient and member experiences, enabling better communication, timely interventions, and ultimately leading to better health outcomes.

Providing dynamic, personalized, and evolving solutions is no longer optional; it is essential for delivering improved health outcomes and experiences

In this report, we present an assessment of 20 patient and member engagement platform providers featured on the Patient and Member Engagement Platforms PEAK Matrix®. The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2024, interactions with leading healthcare patient and member engagement platform providers, client reference checks, and an ongoing analysis of the patient and member engagement market.

This report includes profiles of the following 20 leading patient and member engagement platform providers featured on the Patient and Member Engagement Platforms PEAK Matrix®:

- **Leaders:** Microsoft, Pegasystems, and Salesforce

- **Major Contenders:** Carenet, Cognizant, Innovaccer, League, Medallia, mPulse, Optum, Oracle, Phreesia, Press Ganey, Qualtrics, Tebra, and Zyter|Trucare

- **Aspirants:** b.well, CareCloud, Health Catalyst, and Luma Health

Scope of this report

Geography: global

Industry: market activity and investments of 20 leading patient and member engagement platform providers; healthcare

Domain: patient and member engagement

Overview and abbreviated summary of key messages

The report examines the patient and member engagement platform provider landscape and its impact on the healthcare market. It focuses on patient and member engagement platform provider position and growth in the healthcare market, changing dynamics and emerging trends, and assessment of platform providers delivery capabilities.

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

Emerging enterprise trends

- Enterprises are moving away from standardized approaches, focusing on personalized communication to enhance patient satisfaction and treatment adherence.

- Enterprises are adopting digital payments, telemedicine, and data analytics to provide comprehensive, patient-centric services

- Enterprises are consolidating various functions such as sales, marketing, service, and care into single platforms to streamline operations and enhance customer experiences

Emerging platform providers trends

- The patient and member engagement platform provider landscape is constantly evolving with a wide range of providers, such as BigTechs and specialized HealthTech startups , offering a range of engagement solutions

- There's an increasing emphasis on utilizing data analytics to generate actionable insights, enhancing patient engagement and care delivery
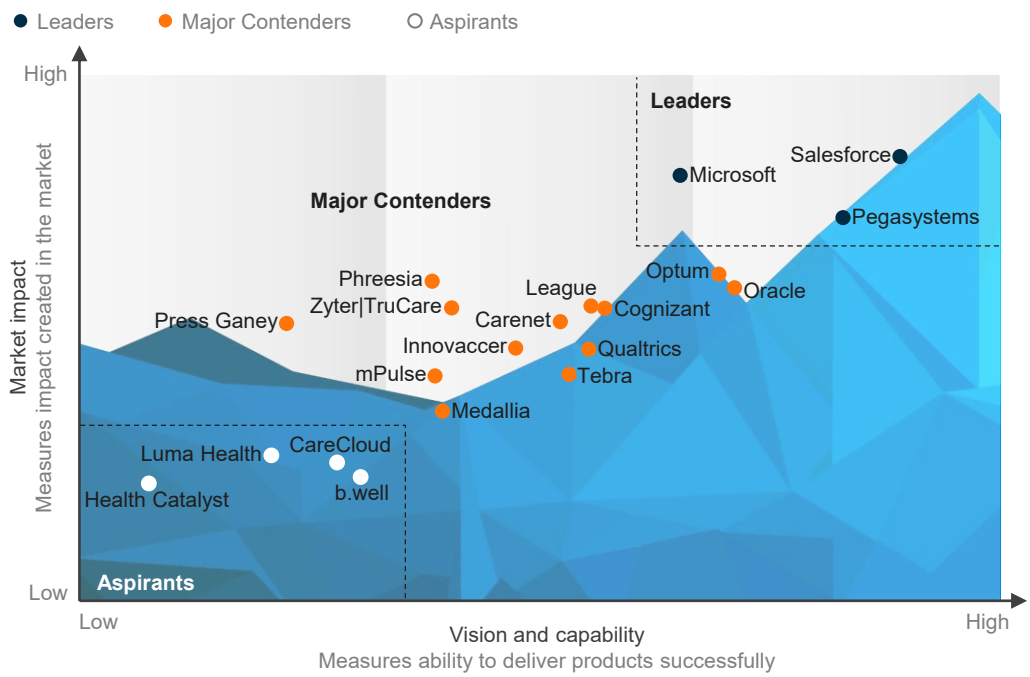
Platform provider capabilities

- Patient and member engagement platforms can be positioned as Leaders, Major Contenders, and Aspirants on a capability-market share matrix

- Microsoft, Pegasystems, and Salesforce are the Leaders in the patient and member engagement platforms market

Everest Group®

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

Everest Group PEAK Matrix® Assessment 2024

Illustrative example

Everest Group Patient and Member Engagement Platforms PEAK Matrix® Assessment 2024[1]

● Leaders ● Major Contenders ○ Aspirants

High

Market impact
Measures impact created in the market

Leaders

Salesforce

Microsoft

Major Contenders

Pegasystems

Phreesia

Zyter|TruCare

League

Optum

Oracle

Press Ganey

Carenet

Cognizant

Innovaccer

Qualtrics

mPulse

Tebra

Medallia

Luma Health

CareCloud

b.well

Health Catalyst

Aspirants

Low

Low — Vision and capability — High

Vision and capability
Measures ability to deliver products successfully

1 Assessments for CareCloud, Health Catalyst, Luma Health, Medallia, Microsoft, mPulse, Oracle, Pegasystems, Phreesia, Press Ganey, Qualtrics, and Tebra 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 and member engagement platform buyers
Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ◔ Low ● High

Providers	Market impact				Vision and 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	◔	◔	◑	◑	◔	◔	◔	◑	◑	◑

Everest Group's remarks on providers

Illustrative example

Measure of capability: ◔ Low ● High

	Market impact				Vision and 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 strong patient administration and sales and marketing offerings such as AI-powered personalized content, campaign management, and intelligent scheduling/patient self scheduling
- Clients identify the cultivating of good client relations and adhering to project timelines as the key strengths of Provider 1

Limitations
- Provider 1 has good breadth of services, but can enhance its client portfolio by unlocking more use cases that cater to the provider segment such as using predictive analytics for mental health
- It should try to expand into larger multi-country deals and also scout for engagements in markets other than North America to strengthen its presence in the region

Research calendar

Payer and Provider Information Technology

Published   Current release   Planned

Reports title	Release date
Importance of IT Security Amid Evolving Care Models in Healthcare and Life Sciences	February 2024
Healthcare Payer Digital Services – Provider Compendium 2024	March 2024
Member Engagement Trailblazers	April 2024
Revenue Cycle Management (RCM) Platforms – Provider Compendium 2024	April 2024
Healthcare Patient Engagement Platforms – Provider Compendium 2024	April 2024
Rise of Analytics in Claims Management	June 2024
Care Management Platforms PEAK Matrix® Assessment 2024	June 2024
Healthcare Industry Cloud Services PEAK Matrix® Assessment 2024	June 2024
Healthcare Industry Cloud Services – Provider Compendium 2024	September 2024
Care Management Platforms – Provider Compendium 2024	September 2024
Patient and Member Engagement Platforms PEAK Matrix® Assessment 2024	November 2024
Healthcare Provider Digital Services PEAK Matrix® Assessment 2024	Q4 2024
Healthcare's Digital Backbone: A Deep Dive into Data Management Platforms	Q1 2025
Patient and Member Engagement Technology	Q1 2025
Patient and Member Engagement Platforms – Provider Compendium 2025	Q1 2025

Note: Click to see a list of all our published Payer and Provider Information Technology reports

Stay connected

Dallas (Headquarters)	**Bangalore**	**Delhi**	**London**	**Toronto**
info@everestgrp.com	india@everestgrp.com	india@everestgrp.com	unitedkingdom@everestgrp.com	canada@everestgrp.com
+1-214-451-3000	+91-80-61463500	+91-124-496-1000	+44-207-129-1318	+1-214-451-3000

Website
everestgrp.com

Blog
everestgrp.com/blog

Follow us on

in X ▶ ⬡ f

Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at **www.everestgrp.com**.

Everest Group®
With you on the journey