



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

November 2024: Complimentary Abstract / Table of Contents

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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

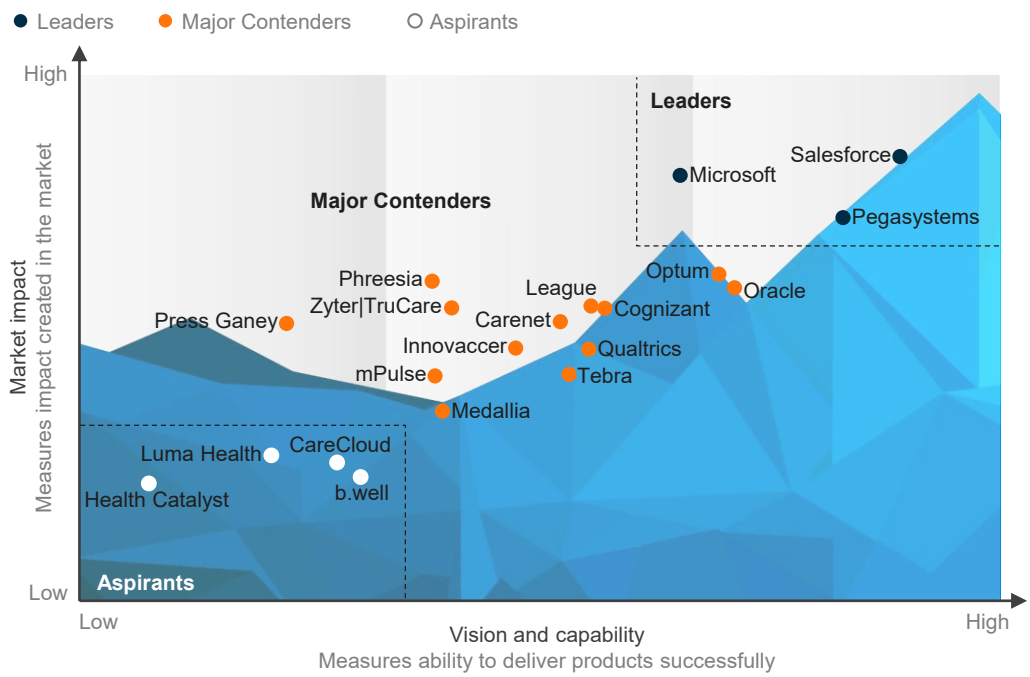
Platform provider capabilities

- 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

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

Everest Group Patient and Member Engagement Platforms PEAK Matrix® Assessment 2024¹



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

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