

Clinical and Care Management Operations Services – Provider Compendium 2024

January 2024



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- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as-a-Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ 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)

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Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

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Introduction

With the growing cost of healthcare services and an observable gap in quality of care provided in the traditional fee-for-service models, value-based care models have gained significant traction in the market. Keeping this in mind, the Centers for Medicare and Medicaid Services (CMS) has planned for increased adoption of value-based care via transferring all Medicare fee-for-service beneficiaries into a care relationship with accountability for quality and reduction in the total cost of care by 2030. While alternate care delivery models, such as home-based care and virtual care, were brought on due to the onset of the pandemic, it is increasingly being utilized by enterprises to improve continuity of care, reduce costs, and drive value for its member/patient base. However, with a growing push toward value-based care and improving overall population health, further technological investments are required from both payer and provider perspectives for integrated care management and effective utilization management. Service providers can fulfill enterprises' clinical and care management operations requirements by delivering clinical services from cost-effective locations and deploying advanced technology solutions built on a foundation of clinical, claims, and Social Determinants of Health (SDoH) data for personalized care programs and engagement.

In this research, we present an assessment and detailed profiles of 15 service providers featured on the [Clinical and Care Management Operations – Services PEAK Matrix® Assessment 2023](#). Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2023, interactions with leading healthcare providers, client reference checks, and an ongoing analysis of the healthcare BPS market.

This report includes the profiles of the following 15 leading healthcare providers featured on the Clinical and Care Management Operations - Services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, EXL, Optum, and Shearwater Health
- **Major Contenders:** CareCentrix, Carenet Health, eviCore, Evolent Health, Sagility, Teleperformance, and WNS
- **Aspirants:** Health Dialog, Kepro, and Wipro

Scope of this report



Geography
Global



Providers
15



Services
Clinical and care
management operations

Overview and abbreviated summary of key messages

Everest Group PEAK Matrix® is a proprietary framework for the assessment of relative market impact and vision & capability. Everest Group classifies 15 service providers on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants. This report examines the clinical and care management BPS service provider landscape and provides analysis of their key strengths and limitations. It also identifies the key implications of the research findings and sourcing considerations for enterprises.

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

Everest Group PEAK Matrix for Clinical and Care Management Operations

- Everest Group classified 15 clinical and care management service providers on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework to assess the overall vision and capability and market impact of providers
 - **Leaders:** There are five service providers in the Leaders category - Accenture, Cognizant, EXL, Shearwater Health, and Optum
 - **Major Contenders:** The Major Contenders category has seven service providers – CareCentrix, Carenet Health, eviCore, Evolent Health, Sagility, Teleperformance, and WNS
 - **Aspirants:** Health Dialog, Kepro, and Wipro are Aspirants on the PEAK Matrix

Key insights on Clinical and Care Management Operations providers' market shares

- Specialty-based utilization management specialists, such as Evolent Health and eviCore, along with healthcare-centric provider Optum, occupy the lion's share in terms of revenue
- Among large providers, Optum and Evolent Health continued their impressive growth with a strong foothold in the market, while smaller players in the CCM space such as Wipro and Health Dialog registered high growth and increasing their market presence

The Clinical and Care Management Operations – Services Provider Compendium 2024 has 15 provider profiles

Clinical and Care Management Operations Services – Provider Compendium 2024

Provider 1 profile (page 1 of 3) Overview

Company overview

Provider is a healthcare management and quality improvement company that provides services to government and private healthcare organizations. Its capabilities provide program beneficiaries with access to vital services and outcome impact through an agile and innovative whole person-centered approach. It is creating health solutions for the vulnerable population of its partners across the continuum of physical, behavior, social, and pharmacy health.

Headquarters: City, state Website: www.companywebsite.com

Key leaders

- Leader 1, Chief Executive Officer
- Leader 2, President and Chief Operations Officer
- Leader 3, Chief Financial Officer
- Leader 4, Chief Analytics Officer
- Leader 5, Chief Strategy Officer

Suite of services

- Care coordination
- Utilization management
- Quality improvement services
- Population data management

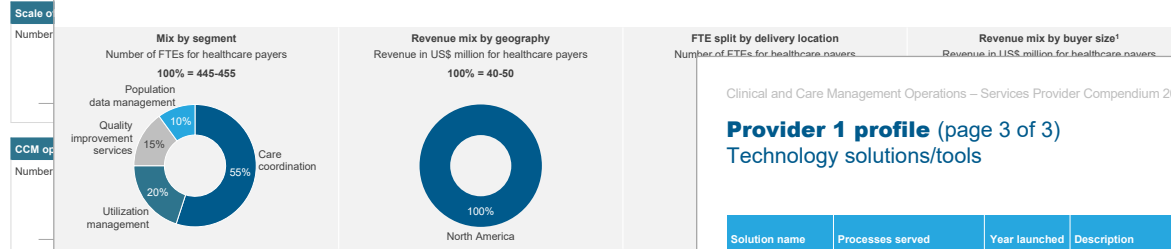
Recent investments (acquisitions and partnerships)

- 2022: provider and XYZ announced a merger to create a leading healthcare solutions company. The combined company aims to help government-sponsored healthcare agencies and payers expand healthcare access, enhance quality, improve health outcomes, and lower costs through its clinical services, provider management, health claims and encounter processing, interoperability, and health analytics services and solutions
- 2021: it acquired XYZ, a population health management and technology solutions company. The acquisition aims to expand provider's population health management and technology solution portfolios

¹ 12 months ending December 31 of any particular year, i.e., from January 1, YYYY to December 31, YYYY
Note: Data based on Everest Group's estimates

Clinical and Care Management Operations – Services Provider Compendium 2024

Provider 1 profile (page 2 of 3) Capabilities and key clients for healthcare payer



Key healthcare payer operations engagements

Client name	Processes served
A federal agency within US department of Health and Human Services (HHS)	N/A

¹ Buyer size is defined as small (<US\$5 billion in revenue), midsize (US\$5-10 billion in revenue), and large (>US\$10 billion in revenue)
Notes: Data based on Everest Group's estimates

Clinical and Care Management Operations – Services Provider Compendium 2024

Provider 1 profile (page 3 of 3) Technology solutions/tools

Solution name	Processes served	Year launched	Description	No. of clients	Solution type (proprietary / joint development)
Solution 1	Care management	N/A	This program promotes quality and cost-effective healthcare and member well-being, which ensures appropriate utilization of services.	N/A	N/A
Solution 2	Quality oversight	N/A	Through this program, provider monitors the quality of programs and services provided by managed care partners. Its team of medical and technical experts analyzes volumes of data to identify opportunities to improve the timeliness, quality, and access to care.	N/A	N/A
Solution 3	Assessments, eligibility, and enrolment	N/A	This program enables the provider to assist Medicaid beneficiaries with mental illnesses, disabilities, and long-term care to review its eligibility for state waiver programs to determine if additional services are needed. The level of care is determined by aligning quality metrics and using standardized assessment content.	N/A	N/A
Solution 4	Technology solutions	N/A	It is a technology platform that integrates essential care management features and all relevant data into one comprehensive solution. Its is leading-edge technology, coupled with an intuitive user experience, provides a foundation for proactive care management.	N/A	Proprietary

Research calendar

Payer and Provider Business Process

Published Planned Current release

Reports title	Release date
Pharmacy Benefits Management (PBM): The Next Big Healthcare Opportunity	January 2023
Revenue Cycle Management (RCM) Trailblazers	March 2023
Navigating the Medicaid Market: Key Themes Riding the Next Wave of Growth	March 2023
Dawn of the Metaverse in Healthcare	March 2023
Healthcare Data and Analytics Services PEAK Matrix® Assessment 2023	May 2023
Generative AI: The New Age of Artificial Intelligence	May 2023
Healthcare Payer Operations PEAK Matrix® Assessment 2023	June 2023
Revenue Cycle Management (RCM) Operations PEAK Matrix® Assessment 2023	June 2023
Clinical and Care Management Operations Services – Provider Compendium 2024	January 2024
Healthcare Outsourcing 2024: How the Year Will Shape Up?	Q1 2024
Payment Integrity (PI) Solutions PEAK Matrix® Assessment 2024	Q1 2024
Generative AI in Healthcare: Moving from Ideas to Operationalization	Q2 2024
Healthcare Payer BPaaS PEAK Matrix® Assessment 2024	Q2 2024
Healthcare Provider Data & Analytics (D&A) Services PEAK Matrix® Assessment 2024	Q3 2024
Utilization Management PEAK Matrix® Assessment 2024	Q4 2024
Payment Integrity (PI) Solutions PEAK Matrix® Assessment 2023	Q4 2023

Note: [Click](#) to see a list of all our published Payer and Provider Business Process reports



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