Clinical and Care Management (CCM) BPS Services PEAK Matrix™ Assessment 2019

Healthcare & Life Sciences Business Process Services (HLS BPS)
Market Report – September 2019: Complimentary Abstract / Table of Contents

EGR-2019-20-CA-3342

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background and methodology of the research

Background of the research

Clinical and care management can be defined as a set of activities that either directly impact the health outcome of the population / individual (such as health risk assessment, case management, and medication adherence programs) or indirectly help healthcare organizations provide quality care at lower cost (such as CAHPS and STAR / HEDIS).

While clinical and care management as a segment has existed for a while now, its importance has increased exponentially post ACA. With the US already being the highest spender in the world on healthcare, ensuring care to reduce readmissions and denials of members is the need of the hour. Also, with ACA shifting the focus from volume-based care to value-based care, the healthcare stakeholders are taking proactive measures to ensure quality care at lower cost for members. This shift is supported by the seepage of consumerism in healthcare, motivating the customers or members to be more involved in their care lifecycle. All this is putting pressure on the payers as well as providers to make investments in clinical and care services and at the same time reduce their costs. With the stakeholders struggling to find the right talent, domain, and technology expertise in house, they are looking for the outsourcing route to help them in their journey.

Such a scenario presents BPS service providers with a host of opportunities; however, third-party vendors need to enhance investments in building capabilities in areas such as consulting / design thinking, technology, and domain-led services to ensure they plug gaps where payers and providers lack in-house capabilities.

Scope and methodology

In this research, we analyze the global healthcare clinical and care management BPS provider landscape. We focus on:

- Relative positioning of 16 service providers on Everest Group's PEAK Matrix™ for clinical and care management BPS
- Analysis of service provider's market share
- Everest Group's analysis of service providers' strengths and areas of improvement

Overview and abbreviated summary of key messages

This report uses Everest Group's proprietary PEAK Matrix™ to assess and rate service providers on various dimensions of their capabilities. It also includes market share analysis of service providers and Everest Group's remarks on service providers highlighting their key strengths and development areas.

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

Everest Group PEAK Matrix for CCM BPS

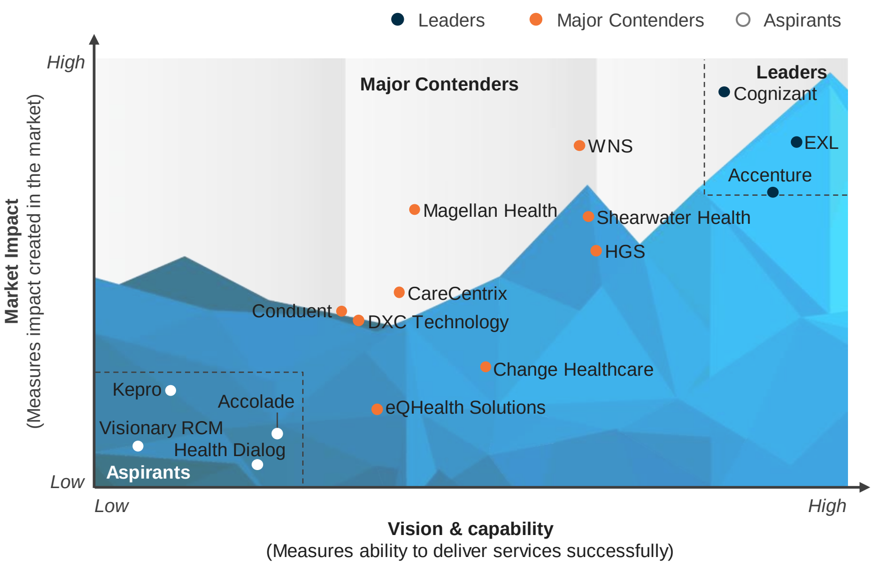
- Everest Group classified 16 CCM BPS service providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework to assess the absolute market success and overall capability of service providers
- Leaders: There are three service providers in the Leaders category – Accenture, Cognizant, and EXL
- Major Contenders: The Major Contenders category has nine service providers – CareCentrix, Change Healthcare, Conduent, DXC Technology, eQHealth Solutions, HGS, Magellan Health, Shearwater Health, and WNS
- Aspirants: Accolade, Health Dialog, Kepro, and Visionary RCM are Aspirants on the PEAK Matrix for CCM BPS

Key insights on CCM BPS market shares

- The top five service providers – Magellan Health, Cognizant, Conduent, CareCentrix, and WNS – account for more than 50% of the revenue of the CCM BPS market
- EXL, HGS, and WNS were the highest contributors to the overall CCM BPS market growth, accounting for more than 60% of the market growth
- Cognizant, Change Healthcare, EXL, and Shearwater Health accounted for almost 65% of all the clients
- Cognizant, EXL, HGS, and Shearwater Health accounted for most of the new client logos added
- Accenture, Cognizant, EXL, Magellan Health, and Shearwater Health have a dominant presence across most of the CCM BPS processes

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

Assessment of CCM BPS Service Providers 2019



Note Assessment for Accolade, CareCentrix, Change Healthcare, Conduent, eQHealth Solutions, Health Dialog, Kepro, Magellan Health, and Visionary RCM excludes service provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, their public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

Source: Everest Group (2019)

Capability assessment

Illustrative example

Measure of capability: High Low

	Market impact				Vision & capability				
Service provider	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1									
Service provider 2									
Service provider 3									
Service provider 4									
Service provider 5									
Service provider 6									
Service provider 7									
Service provider 8									
Service provider 9									

Everest Group's remarks on service providers

Illustrative example

Measure of capability: High Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall

Strengths

- Service Provider 1's acquisition has set ABC up as one of the major players in the care management space, especially in the non-denial UM process. Its delivery efficiency, coupled with acquired entity's clinical expertise, provides Service Provider 1 with a strong value proposition
- Service Provider 1 has invested significantly in domain expertise by having a dedicated team of academicians. Its strong relationship with academic institutions is one of its key strengths as highlighted by buyers

Areas of improvement

- Despite strong capabilities in areas such as analytics and project management in the broader BPO, buyers mentioned them as some of the areas of improvement for Service Provider 1
- With buyers increasingly outsourcing processes such as population health management and risk and compliance, Service Provider 1 stands to gain by diversifying its scope of services, which is centered around utilization management

Research calendar – Healthcare and Life Sciences BPS

Published | Planned | Current release

Flagship HLS BPS reports	Release date
Healthcare Report Card 2018 – Outlook for 2019, and Enterprise Initiatives and Service Provider Performance in 2018	March 2019
Life Sciences Report Card 2018 – Outlook for 2019, and Enterprise Initiatives and Service Provider Performance in 2018	March 2019
Healthcare Payer BPO PEAK Matrix™ with Service Provider Landscape – 2019	April 2019
Healthcare Payer BPS Service Provider Compendium	June 2019
Revenue Cycle Management (RCM) Business Process Services PEAK Matrix™ Assessment 2019	June 2019
Revenue Cycle Management (RCM) Business Process Services (BPS) Service Provider Profile Compendium 2019	September 2019
Clinical and Care Management (CCM) BPS Services PEAK Matrix™ Assessment 2019	**September 2019**
CCM Market Landscape	Q4 2019
Makings of a Successful Sourcing Relationship – Deal Trends in RCM	Q4 2019
Comprehending the Buyer's Sourcing Mindset	Q4 2019

Thematic HLS BPS reports	
Innovation in Pharmacovigilance (PV): How to Spend Smarter Not Higher?	June 2017
Rising Cost of Healthcare in the United States: Can Analytics Help?	August 2017
Pharma Sales & Marketing: Old Strategies Into New Methods | Focus on Transmutation Rather Than Transformation	June 2018
The Digitalization Rhapsody: Enabling Clean Claims Through Digital Means	March 2019
The Quintessential Case for the Amazonization of the Health Plan Enrollment Process	May 2019
Revenue Cycle Management (RCM) Services Market	Q4 2019
RCM 2.0 – What's Next for the BPO Industry	Q4 2019

Note: For a list of all of our published HLS BPS reports, please refer to our website page

Additional Healthcare and Life Sciences BPS research references

The following documents are recommended for additional insights into the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

1. **Healthcare Payer Business Process Services PEAK Matrix™ Assessment 2019** (EGR-2019-20-R-3141); 2019. With multiple M&As and partnerships being announced, healthcare payers have had a busy last couple of years. Quest for consolidation across the value chain has led payers to merge with PBMs, acquire providers, and invest in technology consortia. Additionally, entry of technology firms, such as Amazon, Apple, and Microsoft, and the rise of new-age digital health insurers further complicates the market scenario for traditional health insurers. All these, when coupled with ongoing perennial challenges related to transition to value-based care, regulations, rise of consumerism, provider consolidation, and increasing medical costs, continue to push payers to look for ways and means to not only survive in this space but also thrive. With this slew of changes, the healthcare in the United States is at an inflection point, with everything from member engagement to administrative management to care management being transformed. For payers, the path ahead lies in transforming the way they, typically, work by imbibing technology

2. **Makings of a Successful Sourcing Relationship – Deal Trends in Healthcare Payer BPS Market** (EGR-2019-20-R-3119); 2019. Healthcare payers have always been sluggish in making sweeping technology changes and this year is no different. However, the digital solutions have provided payers the perfect combination of investments and the associated ROIs. This report discusses some of the digital adoption trends by payers and their leverage of third-party service providers in doing so. In addition to leveraging digital assets, payers are also looking for support in areas beyond the traditionally-outsourced claims-associated processes. From creating meaningful member touchpoints to driving higher quality of care, several initiatives have been taken up by all classes of healthcare payers in the US. This report provides initial adoption trends around some of these services as well as matches payer types to areas of interests

3. **Healthcare Analytics Services PEAK Matrix™ Assessment with Service Provider Landscape – 2019** (EGR-2018-20-R-2898); 2018. The labor arbitrage model is steadily reaching a point where enterprises have to look toward other avenues to continue to benefit from outsourcing. Digital technologies, such as analytics, are a potential solution for buyers to improve process efficiency while lowering cost (in the long term). The healthcare analytics services market is showing a double-digit growth rate, with demand coming not only from traditional administrative segments but also from new areas such as care management and member engagement. As a result, the supplier landscape is filled with a multitude of players offering these services under different models. The report will explore some of the leading players in this market.

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