



Everest Group PEAK Matrix[®] for Salesforce Healthcare Service Providers 2021

Focus on Cognizant
December 2020



Background of the research

Early adopters of Salesforce services were looking to effectively manage customer relationships, market targeted products, explore sales performance, and drive cost efficiencies riding on the cloud wave. As the Salesforce technology landscape broadened, enterprises' approach toward Salesforce has evolved from a "reactive" relationship management to a "proactive" approach toward Customer Experience (CX).

Healthcare enterprises are looking to leverage Salesforce for not just engaging with patients, but for their end-to-end business functions as well as addressing the broader healthcare trends, such as reducing technical debt, cost containment, driving patient centricity, and data interoperability. Healthcare enterprises seek to create a 360-degree patient/member view by leveraging advanced analytics to better engage and offer personalized experience to patients/members, improve care outcomes, and drive cost efficiencies. They are integrating customer data across Sales, Service, Marketing, and Commerce Cloud to provide a unified customer experience and achieve data interoperability mandates.

With these changing enterprise expectations and evolving Salesforce technology landscape, service providers are investing in building strong healthcare-specific solutions to expedite time-to-market for their clients and are taking a strong inorganic approach with tuck-in acquisitions to fill gaps across their Salesforce services portfolio and further enhance their geographic footprint.

In this research, we present an assessment of 18 service providers featured on the Salesforce healthcare services PEAK Matrix®.

The assessment is based on Everest Group's annual Request For Information (RFI) process for calendar year 2020, interactions with leading Salesforce service providers, client reference checks, and an ongoing analysis of the Salesforce services market.

This report includes the profiles of the following 18 leading service providers featured on the Salesforce healthcare services PEAK Matrix®:

- **Leaders:** Accenture, Cognizant, and Deloitte
- **Major Contenders:** Coastal Cloud, IBM, Infosys, NTT DATA, Penrod, Persistent Systems, PwC, Silverline CRM, TCS, Torrent Consulting, Virtusa, and Wipro
- **Aspirants:** Acumen Solutions, Customertimes, and Virsys12

Scope of this report:



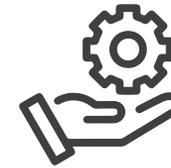
Geography
Global



Industry
Healthcare



Services
Salesforce
services



Service providers
18 leading Salesforce
service providers
for healthcare

Salesforce healthcare services PEAK Matrix® characteristics

Leaders:

Accenture, Cognizant, and Deloitte

- Leaders have invested in building healthcare-specific solutions, targeting both payers and providers
- They are taking a consulting-led approach to assist clients in large-scale transformational deals. Furthermore, they have displayed a holistic vision for the healthcare clients by using Salesforce technology
- Leaders continue to keep pace with the market dynamics through continued investments in capability development (internal IP/tools, CoEs, innovation centers, acquisitions, partnerships, etc.). They are using acquisitions to plug the gaps in their capabilities across functions and geographies
- Strong focus on talent – heavily invested in upskilling and cross-skilling resources across multiple Salesforce certification streams/trails
- They have a strong global delivery network and onshore presence that helps them win transformational multi-geography Salesforce healthcare services deals

Major Contenders:

Coastal Cloud, IBM, Infosys, NTT DATA, Penrod, Persistent Systems, PwC, Silverline CRM, TCS, Torrent Consulting, Virtusa, and Wipro

- Major Contenders have demonstrable proof points and have built meaningful capabilities in select areas within the Salesforce healthcare services domain. However, they need to build capabilities across the broader healthcare value chain
- They exhibit flexible engagement & solutioning approach to build long-term client relationships

Aspirants:

Acumen Solutions, Customertimes, and Virsys12

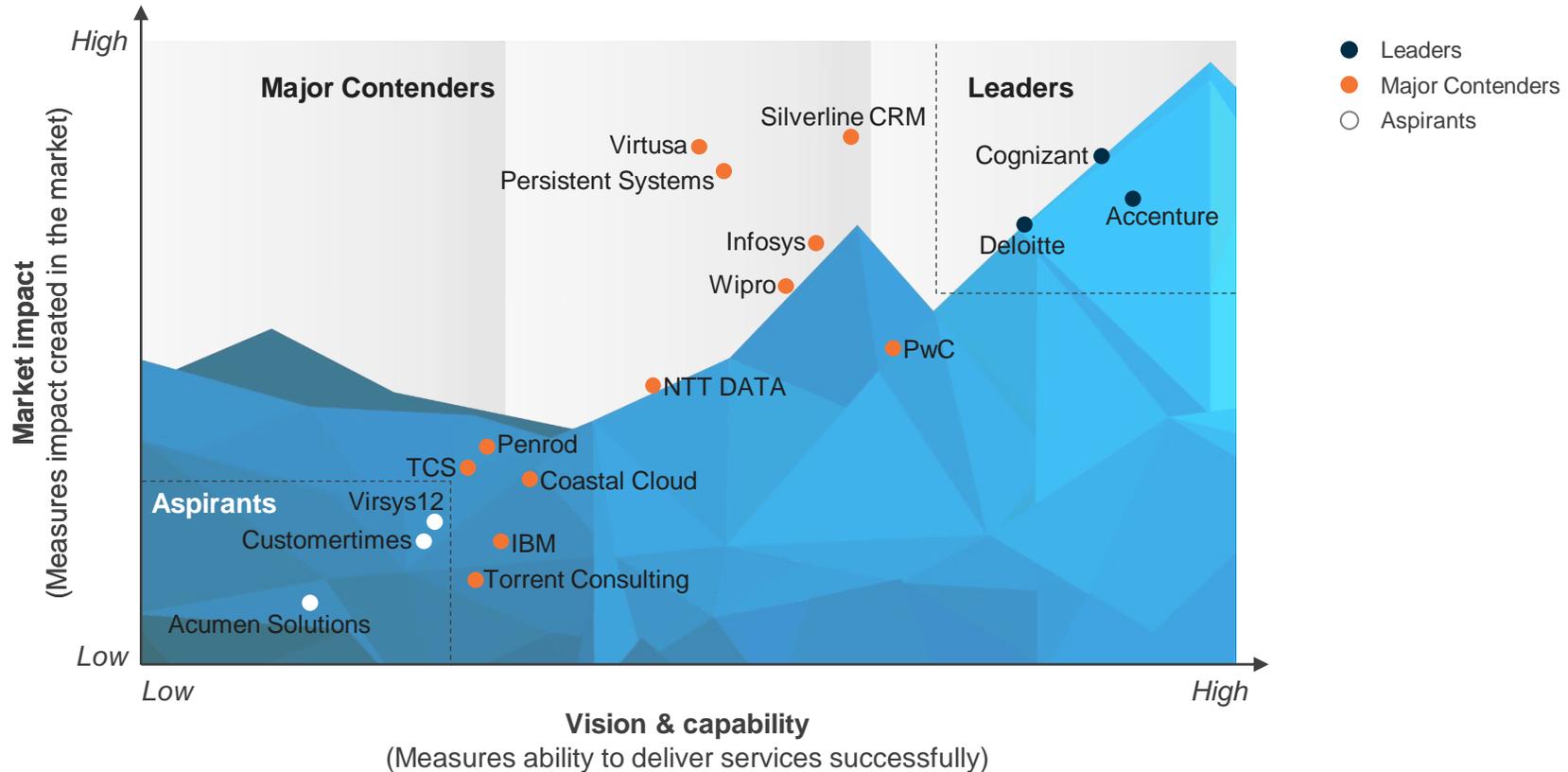
- Aspirants have built niche capabilities for healthcare clients but need to showcase demonstrable proof points to build their credibility. They are largely focused on small and mid-sized buyer segments
- These companies require making investments through partnerships, or through building internal IP/tools to build broader capabilities to cater to the buyers

Everest Group PEAK Matrix®

Salesforce Healthcare Services PEAK Matrix® Assessment 2021 | Cognizant positioned as Leader



Everest Group Salesforce Healthcare Services PEAK Matrix® Assessment 2021



Note 1: Assessments for Accenture, Acumen Solutions, Coastal Cloud, Deloitte, IBM, Penrod, PwC, TCS, Torrent Consulting, and Virsys12 exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

Note 2: As of December 1, 2020, Salesforce has signed a definitive agreement to acquire Acumen Solutions

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information will be presented back to the industry only in an aggregated fashion

Cognizant | Salesforce healthcare services profile (page 1 of 4)

Everest Group assessment – Leader

Measure of capability: ● High ◐ Low

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

Strengths

- Cognizant has a well-articulated vision focused on establishing the innovation curve for healthcare clients by leveraging the Salesforce technology. It is combining its Salesforce expertise with its healthcare proficiency to assist clients in their end-to-end business functions
- It is focusing on consulting-led engagements to win large-scale transformation deals
- It has a strategic focus on boosting capabilities across functions and geographies through inorganic growth, a stance clear by its recent acquisitions of Code Zero, Lev, and EI-Technologies. It is successfully cross-leveraging these capabilities to deliver value for its healthcare clients
- Cognizant has a robust suite of IP tools, frameworks, and accelerators across the healthcare value chain, thus helping it to expedite time-to-market for its clients
- Its delivery excellence and quality of resources are well-perceived by the market

Areas of improvement

- Clients cite talent management, onshore presence, and organizational change management capabilities as the key areas of improvement
- Cognizant must focus on improving internal collaboration and communication in order to create a smooth experience for its clients
- It needs to explore alternate growth avenues by scaling client relationships across small and mid-sized clients

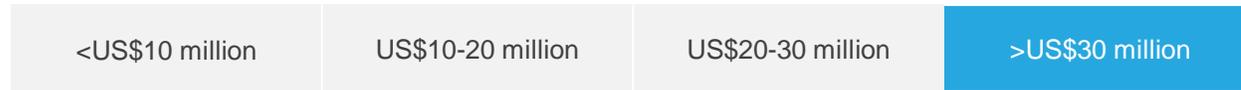
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Provider overview

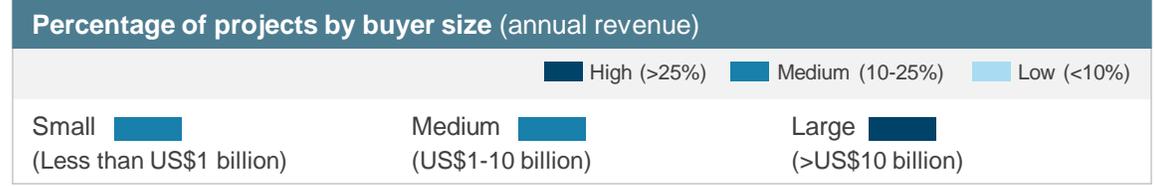
Vision for Salesforce healthcare services

Cognizant’s vision is to be a frontrunner in the healthcare industry, achieve faster go-to-market through industry aligned solutions, and build real-time insights from customer success across provider and payers.

Salesforce healthcare services revenue



Current partnership status with Salesforce:	Global strategic
Salesforce Customer Satisfaction Score (CSAT):	9.6
# Salesforce-certified healthcare experts:	240-250
Current healthcare & life sciences industry expertise status with Salesforce:	Certified



Cognizant | Salesforce healthcare services profile (page 3 of 4)

Case studies, offerings, and recent developments

Case study 1 Re-designing digital member and user experience for a non-profit health plan

Business challenge

A non-profit health plans provider was facing lack of digital member and user experience, absence of an end-to-end marketing/campaign management process, claims backlog, and high operational costs

Solution and impact

Cognizant implemented Service and Marketing Cloud and complete Trizetto product suite including Facets, CareAdvance, and TranZform. Implemented SFMC solution with a multi-business unit set up by enabling email, mobile, web, and automation studio features along with Journey Builder, and provided system integration services. This resulted in reduction of 200-400 basis points in SG&A (ongoing), cleared 600,000 claims backlog in seven months using RPA and ML, and reached around three million members through 100+ campaigns a month.

Case study 2 Re-imagining customer experience with Patient 360 for a US healthcare major

Business challenge

A US healthcare major wanted to implement a Patient 360 with salesforce Health Cloud to enable partners to access patient longitudinal records, care documents, and registries. It required consolidation of patient information from multiple data sources into a centralized platform and seamless digital integration with MuleSoft

Solution and impact

Cognizant implemented Patient 360 leveraging Salesforce Health Cloud. This enabled 200+ partners to access the patient longitudinal records, care documents, encounter information & access patient registries, ensured seamless digital integration of patient information from multiple data sources into single portal with MuleSoft, and allowed Salesforce-based community solution for client partners

Proprietary digital solutions (representative list)

Solution	Details
Single-click patient conversion	It converts prospects into confirmed patients with a single click. No need to go through multi-step Health Cloud default conversion flow enabling better user experience
Patient prime	It facilitates coordination to improve patient outcomes through care coordination and providing a holistic view of patients' activities, results, and progress. Streamlines operations through coordinated patient interactions throughout the organization leading to increase in productivity
Patient Withdrawal Flow	It is a flow-driven, dynamic Q&A capture through which the agent can capture and update the withdrawal reason and related inputs
Single-click Care Plan Generation Framework	It enables single-click care plan generation with problems, goals, and tasks based on relevant Care Plan pattern
Automated Call Guide Scripts	The solution enables automation of call guides & questionnaire-based scripts leading to reduced call AHT, improved call experience, and efficient on-call response gathering

Cognizant | Salesforce healthcare services profile (page 4 of 4)

Offerings and recent developments

Key events (representative list)

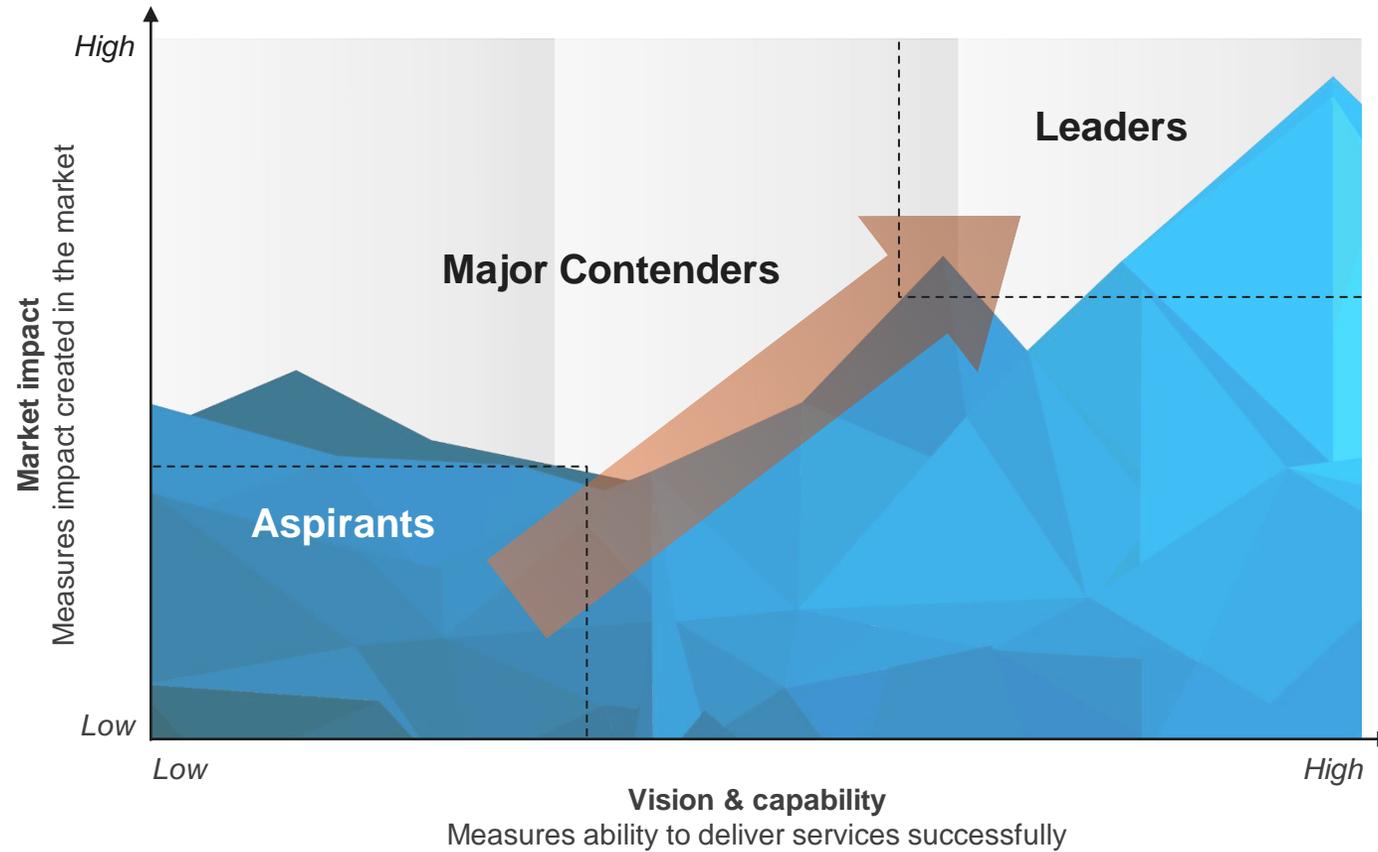
Event name	Type of event	Details
EI-Technologies acquisition	Acquisition	EI-Technologies was acquired for focus on consulting, solution/application development and implementation, along with expanding capabilities in new growth market (France)
Code Zero acquisition	Acquisition	Acquired Code Zero to expand Configure-Price-Quote and Billing Solutions capabilities
Customer success centers	Investments	Cognizant invested in customer success centers across the globe to drive innovation and client-centricity – Missoula (CPQ specialization), Barcelona (marketing and Einstein lab), Dallas (commerce & community specialization), and Bangalore (customer experience zone)

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



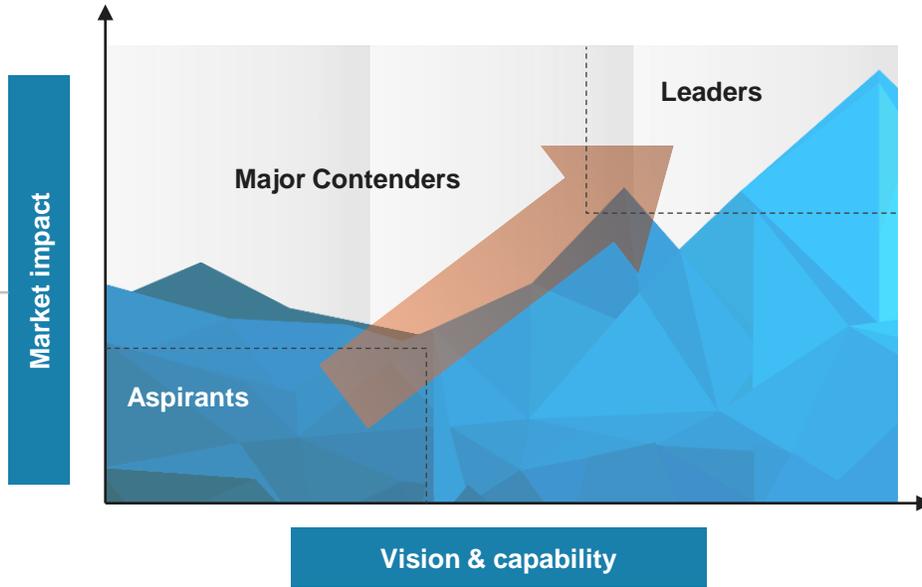
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YOY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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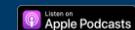
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