



Everest Group Healthcare Care Management Platforms PEAK Matrix® Assessment 2024

Focus on Cognizant

July 2024



Background of research

Care management has always been a cornerstone of healthcare, ensuring that patients receive coordinated, efficient, and personalized care. Traditionally, healthcare stakeholders such as physicians, clinicians, nurses, social workers, and family members, have served as care managers, orchestrating care plans, facilitating communication among providers, and ensuring adherence to treatment regimens. In the post-COVID era, the landscape of care management is being transformed by technology and next-generation innovations such as generative AI. Advanced data analytics, telemedicine, and Electronic Health Records (EHRs) have enhanced the precision and accessibility of care management, while generative AI is being used to predict patient needs, personalize treatment plans, and automate administrative tasks.

Among these developments, care management platforms have emerged as crucial tools in enhancing the delivery of healthcare services. The adoption of care management platforms is driven by several key factors, including the imperative to reduce healthcare costs, the shift toward value-based care models, and the rising demand for patient-centered care. As the healthcare landscape continues to evolve, these platforms are expected to play a pivotal role in transforming the delivery and management of care. Additionally, the current landscape emphasizes the integration of advanced technologies such as Artificial

Intelligence and Machine Learning (AI and ML) to enhance predictive analytics and patient outcomes. Regulatory pressures and the need for interoperability among diverse healthcare systems further propel the adoption of these platforms, establishing them as indispensable tools.

In the research, we present an assessment of 20 care management platform providers featured on the [Care Management Platforms PEAK Matrix® Assessment 2024](#). The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2023, interactions with leading healthcare care management platform providers, client reference checks, and an ongoing analysis of the care management market.

The full report includes the profiles of the following 20 leading care management platform providers featured on the Care Management Platforms PEAK Matrix:

- **Leaders:** Cognizant, Salesforce, and ZeOmega
- **Major Contenders:** Buddy Healthcare, CareCloud, Datas Health, EPIC, HealthEdge, Innovaccer, Lightbeam Health Solutions, MHK, Microsoft, Optum, Oracle, Pegasystems, VirtualHealth, and Zyter|TruCare
- **Aspirants:** Health Catalyst, Luma Health, and Medecision

Scope of this report

Geography: global

Industry: market activity and investments of 20 leading care management platform providers; healthcare

Domain: care management

Use cases: twenty enterprises in the care management space

Care management platforms PEAK Matrix® characteristics

Leaders

Cognizant, Salesforce, and ZeOmega

- Leaders have a strong vision to enhance care management capabilities with more next-gen functionalities, leveraging their strong vertical and technical capabilities. They also provide robust support services to assist enterprises in platform implementation, change management, and on-demand customization, as well as in addressing any concerns
- Leaders offer balanced coverage in care management (such as care outcomes improvement, population health management, and utilization management) by using technology enablers (such as cloud, automation, data management, AI/ML, reporting and analytics, IT security, and mobility) to provide next-best-action and prescriptive care plans, low-/no-code workflows, automated rules engines, conversational AI-based UI, real-time insights, and automated reporting
- Leaders are improving interoperability for enhanced payer-provider collaboration

Major Contenders

Buddy Healthcare, CareCloud, Datos Health, EPIC, HealthEdge, Innovaccer, Lightbeam Health Solutions, MHK, Microsoft, Optum, Oracle, Pegasystems, VirtualHealth, and Zyter|TruCare

- Most Major Contenders have a strong presence across small and midsize payer and provider accounts
- While some Major Contenders use their partner networks of system integrators, technology partnerships, and industry partnerships for implementation and customization services, a significant proportion rely heavily on internal teams for these services
- Certain Major Contenders can effectively perform data management by ingesting data from multiple sources, while a significant proportion are making strides in incorporating SDoH and social, mental, and behavioral health data to consolidate and structure the data collected

Aspirants

Health Catalyst, Luma Health, and Medecision

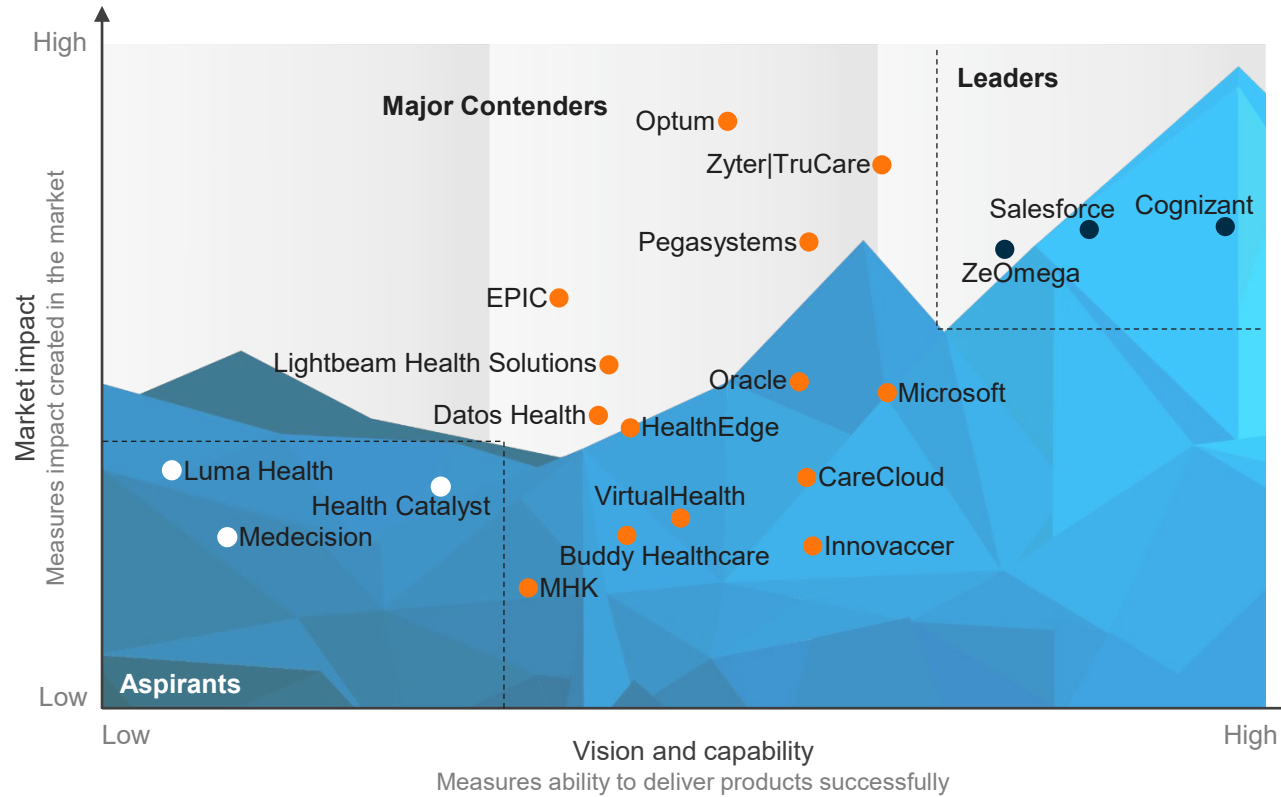
- Aspirants exhibit strong healthcare expertise, with a well-rounded focus on provider solutions
- Most Aspirants focus on selective areas in terms of care management capabilities, target client segments or geographies. They have limited offerings in population health management and utilization management to provide an end-to-end care management platform for its healthcare clients
- Aspirants lack brand recall and presence across large healthcare accounts to complement their strong healthcare domain expertise

Everest Group PEAK Matrix®

Care Management Platforms PEAK Matrix® Assessment 2024 | Cognizant is positioned as a Leader

Everest Group Care Management Platforms PEAK Matrix® Assessment 2024¹

- Leaders
- Major Contenders
- Aspirants



¹ Assessments for Buddy Healthcare, CareCloud, EPIC, HealthEdge, Health Catalyst, Innovaccer, Lightbeam Health Solutions, Luma Health, Medecision, MHK, Microsoft, Oracle, Pegasystems, and VirtualHealth excludes platform provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with care management healthcare buyers
Source: Everest Group (2024)

Cognizant profile (page 1 of 5)

Overview

Vision for care management platforms

The company's vision is to integrate care management to drive patient-centric care, aiming to shift from doing more to doing the right thing through next-generation care management. This approach helps in improving the experience of care, enhancing population health, and reducing per capita healthcare costs. The strategy is based on investment in digitization, enhancing products by investing in digitization to create a cutting-edge healthcare platform; expansion into the provider market, leveraging deep domain expertise to deliver new solutions and address challenges across the health system's value chain; and accelerated digital capabilities, harnessing AI and digital tools to capitalize on market opportunities and deliver optimal solutions in critical areas for clients.

Revenue attributed to care management products portfolio for healthcare clients (CY 2023)

<US\$50 million	US\$50-100 million	US\$100-200 million	>US\$200 million
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Key partnerships

- Salesforce
- Microsoft Azure
- Google Cloud
- Amazon
- Philips Health Suite
- ServiceNow
- UiPath
- Oracle
- Adobe
- Cisco
- Cloudera

[NOT EXHAUSTIVE]

Revenue mix for care management products portfolio in healthcare (CY 2023)

● Low (<10%) ● Medium (10-20%) ● High (>20%)

By geography

- North America
- Asia Pacific
- United Kingdom
- Latin America
- Europe
- Middle East & Africa

By Line of Business (LoB)

- Payer
- Provider

By buyer size

- Small (annual client revenue <US\$1 billion)
- Midsize (annual client revenue US\$1-5 billion)
- Large (annual client revenue US\$5-10 billion)

Cognizant profile (page 2 of 5)

Key investments

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Key care management-specific investments in proprietary solutions / tools / frameworks and talent / Center of Excellence (CoE)

Solutions/Tools/Frameworks	Details
TriZetto Provider Solutions® Analytics	It enables providers to take practice performance and revenue cycle analysis to the next level with National Provider Identifier, payer, and Current Procedural Terminology code filtering, individual transaction drill-downs, and a suite of metrics and key performance indicators.
TriZetto Provider Solutions® Advanced Reimbursement Manager Pro	It identifies denied and underpaid claims and monitors transactions to prevent issues by capturing common errors and payer trends. It tracks and manages work efficiently with statuses and follow-up dates and automates the appeal process with payer-specific forms.
TriZetto® CareAdvance®	It is a unified care, disease, and utilization management platform that reduces operating costs, enhances care manager impact, enables better health outcomes, and meets NCQA standards. It grants flexibility for simple configuration; member, health plan, and provider cooperation is facilitated by pre-made integrations.
TriZetto® EngageMember®	It allows members to access their healthcare data on demand. It provides members with timely healthcare data so they can make more informed care decisions based on their coverage, claims, and costs to support improving outcomes and lowering the cost of care.
TriZetto Provider Solutions® Insurance Eligibility Discovery	It mitigates the financial risk by using an automated process to identify a patient's insurance carrier in a matter of seconds. It can submit a real-time eligibility request using minimal patient data to multiple payers at once.
Cognizant® Patient Care Management	It prioritizes the patient's well-being by placing them at the core of care, bringing together the four Ps - Patient, Provider, Pharma, and Payer.
TriZetto Provider Solutions® Electronic Authorizations	It streamlines the process of requesting a healthcare services review or notice of admission by reducing administrative costs and manual paper-based processing and allows to seamlessly receive the response by leveraging the HIPAA-covered 278 EDI transaction.
NXT Utilization Management	It automatically identifies, prioritizes, and routes Utilization Management (UM) documents to end users, validating member eligibility and allowing prior authorization details to be viewed and approved. Through seamless integration with QNXT, work items are delivered in real time, and end-user desk-level requirements are configured using natural language. It prioritizes UM requests and ensures member eligibility for drug prescription authorization.
TriZetto Provider Solutions® Patient Payments	It improves financial performance with patient payments through a digital payments platform, interactive voice response, text-to-pay, and electronic or paper patient statements.
OneCare IoMT Platform	It is a remote patient monitoring platform that integrates with EHR/EMR systems, enabling the collection of patient vitals through wearables, monitoring devices, and mobile apps. It features ready-to-deploy components, adheres to medical-grade services and standards compliance, ensures data security, and supports multi-tenant deployment through robust architectural principles.

Cognizant profile (page 3 of 5)

Key investments

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Other key care management-specific investments in acquisitions, Joint Ventures (JVs), and partnerships (such as SI, consulting services, SaaS platform/product, and solution partners)

Partnerships/Alliances/Acquisitions/JVs	Details
Beacon labs	Developed a proprietary claims editing system for BeaconLBS and its payer clients in the pharmacy market
Chello/Verso	Enabled an electronic bank product that allows providers to apply for loans through the TriZetto Provider Solutions client website; it also shares aggregate claims and remits data to the provider if a product is purchased
Innovation and platform modernization	Collaborated with Softvision on a modernized and unified platform to create a human-centered design to reimagine the end-user experience and bring all clients together on a single platform
Customer product order UI	Collaborated with Cardinal to build an integrated solution via API into Cardinal's Customer Product Order UI. The portal that is accessible to clients and internal customer service agents, verifies insurance coverage for a product, establishes the cost and patient responsibility through claims pricing and makes eligibility API calls to the TriZetto Provider Solutions Platform. The buyer pays for the item when the price and patient part has been determined, and Cardinal then processes the order.
Gen AI partnership with hyperscalers (Google, Microsoft, and AWS)	Partnered with hyperscalers such as Google, Microsoft, and AWS to craft payer-specific Large Language Model (LLM) solutions, unlocking generative AI's potential for addressing various payer business complexities; initially, collaboration with Google targeted the transformation of administrative sectors such as appeals and grievances, as well as member and patient engagement
Cognizant Skygrade	Invested in Cognizant Skygrade to promote safe and quick application modernization, multi-cloud interoperability, full adoption of DevSecOps, and observability while accelerating time-to-value, improving performance and cost containment, and reducing complexity over the whole cloud life cycle
Bluebolt	Invested in Bluebolt, a grassroots innovation movement to enable and empower associates to take up the innovation journey within their area of work at the project level, leading to continuous improvement and innovation; the Bluebolt Innovation Challenge has led to the generation of 45,000+ ideas thus far

Cognizant profile (page 4 of 5)

Case studies

CASE STUDY 1

Enhanced clinician satisfaction and productivity with automated UM processes for the client

Business challenge

The client realized its clinical staff were not fully using their skills due to repetitive, rule-based UM tasks. This lowered job satisfaction in a competitive job market. It wanted to increase UM productivity, reduce administrative costs, and improve clinician satisfaction.

Solution

The solution involved implementing a pilot program using its TriZetto® Clinical CareAdvance®. By using pre-established business rules to automate the process, physicians can go on to the next case by simply activating the applicable rule, rather than having to navigate through more than 20 steps to write a letter. The letter was automatically created by CareAdvance® using the clinician's input.

Impact

As a result, the client experienced a recovery of 9 hours of productivity daily, potentially saving 33 hours each day. This achievement equated to the workload of an additional full-time employee being completed.

CASE STUDY 2

Implemented an agile solution to meet NCQA requirements and improve workflows for the client

Business challenge

The client needed to set up a case management system to meet NCQA requirements for complex cases.

Solution

The client implemented Cognizant's agile solution for TriZetto's clinical CareAdvance® case management module, meeting NCQA requirements. It achieved an early go-live, completing mock chart reviews with NCQA consultants, improving workflows post-go-live.











Impact

As a result, CareAdvance® case management implemented automated identification campaigns. It conducted NCQA-compliant assessments systematically, targeting at-risk populations. Progress monitoring tracked care planning goals for maintaining or improving member health. It standardized complex case management processes, including enrollment, documentation, and reporting. Case managers could manage members across care settings and ensure access to evidence-based programs. These changes allowed the payor to serve more providers and meet launch deadlines for new products, leading to NCQA accreditation for case management.

Cognizant profile (page 5 of 5)

Everest Group assessment – Leader

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

- Cognizant offers a comprehensive suite of platforms across the care management area, including Clinical CareAdvance® and CareAdvance® provider solutions, for utilization management, case, and disease management along with offering TriZetto® Touchless Authorization Processing (TTAP) for automating the prior authorization process
- It is leveraging its strong partnership ecosystem with cloud partners (Azure, AWS) and industry partners (Healthwise, MCG, and Optum) to strengthen its care management market penetration. For instance, it expanded its partnership with Microsoft to integrate generative AI into TriZetto Assistant on Facets to provide enhanced process automation, regulatory compliance, and data security
- Clients cite ease of integration with the existing enterprise solutions and extensibility of the platform as the key strengths of the TriZetto Suite
- Clients appreciate Cognizant’s proactiveness and responsiveness to client issues

Limitations

- Cognizant can look to improve its support services and the user interface of the care management platform to improve client experience
- It can look to offer innovative price constructs such as risk-based or outcome-based models more proactively to provide price flexibility to clients
- While Cognizant has a strong presence within the North American region, it can look to take its offerings to clients outside of the region such as in the Middle East and Europe, to scale its market presence and increase brand recall
- While clients perceive the platform as being smooth, they often experience technical workarounds for uploading or downloading documents, which impacts the stability of the system and makes it slow

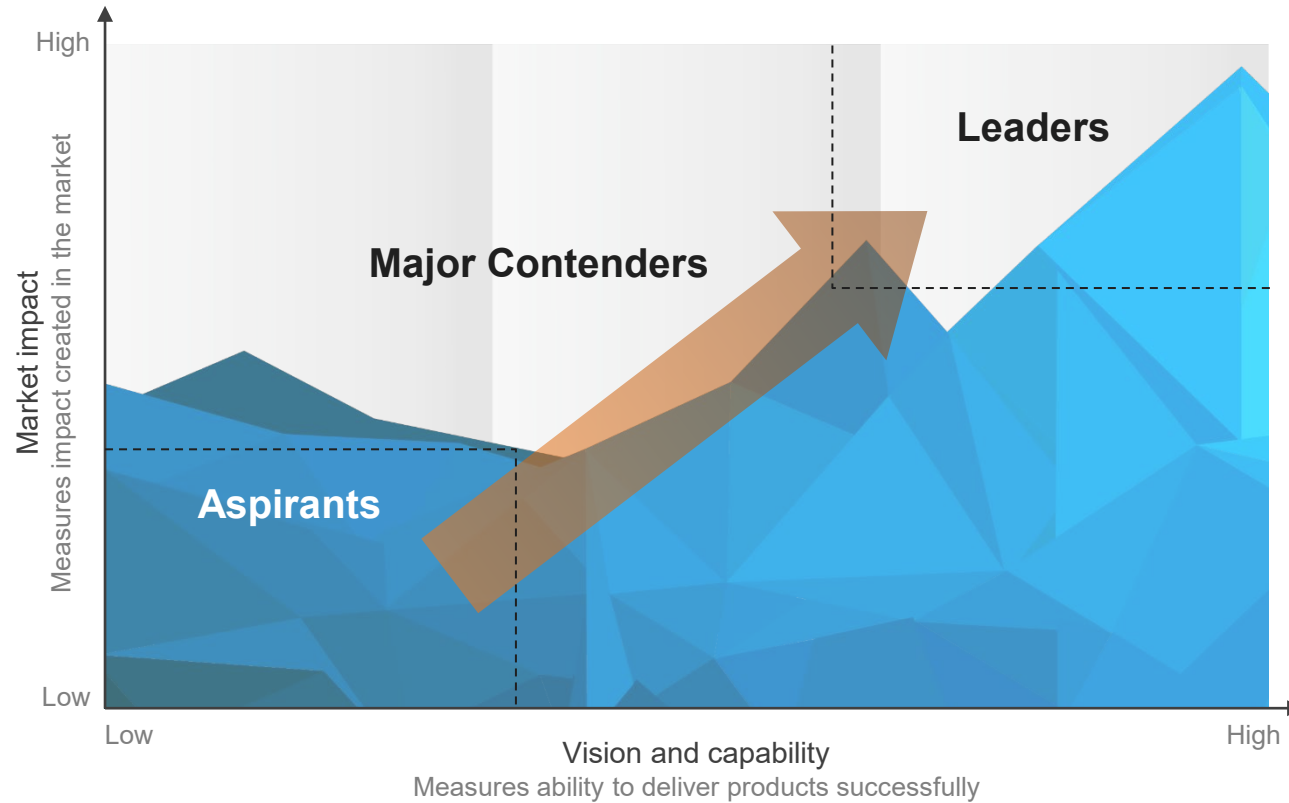
Appendix

PEAK Matrix® framework

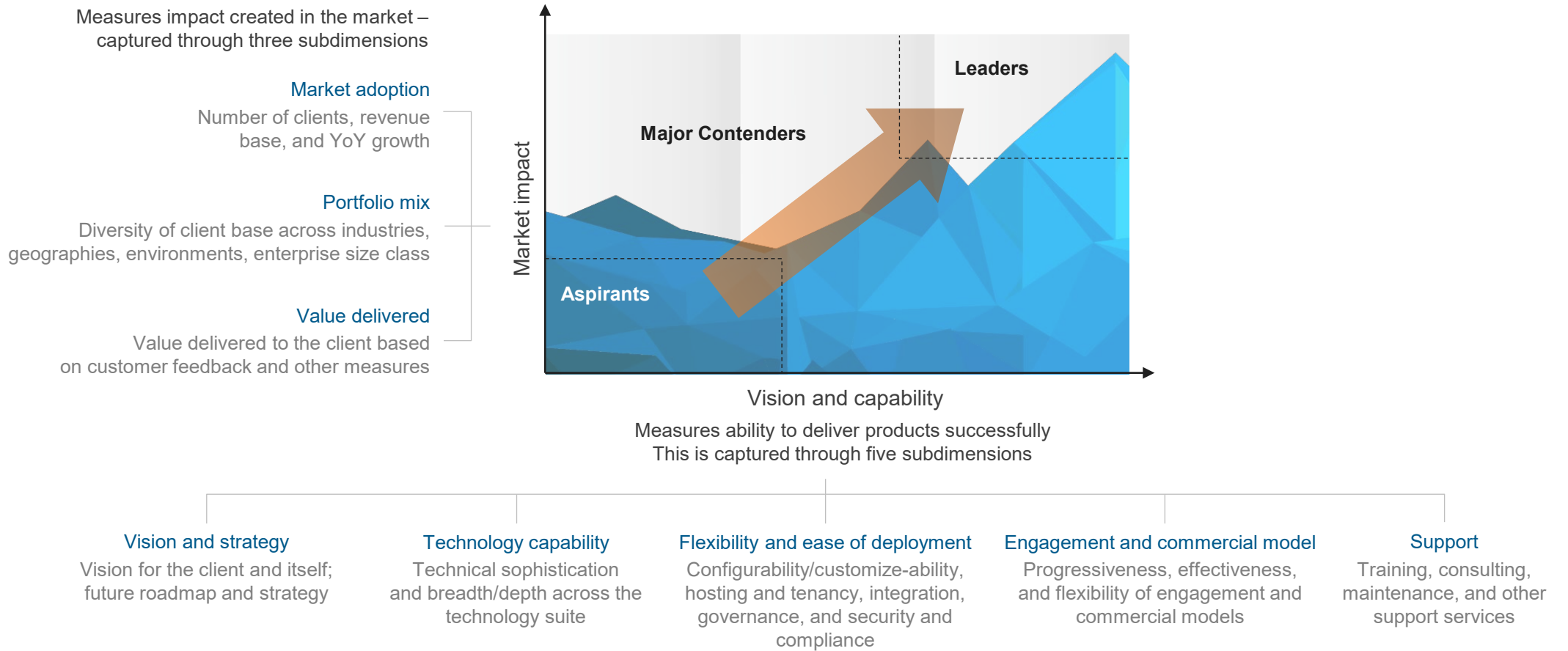
FAQs

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

Everest Group PEAK Matrix



Products PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

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

A: No. The PEAK Matrix highlights and positions only the best-in-class 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.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

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

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for 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 Everest Group; please contact your CD or contact us

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

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.

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