IDC PERSPECTIVE

22 Vendors to Watch to Enable Customer-360 for Payers

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EXECUTIVE SNAPSHOT

FIGURE 1

Executive Snapshot: 22 Vendors to Watch to Enable Customer-360 for Payer

In December 2020, IDC conducted an IDC MarketScape, weighting and scoring 12 vendors and reporting well-researched IDC judgment about the customer-360 data platforms market for payers. There are 22 other vendors that did not qualify for a complete IDC MarketScape evaluation but are still identified as "vendors to watch" in this space. This document identifies these vendors and reports publicly available information to complete a substantive study of this market.

Key Takeaways

- With 12 vendors in a previous MarketScape and 22 vendors reported here, payers have a comprehensive view of the vendors in the customer-360 infrastructure market.
- Most, if not all, of the vendors offer "services" as at least an optional part of their offerings. Payers should ensure they clearly understand the offering versus the services needed to implement and support.
- The nascency of the space, the inherent nature of comprehensive customer/patient/member/person-360, the complicated nature of master data management (MDM), and the common practice of vendors acquiring other vendors to build a portfolio make this analysis difficult.

Recommended Actions

- This document and the preceding IDC MarketScape should be used to assess customer-360 as-is and to-be architectures and road mapping.
- Payers should look at their own requirements carefully, including multiyear budgets for strategy, configuration, consulting, and customization over and above the software cost and functionality.
- The vendors must be able to scale. Some products were born and may be brought up quickly for the interoperability mandates or evolved as a vendor acquired various software pieces and stitched together a derivative data model and platform.
- Infrastructure (data model, standards, process, workflow, education, integration, and agility) should be respected by the vendor, not just application or clinical integration.

Source: IDC, 2021

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IN THIS EXCERPT

The content for this excerpt was taken directly from 22 Vendors to Watch to Enable Customer-360 for Payers (Doc #US47270521). All or parts of the following sections are included in this excerpt: Situation Overview, Advice for the Technology Buyer, and Learn More sections that relate specifically to Cognizant, and any figures and or tables relevant to Cognizant.

SITUATION OVERVIEW

In December 2020, IDC conducted an IDC MarketScape, weighting and scoring 12 vendors and reporting well-researched IDC judgment about the customer-360 data platforms market for payers. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability. For more information, see *IDC MarketScape: U.S. Customer-360 Data Platforms for Payers 2020-2021 Vendor Assessment* (IDC #US46997020, December 2020).

There are 22 other vendors that did not qualify for a complete IDC MarketScape evaluation but are still identified as "vendors to watch" in this active space. This IDC Perspective identifies these vendors and reports publicly available information to complete a substantive study of this market. Readers of both documents will get a complete view of this nascent and evolving market.

Context: Market Definition

- The customer-360 data platforms market for payers includes a top-down approach to physical data architecture and is based on a data management life cycle. Data is loaded, curated, stored, accessed, aggregated, and archived. Applications and analytics are quickly spun up and down once the data, workflow, and services are in place. This approach centers on a "canonical data model," is based on standards (such as the HL7, Fast Healthcare Interoperability Resources [FHIR], and ONC U.S Core Data for Interoperability [USCDI] or the Observational Medical Outcomes Partnership [OMOP] data model, which is an approved OSCDI model that is mappable with public information to FHIR standards).
- The data platform not only is the structure of the data but also includes the workflow around ingestion, mapping, cleansing, codifying, and verifying personal identification and data quality. Once staged, services layers or applications can point to the data in its various forms of aggregation and content. Services are enabled for analytic workbenches, models, reports, dashboards, and machine learning (ML) opportunities.

Context: Market Overview

This market is strewn with small tech companies, analytic companies, dashboard companies, services companies, methodology-centric companies, population health companies, and others trying to capture this emerging market. While not all of these companies are attempting full "customer-360," they are worth keeping an eye on in the enterprise-360 space.

Vendors came from many roots toward this recent customer-360 branding for payers. A desire for a unified view of patients/members/consumers has hit healthcare, and payers with their blended "payvider" role now are reacting. This analysis found vendors with previous experience in:

- Other industries (finance, sales, CRM)

- Horizontals (API, data exchange, workflow management)
- Payer health administration (care, utilization, and population health management; cost/quality analytics)
- Payer core administration (enrollment, claims, appeals)
- Data management (data factories, data warehousing, NoSQL databases)
- Health information exchange, EDI, interoperability
- Electronic health records
- FHIR and other standards

This document emphasizes the surrounding customer-360 ecosystem includes vendors with experience in these industries, plus:

- Pure interoperability/API
- Patient experience
- Consumer experience
- Patient engagement
- Cloud-native data management
- Reference data management
- Digital healthcare experience
- Suites of point solutions for payers
- Identity management
- Ancillary data providers
- Employer-focused solutions
- Social determinants of health (SDOH) member data
- AI-driven insights on member data
- Front/middle/back-office payer workflows and payer operations

Context: MarketScape Participants

In December 2020, IDC conducted an IDC MarketScape, weighting and scoring 12 vendors and reporting well-researched IDC judgment about the customer-360 data platforms market for payers. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability. Vendors profiled in that document were:

- Arcadia
- Diameter Health
- Edifecs
- ELLKAY
- HealthTrio
- IBM Watson Health
- Innovaccer
- InterSystems

- Medecision
- Salesforce
- Smile CDR
- Zipari

Analysis: Vendors to Watch

There are 22 other vendors that did not qualify for a complete IDC MarketScape evaluation but are still identified as "vendors to watch" in this active space. This document identifies these vendors and reports publicly available information to complete a substantive study of this market.

Cognizant

Cognizant is taking a strategic approach to enabling on-demand data access by investing in expanding the capabilities of its existing products, launching new solutions, and moving toward a nimble SaaS delivery model that can scale to customer demands and deliver data-driven access and engagement. The foundation of that offering, a data orchestration and management layer called the Cognizant TriZetto Healthcare Platform, is developed based on three core tenets:

- **Data liquidity:** It *integrates* disparate systems across the healthcare ecosystem to realize the power of data in healthcare and deliver collaborative care across members, providers, and the care community.
- **Cost and operational efficiencies:** It *automates* the movement of data, insights, and services across the care continuum utilizing data standards, modern interfaces, preconfigured and customizable connectors, and published APIs.
- **Business and digital transformation:** It *delivers* collaborative care across members, providers, and the care community to empower better patient engagement and outcomes and support new and evolving healthcare business models.

The components of the platform are described as follows:

- **Cognizant Interoperability Solution** is an end-to-end offering that pairs modular SaaS products with strategic consulting to connect disparate systems, standardize data, and enable secure, authenticated access in real time. The Cognizant TriZetto Connected Interoperability Solution includes SaaS interoperability products that enable members to securely access health data from payer Core systems and other data sources (clinical systems, administrative systems, data warehouses, etc.) on demand. The products have a modular design and built-in security to assist payers in meeting federal requirements, real-time utilization management, automated care management, and improved patient outcomes. Products include the TriZetto Interoperability Data Hub, TriZetto Interoperability Adapter, TriZetto Interoperability API Gateway, and TriZetto Interoperability Privacy & Consent Engine. All of these products can ingest data in HL7 V2/3, C-CDA, and 5010 formats.
- **Cognizant TriZetto Systems of Engagement** provide members and providers with real-time information via SaaS portals. Components include:
    - **Cognizant TriZetto EngageMember** is a solution that enables members to securely access their claims, coverage, cost, and network data in real time from core administration systems.
    - **Cognizant TriZetto EngageProvider** equips providers with real-time transactional data delivered through a SaaS engagement solution that taps into core administrative systems to give providers a single source of real-time data, including eligibility, claims, coverage,

referrals, and authorizations. This solution offers self-service capabilities through an intuitive interface to help providers more efficiently manage their practices and support member care decisions to improve outcomes and lower costs.

Cognizant has totally absorbed TriZetto after the acquisition seven years ago and has rededicated itself to a growth strategy in all areas of payer technology. Its core experience and its comprehensive solutions to the industry's pain points should put it on any payer's short list for customer-360 technologies and services.

ADVICE FOR THE TECHNOLOGY BUYER

- This document and the preceding MarketScape can be used to assess customer-360 as-is and to-be architectures and road mapping.
- It is very hard to compare the "products" that the vendors offer. Most, if not all, of the vendors offer "services" as at least an optional part of their offerings. The nascency of the space, the inherent nature of comprehensive customer/patient/member/person-360, the complicated nature of master data management (MDM), and the common practice of vendors acquiring other vendors to build a portfolio make this analysis difficult. Payers should look at their own requirements carefully, including multiyear budgets for strategy, configuration, consulting, and customization over and above the software cost and functionality.
- Differentiation also occurred in strategic direction, implementation approach, and accompanying software. This is an emerging market; therefore, a vendor's context (clinical data integration, interoperability enabling, FHIR focus, and master data management focus) matters much in an area that will equate with core processing in longevity at a payer.
- The vendors must be able to scale. Some products were born and may be brought up quickly for the interoperability mandates or evolved as a vendor acquired various software pieces and stitched together a derivative data model and platform. Ensure that infrastructure (data model, standards, process, workflow, education, integration, and agility) is respected by the vendor, not just application or clinical integration. This backbone will be the baseline for the infusion of future data requirements such as remote monitoring data, telehealth data, and contact tracing data and be the basis for lifetime person data for the enterprise. It must scale.

LEARN MORE

Related Research

- *IDC MarketScape: U.S. Customer-360 Data Platforms for Payers 2020-2021 Vendor Assessment* (IDC #US46997020, December 2020)
- *IDC Market Glance: Payer, 3Q20* (IDC #US46848117, September 2020)
- *Eight Drivers for Payer Interoperability Implementation, Now!* (IDC #US46539920, June 2020)
- *IDC PlanScape: Payer Data Platforms for Member-360 and Provider-360 Views* (IDC #US46015320, February 2020)

Synopsis

This IDC Perspective discusses customer-360 data platforms that focus payers on the data architecture, data management, workflow of ingestion, mapping, cleansing, codifying, and verifying data and the activation of the data for applications, analytics, access, and partners.

The 12 vendors that focus on data management and interoperability plumbing were highlighted in a previous IDC MarketScape evaluation, published in December 2020. There are 22 other vendors who did not qualify for a complete MarketScape evaluation but are still identified as "vendors to watch" in this active space. This document identifies these vendors and reports publicly available information to complete a substantive study of this market.

"Around and throughout the customer-360 platform, there are long tentacles and subtle surrounding capabilities that must be considered when evolving a customer-360 technology infrastructure for payers," says Jeff Rivkin, research director, IDC Health Insights. "Vendors with comprehensive capability, niche functionality, and innovative approaches to open architectures and interoperability must be considered as payers attempt to integrate disparate sources and develop one clean, accurate, common member data profile for their internal and external constituencies."

About IDC

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