



# Everest Group Patient and Member Engagement Platforms PEAK Matrix<sup>®</sup> Assessment 2024

Focus on Salesforce

December 2024



# Background of research

The era of standardized, one-size-fits-all healthcare is now a thing of the past. Today, personalized communication is essential for enhancing user satisfaction and ensuring adherence to treatment plans. Tailoring this age-old approach not only meets diverse customer expectations but also drives better outcomes. To serve these needs, healthcare enterprises are increasingly leveraging patient and member engagement platforms, driving the shift to personalized, patient- and member-centric care.

The patient and member engagement ecosystem is evolving with a wide range of suppliers, from BigTechs to niche HealthTech startups. While core offerings such as appointment scheduling and omnichannel communication are standard, differentiators such as digital payments and integrated telemedicine set some vendors apart. The significance of personalized engagement in healthcare is shifting from reducing administrative tasks to enhancing patient and member experiences, enabling better communication, timely interventions, and ultimately leading to better health outcomes.

Providing dynamic, personalized, and evolving solutions is no longer optional; it is essential for delivering improved health outcomes and experiences

In the full report, we present an assessment of 20 patient and member engagement platform providers featured on the [Patient and Member Engagement Platforms PEAK Matrix® Assessment 2024](#). The assessment is based on Everest Group’s annual Request for Information (RFI) process for the calendar year 2024, interactions with leading healthcare patient and member engagement platform providers, client reference checks, and an ongoing analysis of the patient and member engagement market.

**This report includes profiles of the following 20 leading patient and member engagement platform providers featured on the Patient and Member Engagement Platforms PEAK Matrix:**

- **Leaders:** Microsoft, Pegasystems, and Salesforce
- **Major Contenders:** Carenet, Cognizant, Innovaccer, League, Medallia, mPulse, Optum, Oracle, Phreesia, Press Ganey, Qualtrics, Tebra, and Zyter|Trucare
- **Aspirants:** b.well, CareCloud, Health Catalyst, and Luma Health

## Scope of this report

**Geography:** global

**Industry:** market activity and investments of 20 leading patient and member engagement platform providers; healthcare

**Domain:** patient and member engagement

# Patient and Member Engagement Platforms PEAK Matrix® characteristics

## Leaders

Microsoft, Pegasystems, and Salesforce

- Leaders have a strong vision to enhance patient and member engagement capabilities with more next-generation functionalities, leveraging their strong vertical and horizontal capabilities. They also provide strong support services to assist enterprises in implementing the platform and addressing any grievances
- Leaders offer balanced coverage in patient and member engagement by using technology enablers (such as cloud, automation, data management, AI/ML, IT security, and mobility) to provide personalized communication
- Leaders' healthcare patient and member engagement platform offerings provide a balanced coverage across the healthcare patient/member engagement value chain areas – sales and marketing, services management, care management, patient administration, and billing and payments
- Leaders are improving interoperability for enhanced payer-provider collaboration

## Major Contenders

Carenet, Cognizant, Innovaccer, League, Medallia, mPulse, Optum, Oracle, Phreesia, Press Ganey, Qualtrics, Tebra, and Zyter|TruCare

- Most Major Contenders have a strong presence across small and midsize payer and provider accounts
- Most of the Major Contenders offer user-friendly, easy-to-navigate, and customizable platforms to meet the unique needs of healthcare providers
- However, since the client base for Major Contenders is largely limited to the US, they should consider expanding their offerings to other developing markets such as Europe and APAC to enhance their market presence

## Aspirants

b.well, CareCloud, Health Catalyst, and Luma Health

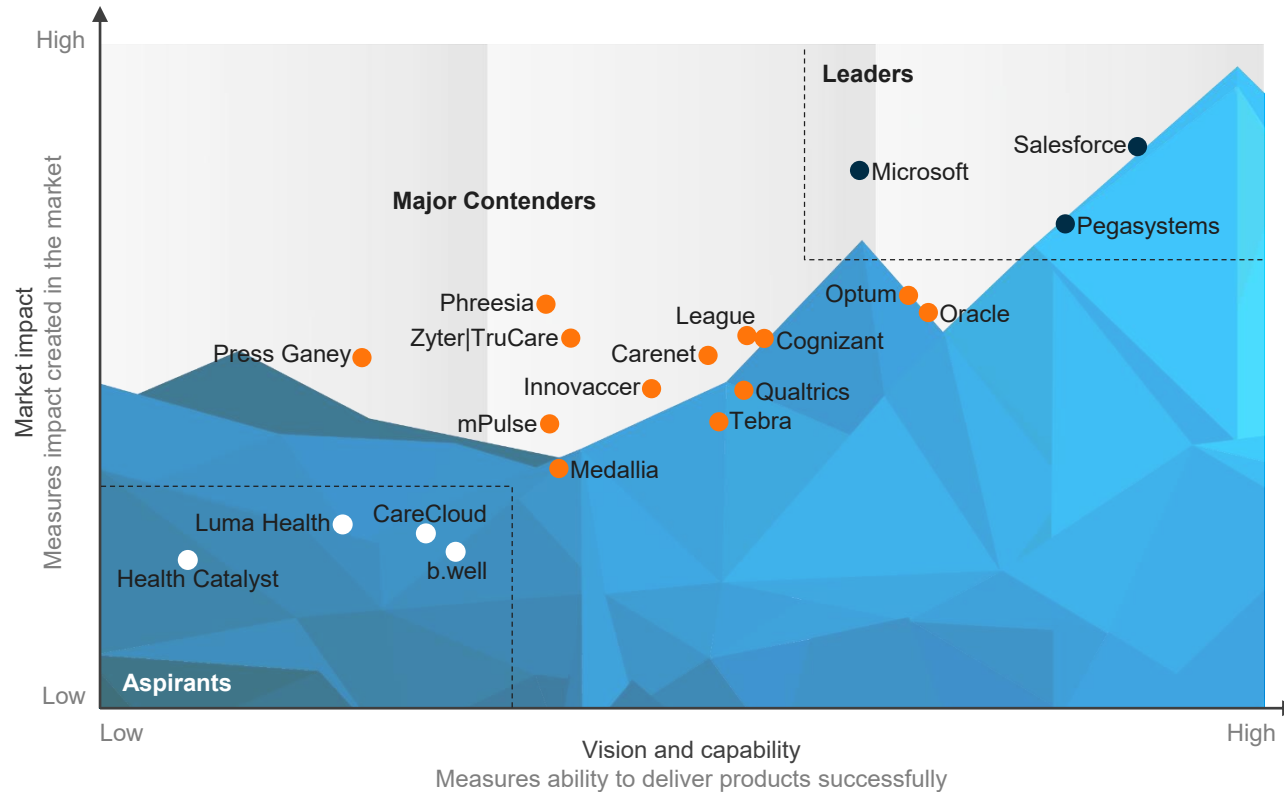
- Aspirants exhibit strong healthcare expertise, with a well-rounded focus on a specific area
- Most Aspirants focus on selective areas in terms of patient and member engagement capabilities, target client segments, or geographies. They have limited offerings to provide an end-to-end patient and member engagement platform for their healthcare clients
- Aspirants lack brand recall and presence across large healthcare accounts to complement their strong healthcare domain expertise

# Everest Group PEAK Matrix®

Patient and Member Engagement Platforms PEAK Matrix® Assessment 2024 | Salesforce is positioned as a Leader

## Everest Group Patient and Member Engagement Platforms PEAK Matrix® Assessment 2024<sup>1</sup>

- Leaders
- Major Contenders
- Aspirants



<sup>1</sup> Assessments for CareCloud, Health Catalyst, Luma Health, Medallia, Microsoft, mPulse, Oracle, Pegasystems, Phreesia, Press Ganey, Qualtrics, and Tebra exclude platform provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with patient and member engagement platform buyers  
Source: Everest Group (2024)

# Salesforce profile (page 1 of 5)

## Overview

### Vision for patient and member engagement platforms

Salesforce's vision is to serve as the patient engagement layer for payers and providers across the patient's complete care continuum experience. Its mid- to long-term strategy focuses on expanding its offerings to provide treatment anywhere and removing silos between payers and providers to improve health outcomes. It increased its capabilities in virtual care, behavioral and mental health, utilization management, home health, and care coordination.

### Overview of the client base

Salesforce uses its health cloud and other point solutions to help clients improve patient and member experiences. It has a presence in both the payer and provider customer sectors. In the provider area, Salesforce works with eight of the top 10 organizations.

### Revenue attributed to patient and member engagement platforms (CY 2023)<sup>2</sup>

<US\$50 million	US\$50-100 million	US\$100-200 million	<b>&gt;US\$200 million</b>
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### Key partnerships

- Deloitte
- Accenture
- Cognizant
- PwC
- Penrod

[NOT EXHAUSTIVE]

### Revenue mix for patient and member engagement platforms (CY 2023)

● Low (<20%) ● Medium (20-40%) ● High (>40%)

#### By geography<sup>1,2</sup>

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

#### By line of business (LoB)<sup>1,2</sup>

- Payer
- Provider

#### By buyer size

- Small (annual client revenue <US\$1 billion)
- Medium (annual client revenue US\$1-10 billion)
- Large (annual client revenue >US\$10 billion)

#### By value chain<sup>1,2</sup>

- Sales and marketing
- Services management
- Care management
- Patient administration
- Billing and payments

# Salesforce profile (page 2 of 5)

## Solutions

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Key patient and member engagement-specific investments in proprietary solutions/tools/framework

Solutions/Tools/Frameworks	Details
Health Cloud	It allows unlocking Electronic Health Record (EHR) systems and integrates apps in a secure, flexible platform, transforming the system of record into a system of interaction.
Patient 360	It works with established healthcare workflows to help manage patient health more efficiently. It provides a 360-degree view of the patient's medical profile, allowing for continuous care delivery across the continuum of care.
Virtual Care	It allows patients to interact with care teams through live video from their mobile devices, resulting in more prompt, convenient, and contextual care.
Utilization Management (UM)	It streamlines care decision reviews and appeals, simplifies prior authorizations and referrals, and leverages automation and intelligent recommendations.
Provider Network Management	It is a solution that improves provider engagement and satisfaction by allowing payers to enroll providers in their networks. It allows payers to expand provider recruiting, streamline the credentialing process, and manage networks by registering network participants for participating providers, facilities, and networks that are contractually bound.
Agentforce	It uses assistive and autonomous AI agents to support use cases such as a population outreach agent that generates target cohorts for engagement and initiates a campaign, and a care coordination agent that identifies gaps in care and generates care plans and medical summaries.
Patient acquisition and outreach	It is a solution that allows health systems to expand their patient base while also managing their brand reputation through effective marketing to their target patient demographic and geographic area. The solution combines multi-channel marketing capabilities with data-driven campaigns to maximize marketing budget and generate meaningful/profitable patient volume.
Care coordination	It is a solution that assists customers in assessing their patients' needs and prioritizing them for intervention, generating care plans and engaging patients in their preferred manner, responding to changes in their patient's health status as notified by the patient, notifications and alerts, and orchestrating care transitions all to improve care quality, reducing missed handoffs, lowering care costs, and improving patient experience.
CRM analytics for health cloud	It is an analytics platform that delivers a holistic picture of data from healthcare and life sciences organizations to assist deliver connected, one-on-one patient care.

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## Investments

[ILLUSTRATIVE] [NOT EXHAUSTIVE]

Other key patient and member engagement-specific investments in acquisitions, Joint Ventures (JVs), and partnerships (such as SI, consulting services, SaaS platform/product and solution partners), and talent/Center of Excellence (CoE)

**Partnerships/Alliances/Acquisitions/JVs Details**

Platform	<ul style="list-style-type: none"> <li>Announced the availability of Life Sciences Cloud, a platform for pharmaceutical and medical technology companies that uses data, automation, and trusted AI to better personalize patient and healthcare professional engagement and streamline clinical operations</li> <li>Announced Patient 360 for health solutions, which gives healthcare and life sciences firms real-time data, tailored intelligence, and automation to provide holistic patient satisfaction and equitable treatment more effectively</li> <li>Introduced Data Cloud, a new data platform that underpins the whole Salesforce customer 360 platform; Data Cloud enables organizations to transform data into insights, offering tailored experiences in real time across sales, service, marketing, and commerce</li> <li>Announced Agentforce, which enables users to build assistive and autonomous agents easily, leveraging the organization’s business context and within the flow of work</li> </ul>
Partnership	Partnered with Blue Shield of California to streamline prior authorizations by seamlessly searching a patient’s electronic health record for relevant information, and compiling information into a pre-populated form.
Acquisition	<ul style="list-style-type: none"> <li>Acquired Phennecs, a company that offers data management, privacy, and compliance solutions, to assist developers in managing their data with integrated security and privacy compliance features</li> <li>Acquired Spiff, a sales commission software that addresses commission management</li> </ul>
Collaboration	Got selected by HarmonyCares to expand its care management and engagement center following the success of its Complete Health Assessment (CHA) platform; this scheduling tool, enhanced by Salesforce field service, simplifies the process for patients to arrange their visits.

# Salesforce profile (page 4 of 5)

## Case studies

### CASE STUDY 1

Unified patient information system, enhanced cancer care delivery, and improved engagement

#### Business challenge

The client faced significant challenges in delivering personalized cancer care due to fragmented patient information stored in silos. The previous Customer Relationship Management (CRM) system was underutilized, hindering collaboration among medical, surgical, and support teams. With evolving patient expectations for accessible healthcare services, the client recognized the urgent need for a unified platform that could enhance visibility and streamline patient interactions across various touchpoints.

#### Solution and impact

The client implemented Salesforce, creating a unified 360-degree view of patients and consolidating data across systems. This enabled faster, more personalized care by empowering staff with real-time insights. As a result, inquiry response time was reduced by 49%, service queries were resolved in under five minutes, and patient engagement increased significantly. The platform also allowed the client to stay connected with 75% of patients' post-treatment, enhancing their overall cancer care journey.

### CASE STUDY 2

Enhanced patient experiences through unified data integration and automation in healthcare services and marketing

#### Business challenge

The client faced significant challenges due to disparate systems and manual processes that hindered the creation of unified patient experiences. With a vision of providing compassionate care, the organization sought a solution to automate service and marketing processes, allowing employees to access a 360-degree view of patient data. This integration was essential for empowering patients to navigate their healthcare journeys.

#### Solution and impact

The client reduced average call handling time by 7% and increased appointment conversions by 5% by integrating Salesforce's service cloud and marketing cloud to automate manual activities and unify patient data. This holistic approach allowed agents to interact with patients empathically, improving communication and establishing better relationships while maintaining privacy and security when managing sensitive patient information.

### CASE STUDY 2

Transformed operations and patient care by implementing Tableau CRM and health cloud solutions

#### Business challenge

The client faced challenges in establishing a single source of truth, gaining visibility into its data to take inventory actions, enhance forecasts, and maintain staff satisfaction using appropriate digital technologies. The old in-house technology solution was inefficient; it housed data in several systems, making it difficult to generate a comprehensive report from medical records or patient data.

#### Solution and impact











The client boosted engagement and operational efficiency by deploying Tableau CRM and health cloud, which increased visibility into patients' health journeys. This transformation resulted in a 30% increase in efficiency and patient satisfaction, a 15% cost decrease, and an enhanced Return on Investment (RoI) of over 450%. The new technology enabled better collaboration and data insights, improving patient care.



# Salesforce 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

- Salesforce leverages its Customer 360™ Platform, integrating Health Cloud™, Sales Cloud™, Service Cloud™, and Marketing Cloud™, to provide comprehensive solutions for customer engagement
- It offers a comprehensive suite of mature platforms that cover the entire patient and member engagement value chain. With a strong focus on patient administration, it serves as a mature provider, offering extensive support and guidance to meet diverse client needs
- It is leveraging technologies such as AI and ML to enhance offerings with personalized engagement, predictive analytics, and automated care plans. It also utilizes Natural Language Processing (NLP) for efficient referral processing and appointment scheduling
- MuleSoft®, with its robust integration capabilities, enhances Salesforce’s ability to unify data across diverse systems. This synergy ensures seamless data management and operational efficiency for Salesforce users

### Limitations

- While Salesforce offers capabilities in the care management space (virtual health, population health management, and care coordination), there is potential to increase the depth and maturity of these services for enhanced capabilities
- As it is perceived to be premium-priced, it should consider revising its pricing models to be more enterprise-friendly
- Users often find the platform complex and note that it requires a steep learning curve to master
- Although Salesforce has a good presence among large client accounts, it should also consider enhancing its presence in SMB enterprise accounts to increase its market presence

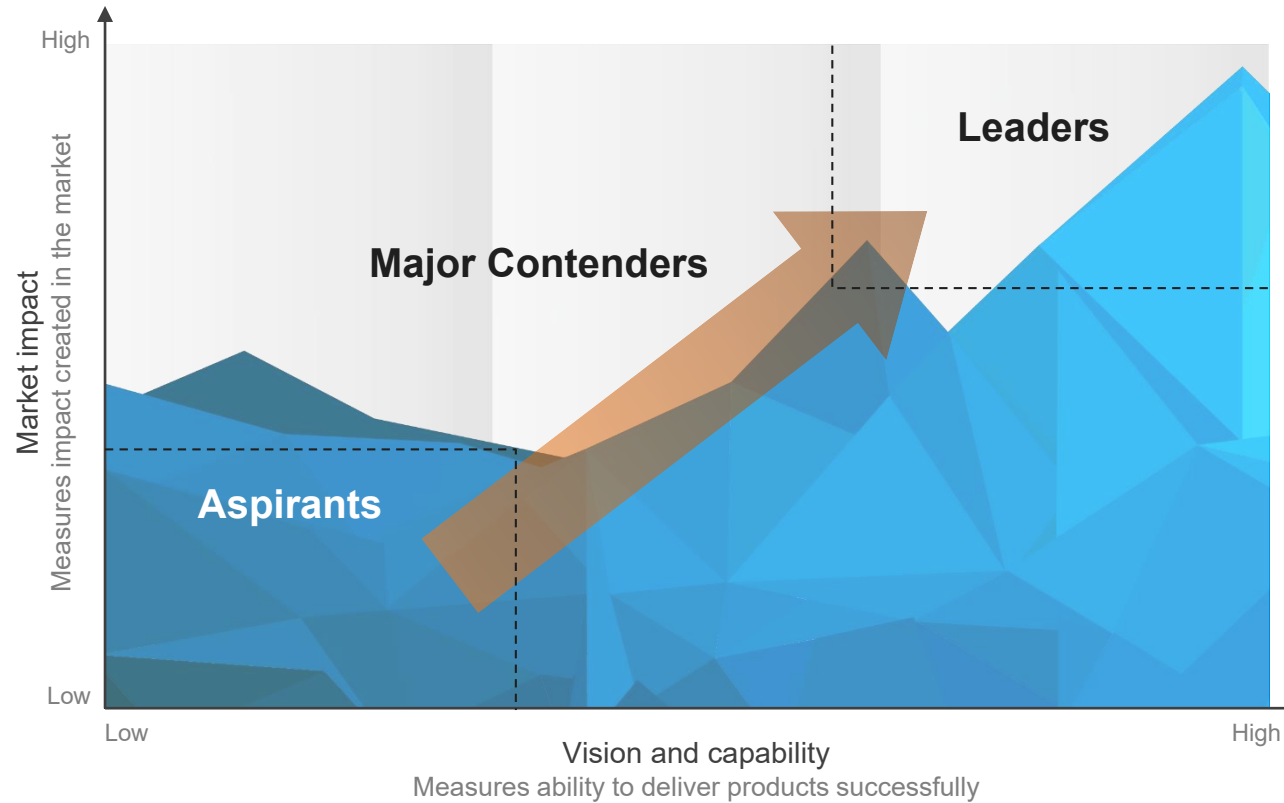
# Appendix

PEAK Matrix® framework

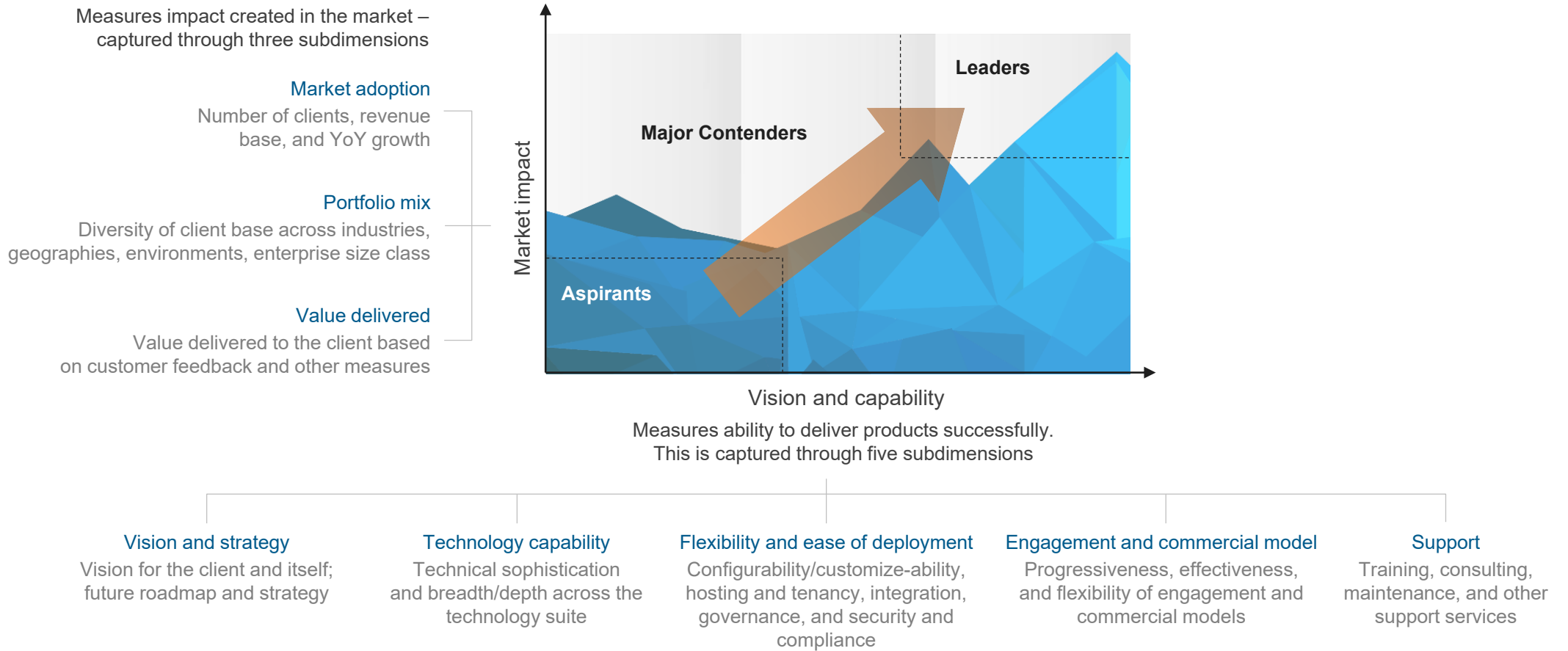
FAQs

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

# Stay connected

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