Everest Group®

Everest Group Healthcare Customer Experience Management (CXM) Intelligent Operations PEAK Matrix® Assessment 2026

Focus on TP

June 2026

PEAK MATRIX®

Introduction

The US healthcare Customer Experience Management (CXM) market is becoming more complex as payers and providers seek to deliver seamless, patient-centric journeys amid fragmented data, regulatory scrutiny, and siloed operations. Disconnected clinical, administrative, and engagement systems reduce visibility across the member and patient life cycle, creating friction at critical access and navigation touchpoints. As consumer expectations rise and increasingly mirror retail-grade experiences, traditional reactive service models are proving insufficient.

In response, payers and providers are increasingly turning to specialized CX operations partners that combine healthcare domain expertise with digital platforms, automation, and analytics. Outsourcing models are moving beyond traditional staffing toward outcome-aligned partnerships, where providers modernize workflows, embed intelligence, and scale compliant operations.

In the report, we present an assessment of 24 healthcare customer experience management operations providers featured on the Healthcare Customer Experience Management (CXM) Intelligent Operations PEAK Matrix® Assessment 2026. This assessment is based on Everest Group's annual RFI process for the year 2025 (period of assessment being July 2024 to June 2025), interactions with leading healthcare customer experience management operations providers, client reference checks, and ongoing analysis of the healthcare customer experience management operations market.

In the report includes the profiles of the following 24 leading healthcare customer experience management providers featured on the healthcare CXM intelligent operation PEAK Matrix:

- **Leaders:** Alorica, Cognizant, Concentrix, Everise, Optum, ResultsCX, and TP
- **Major Contenders:** Carenet Health, Conduent, EXL, Firstsource, Foundever, IBM, NTT DATA, Sagility, Sutherland, TaskUS, TELUS Digital, TTEC, and Wipro
- **Aspirants:** ibex, Infosys, Startek, and VXI

Scope of this report

Geography: global

Industry: healthcare

Services: healthcare customer experience management services

Everest Group's view of the healthcare Customer Experience Management operations value chain

[NOT EXHAUSTIVE]

	Member/Patient enrollment	Member/ Patient support	Care coordination	Billing and payment collections	Member/Patient outbound engagement	Payer, provider, and third-party interaction
Provider	Marketing and outreach	Eligibility and benefits verification	Nurse triage	Patient collections and payment recovery	Patient feedback collection	Payer collections (including follow-ups)
	Patient registration and data collection	Prior authorization	Post-discharge follow-up (case management)	Credit balance settlements	Engagement and outreach initiatives	Prior authorization
	Appointment scheduling	Patient pay estimation				Denials and appeals handling
		General query handling				Claim status inquiry
		Broker helpdesk				Credentialing support
						Payer helpdesk support
						Contract management
Payer	Lead generation	Endorsements, renewals, and cancellations	Nurse triage	Billing and collections for premiums	Education and wellness	Prior authorization
	Benefit authorization	HIX support	General care coordination		Health risk assessment	Claim intake and processing
	Member enrollment		Appointment reminders			Medical bill review (payment integrity)
	Member records management		Appeals			Provider data management and credentialing
	Data collection					Provider helpdesk support
	Data cleansing and refresh					Contract management

Analytics

Automation

Platform

Healthcare customer experience management intelligent operations services PEAK Matrix® characteristics

Leaders

Alorica, Cognizant, Concentrix, Everise, Optum, ResultsCX, and TP

- Leaders demonstrate robust operational scale and comprehensive almost end-to-end coverage across healthcare payer and provider value chains. Leaders serve a broad spectrum of clients, consistently delivering high-value outcomes at industry-leading scale
- They leverage deep healthcare domain knowledge with expansive global delivery networks. Backed by portfolios of renowned healthcare clients and success stories, Leaders reliably support large-scale, complex CX operations with unparalleled consistency and quality
- These providers are deploying enterprise-wide, AI-first strategies to standardize member and provider journeys. By embedding generative and agentic AI into core workflows, they are transitioning from basic automation to governed, end-to-end orchestration that optimizes both costs and experiences

Major Contenders

Carenet Health, Conduent, EXL, Firstsource, Foundever, IBM, NTT DATA, Sagility, Sutherland, TaskUS, TELUS Digital, TTEC, and Wipro

- They offer flexible service models capable of supporting healthcare organizations of varying sizes. Major Contenders demonstrate growing delivery footprints and the ability to meet diverse client needs reliably, reflecting expanding reach and solidifying their market impact
- They excel in key healthcare customer journeys, such as member and provider support. These providers deploy advanced engagement solutions (e.g., AI-enabled chatbots and voice bots) to improve service quality and patient/member experiences across multiple channels
- They are expanding capabilities through focused investments and partnerships, while serving healthcare enterprises seeking incremental CX optimization

Aspirants

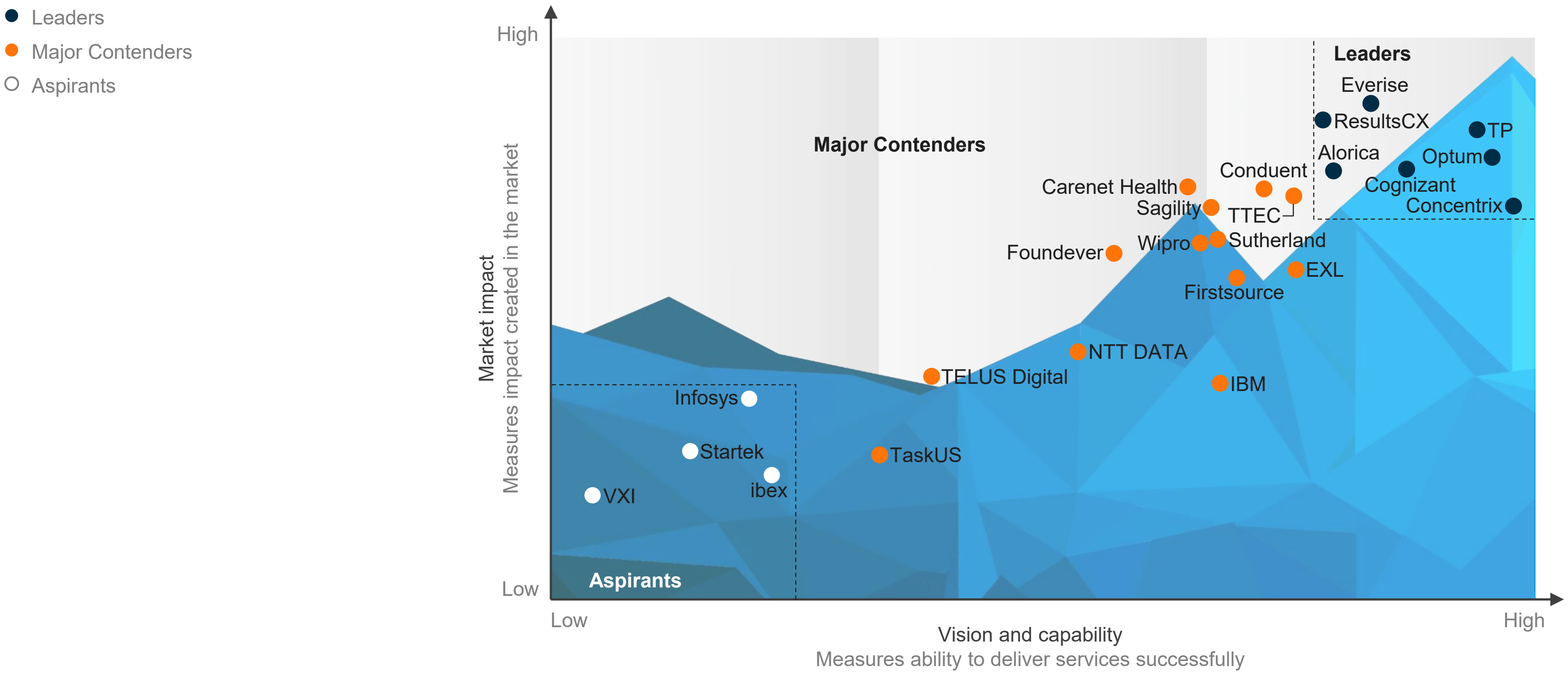
ibex, Infosys, Startek, and VXI

- They operate with targeted focus in select CXM areas. Aspirant providers often specialize in specific healthcare processes or client segments, delivering highly focused value and personalized service within their chosen niches
- Their technology capabilities are developing, with limited proprietary healthcare CX platforms or advanced AI-led orchestration; however, they provide structured, reliable support models for organizations prioritizing cost control and operational continuity
- Aspirants invest in building healthcare domain capabilities and strategic partnerships. They signal strong potential for future scalability and greater market impact by continuously enhancing their service portfolio and expanding operational capacity as they mature

Everest Group PEAK Matrix®

Healthcare Customer Experience Management (CXM) Intelligent Operations PEAK Matrix® Assessment 2026 | TP is positioned as a Leader

Everest Group Healthcare Customer Experience Management (CXM) Intelligent Operations PEAK Matrix® Assessment 2026[1]



1 Assessments for Foundever, ibex, Optum, Startek, TELUS Digital, TaskUS, and VXI exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and interactions with buyers
Source: Everest Group (2026)

TP

Everest Group assessment – Leader

Measure of capability: Low High

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

Strengths

- TP maintains a diversified presence across healthcare payer and provider CXM, including Medicaid, select commercial plans, and hospital systems, supporting varied buyer types and engagement requirements
- Healthcare enterprises have highlighted TP's account responsiveness, onboarding agility, and operational flexibility, reflecting its ability to adapt delivery models to varying client technology maturity levels and transition requirements
- TP operates at a broad delivery footprint across onshore, nearshore, and offshore locations, enabling buyers to balance regulatory needs, talent access, and cost efficiency across healthcare CXM engagements
- TP has invested in vertical-specific innovation, including agentic AI-enabled orchestration for workflows such as prior authorization and risk scoring, supporting automation and consistency across regulated healthcare processes

Limitations

- TP demonstrates comparatively lower presence among independent physicians and standalone hospitals, which may encourage these provider segments to further assess experience alignment for sized care settings
- Healthcare enterprises have indicated opportunities to strengthen analytics maturity by progressing beyond operational reporting toward predictive and diagnostic insights that better support healthcare CX transformation objectives

Market trends

The healthcare CXM market is driven by rising expectations and regulatory mandates, but challenged by fragmented data and slow adoption of advanced technology

Market size and growth

- The healthcare Customer Experience Management (CXM) market is estimated to be valued between US$11-12 billion in June 2025, and is expected to grow at a CAGR of 7-8% over the next few years
- Regulatory mandates, Star rating benchmarks, and heightened member and patient expectations combined with rapid technological advances are fueling this growth

Key drivers for healthcare CXM market

Member/Patient experience	Rising expectations for personalized, seamless interactions are compelling organizations to redesign engagement models and elevate service quality across all touchpoints.
Digital transformation and omnichannel	Growing demand for integrated digital journeys is pushing enterprises to adopt omnichannel platforms that streamline communication and improve access.
Star ratings	Stricter CMS quality benchmarks are pressuring health plans to enhance experience performance to protect reimbursement and remain competitive.
Regulatory headwinds	Regulations such as Medicaid redetermination and CMS-0057-F require seamless data exchange. Outdated, siloed architectures lack real-time visibility, creating significant compliance risks for legacy workflows.

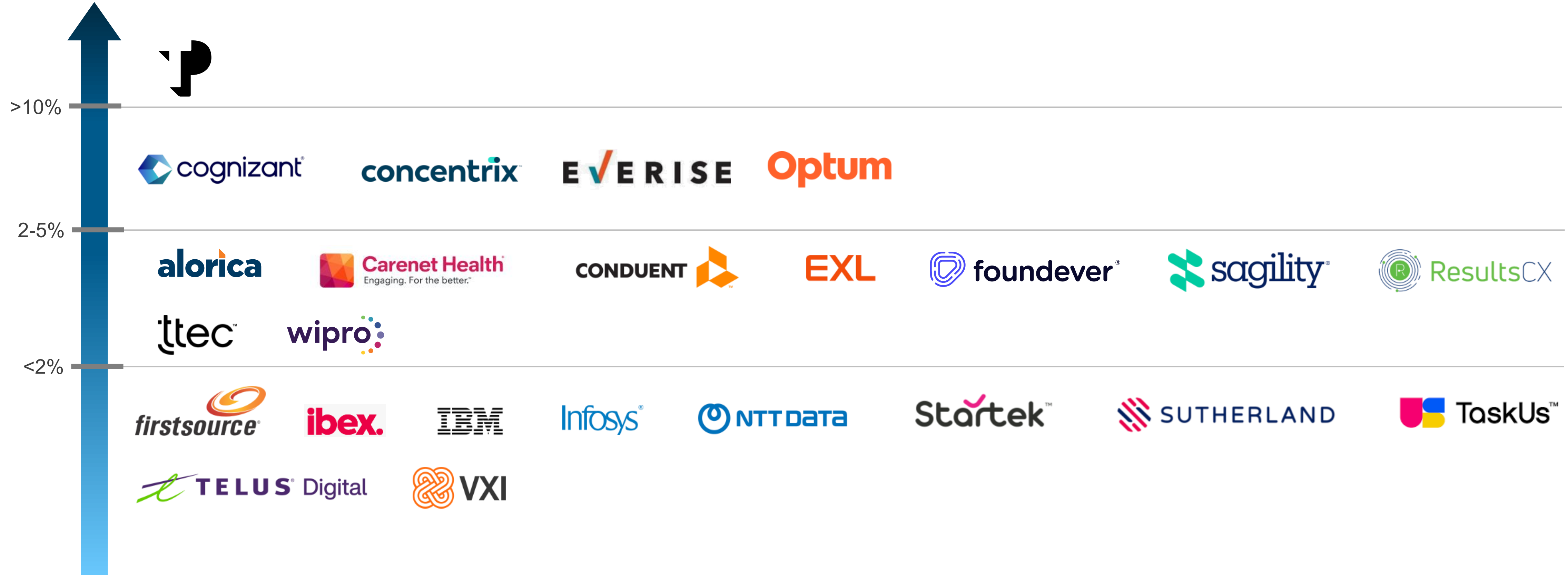
Opportunities and challenges

Fragmented systems and data silos	Limited interoperability continues to hinder seamless journeys, yet modernization efforts present opportunities to unlock richer insights and personalized engagement.
Slow adoption of advanced digital capabilities	Underutilized AI and automation constrain CX transformation, but growing investment momentum enables faster deployment of next-generation solutions.
Workforce shortages and operational strain	Capacity gaps reduce responsiveness and service quality, while workforce optimization technologies offer new pathways to enhance efficiency and support.

Provider landscape analysis

Cognizant, Concentrix, Everise, Optum, and TP stand out as the largest service providers in terms of market share

Market share analysis of the providers[1]
July 2024-June 2025; percentage of overall market of healthcare CXM operations



1 Providers are listed alphabetically within each range

Key buyer considerations

Buyers raise healthcare CXM sourcing standards, favoring partners with cost reduction, healthcare expertise, scalability, and innovation

Key sourcing criteria

High

Priority

Low

Cost reduction

Buyers prioritize partners that can deliver measurable cost savings by improving efficiency through AI, automation, and innovative delivery models

Domain expertise

Buyers value partners with healthcare domain and process expertise to enable compliant, context-aware decisions and efficient customer service delivery

Next-generation technology innovation and value-addition

Advanced AI, automation, and analytics capabilities enable intelligent, compliant CX and long-term strategic value

Relationship management

A collaborative and responsive account management approach focused on flexibility, issue resolution, and ongoing engagement is essential

Implementation management

Strong transition capabilities, including rapid deployment, effective knowledge transfer, and minimal disruption, are critical

Talent and workforce management

A strong talent pool, including high-quality hiring and retention strategy, is essential to ensure skilled resources and long-term workforce stability

Summary analysis

Buyers are prioritizing partners that deliver strong cost efficiencies through optimized operations, automation, and scalable delivery, while ensuring dependable continuity and risk mitigation. **Cost, domain expertise, and next- generation technology** remain top differentiators, with buyers expecting deep healthcare knowledge and responsive, credible next-generation capabilities. Expectations are also rising for **account management, implementation quality, and workforce strength**, favoring providers with flexible relationship management, smooth transitions, and trained, scalable talent. Overall, buyers are setting a higher sourcing bar, rewarding partners that demonstrate efficient, resilient operations and targeted innovation to consistently enhance customer experience.

Key takeaways for buyers

As healthcare CXM shifts from task-based support to outcome-driven experience management, buyers must engage partners with healthcare expertise, digital maturity, and operational resilience to deliver consistent, compliant, and scalable experiences

Tech-enabled CX

Buyers should prioritize partners that deliver seamless experiences using advanced technologies to enable personalized, efficient, and context-aware interactions across voice and digital touchpoints.

Outcome-aligned partnership

Buyer must seek healthcare CXM partnerships that encourage outcome-based engagement models that share accountability, align incentives, and focus on measurable experience, efficiency, and care access improvements.

Integrated global staffing

Buyers should prioritize offshore locations integrated with advanced technologies, such as accent and real-time translation and noise cancellation, to ensure seamless communication, cultural alignment, and operational excellence.

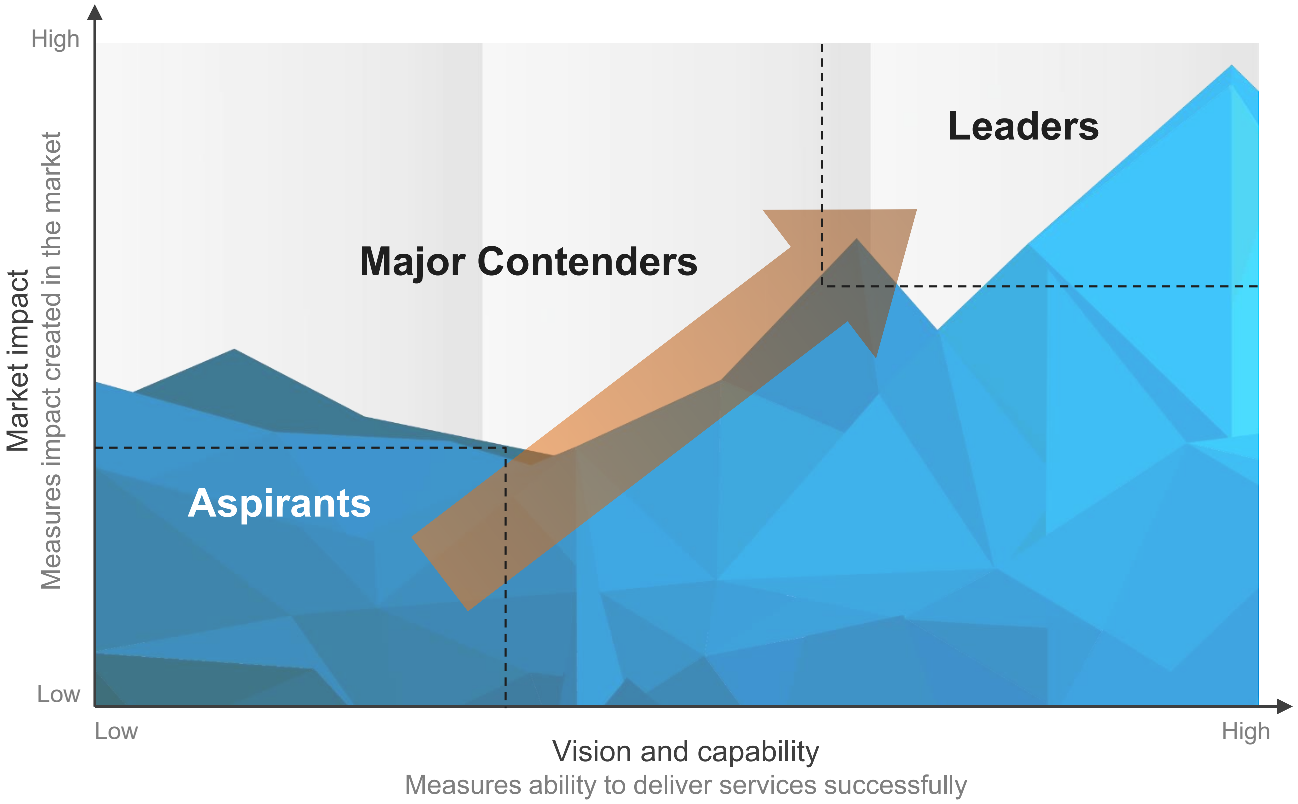
Appendix

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



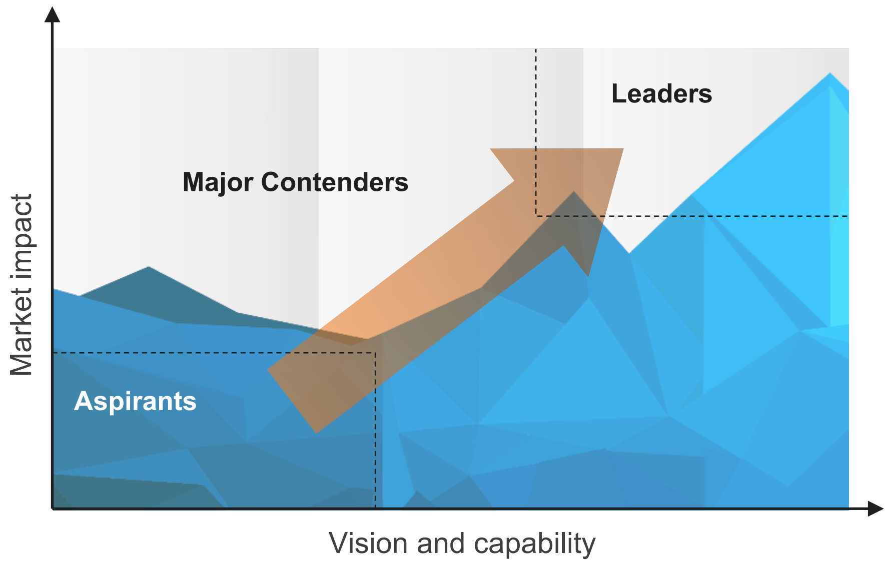
Services PEAK Matrix® evaluation dimensions

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

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 in 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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