Everest Group PEAK Matrix® for Intelligent Automation in Healthcare Solutions Providers 2022

Focus on Wipro
December 2021

Background of the research
Intelligent Automation in Healthcare 2021

Although healthcare payer and provider enterprises have traditionally relied on outsourcing services and offshoring their delivery footprint to improve their business across multitude of parameters; they have reached a saturation stage and have been looking for other ways to extract additional benefits. Many healthcare enterprises have garnered maximum traction in the past couple of years by employing automation solutions such as cloud, RPA, NLP, AI/ML and more, to improve performance delivery in claims management, patient engagement, risk adjustments, etc. The need for automating processes is now more than ever as the global pandemic has brought to light the glaring inadequacies and inefficiencies of the healthcare systems across the globe. The aim of automation is not to de-humanize the healthcare systems, but rather, to support the working of the stakeholders in the value chain to optimize processes, reduce costs and waste, improve patient care and experience, and enhance business resilience. The scope of integrating intelligent automation with the existing healthcare functions exists in almost all segments of the healthcare value chain and provides ample opportunity to the healthcare payers and providers to upgrade themselves and cater to the growing demand for value-based care.

This report includes the profiles of the following XX leading ABC service providers featured on the Intelligent Automation in Healthcare PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Exela Technologies, NTT DATA, Wipro, and Optum
- **Major Contenders:** Access Healthcare, EXL, HCL Technologies, HGS, emids, TCS, Sutherland Global Services, Atos, and Virtusa
- **Aspirants:** AGS Health, GeBBS, and Omega Healthcare

Scope of this report:

Geography
Global

Service providers
18 providers

Services
Intelligent automation
in healthcare

Everest Group intelligent automation in healthcare solutions PEAK Matrix® characteristics

Everest Group classified 18 healthcare BPS service providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants.

The PEAK Matrix® is a framework to assess the absolute market success and overall capability of service providers.

Leaders

There are six service providers in the Leaders category – Accenture, Cognizant, Exela Technologies, NTT DATA, Wipro, and Optum

Major Contenders

The Major Contenders category has nine service providers – Access Healthcare, EXL, HCL Technologies, HGS, emids, TCS, Sutherland Global Services, Atos, and Virtusa
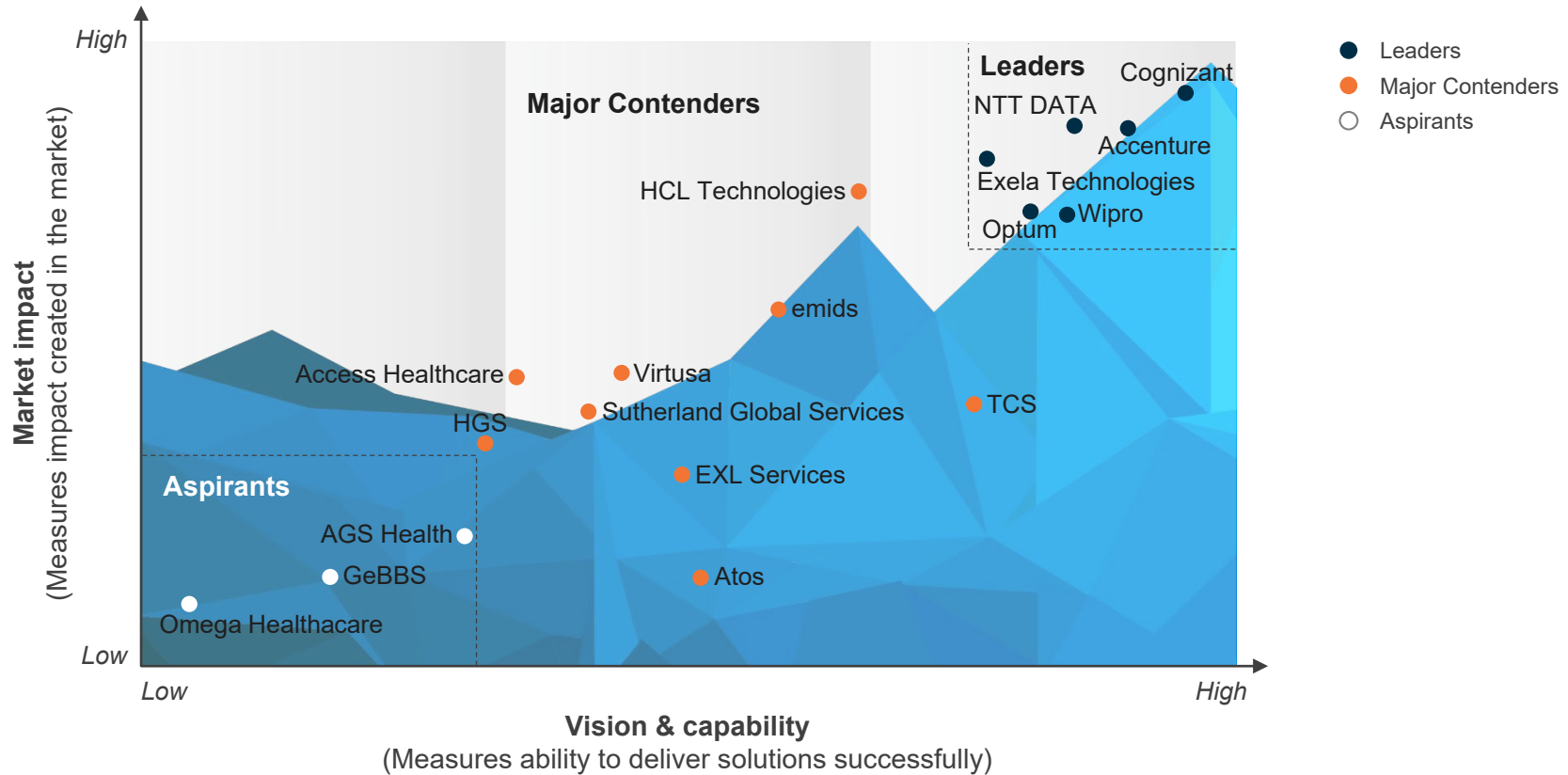
Aspirants

AGS Health, GeBBS, and Omega Healthcare are Aspirants on the PEAK Matrix® for intelligent automation in healthcare solutions

Everest Group PEAK Matrix®
Intelligent Automation in Healthcare – Solutions PEAK Matrix® Assessment 2022 | Wipro positioned as Leader

Everest Group Intelligent Automation in Healthcare – Solutions PEAK Matrix® Assessment 2022[1]

A scatter plot titled with axes "Market impact (Measures impact created in the market)" on the vertical axis (Low to High) and "Vision & capability (Measures ability to deliver solutions successfully)" on the horizontal axis (Low to High). Legend: Leaders (dark navy dots), Major Contenders (orange dots), Aspirants (white dots).

Leaders: Cognizant, NTT DATA, Accenture, Exela Technologies, Wipro, Optum

Major Contenders: HCL Technologies, emids, Access Healthcare, Virtusa, Sutherland Global Services, HGS, EXL Services, TCS, Atos

Aspirants: AGS Health, GeBBS, Omega Healthacare

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1 Assessments for Sutherland, Atos and GeBBS excludes service provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of the service providers, their public disclosures, and interaction with buyers

Source: Everest Group (2021).

Wipro | IA in healthcare profile (page 1 of 7)
Overview

Company overview

Wipro is a global information technology, consulting, and business process services company. It utilizes cognitive computing, hyper-automation, robotics, cloud, analytics, and emerging technologies to help clients adapt to the digital world and make them successful. It has over 200,000 employees serving clients across six continents.

Key leaders

- Mohd Haque: SVP, Global Business Head– Healthcare & Medical Devices
- Prashant Kulkarni: VP, Healthcare Digital Operations
- Pankaj Kumar: VP & Cluster Account Head– Healthcare & Medical Devices

Headquarters: Bengaluru, India

Website: www.wipro.com

Recent deals (not exhaustive)

- **2021:** leading health insurance organization in the US, global health services company, a managed care company, a provider of revenue and payment cycle management, and a clinical information exchange solution

- **2020:** a for-profit American health insurance company, the largest healthcare payer in the US, Kindred – a large healthcare services organization (provider), and a leading Blue health plan provider

- **2019:** a large provider of sponsored heath insurance, a global health service company, a member-owned health insurance company

Adoption and capability overview

Total clients leveraging IA in healthcare	Total size of healthcare-specific IA or technology team (in FTEs)	Total/cumulative RPA robots deployed by clients
60	**800**	**9,900**

Key locations with IPA FTEs

North America (US)	EU, Africa, and LATAM	Asia Pacific (India and other counties)
80 FTEs	**N/A**	**720 FTEs**

Key third-party technology partners: Automation Anywhere, Appian, Avaamo, AWS, BluePrism, Camunda, Celonis, Fathom, IBM Watson, Microsoft Azure, Mulesoft, Ontotext (medical coding), Pega Systems, Raziel Health, RCM Brain ServiceNow, Tensor Flow, UI Path, Medversant, HealthEdge, Innovacer

■ Offered   ■ Not offered

Commercial model	
Fixed price model	■
Input/FTE/T&M-based	■
License / IP-based	■
Outcome-based	■
Transaction-based	■

Healthcare IA offering structures	
IA as part of broader deal	■
Product licenses + associated IA services	■
Stand-alone IA services	■
Stand-alone product licenses	■

Wipro | IA in healthcare profile (page 2 of 7)
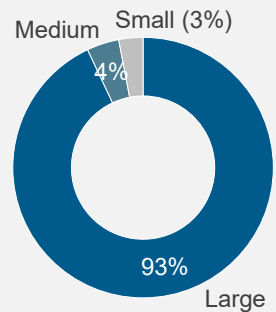## Capabilities and client mix

**Split of healthcare IA FTEs**
Total FTEs (100%) = 800

By function

Product development
3%

97%
Services

By automation type

RPA 37%

63% Cognitive automation

By healthcare market type

Provider 25%

75% Payer
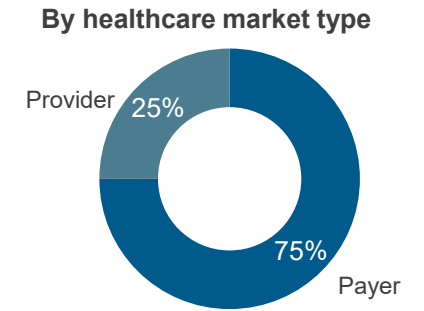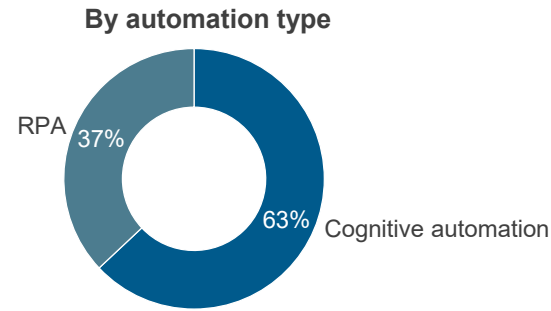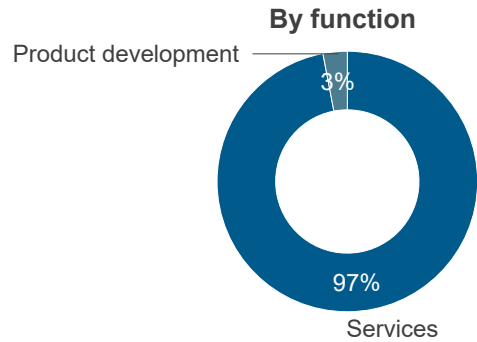
Split of IA clients mix

Payer market IA client mix by buyer size[1]
Number of clients (100%) = Not disclosed

Medium   Small (3%)
4%

93%
Large

Provider market IA client mix by buyer size[1]
Number of clients (100%) = Not disclosed

Small
8%

Large 32%

60% Medium
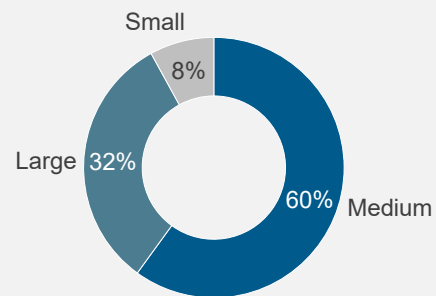
Split of total IA bots deployed across value chain processes

Payer market bots mix by processes
Number of bots deployed (100%) = Not disclosed

Care management   Product development
Risk and compliance   7%   3%
8%
Network
management   17%   43% Claims
management

23%
Member engagement
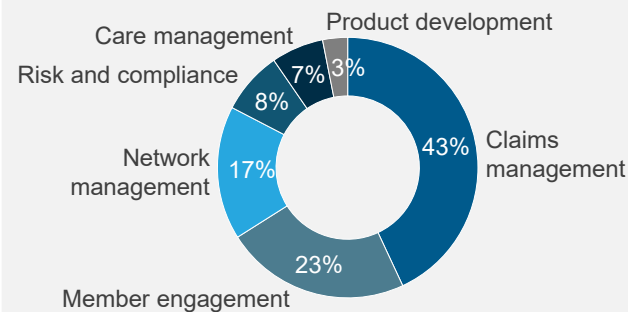
Provider market bots mix by processes
Number of bots deployed (100%) = Not disclosed

Patient access
12%
A/R management   21%   44% Claims
management

24%
Medical billing
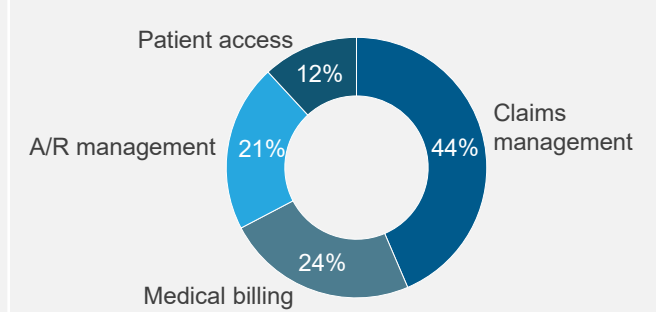
1   Buyer size is defined as large (>US$5 billion in revenue), medium (US$1-US$5 billion in revenue) and small (<US$1 billion in revenue)

Wipro | IA in healthcare profile (page 3 of 7)
Solutions portfolio

	RPA	Intelligent document processing	Intelligent virtual agents	AI advisor tools	Classic process mining	Desktop Process Mining (DPM)	Workflow/ orchestration	Others
Third-party solutions vendor	Automation Anywhere, Ui Path, BluePrism, Power Automate, Nice, Work Fusion, Automation Edge, Intellibot, Antworks (member and provider customer service, claims management)	Abbyy, Nuance (Kofax) Framework - Tensorflow, Keras, Fathom, RCM Brain (member and provider customer service, coding, document management)	AWS, Avaamo, ServiceNow Chat, IBM Watson, Microsoft WCA, Yellow Messenger, Raziel Health (member and provider customer service, telehealth)	N/A	Celonis, Kryon, Fortress IQ (end-to-end payer and provider process mining)	Celonis, Kryon, Fortress IQ (end-to-end payer and provider process mining)	Pega Systems, Appian, ServiceNow, Camunda, Pipefy (end-to-end payer and provider workflow management)	NLP/NLG - Azure, Microsoft Louis, Spacy, NLTK, Scikitlearn, Tensorflow Medical coding - Fathom, Ontotext Integrated PaaS - Mulesoft, Informatica, Oracle Facial/Object Recognition - Azure, IBM Watson, Amazon InterQual Intelliassure
Proprietary solutions offered	Mimictron	HOLMES Doc Cognitive	HOLMES Chat, HOLMES Virtual Assist (member and provider customer service, telehealth, claims management, provider data management)	HOLMES, Data Discovery Platform (end-to-end payer and provider advisory)	Wipro Harmony (end-to-end payer and provider process mining)	Wipro Harmony	Wipro Base NXT, AAC, MPA, HOLMES Orchestrator, HOLMES Automation Studio	Membership management - ExchangeLink, SalesLink, ServiceLink, and ClaimsLink, Member360, Revenue360, AG360 End-to-end payer process - Wipro EMaaS platform Wipro AssureNXT
Solutions developed jointly with technology vendor	N/A	AI+RPA Document Digitization Solution, Wipro HOLMES™ E-KYC Controller Extractor (provider data management), E-KnowYourProvider -EKYP for provider verification	N/A	N/A	N/A	N/A	N/A	N/A

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Wipro | IA in healthcare profile (page 4 of 7)
Solutions portfolio

	RPA	Intelligent document processing	Intelligent virtual agents	AI advisor tools	Classic process mining	Desktop Process Mining (DPM)	Workflow/ orchestration	Others
Customizations/ wrappers created for third-party solutions	RPA insights dashboard (business analytics)	N/A	N/A	N/A	N/A	N/A	N/A	Marketing Science Lab (mSL), Wipro ML for Accounts Payable Auditor, Wipro Incident Ticket Volume Predictor, O365, and Dyanmics365 adoption support
Number of active clients	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed

Wipro | IA in healthcare profile (page 5 of 7)
Key IA solutions

Top healthcare-specific IA solutions	Value chain process area served	Year launched	Development type	Description	No. of clients
Membership management	Member engagement and billing	2016	Proprietary	It is a platform-agnostic Robotic Process Automation (RPA) solution that covers membership intake to benefit testing including: • Intake and fallout: AI and NLP-powered intake and additions/updates of enrollments • Error detection through automated comparison of billed amount to coverage history as well as proactive CMS and carrier data reconciliation for identification of premium refunds • Auto validation of coverage history • Auto Audit for all 834 and enrollment data to validate the accuracy of information prior to CMS transmission • Benefit BOT designed to intake a benefit grid/template, create coverage summary document, auto-incorporate the benefit template, configure benefits across platforms, run test claims and auto-align benefit elements	14
Provider life cycle management - Directory accuracy improvement	Provider network management	2016	Proprietary	It standardizes & simplifies provider network management processes with automated operations around provider onboarding and data management. The tool uses cognitive capabilities including NLP engines, machine learning, pattern recognition, and robotics to execute and manage some of the complex decisions and processes otherwise performed by humans leading to quicker TAT & higher accuracy. The solution integrates claims and provider sources to determine the provider match based on critical elements.	3
Smart claims adjudication solution	Claims management	2016	Proprietary	Platform-agnostic second stage auto adjudication solution for E2E claim transformation including: • smart OCR for data extraction • inventory segregation predictive model to predict and classify claims into various queues based on workable and non-workable work queues • automated routing to appropriate stakeholders based on the workable queue • automated processing of claim fallouts • automated auditing to proactively prevent over/under payment. The model ensures claim accuracy and eliminates costly rework downstream. The solution improves auto-adjudication rates outside of the payers claims engine and reduces significant rework downstream in term of appeals and incorrect denials/payments	6

Wipro | IA in healthcare profile (page 6 of 7)
Key IA solutions

Top healthcare-specific IA solutions	Value chain process area served	Year launched	Development type	Description	No. of clients
Denial predictors and auto audit solution for real-time transaction audits Virtual SME – knowledge repository of SMEs with conversational bot enablement	Claim management and member engagement including customer service / contact center management	2016	Proprietary	It is utilized for audit automation enabled with logic to systematically audit 100% population vs. sample size. Some of the tool features are highlighted below: • Flexibility of connectivity to multiple applications by leveraging adapters • Auto extraction of data from multiple sources (client CRM, web portals, and external forums) • Auto check for defects, flags defective transaction fields, qualitative canned comments for defects • Audit trail and summary of errors • Auto segregation of transaction types Virtual SME uses an NLP engine to identify the query raised by the agent/customer and use that information to extract entities and match intents from the user's request. Conversational engine supports both supervised and unsupervised training. The training text can be specified during the definition of the flow and can be augmented based on user queries and unmatched responses. All unmatched responses are also available to the developer so they can train the bot. The platform also enables the creation of domain-specific knowledge packs. The bot also offers a handoff to a real SME in case further information and assistance is required on the query.	11
Smart OCR – digital document management solution	Mailroom operations across member engagement, network management, care management, claims management and risk & compliance	2016	Proprietary	This solution handles multi-format handwritten, printed, structured, and unstructured documents. Intelligent documents classification and extraction coupled with smart workflow management ensures accurate information dissipation across the organization based on document type (medical record, appeal, paper claims, etc.) department (claims, A&G, etc.), PO Box number and member ID across payer platforms. It leverages interactive reports & dashboards to provide actionable business insights.	6

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Wipro | IA in healthcare profile (page 7 of 7)
Everest Group assessment – Leader

Measure of capability: ◕ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Innovation and investments	Services capability	Engagement and commercial model	Overall
◔	◔	◕	◔	◑	◔	◔	●	◕	◔

Strengths

- Wipro has developed an ecosystem of strategic alliances and partnerships with leading third-party technology vendors such as Automation Anywhere, Pega, Blue Prism, and Work Fusion, covering different facets of automation such as RPA, IDP, conversational AI, and process mining, for driving value and reducing costs across the payer and provider value chain

- Increasing the capability under RCM on the BPS side for automation-enabled partner-led solutions in claims remittance, payment posting, and billing, by leveraging their resources and deep penetration in payer market, has enabled Wipro to increase its overall presence in BPO and get access to a new provider client base. Wipro has seen one of the highest percentage increases in the number of healthcare BPO clients in contrast to other players

- The scalability of bots is on the higher side for them, which means that they generally deploy more bots per client than some of their peers. Over 50% of Wipro's clients have active deployment of over 25 bots. Also, the share of its clients leveraging cognitive automation is on the higher side compared to its peers

- The launch of Digital Academy by Wipro Digital, to build a strong team of digital engineers that can deliver dynamic and innovative automation services on the fly, denotes an increased focus on developing human capital and has been a step in the right direction for enhancing automation-related capabilities

- Since most of its healthcare contracts are outcome-/output-based, their focus on developing capabilities is necessary, which makes them develop the best possible solutions for their clients, with end-to-end accountability

- Buyers have cited proactiveness, ideation capability, and collaboration as its key strengths

Limitations

- Having achieved expertise across claims management to drive future growth, Wipro should use its capabilities to develop automation solutions for care management and patient engagement

- Interaction with the buyers has disclosed that there is scope for the service provider to improve on timely execution of the planning and upfront cost estimation

- Despite having a moderate presence in the healthcare BPO market, Wipro's solutions have applicability across various industries. Going forward, in order to compete with some of the leaders, Wipro should focus on developing healthcare-specific solutions for its clients

Appendix

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

Everest Group PEAK Matrix
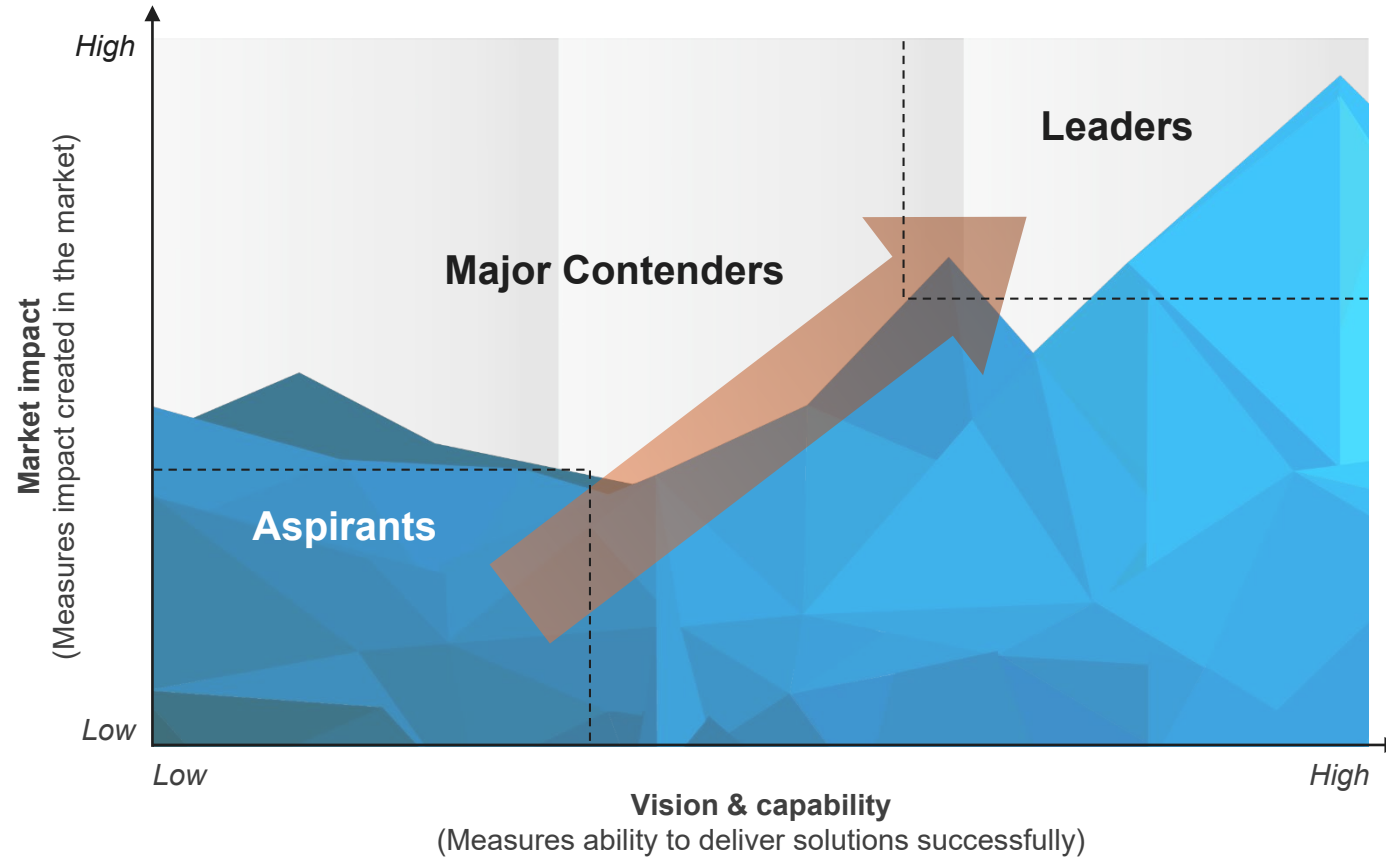
Solutions PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

| Market adoption |
| Size and growth of deployments across the solution portfolio |

| Portfolio mix |
| Solution footprint across geographies, industries, and buyer size segments |

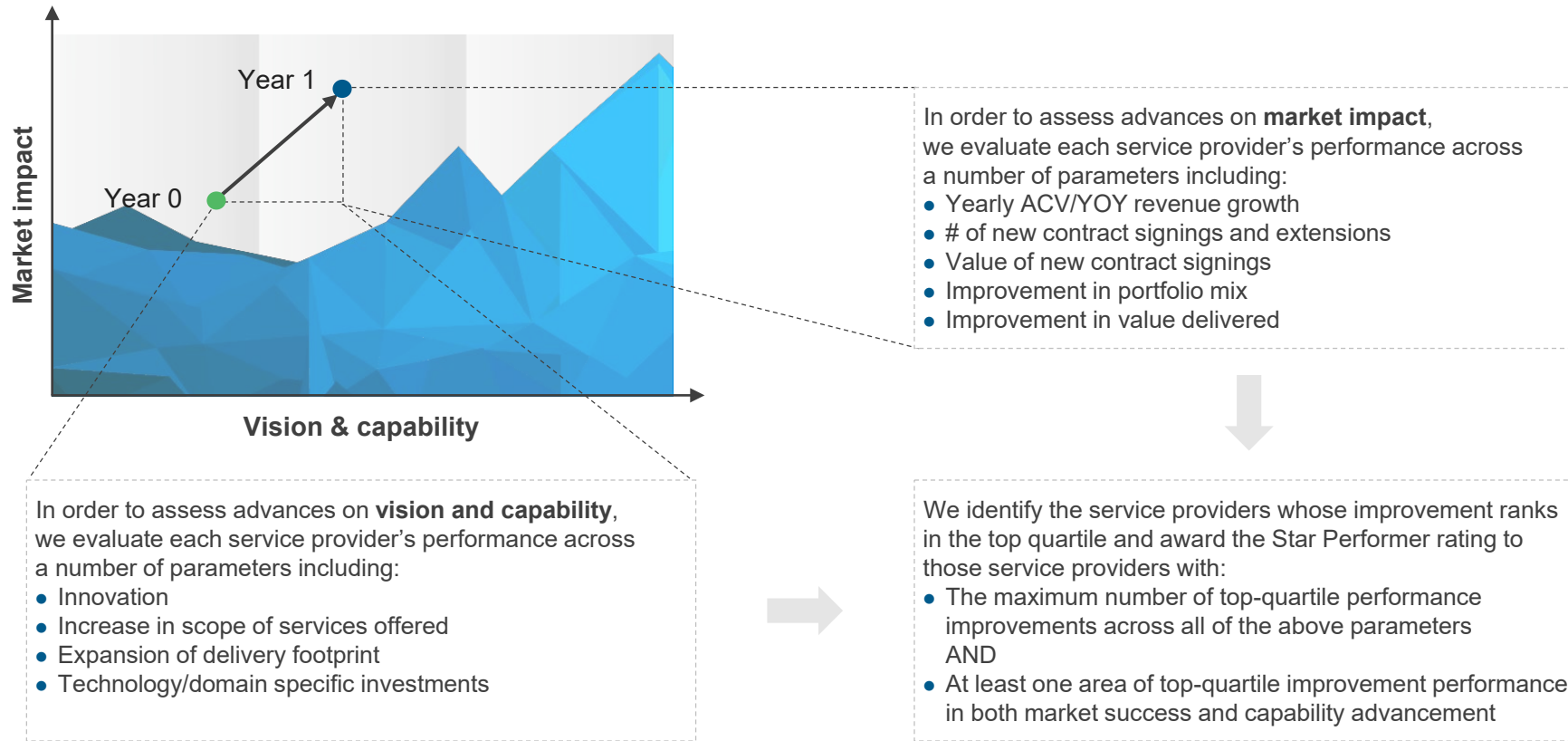| Value delivered |
| Value delivered to the client based on customer feedback and other measures |

Market impact

Leaders

Major Contenders

Aspirants
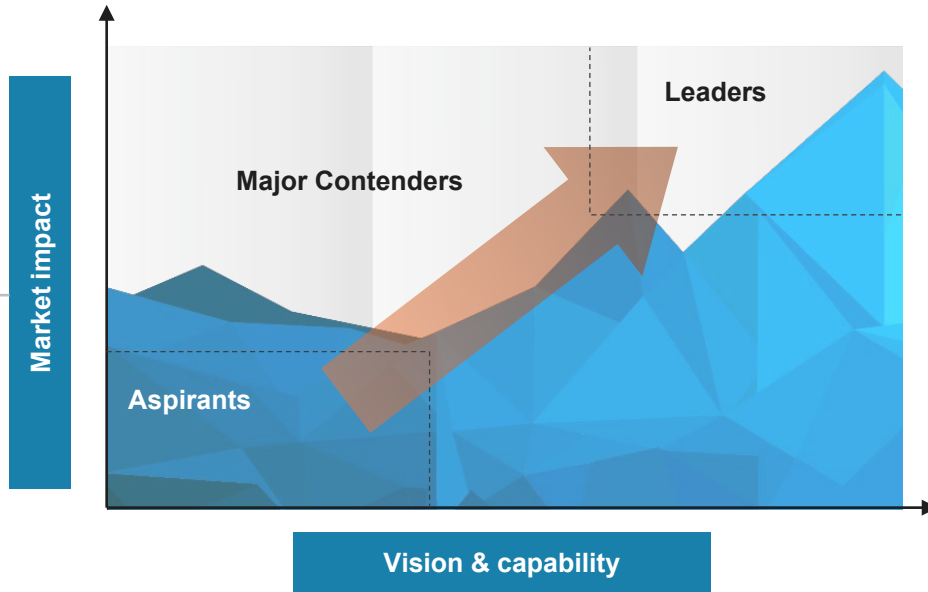
Vision & capability

Measures ability to deliver solutions successfully. This is captured through five subdimensions

Vision and strategy	Technology capability	Services capability	Innovation and investments	Engagement and commercial model
Vision for the client and itself; future roadmap and strategy	Technical sophistication and breadth/depth across the technology suite	Effectiveness and breadth/depth of services portfolios across the services suite	Innovation and investment in the solution suite	Progressiveness, effectiveness, and flexibility of engagement and commercial models

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology
Everest Group selects Star Performers based on the relative YOY improvement on the PEAK Matrix

Market impact (y-axis)

Year 1

Year 0

Vision & capability (x-axis)

In order to assess advances on **market impact**, we evaluate each service provider's performance across a number of parameters including:
- Yearly ACV/YOY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each service provider's performance across a number of parameters including:
- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain specific investments

We identify the service providers whose improvement ranks in the top quartile and award the Star Performer rating to those service providers with:
- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

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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With you on the journey

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