

The Customer Experience Platforms For Healthcare Landscape, Q2 2024

Forrester's Overview Of 29 Vendors

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Summary

You can use customer experience platforms for healthcare to grow revenue, improve outcomes with sustained engagement, and unlock operational efficiencies. But to realize these benefits, you'll first have to select from a diverse set of vendors that vary by size, type of offering, geography, and use case differentiation. Digital business and strategy and CX leaders should use this report to understand the value they can expect from a customer experience platform for healthcare vendor, learn how vendors differ, and investigate options based on size and market focus.

Market Definition

Healthcare organizations (HCOs), including providers and insurers, must establish new ways of engaging consumers to drive acquisition, sustain engagement, differentiate their offerings, and (re)establish trust. Forrester defines customer experience platforms for healthcare as:

Technologies that orchestrate seamless, personalized healthcare experiences at every touchpoint to drive sustained customer engagement that improves customer loyalty and trust.

HCOs use these platforms to create value for their customers, move beyond transactional engagements, and put the consumer in the driver's seat.

Business Value

A turbulent labor market and greater economic pressure have made the ability to acquire and retain customers an imperative for HCOs. HCOs' efforts to achieve digital transformation have been hindered by a lack of focus on the right technologies and customer outcomes. The pandemic exacerbated this problem by both accelerating digital adoption and fragmenting the technological ecosystem. Fragmented point solutions disrupt customer experiences, create inefficient workflows, and worsen the challenges faced by an already turbulent labor force. Digital business and strategy and CX leaders implement customer experience platforms for healthcare to:

- **Grow revenue.** HCOs recognize the importance of [growing revenue in 2024](#) and the role that customer experience plays in protecting and driving profit. These platforms empower HCOs to gain and maintain a deep understanding of their customers, enabling them to prioritize customer obsession. [Customer-obsessed](#) companies achieve faster revenue growth, faster profit growth, and better customer retention compared with non-customer-obsessed companies.
- **Improve outcomes with sustained engagement.** By fostering sustained engagement with patients or members, HCOs can accomplish key goals, including increased customer retention, better clinical outcomes, and reduced medical expenses. Too often, customers are engaging at the [unwanted emotional valleys](#) of their journeys. HCOs are working to create more opportunities to engage customers at emotional peaks and generate value through active involvement. When individuals are active participants in their own care, they are more likely to adhere to treatment plans, make healthier choices, and effectively manage chronic conditions.

- **Unlock operational efficiencies.** These platforms benefit both customers and employees by creating operational improvements, like self-service for customers and faster issue resolution for employees. Through improved customer engagement and experiences, HCOs can also reduce unnecessary hospital visits, avoid emergency department utilization, and streamline processes that reduce costs.

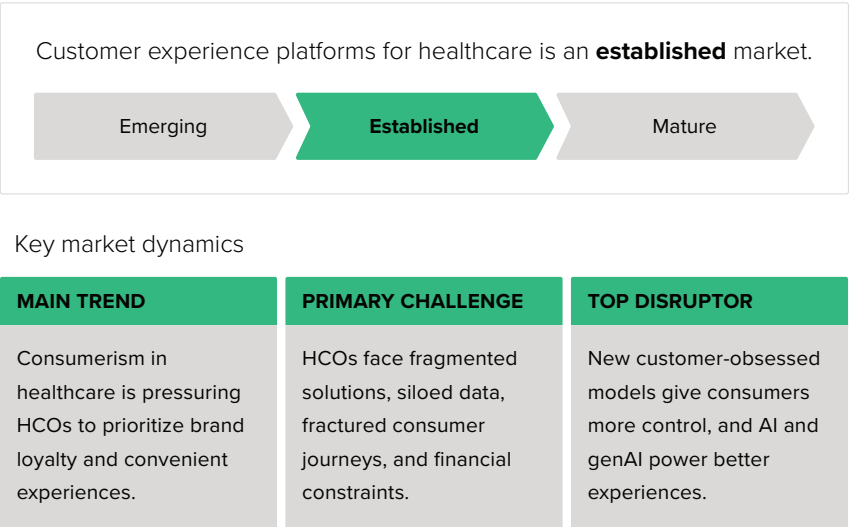
Market Maturity

The customer experience platforms for healthcare market is evolving rapidly. As many HCOs must piece together multiple point solutions, some end-to-end solutions are emerging through native development and acquisitions. Recent private equity funding rounds provide new offerings with a tailwind that helps them compete with legacy solutions. While traditional players undergo some soul searching, health systems feel pressure to extract more value from expensive electronic health records (EHRs). But they are limited by the speed of their vendors, which often lags the market. To compete in this market revolution, platforms must prioritize continued investment in integration and interoperability (see Figure 1). Customer experience platforms for healthcare have evolved into an established market that:

- **Understands the importance of quality data.** HCOs are drowning in data but lack access to critical consumer data that lives outside of the EHR or claims history. HCOs are investing in technology and services that help them acquire and transform key data into actionable insights that have uses across multiple applications for consumers and employees. The rise of [generative AI \(genAI\)](#) makes the quality of data the make-or-break component of their AI strategies. Having a strategy ahead of deployment is key: Rushing into technology deployment due to FOMO creates fragmentation, disruption, inefficiencies, and challenges.
- **Provides necessary visibility into the customer journey.** Healthcare leaders have long struggled to piece together the full customer journey and measure intervention effectiveness due to fragmentation and disparate data. Customer experience platforms for healthcare enable longitudinal mapping and integrated data that paint a clear picture of customers, their behavior, and the effectiveness of campaigns directed at them. These solutions break down the digital front door, supporting customers within a dynamic healthcare ecosystem.
- **Creates value for the customer beyond the transaction.** Scheduling an appointment, choosing benefits, paying a bill, and other similar transactions don't create value. Outcomes achieved over time do. At the heart of value creation lies a

deep understanding of the customer’s unique needs and motivations, which allows HCOs to deliver personalized, anticipatory, and well-orchestrated experiences. This process is built on customer trust and data. HCOs must engage in an iterative model that taps into the power of the data that customers share and rewards customers with valuable experiences — what we call the [value flywheel](#).

Figure 1
Customer Experience Platforms For Healthcare Market Maturity And Key Dynamics



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Market Dynamics

Healthcare consumers’ expectations of easier, faster, retail-like experiences have persisted over the years, and now, retailers are projected to own as much as [30% of primary care by 2030](#). The typical consumer is more willing than ever to receive care from CVS, Amazon, and other newer direct-to-consumer models. They offer consumers control over their time and the modality of care while ensuring that care is faster and costs are clear. It is no longer enough to offer a digital front door — HCOs must intercept consumers and customers as they navigate an increasingly complex and diverse healthcare ecosystem. To remain competitive, health systems and health insurers must embrace data-driven experiences that deliver more choice and personalization and [create value for the customer](#).

Digital business and strategy and CX leaders will face a plethora of vendor options and should pay attention to the following market dynamics.

- **Main trend.** Consumerism in healthcare is pressuring HCOs to prioritize brand loyalty and convenient experiences. While not new, this trend persists and has had a profound impact on the [future of healthcare](#) and how it is delivered. Now more than ever, HCOs must invest in [customer obsession](#) and ensure that they understand their customers to survive.
- **Primary challenge.** HCOs face fragmented solutions, siloed data, fractured consumer journeys, and financial constraints. As consumers seek new choices and take ownership of their health, many HCOs struggle to access and integrate their disparate data. Creating a cohesive view of the customer requires advanced data management, interoperability, and data integration.
- **Top disruptor.** New customer-obsessed models give consumers more control, and AI and genAI power better experiences. Offerings from Big Tech, [retailers](#), and digital health newcomers look to capture the hearts and wallets of frustrated healthcare consumers. These models tap emerging capabilities, such as genAI, to drive efficiency and faster, improved experiences, putting legacy HCOs further on their heels.

Notable Vendors

Digital business and strategy and CX leaders can start investigating specific vendors based on their geographic focus, industry focus, deployment options, and size. Across all markets, Forrester defines large vendors as having \$250 million or more, medium vendors as having \$100 million to less than \$250 million, and small vendors as having \$10 million to less than \$100 million in category revenue (see Figure 2).

Figure 2

The Customer Experience Platforms For Healthcare Landscape, Q2 2024

Vendor	Geographic focus	Industry focus	Deployment model(s)	Size
Adobe ¹	NA	Healthcare Insurance Pharmaceuticals and medical equipment	Multitenant SaaS	■■■
Artera ¹	NA	Government Healthcare	On-premises Hosted, private SaaS Multitenant SaaS	■
b.well Connected Health ¹	NA	Healthcare	Hosted, private SaaS Multitenant SaaS	■
CipherHealth ¹	NA	Healthcare	Multitenant SaaS	■
DexCare ¹	NA	Healthcare	Hosted, private SaaS	■■
Fabric Labs ¹	NA	Healthcare	Multitenant SaaS	■■
Keona Health ¹	NA	Healthcare IT/tech services	Hosted, private SaaS Multitenant SaaS	■
Klara ¹	NA	Healthcare	Multitenant SaaS	■
League ¹	NA	Healthcare Insurance	Hosted, private SaaS Multitenant SaaS	■
Loyal ¹	NA	Healthcare	Hosted, private SaaS Multitenant SaaS	■■
Luma Health	NA	Healthcare IT/tech services Professional services	Multitenant SaaS	■
Medallia ¹	NA; EMEA	Financial services Healthcare Retail	Hosted, private SaaS	■■
Memora Health ¹	NA	Healthcare	Hosted, private SaaS Multitenant SaaS	■
Microsoft ¹	NA; EMEA	Healthcare	Hosted, private SaaS Multitenant SaaS	■■■
Nuance ¹	NA	Financial services Healthcare Telecommunications	Hosted, private SaaS Multitenant SaaS	■■■
PatientPoint ¹	NA	Healthcare	Multitenant SaaS	■
Pegasystems ¹	NA; EMEA	Financial services Healthcare Insurance	On-premises Hosted, private SaaS Multitenant SaaS	■■■
Personify Health ¹	NA	Healthcare Insurance Professional services	On-premises Hosted, private SaaS Multitenant SaaS	■■■

Size ■■■ Large ≥\$250M ■■ Medium \$100M to <\$250M ■ Small \$10M to <\$100M

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Vendor	Geographic focus	Industry focus	Deployment model(s)	Size
Phreesia	NA	Healthcare	On-premises Multitenant SaaS	■■■
Press Ganey ¹	NA	Healthcare	Multitenant SaaS	■■■
Qualtrics	NA	Financial services Government Healthcare	Multitenant SaaS	■
Relatient ¹	NA	Healthcare	Multitenant SaaS	■
Salesforce ¹	NA	Financial services Government Healthcare	Hosted, private SaaS Multitenant SaaS	■■■
Smart Communications ¹	NA; EMEA	Financial services Healthcare Insurance	On-premises Hosted, private SaaS Multitenant SaaS	■■
Solutionreach ¹	NA	Healthcare	Multitenant SaaS	■
TigerConnect ¹	NA	Healthcare	Multitenant SaaS	■
Twilio ¹	NA; EMEA	Financial services Healthcare Retail	On-premises Hosted, private SaaS Multitenant SaaS	■■■
Upfront Healthcare ¹	NA	Healthcare	Multitenant SaaS	■
Weave ¹	NA	Healthcare	Multitenant SaaS	■

Size ■■■ Large ≥\$250M ■■ Medium \$100M to <\$250M ■ Small \$10M to <\$100M

Note: Geographic focus indicates regions where the vendor's product revenue in this category is greater than or equal to 15% of its total product revenue.

1. The information about this vendor includes Forrester's estimates.

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Top Use Cases

We've identified the following core use cases for this market: customer acquisition, customer engagement, and customer loyalty and retention. These are the use cases that buyers most frequently seek and that they expect customer experience platform for healthcare vendors to address. Beyond these core use cases, buyers often look for vendors that focus on certain extended use cases. We've identified the following use cases as extended: care referral coordination, chronic care management, customer activation, customer segmentation, finding care, personalized care journeys, and reputation management. Some buyers look to address these use cases in addition to the core ones, but customer experience platforms for healthcare may less commonly address them (see Figures 3 and 4).

Figure 3

Customer Experience Platforms For Healthcare: Core Use Cases

Use case	Objective	Top differentiators
Customer acquisition	Increase the customer base, generate revenue, and build long-term relationships with customers (patients or members)	<ul style="list-style-type: none">• Appointment scheduling• Campaign management• Omnichannel communication
Customer engagement	Empower customers to actively manage their health to achieve better health outcomes and increase customer satisfaction	<ul style="list-style-type: none">• Prescriptive analytics• Customer 360• Personalized health recommendations
Customer loyalty and retention	Ensure customers feel valued and trust the brand, increasing revenue, retention, and engagement while optimizing outcomes and costs	<ul style="list-style-type: none">• Customer journey visualization• Customer 360• Personalized health recommendations

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Figure 4

Customer Experience Platforms For Healthcare: Extended Use Cases

Use case	Objective	Top differentiators
Care referral coordination	Ensure efficient care transition across specialties and settings, ensuring customers receive necessary services	<ul style="list-style-type: none">• Care coordination• Data integration• Customer health record access
Chronic care management	Provide comprehensive, coordinated care for chronic conditions, improving overall health outcomes and quality of life	<ul style="list-style-type: none">• Care coordination• Data integration• Health education content
Customer activation	Empower and motivate individuals to engage in their healthcare, make informed decisions, and take steps to improve health and well-being	<ul style="list-style-type: none">• Customer journey visualization• Personalized health recommendations• Omnichannel communication
Customer segmentation	Define distinct cohorts based on characteristics, behaviors, and preferences to understand and support specific needs	<ul style="list-style-type: none">• Data integration• Predictive analytics• Customer 360
Finding care	Ensure individuals receive appropriate, timely, and effective treatment or support to improve their health and well-being	<ul style="list-style-type: none">• Appointment scheduling• Benefits coordination/eligibility verification• Conversational interfaces
Personalized care journeys	Orchestrate and tailor seamless healthcare experiences to achieve optimal outcomes, satisfaction, and sustained engagement	<ul style="list-style-type: none">• Customer journey visualization• Personalized health recommendations• Omnichannel communication
Reputation management	Improve perceptions and trust of customers and stakeholders by collecting, analyzing, and addressing feedback and reviews	<ul style="list-style-type: none">• Surveys and health assessments• Predictive analytics• Data integration

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Functionality By Use Case

Enabling these top use cases demands functionality that powers an easier, faster, and frictionless experience. To accomplish this, HCOs require rich data analysis and the ability to intercept the customer throughout their wellness journey. To build a [value flywheel](#) and continuously collect data that provides insights about customers, HCOs require key functionality as table stakes. This includes appointment scheduling, campaign management, omnichannel communication, prescriptive analytics, customer 360, personalized health recommendations, and customer journey visualization. Select the use cases that are most relevant to your business requirements and then use the following tables as a guide to choose the functionalities that matter most for your technology evaluation and vendor selection criteria (see Figures 5 and 6).

Figure 5

Customer Experience Platforms For Healthcare: Functionality By Core Use Case

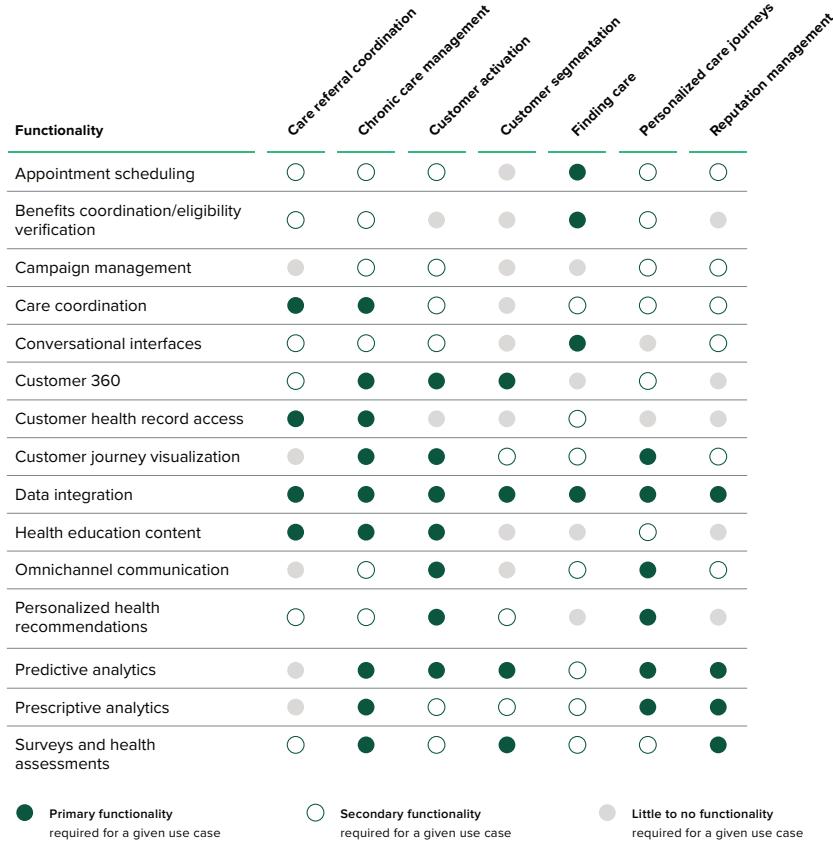
Functionality	Customer acquisition	Customer engagement	Customer loyalty and retention
Appointment scheduling	●	○	○
Benefits coordination/eligibility verification	●	○	●
Campaign management	●	●	○
Care coordination	○	●	○
Conversational interfaces	○	○	●
Customer 360	●	●	●
Customer health record access	○	○	●
Customer journey visualization	●	●	●
Data integration	●	●	●
Health education content	●	○	●
Omnichannel communication	●	●	○
Personalized health recommendations	○	●	●
Predictive analytics	○	●	○
Prescriptive analytics	○	●	○
Surveys and health assessments	○	○	●

Primary functionality required for a given use case
 Secondary functionality required for a given use case
 Little to no functionality required for a given use case

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Figure 6

Customer Experience Platforms For Healthcare: Functionality By Extended Use Case



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Vendor Focus: Top Three Extended Use Cases

Most vendors can support the initial transactions that an HCO’s customer is looking to complete. End-to-end solutions and point solutions start to diverge in their support for use cases that go beyond finding and scheduling care by supporting ongoing engagement with the customer through their health and wellness journey. Some vendors enable engagement at scale by supporting customer segmentation. Other vendors heavily invest in care referral coordination and chronic care management, creating value for customers and helping to reduce potentially avoidable medical and administrative costs for the HCO. We asked each participating vendor in the report to select the top three extended use cases that it focuses on. These are three use cases,

beyond the core ones, that the vendor wants customers to recognize as its areas of focus. This table doesn't represent available functionalities and may not represent the only use cases that vendors serve (see Figure 7).

Figure 7

Customer Experience Platforms For Healthcare: Extended Use Case By Vendor

Vendor	Care referral coordination	Chronic care management	Customer activation	Customer segmentation	Finding care	Personalized care journeys	Reputation management
Adobe			🔑	🔑		🔑	
Artera	🔑	🔑				🔑	
b.well Connected Health		🔑			🔑	🔑	
CipherHealth	🔑		🔑			🔑	
DexCare			🔑		🔑	🔑	
Fabric Labs			🔑		🔑	🔑	
Keona Health			🔑		🔑	🔑	
League		🔑			🔑	🔑	
Luma Health			🔑		🔑	🔑	
Medallia			🔑	🔑		🔑	
Memora Health		🔑	🔑			🔑	
Personify Health		🔑	🔑			🔑	
Phreesia			🔑		🔑	🔑	
Qualtrics			🔑	🔑		🔑	
Salesforce	🔑				🔑	🔑	
Smart Communications	🔑	🔑	🔑				

Note: The following vendors declined to provide use case information in our questionnaire: Klara, Loyal, Microsoft, Nuance, PatientPoint, Pegasystems, Press Ganey, Relatient, Solutionreach, TigerConnect, Twilio, Upfront Healthcare, and Weave.

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How To Work With These Vendors

Customer experience platform for healthcare vendors often replace or overlap functionality across HCOs' existing technology ecosystems, including but not limited to EHRs, consumer data platforms, and customer portals. Larger players will continue to acquire or drive the evolution of integration strategies for point solutions in this market. HCOs will benefit from the quick development of new functionality that taps into emerging tech like genAI, delivering value and speed. When evaluating customer experience platforms for healthcare, remember to:

- **Question vendors about critical integration capabilities.** Given the overlap of functionality and movement in the market, a system's ability to share data and packaged insights across the ecosystem is nonnegotiable. In healthcare, data has remained siloed for too long, resulting in higher infrastructure costs and poor customer experience. Make sure that your vendor of choice provides out-of-the-box integration functionality that is scalable and cost effective and adheres to your organization's data and regulatory standards, including FHIR-based APIs.
- **Build a roadmap for enterprisewide adoption.** HCOs' adoption of point solutions and duplicative systems has led to poor adoption and low realized value outside of marketing and CX teams. As your organization faces increasing pressure to lower costs, select a vendor that will help you articulate the enterprisewide value of the platform to the business in the short and long term. Engage stakeholders across the enterprise to establish buy-in before implementation. Choose a vendor that will act as a partner and help establish internal champions. Ensure that the enterprisewide roadmap includes sunsetting legacy products and migrating protected health information (PHI) if necessary.
- **Scrutinize vendor measurement capabilities now, not later.** Too often, HCOs struggle to establish baselines and find benchmarks for customer experiences due to lack of data collection and the sensitivity of PHI. Customer effort or trust scores may seem out of reach, but HCOs must ensure that their solution consistently collects the data necessary to monitor more advanced metrics now, rather than treating it as an item on a vendor's roadmap. This, combined with the enterprisewide roadmap, will serve the organization in holding vendors to their promises in the long term and measuring the true value of the platform.

Where The Market Is Going Next

Once a patient, always a consumer. The rise of consumerism shows no signs of stopping in healthcare, and customer expectations for a better healthcare experience will only increase from this point forward. Expect:

- **Turbulence and consolidation.** This market category is still finding its identity. HCOs already feel pressure to reduce costs, but opting for a point solution in favor of cost savings today will result in regret later. In the future, HCOs will look to replace multiple point solutions with an end-to-end offering with less integration costs. More end-to-end offerings will emerge under this pressure as the market consolidates and more acquisitions and partnerships unfold.
- **Investments in improved interoperability.** We can only go up from here. Interoperability has long plagued healthcare, and with the [emergence of QHINs](#) and mandates for adoption of FHIR, we finally see the promise of unlocking data on the horizon. Vendors will need to choose a [QHIN partner](#), maintain API infrastructure [amid evolving guidance](#), and build functionality that empowers consumers to truly own and carry their data with them as they move across the ecosystem. They will also need to build functionality that [enables consumers to revoke access](#) to data when, where, and how they see fit.
- **More genAI-enabled functionality.** HCOs need a partner as they explore the world of [genAI](#) and AI. HCOs must balance the fear of missing out and the fear of messing up when it comes to the ethical, appropriate use of customer data in these emerging technologies. Vendors must guide and reinforce the importance of transparency and explainable AI to foster trust — and proper use of these technologies to create value for the customer — rather than merely adding more jewelry to the box for HCOs.

Supplemental Material

Methodology

To complete our review, Forrester requested information from vendors. If vendors didn't share this information with us, we made estimates based on available secondary information. We've marked all estimates with a note. Forrester shared a preview of this report with participating vendors before publishing.

Companies We Researched For This Report

Forrester researched the following companies for this report.

Adobe

Artera

b.well Connected Health

CipherHealth

DexCare

Fabric Labs

Keona Health

Klara

League

Loyal

Luma Health

Medallia

Memora Health

Microsoft

Nuance

PatientPoint

Pegasystems

Personify Health

Phreesia

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