

Clinical and Care Management Services Business Process Transformation 2025 Market Insights™

Rise of personalized, data-driven
care through AI and predictive
analytics

June 2025

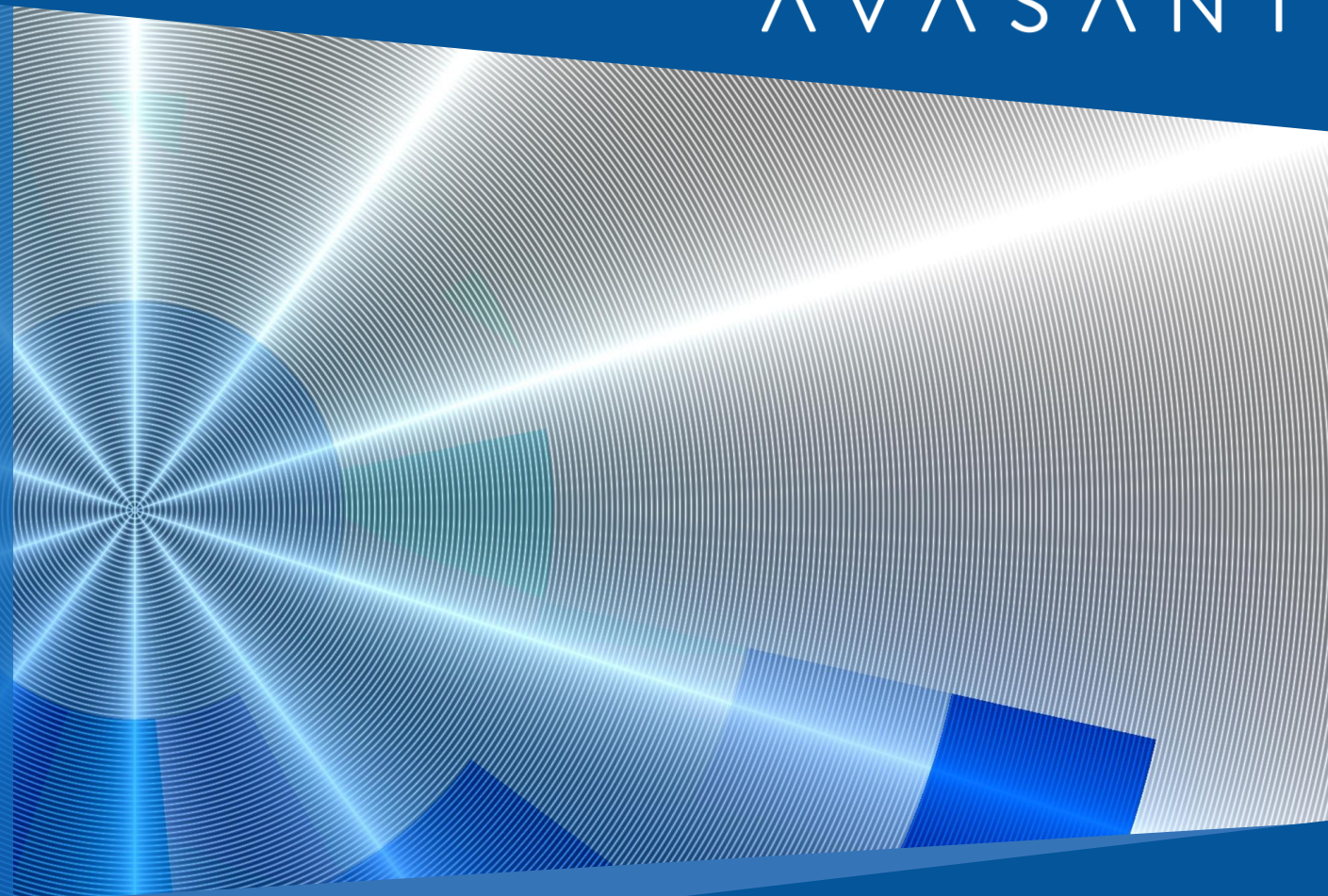


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- Key enterprise clinical and care management business process transformation trends shaping the market
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- Gen AI drives efficiency and productivity in clinical operations while addressing workforce gaps, payor friction, and the shift to value-based, whole-person care.
- Zero-touch intelligence revolutionizes healthcare by shifting from manual tasks to AI-driven support, improving efficiency, accuracy, and patient outcomes.
- Whole-person care integrates clinical staff, digital tools, and SDOH insights to improve patient outcomes and reduce costs.
- Telehealth is scaling fast, with investments shifting to integrated, AI-powered RPM platforms for proactive, data-driven chronic care.
- Interoperability standards such as FHIR enhance data sharing and care coordination in US health systems

Key contacts 15

Key clinical and care management services market trends shaping the industry

AI-powered automation and decision support

- Enterprises are leveraging AI/generative (Gen) AI across workflows to automate prior authorization, claims reviews, medical necessity checks—improving efficiency and consistency while reducing manual handoffs and cycle times.
- RPA bots manage high-volume tasks, such as eligibility checks and intake, enabling “zero-touch” processing with human-in-the-loop oversight. New agent-based automation replaces legacy RPA for document review and medical necessity decisions, adding real-time decision support.

Whole-person care model

- Health plans are shifting to a “whole-person” care model, explicitly integrating physical health, behavioral health, and SDOH into care management to deliver truly holistic member support.
- Organizations are investing in deeper clinical capabilities to support this integrated approach, building people-driven and tech-driven programs around whole-person care. Clinical teams are integrating nursing and social work resources early in the care process to identify gaps, improve care transitions, and reduce readmissions.

Digital and virtual care innovation

- Providers have rapidly built telehealth and RPM platforms to extend care beyond traditional settings, offering end-to-end virtual solutions that support everything from acute consults to chronic disease management.
- Interoperable data and advanced analytics are being leveraged to drive population health management and personalized outreach alongside virtual care. Digital health risk assessments (HRAs) and mobile health apps feed real-time patient data into care management workflows for more proactive interventions.

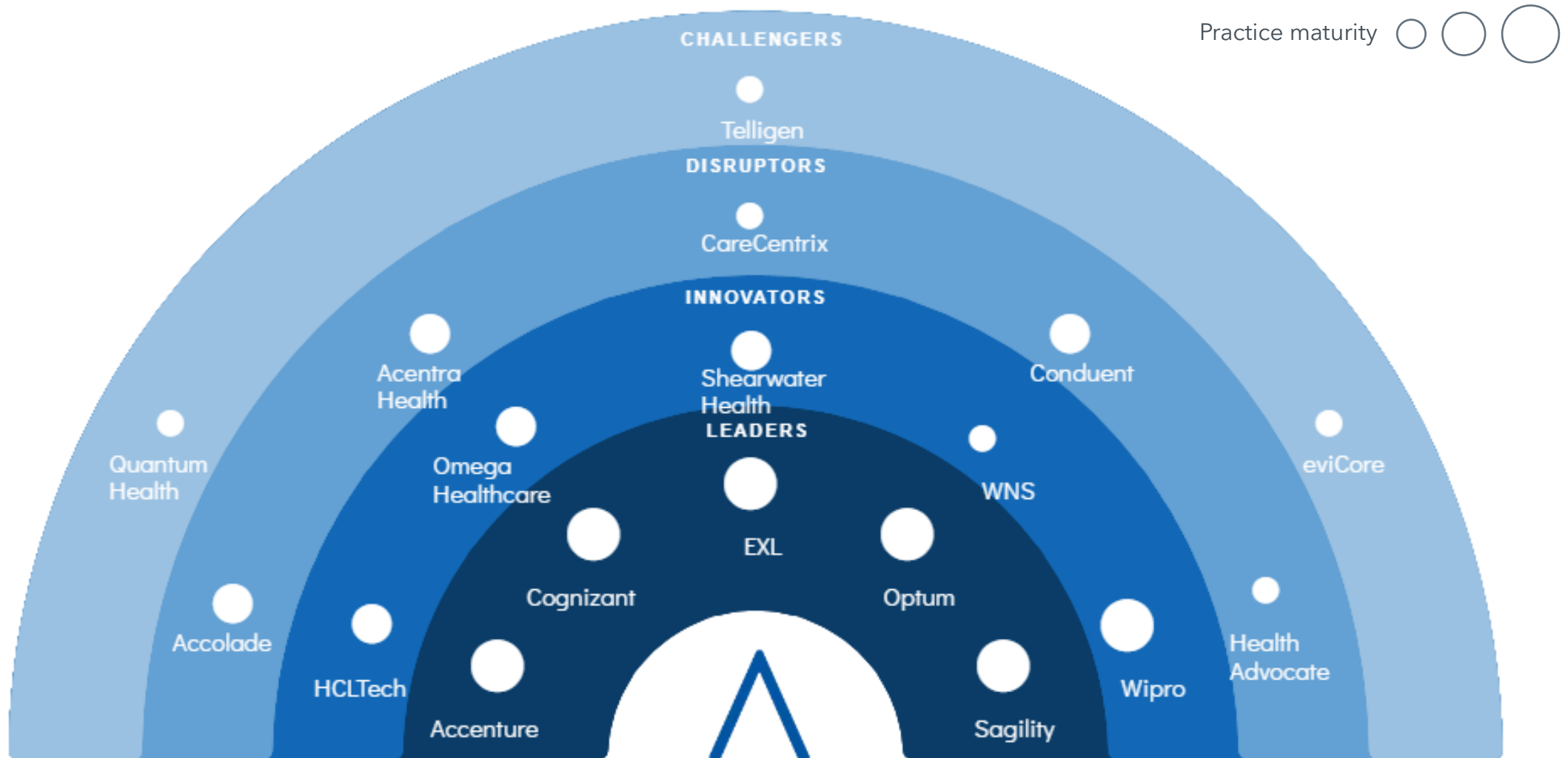
Value-based/Outcome-focused contracts

- Payers and providers are moving from fee-for-service to outcome-driven contracts, tying reimbursement to metrics such as Healthcare Effectiveness Data and Information Set (HEDIS), Star Ratings, and net promoter score (NPS), rather than solely relying on process-based SLAs.
- Analytics-powered stratification models identify high-risk members for targeted interventions, driving down medical loss ratios (MLR) and total cost of care.

Population health management

- Advanced interoperability standards (HL7 FHIR, CCD, X12) enable seamless clinical data exchange across electronic medical records (EMRs), claims systems, and third-party platforms.
- Predictive analytics (risk scoring, comorbidity indices, readmission risk) underpin proactive care gap closure and resource allocation.

Avasant recognizes 18 top-tier providers offering clinical and care management business process transformation services

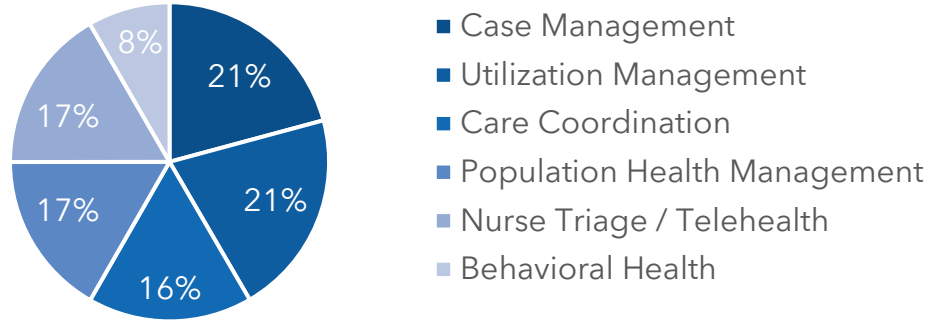


Note: Please refer to Avasant's *Clinical and Care Management Business Process Transformation 2025 RadarView* for detailed insights on the service providers and supply-side trends.

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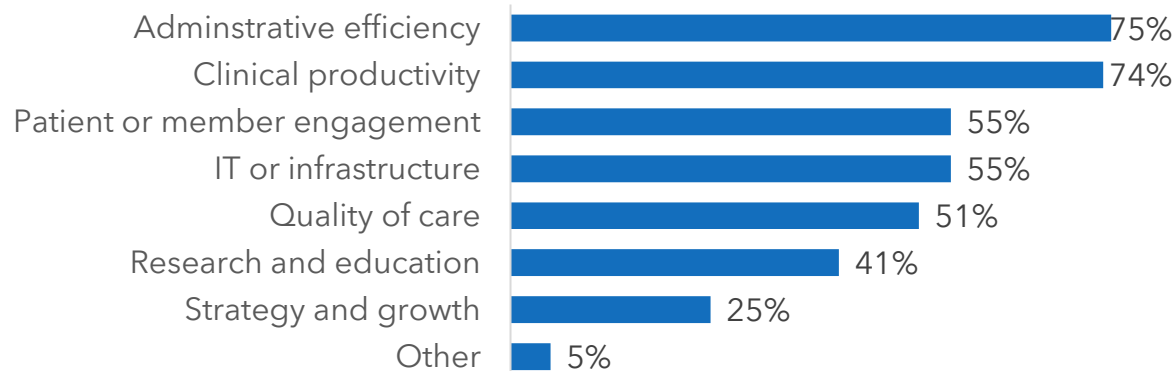
Gen AI drives efficiency and productivity in clinical operations while addressing workforce gaps, payor friction, and the shift to value-based, whole-person care

Gen AI current adoption across the value chain



85% of healthcare organizations are pursuing Gen AI initiatives with 47% already implemented, focusing primarily on administrative efficiency (75%) and clinical productivity (74%) across evenly distributed clinical functions, indicating the industry has moved from pilots to strategic, value-driven implementations.

Gen AI potential across clinical and care management areas Q4 2024



Key reasons for Gen AI adoption in clinical operations

Healthcare workforce shortage crisis driving AI adoption

- 900K nurses exiting the workforce by 2027
- 39K physician shortage by 2033
- 45% increase in 60-90-year-olds needing care

Payer-provider friction drives AI automation imperative

58% negative trend in payer-provider relationship over three years, claimed by hospital CFOs

Top friction points: 80% cite intentional denials | 76% PA request surge | 75% accountability gaps

Shift to value-based care, requiring real-time patient insights and interventions

- 64% of healthcare organizations expect higher revenue from value-based care in 2025 compared to 2024
- 70% claim AI will boost predictive analytics and scale value-based care

Member expectations for faster and consistent service

- 91% of patients expect a response from their provider within 4 to 24 hours
- 47% of patients have left facilities due to unsatisfactory experiences, underscoring the need for convenience and responsiveness

Zero-touch intelligence revolutionizes healthcare by shifting from manual tasks to AI-driven support, improving efficiency, accuracy, and patient outcomes

Healthcare automation is evolving from rule-based RPA to zero-touch intelligence and agent-based cognition—enabling AI to handle clinical complexities, automate workflows, reduce patient wait times, and support physician-level decisions for improved care delivery and operational efficiency.

Legacy RPA era

- Processed only structured data and struggled with clinical complexity
- Required extensive manual configuration for each workflow
- System changes disrupted automation, requiring constant IT support
- Confined to simple, repetitive tasks such as data entry
- Faced HIPAA compliance issues due to insufficient security protocols

Current: Zero-touch intelligence

- Automated eligibility checks processing millions of transactions daily
- Enabled smart patient onboarding with exception-based escalation
- Achieved End-to-end processing from submission to adjudication
- Strategic oversight for complex cases and quality assurance
- Reduced patient wait times by 85% through continuous processing

Next-gen: Agent-based cognition

- AI agents' analysis of complex medical documents with physician-level accuracy
- Autonomous evaluation against clinical guidelines and evidence-based protocols
- Instant clinical decision support integrated into provider workflows
- Use of natural language processing to convert conversations to structured notes
- Proactive identification of patient risks and treatment optimization

Market impact and performance

\$2.8B

RPA in the healthcare market 2025

26%

Compound annual growth rate of RPA in the healthcare market

40%

Reduction in service desk tasks

\$382B

in savings for the healthcare industry by 2027 with IA

Key use cases of zero-touch intelligence



Deployed a zero-touch RPA solution to handle individual case safety reports (ICSRs) submitted by consumers in the pharmaceutical sector. This automation replaced repetitive manual tasks traditionally overseen by regulators, improving efficiency and compliance in life sciences operations.



Implemented zero-touch invoice processing using IA to automate invoice workflows and minimize manual intervention. It enhanced efficiency, reduced processing time, and enabled its finance team to focus on more strategic tasks, boosting overall productivity.

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