

LANDSCAPE REPORT

The Customer Experience Platforms For Healthcare Landscape, Q4 2025

Forrester's Overview Of 27 Vendors

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Summary

You can use customer experience platforms for healthcare to deliver a better total experience, sustain engagement to improve outcomes, 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, strategy, and CX leaders should use this report to understand the value they can expect from a customer experience platform for healthcare, learn how vendors differ, and investigate options based on size and market focus.

Market Definition

Healthcare organizations (HCOs), including providers and insurers, must connect with healthcare consumers to win them over in a fast-changing market amid a growing set of alternative care and coverage options. Forrester defines customer experience platforms for healthcare as:

Technologies that orchestrate or contribute to personalized healthcare experiences at every touchpoint, from plan selection to provision of care and payment, to drive sustained customer engagement that improves customer loyalty and trust.

HCOs use these platforms to [cocreate value](#) with their customers, moving from transactional interactions to trustworthy, [sustained engagement](#). The experiences HCOs build with these platforms keep the consumer in the driver's seat, help differentiate their offerings, and support the dire need to improve their customer relationships.

Business Value

Consumer expectations for fast, convenient, retail-like healthcare interactions are here to stay. These expectations pressure HCOs to make bold investments in unproven, emerging technologies, [sometimes to their detriment](#). Volatility in healthcare is driving unpredictable shifts in financial performance, policy, and consumer demand — forcing HCOs to stay agile in their strategies. Digital business, strategy, and CX leaders implement customer experience platforms for healthcare to:

- **Deliver a better total experience.** Forrester defines [total experience](#) as the sum of all interactions with a brand that shape consumer perception. The Total Experience Score measures a company's ability to acquire new customers, deliver experiences, and drive loyalty. The [US health insurance industry](#) is experiencing a brand and customer experience crisis, scoring the lowest among 10 industries we tracked. Addressing questions with clear answers is the most critical driver for both brand and customer experience, while positive emotion and empathy foster loyalty and trust.
- **Sustain engagement to improve outcomes.** By fostering sustained engagement with patients or members, HCOs can accomplish key goals, including increasing customer acquisition and retention, improving clinical outcomes, and reducing medical expenses. Too often, customers are engaging in the unwanted emotional valleys of their journeys. HCOs are working to improve salience — staying top of mind for consumers and creating more opportunities to engage customers in

emotional moments and generate value through active involvement.

- **Unlock operational efficiencies.** These platforms benefit employees by creating operational improvements by resolving issues faster. Customers also benefit from self-service features. Through improved customer engagement and experience, HCOs can reduce unnecessary hospital visits, avoid high-cost medical utilization, and [streamline — even automate — processes that reduce costs](#). This is a critical need for a market facing [significant change](#), rising costs, and financial strain.

Market Maturity

The customer experience platforms for healthcare market is established but continues to evolve as it matures. As HCOs grow frustrated with piecing together multiple point solutions, vendors have either natively developed or acquired their way into end-to-end solutions. Continued venture funding injects capital into new offerings and gives long-established vendors an incentive to invest in emerging technologies. Traditional players are struggling to differentiate and keep up with the functional demands of today's HCOs (see Figure 1). Customer experience platforms for healthcare has evolved into an established market that:

- **Creates value for the customer beyond the transaction.** Scheduling an appointment, choosing benefits, paying a bill, and other similar transactions don't create value for customers — they are basic requirements. Outcomes achieved over time enable HCOs to cocreate value with customers. HCOs must develop a deep understanding of the customer's unique needs and motivations to deliver personalized, anticipatory, and well-orchestrated experiences. This process is built on customer trust and data.
- **Builds trust through transparency.** Consumers are more skeptical of HCOs than ever, even as healthcare remains essential. Vendors that offer transparent experiences — clearly explaining how they use data and avoiding repetitive requests — can gain a competitive edge. As solutions increasingly rely on personal data, those that embed empathy and trust into the experience will stand out.
- **Tests the possibilities of emerging technologies.** As emerging technologies flood the market and influence consumers from every direction, healthcare leaders struggle to keep pace and identify which innovations will deliver real impact. The rapid adoption of dynamic search, agentic orchestration, and generative AI reflects mounting pressure from other industries and rising consumer expectations.

Figure 1

Customer Experience Platforms For Healthcare Market Maturity And Key Dynamics

Customer experience platforms for healthcare is an **established** market.



Key market dynamics

MAIN TREND	PRIMARY CHALLENGE	TOP DISRUPTOR
HCOs strive to meet evolving consumer expectations and repair trust through clarity, responsiveness, and empathy.	HCOs struggle to identify which emerging vendor technologies are truly viable.	Rapid change across the industry and a shifting regulatory landscape are reshaping the market.

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Market Dynamics

The demand for [healthcare experiences](#) that are assistive, anticipatory, and agentic — and empower consumers in unprecedented ways — has accelerated. Healthcare consumers are more connected than ever, accessing care services and guidance through an array of devices, channels, and interfaces. They have rising expectations for convenience and personalization. Technologically adventurous health insurance consumers are [increasingly willing](#) to use emerging digital touchpoints and demand curated and personalized experiences that help them manage their health.

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

- **Main trend.** HCOs strive to meet evolving consumer expectations and repair trust through clarity, responsiveness, and empathy. Consumers increasingly distrust HCOs to act in their best interest and feel confused about how HCOs protect their data and use it to improve their experience. This presents a challenge as HCOs

rely more on data to drive a meaningful, personalized experience. [Forrester's Consumer Benchmark Survey, 2025](#), shows that just 48% of US online adults trust healthcare providers to keep their personal information secure, and for health insurers, that number drops to 45%. Rebuilding eroded customer trust must be a priority.

- **Primary challenge.** HCOs struggle to identify which emerging vendor technologies are [truly viable](#). Pressured by [rapid advancements in agentic](#) and generative AI, vendors often make bold promises. When used effectively, these technologies create immense value by offering natural, intuitive experiences that feel less like transactions and more like real conversations, empowering customers and closing the gap between their expectations and reality.
- **Top disruptor.** Rapid change across the industry and a shifting regulatory landscape are reshaping the market. Economic instability, evolving reimbursement and insurance models, and new mandates around interoperability, consent, and digital engagement (like TEFCA, FHIR APIs, and TCPA) are reshaping how HCOs operate. These changes threaten existing strategies and demand that HCOs adapt quickly by addressing critical, [antiquated systems](#) and boosting consumer engagement to win and retain customers.

Notable Vendors

Digital business, 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).

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Figure 2
The Customer Experience Platforms For Healthcare Landscape, Q4 2025

Vendor	Geographic focus	Industry focus	Deployment model(s)	Size
Adobe ¹	NA	Healthcare Insurance Pharmaceuticals and medical equipment	Multitenant SaaS	■ ■ ■
Artera	NA	Government Healthcare	Hosted, private SaaS Multitenant SaaS	■ ■
b.well Connected Health	NA	Government Healthcare	On-premises Hosted, private SaaS Multitenant SaaS	■
Commure ¹	NA	Healthcare	Hosted, private SaaS Multitenant SaaS	■
dacadoo ¹	NA	Healthcare Insurance Retail	Hosted, private SaaS Multitenant SaaS	■
Fabric Labs	NA	Healthcare	Multitenant SaaS	■ ■
Health Catalyst ¹	NA	Healthcare Pharmaceuticals and medical equipment Professional services	Hosted, private SaaS	■
HealthEdge ¹	NA	Healthcare Insurance	On-premises Hosted, private SaaS Multitenant SaaS	■ ■
League	NA	Healthcare Insurance Pharmaceuticals and medical equipment	Hosted, private SaaS 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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Vendor	Geographic focus	Industry focus	Deployment model(s)	Size
Loyal	NA	Healthcare	Hosted, private SaaS	■
Luma Health	NA	Healthcare IT/tech services Professional services	Multitenant SaaS	■
Medallia ¹	NA	Financial services Healthcare Retail	Hosted, private SaaS	■ ■
mPulse	NA	Healthcare	Hosted, private SaaS Multitenant SaaS	■ ■
Nayya	NA	Financial services Healthcare Insurance	Multitenant SaaS	■
Pager Health	NA	Healthcare Insurance IT/tech services	Hosted, private SaaS Multitenant SaaS	■ ■
PatientPoint ¹	NA	Healthcare	Hosted, private SaaS Multitenant SaaS	■ ■
Pegasystems	NA	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

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.

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Vendor	Geographic focus	Industry focus	Deployment model(s)	Size
Press Ganey	NA; EMEA	Healthcare IT/tech services Professional services	Hosted, private SaaS Multitenant SaaS	■ ■ ■
Qualtrics	NA	Financial services Government Healthcare	Multitenant SaaS	■ ■
Relatient ¹	NA	Healthcare	Hosted, private SaaS Multitenant SaaS	■
Salesforce ¹	NA	Healthcare Insurance Pharmaceuticals and medical equipment	Hosted, private SaaS Multitenant SaaS	■ ■ ■
Sharecare ¹	NA	Healthcare Insurance	On-premises Hosted, private SaaS Multitenant SaaS	■ ■ ■
Smart Communications ¹	NA; EMEA	Financial services Healthcare Insurance	On-premises Hosted, private SaaS Multitenant SaaS	■ ■
Talkdesk	NA	Financial services Healthcare Retail	Multitenant SaaS	■
Weave ¹	NA	Healthcare	On-premises Hosted, private SaaS Multitenant SaaS	■
Zelis	NA	Financial services Healthcare Insurance	Hosted, private SaaS 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: care navigation/find care, care scheduling, customer engagement, and orchestrated care journey. These are the use cases that buyers most frequently seek and that they expect customer experience platforms for healthcare vendors to address (see Figure 3). 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: benefits/coverage inquiry, chronic condition management, customer health record access, estimating cost of care, personalized health recommendations, and virtual care delivery (see Figure 4). 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.

Figure 3
Customer Experience Platforms For Healthcare: Core Use Cases

Use case	Objective	Top differentiators
Care navigation/find care	Empower individuals to easily identify and access the most appropriate care options based on their needs and preferences.	• Dynamic search • Benefits coordination/eligibility verification • Agentic orchestration
Care scheduling	Simplify and streamline booking, scheduling, and managing care across channels.	• Omnichannel communication • Customer 360
Customer engagement	Foster meaningful interactions that build trust, activate consumers, and support health outcomes across the care journey.	• Dynamic and personalized content • Omnichannel communication • Agentic orchestration
Orchestrated care journey	Deliver a seamless experience by coordinating touchpoints, services, and communications across the continuum of care.	• Customer 360 • Omnichannel communication • Agentic orchestration

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Figure 4
Customer Experience Platforms For Healthcare: Extended Use Cases

Use case	Objective	Top differentiators
Benefits/coverage inquiry	Help members quickly understand their coverage to make informed care decisions.	• Benefits coordination/eligibility verification • Agentic orchestration • Partner marketplace
Chronic condition management	Support members in managing chronic conditions to improve outcomes and reduce complications.	• Customer 360 • Dynamic and personalized content • Dynamic search
Customer health record access	Provide secure, easy access to personal health records for better care coordination.	• Customer health record access • Data integration • Agentic orchestration
Estimating cost of care	Build customer trust by offering clear, real-time cost estimates to eliminate surprise bills and build trust.	• Care cost calculator • Data integration • Agentic orchestration
Personalized health recommendations	Deliver tailored health tips and actions based on individual needs and history.	• Customer 360 • Dynamic and personalized content • Surveys and health assessments
Virtual care delivery	Expand access to timely, convenient care through digital channels.	• Customer health record access • Data integration • Partner marketplace

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Functionality By Use Case

Enabling these top use cases demands functionality that uses data transparently to cocreate value with customers, [delivering clear, fast resolution](#) to their issues and a frictionless experience. To accomplish this, HCOs require rich data protection, analysis, and the ability to engage with the customer throughout their wellness journey. As a starting point for fostering customer trust, HCOs need key CX functionality: rich data integration, omnichannel communication, dynamic and personalized content, customer 360, and customer journey visualization. With these table stakes, HCOs will enter a virtuous cycle of data collection, insight generation, experience optimization, and [value delivery](#). 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).

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Figure 5
Customer Experience Platforms For Healthcare: Functionality By Core Use Case

Functionality	Care navigation/find care	Care scheduling	Customer engagement	Orchestrated care journey
Agentic orchestration				
Appointment scheduling				
Benefits coordination/eligibility verification				
Care cost calculator				
Care referral coordination				
Dynamic search				
Conversational interface				
Customer 360				
Customer health record access				
Customer journey visualization				
Data integration				
Dynamic and personalized content				
Omnichannel communication				
Partner marketplace				
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 basic transactions that an HCO’s customer is looking to complete. End-to-end solutions advance their support for use cases that go beyond helping customers find and schedule care through personalized experiences. More mature solutions offer dynamic search and responsive experiences that drive ongoing engagement with the customer through their health and wellness journey. Many vendors are investing in agentic capabilities, refining management of chronic conditions, and handling benefits and coverage inquiries. 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 (see Figure 7). This table doesn’t represent available functionalities and may not represent the only use cases that vendors serve.

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Figure 7
Customer Experience Platforms For Healthcare: Extended Use Cases By Vendor

Vendor	Benefits coverage inquiry	Chronic condition management	Customer health record access	Estimating cost of care	Personalized health recommendations	Virtual care delivery
Adobe		🔍			🔍	
Artera		🔍			🔍	🔍
b.well Connected Health		🔍	🔍		🔍	
dacadoo		🔍			🔍	
Fabric Labs		🔍			🔍	🔍
Health Catalyst	🔍	🔍			🔍	
League	🔍	🔍			🔍	
Loyal					🔍	
Luma Health		🔍			🔍	🔍
mPulse	🔍		🔍		🔍	
Nayya	🔍			🔍	🔍	
Pager Health		🔍			🔍	🔍
Pegasystems	🔍	🔍			🔍	
Press Ganey	🔍				🔍	🔍
Salesforce	🔍	🔍	🔍			

Note: The following vendors declined to provide use case information in our questionnaire: Commure, HealthEdge, Medallia, PatientPoint, Personify Health, Qualtrics, Relatient, Sharecare, and Weave.

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Vendor	Benefits coverage inquiry	Chronic condition management	Customer health record access	Estimating cost of care	Personalized health recommendations	Virtual care delivery
Smart Communications	Q	Q		Q		
Talkdesk	Q	Q			Q	
Zelis	Q			Q	Q	

Note: The following vendors declined to provide use case information in our questionnaire: Commure, HealthEdge, Medallia, PatientPoint, Personify Health, Qualtrics, Relatient, Sharecare, and Weave.

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Where The Market Is Going Next

The healthcare market is entering a pivotal phase shaped by economic and regulatory change, rising costs, and increasingly impatient consumers. As personal data remains central to delivering personalized care, healthcare organizations must prioritize trust by building transparent, empathetic experiences that reassure patients that their data is secure and used responsibly. The future of CX in healthcare hinges on platforms that unify engagement, modernize operations and infrastructure, and meet consumer expectations shaped by more agile industries. Expect:

- **Agentic AI to be essential but deployed carefully.** Be disciplined and deliberate with AI-related experiments. Establish performance metrics, assess the impact of AI agents, and prepare for agent-to-agent interactions where the human is adjacent to, but still very much part of, the experience. Test the waters of consumer-facing genAI experiences, and don't forget to [rethink how to measure customer experiences](#) for entirely new types of customer interactions.
- **Convergence and consolidation.** This market is still evolving, with many point solutions persisting, to the annoyance of HCO leaders. HCOs already feel pressure to reduce costs, but opting for a point solution in favor of cost savings today will result in regret later. HCOs are looking to replace multiple point solutions with an end-to-end offering with less integration costs. More end-to-end offerings will continue to emerge under this pressure as the market consolidates and more acquisitions and partnerships unfold.
- **Rapid change that will put the industry on its heels.** Change is a constant in all industries; however, the blistering pace in healthcare [is creating volatility](#) and unique areas of risk for HCOs. HCOs must be proactive and stay flexible to keep

up with the pace of change. Select vendor partners that provide guidance and expertise, as well as flexibility, to help adapt and evolve in an ever-shifting market.

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

Commure

dacadoo

Fabric Labs

Health Catalyst

HealthEdge

League

Loyal

Luma Health

Medallia

mPulse

Nayya

Pager Health

PatientPoint

Pegasystems

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Personify Health

Press Ganey

Qualtrics

Relatient

Salesforce

Sharecare

Smart Communications

Talkdesk

Weave

Zelis



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