



## **Service Provider Intelligence**

### **Service Provider Profiles – Preview Deck**

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# Everest's service provider profiles provide organizations with accurate, fact-based and comprehensive snapshots of individual service provider capabilities

## Challenges involved in obtaining actionable service provider information

- Lack of reliable market data on service provider offerings and capabilities
- Rapidly evolving service provider capabilities
- Highly complex and time-consuming activity

**Everest's multi-layered service provider profiles provide in-depth information and actionable insights on outsourcing and offshoring service providers. Our profiles are used by:**

### Buyers

- Understand and evaluate service provider capabilities to make critical service provider-related decisions
- Monitor developments driving opportunity and risk to existing service provider portfolio

### Service Providers

- Track market activity and trends
- Understand capabilities and significant developments at key competitors

## Types of available service provider profiles

1

**Corporate profiles:** Profiles of overall service provider capabilities and information

2

**Function-specific profiles:** Profiles of a service provider's capabilities in a specific outsourcing function (e.g., IT, BPO, HRO)

3

**Location-specific profiles:** Profiles of a service provider's capabilities in a specific delivery location (e.g., India, China, Philippines)

**Description of individual service provider profiles on subsequent pages**

# Corporate service provider profiles provide information and insights on a number of capability-related dimensions



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- 1 **Key dimensions covered**
- Company description
  - Key financials
  - Service offerings
  - Leadership
  - Locations
  - Client base
  - Business segments
  - Quality certifications
  - Credit rating
  - Transactions activity
  - Market developments
  - Partnerships and alliances

**Summary corporate profile**

**Multi-page corporate profile**

**Corporate profile**  
Company A

**Company description:** Company A is a global management consulting, technology services, and outsourcing firm. The company offers its services and solutions to clients across various industries with a key focus on financial services and manufacturing.

**Key financials:**

	FY 2007	FY 2006	FY 2005
Revenue	\$20,000M	\$18,000M	\$17,000M
Operating margin	10.0%	10.1%	12.4%
Employees	100,000	90,000	75,000

**Service offerings:** Business process outsourcing, application outsourcing, infrastructure outsourcing, IT and BPO services, human resource outsourcing, procurement, consulting, supply chain management, customer relationship management.

**Key locations:** Dallas, TX, USA; Mexico, Czech Republic, and USA.

**Market news:** Mar 2008: Company A acquires Company X, a application services provider based in USA. Feb 2008: Company A makes changes to its management - appoints a new COO, Managing Director - Global Delivery and Practical Head for HR Services. Jan 2008: Company A sets up a 1,000 seat delivery center in Czech Republic. The new center will offer BPO services such as finance & accounting and contact center. Jan 2008: Company A announces plans to increase its headcount in Philippines. The company currently has 500 people across 3 centers and from plans to increase this to 1,200 in the next 6 months. Dec 2007: Company A announces a share repurchase program for 1 million of its common shares.

**Quality certifications:** CMMI, ISO 9001, ISO 27001, ISO 14001, ISO 18001, ISO 22000.

**Credit rating:** S+ (S&P)

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**Corporate profile**  
Company A: Company overview

**Key financial parameters:**

Parameter	FY 2007	FY 2006	FY 2005
Revenue	\$20,000M	\$18,000M	\$17,000M
Operating margin	10.0%	10.1%	12.4%
Employees	100,000	90,000	75,000

**Service mix (2007):**

- IT & BPO
- Business process outsourcing
- Application outsourcing
- Infrastructure outsourcing
- Human resource outsourcing
- Procurement
- Supply chain management
- Contact center

**Corporate profile**  
Company A: Key business segments

**Distribution of revenues by client geography 2007:**

- Asia Pacific: 30%
- Americas: 40%
- EMEA: 10%
- Government: 10%
- Financial services: 10%

**Distribution of revenues by client vertical 2007:**

- Financial services: 30%
- Government: 25%
- Energy & utilities: 15%
- Healthcare: 10%
- Other: 20%

**Corporate profile**  
Company A: Recent transactions and market news

**Recent transactions:**

- Feb 2008: Forbes 2008 Financial services firm, 5 years, applications development & maintenance (ADM) - new
- Dec 2007: Major telecommunications company, multi-year, business process outsourcing (BPO) contract
- Oct 2007: Global consumer packaged goods company, 4.5 years, ADM contract
- Oct 2007: Global retail chain, 10 years, BPO contract
- Nov 2007: Global retail chain, 10 years, BPO contract
- Nov 2007: Global retail chain, 10 years, BPO contract
- Nov 2007: Global retail chain, 10 years, BPO contract
- Nov 2007: Global retail chain, 10 years, BPO contract
- Nov 2007: Global retail chain, 10 years, BPO contract

**Corporate profile**  
Company A: Key delivery locations

Company A has most of its offshore delivery presence in Asia (India and China), it is now looking at expanding its delivery presence within Eastern Europe.

Corporate profiles include a summarized one-page snapshot and a multi-page service provider profile. Access our library of profiles at: <http://www.everestresearchinstitute.com/ServiceProviderDirectory>

# Function and location-specific service provider profiles are typically based on bottom-up, primary data and cover a large number of functions and countries

## 2 Key function-specific profiles available

- [Finance & Accounting Outsourcing \(FAO\)](#)
- [Human Resources Outsourcing \(HRO\)](#)
- [Information Technology \(IT\) consulting](#)
- [Learning Services Outsourcing \(LSO\)](#)
- [Multi-Country Payroll Outsourcing \(MCPO\)](#)
- [Order-to-Cash \(O2C\)](#)
- [Procure-to-Pay \(P2P\)](#)
- [Procurement Outsourcing \(PO\)](#)
- [Recruitment Process Outsourcing \(RPO\)](#)

## IT-consulting profile

**NOT EXHAUSTIVE**

IT consulting profile  
Company A: Key focus areas

IT consulting profile  
Company A: IT consulting headcount snapshot

IT consulting profile  
Company A: IT consulting revenue snapshot

## Order-to-Cash profile

Order-to-Cash (O2C) supplier profile  
Company A (page 1 of 2)

Order-to-Cash (O2C) supplier profile  
Company A (page 2 of 2)

## 3 Key location-specific profiles available

- [China-based IT](#)
- [Indian BPO](#)
- [Philippines-based BPO](#)

## China-based IT profile

Parameter (2007)	Description
Revenue (2007)	US\$40 million
Employees (2007)	~2000
Delivery center (in China)	Beijing Shanghai Shenzhen Tianjin
Key buyer geographies	North America Europe Asia Pacific
Key verticals served	Financial services Retail Health Manufacturing
Key service offerings	Customer acquisition development Application maintenance and integration Automated testing and quality assurance (QA) Strategy and business consulting

**Function and location-specific profiles typically vary from between one to three pages. Additional types of customized service provider profiles can be created on request**

Note: Not all service provider profiles are available online

# Service provider profiles for over 80 service providers are available



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- 24/7 Customer
- Accenture
- Achievo
- Aditya Birla Minacs
- ADP
- ACS, a Xerox Company
- Ariba
- Arvato
- Atento
- Atos Origin
- Augmentum
- BearingPoint
- Bleum
- BT Global Services
- buyingTeam
- Capgemini
- Capita
- Ceridian
- CGI
- ClientLogic
- Cognizant
- CompuCom
- CSC
- Convergys
- Corbus
- Dell Services
- Dextrys
- Dimension Data
- ePLDT Ventus
- eTelecare
- ExcellerateHRO
- EXL Service
- Fidelity
- Firstsource
- Freeborders
- Fujitsu Services
- Genpact
- Getronics
- Global eProcure
- HCL Technologies
- Hewitt
- Hexaware
- HP Services
- Hubwoo
- IBM Global Services
- ICG Commerce
- I-flex
- iGate
- Infosys
- Keane
- L&T Infotech
- Logica
- Longtop International
- Mastek
- Mphasis
- NCO
- Neusoft
- NorthgateArinso
- OPI
- Patni
- Polaris
- Quattrro
- SAIC
- Sapient
- Siemens
- Sitel
- Softtek
- Steria (formerly Xansa)
- Surestock
- Sutherland
- Sykes
- Syntel
- TCS
- Tech Mahindra
- Teleperformance
- TeleTech
- TELUS International
- Transcom
- T-Systems
- Unisys
- Vertex
- VWA
- West
- Wipro
- WNS
- Xchanging
- Zenta

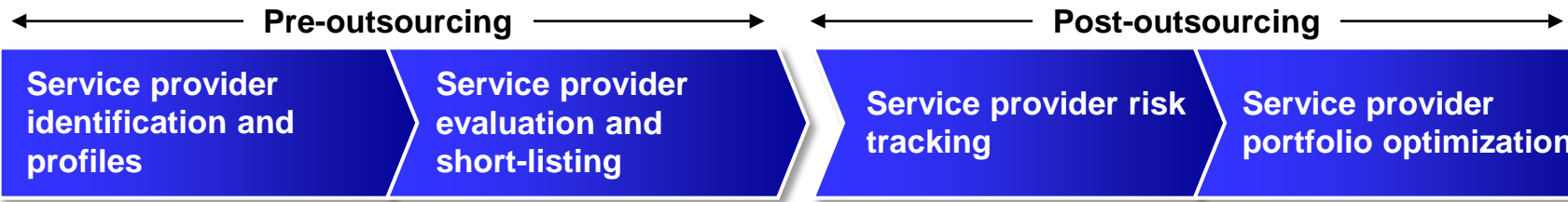
NOT EXHAUSTIVE

- **Most leading service providers have multiple types of service provider profiles**
- **The list of service providers is not exhaustive, and additional service provider profiles can be made available on request**

Access our library of profiles at: <http://www.everestresearchinstitute.com/ServiceProviderDirectory>

Note: Not all service provider profiles are available online

# Everest's Service Provider Intelligence practice assists organizations with service provider-related decisions at all stages of the sourcing lifecycle



## Service provider landscape

This study focuses on eleven BPO suppliers that meet our India centricity and scale criteria

Supplier	Comments on value proposition
<b>EKL</b>	Started as a captive for Conoco but has been able to establish itself as a third-party supplier with a clear eye on the insurance sector.
<b>GENESYS</b>	Formerly ICDI Conducha, it has grown especially well as though up capabilities. Increasing proportion of high-value customer base transaction processing in its services mix.
<b>HCL</b>	Believer of Indian BPO industry, started as GE's captive. Did a very successful IPO in terms of non-GE client wins.
<b>IBM</b>	One of the early entrants through a large BPO deal, which continues to be a large contributor to its growth. Focus on developing new business.
<b>ITC</b>	Formerly BPO acquisition of Citicorp in April 2004, has been able to scale up operations. Offers services support for large BPO deals, but also grows to cater independent for primarily small BPO clients.
<b>WIPAC</b>	One of the first movers with acquisition of Spectroland. Currently, very focused on operational excellence and shift to higher-value work.
<b>WNS</b>	Started as British Airways' captive, has been able to scale up operations in financial services and travel verticals.

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## Evaluation framework

Suppliers were evaluated across five main dimensions and qualitative commentary was also provided

Supplier	Scale	AD&M capability	Insurance expertise	Global footprint	Quality	Outfit	Comments
Supplier 1	●	●	●	●	●	●	Supplier 1 offers consistent record. AD&M employees focused on providing IT and BPO services to clients in the insurance sector.
Supplier 2	●	●	●	●	●	●	Experience in working with 5 of the 20 largest insurance carriers. It is an application service for life and P&C clients makes it a key supplier for the insurance vertical.
Supplier 3	●	●	●	●	●	●	In-depth insurance expertise with 7,500 employees focused on front office operations, policy administration and other services.
Supplier 4	●	●	●	●	●	●	10,000 employees serving insurance clients. Together with its partner who has significant expertise in multiple insurance products, and provides a range of services to global insurers.
Supplier 5	●	●	●	●	●	●	Largest outsourcing experience for AC&M. Ratings do not reflect its nearly signed agreements.
Supplier 6	●	●	●	●	●	●	The largest supplier across the group, insurance sector with depth of AC&M. The insurance practice with over 1,100 employees, through a range of capabilities from end-to-end solutions to senior client.

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## Portfolio developments

Supplier developments analysis | Location footprint  
Location activity declined by 50% in Q4 2008 primarily due to the reduced activity by offshore-centric suppliers

Number of new centers opened by supplier

Supplier	Offshore-centric suppliers	Traditional global suppliers
Q4 2008	22	11
Q4 2009	6	6

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## Value proposition analysis

Given the nascent stage of the LPO market in C&EE, client needs to consider multiple options and evaluate the associated trade-offs

Characteristics	High	Medium	Low
Existing LPO delivery from Central and Eastern Europe	• Existing LPO operations	• Existing LPO operations	• Existing LPO operations
Time to market	• Lower LPO operations	• Lower LPO operations	• Lower LPO operations
Cost	• Lower LPO operations	• Lower LPO operations	• Lower LPO operations

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## Customized service provider profile

All 21 suppliers were profiled in detail to exhibit their AD&M capability and their insurance experience

Supplier	AD&M capability	Insurance experience
Supplier 1	High	High
Supplier 2	Medium	Medium
Supplier 3	Low	Low

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## Evaluation results

An initial filtering was done of the supplier universe to arrive at a long list of suppliers with the ability to offer services that were of interest to the client

Supplier universe → Supplier shortlist → Selected supplier

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## Service provider developments

Q4 2008 | Key developments for suppliers  
ACS (page 1 of 2)

Supplier	Developments	AD&M capability	Insurance experience
Supplier 1	• New center opened in India	High	High
Supplier 2	• New center opened in India	Medium	Medium
Supplier 3	• New center opened in India	Low	Low

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## Service provider positioning

A summary assessment of the Insurance vs. AD&M capability was also shown

Insurance capability vs. AD&M capability

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Can be tailored for any function or location

Customised approach to meet individual needs

Ability to track a wide array of service providers

Applicable to simple as well as large, complex portfolios

# In addition to service provider profiles, we help companies with service provider evaluation and short-listing efforts

## Objectives

- To assist buyers in identifying and short-listing service providers, and providing information and insights on service providers in established and new markets
- To assist service providers in identifying and prioritizing potential acquisition or partnership targets in emerging markets

## Key issues involved in service provider short-listing

- Rapidly evolving service provider landscape
- Increasing number of credible service provider options (50+ credible service providers serving Fortune 500 clients in India alone)
- Perceived lack of differentiation between similar service provider groups
- Increasing risk on account of ongoing service provider consolidation
- Lack of reliable market data on service provider offerings and capabilities

### Service provider selection requires a thorough evaluation of quantitative and qualitative parameters

#### Quantitative parameters

Scale

Financial stability

Process expertise

Industry expertise

Global delivery

Situation-specific criteria

#### Qualitative parameters

Everest experience

Cultural fit

Alignment of interests

Value proposition

Existing relationships

Situation-specific criteria



# Our service provider short-listing experience spans a wide array of functions and geographies and can be tailored to meet individual client requirements

## Service provider landscapes

### Service provider segments

We evaluated 335 companies across the five regions in scope

### Service provider landscape

This study focuses on eleven BPO suppliers that meet our India centricity and scale criteria

### Value proposition assessment

Given the nascent stage of the LPO market in C&EE, client needs to consider multiple options and evaluate the associated trade-offs

Can be tailored for any function or location

## Service provider evaluation

### Evaluation framework

The evaluation ratings were based on the following set of criteria

Criteria	Weight	Supplier 1	Supplier 2	Supplier 3	Supplier 4	Supplier 5	Supplier 6	Supplier 7	Supplier 8	Supplier 9	Supplier 10	Supplier 11
Financial	15%	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5
Operational	25%	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0
Customer	20%	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5
Technology	15%	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0
Compliance	10%	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5	4.0	4.5
Overall	75%	4.2	4.3	4.2	4.3	4.2	4.3	4.2	4.3	4.2	4.3	4.2

### Multi-dimension evaluation

Suppliers were evaluated across five main dimensions and qualitative commentary was also provided

Supplier	Cost	Quality	Service	Compliance	Technology
Supplier 1	4.5	4.0	4.5	4.0	4.5
Supplier 2	4.0	4.5	4.0	4.5	4.0
Supplier 3	4.5	4.0	4.5	4.0	4.5
Supplier 4	4.0	4.5	4.0	4.5	4.0
Supplier 5	4.5	4.0	4.5	4.0	4.5
Supplier 6	4.0	4.5	4.0	4.5	4.0
Supplier 7	4.5	4.0	4.5	4.0	4.5
Supplier 8	4.0	4.5	4.0	4.5	4.0
Supplier 9	4.5	4.0	4.5	4.0	4.5
Supplier 10	4.0	4.5	4.0	4.5	4.0
Supplier 11	4.5	4.0	4.5	4.0	4.5

### Screening process

An initial filtering was done of the supplier universe to arrive at a long list of suppliers with the ability to offer services that were of interest to the client

Approach can be customized to meet individual needs

## Service provider short-list/results

### Service provider positioning

A summary assessment of the Insurance vs. AD&M capability was also shown

### Service provider prioritization

These suppliers were subsequently evaluated and grouped based on how relevant they were to the client

### Custom profile

All 21 suppliers were profiled in detail to exhibit their AD&M capability and their insurance experience

Recommends best-fit Service providers depending on the situation



# Contact us to better understand how we can best assist you

**Everest Research Institute uses its deep expertise and understanding of service providers to provide you with:**

- Comprehensive capability profiles for leading service providers
- An extensive directory of service providers spanning multiple functions, industries and geographies
- Fact-based and practical assistance with short-listing of service providers
- Framework for optimizing and rationalizing service provider portfolios

Everest Research Institute has been designed to meet the specific needs of your organization. Whether it be published or custom research, actionable tools, or even one-to-one interaction, we can develop a solution that applies to your particular scenario.

**For more information about the Institute or to find out how we can assist you please contact us:**

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# Everest Group leads clients from insight to action



Contact us for more information about our consulting, research, and industry resources.

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