



Technology in BPS – Service Provider Profile Compendium 2015

Market Report: June 2015 – Preview Deck

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¹ Banking, financial services, and insurance

Table of contents (page 1 of 2)

Topic	Page no.
Section I: Background and definitions	5
• Background, scope, and methodology	6
• Key definitions used in the report	7
• Technology classification framework	8
• Technology solutions definitions	9
Section II: Profiles of pan-BPS service providers	13
• Accenture	14
• Capgemini	17
• Cognizant	20
• EXL	23
• Genpact	26
• HCL	29
• IBM	32
• Infosys	35
• Sutherland Global Services	38
• TCS	41
• Wipro	44
• WNS	47
• Xchanging	50

Table of contents (page 2 of 2)

Topic	Page no.
Section III: Profiles of specialist service providers	53
• ADP	54
• GEP	56
• NGA	58
Appendix	60
• List of solutions from pan-BPS service providers	61
• Glossary of key terms used in the report	98
• Technology in BPS research calendar	100
• References	101

Background, scope, and methodology of the research

Background of the research

Today's Business Process Services (BPS) supplier market is a highly competitive space with providers from different heritages vying for the same set of buyers. In this scenario, technology is becoming a major differentiator. As a result, service providers are increasingly adding technology solutions to their BPS offerings. These solutions can vary in terms of functionality, deployment mode, hosting, pricing, and several other factors.

Given this, buyers are finding it exceedingly difficult to choose the right partners for their journey from “as-is” to “to-be” state. In this context, this report provides a detailed view of each service provider's offerings and capabilities from the lens of technology solutions for BPS

In this study, we look at each service provider's technology capability along the following dimensions:

- Type of technology solutions on offer – standalone / platform-based vs. augmentation
- Business function / industry alignment
- Tenancy and hosting characteristics
- Recent partnerships in this space
- A detailed list of technology solutions offered (in the Appendix)

Scope of the study and methodology of this report include:

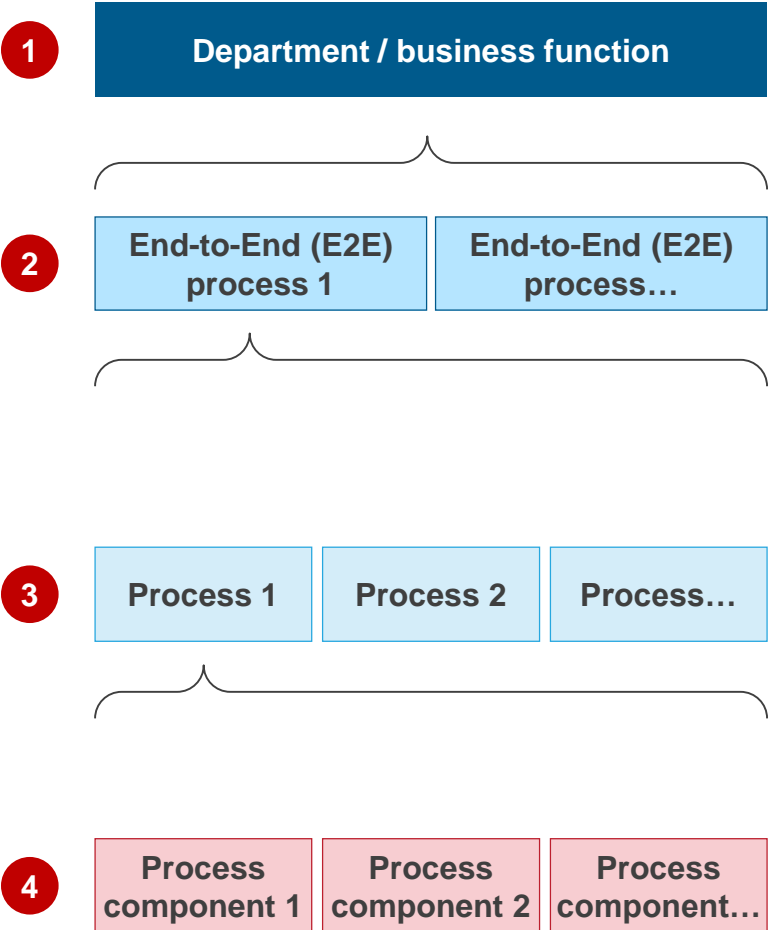
- Over 380 technology solutions with 57,000+ deployments in the BPS market
- Coverage across 16 BPS providers: Accenture, ADP, Capgemini, Cognizant, EXL, Genpact, GEP, HCL, IBM, Infosys, NGA, Sutherland Global Services, TCS, Wipro, WNS, and Xchanging

Key exclusions:

- Solutions leveraged by the service provider for internal business operations
- Infrastructure-level technologies

Key definitions used in this report

Level Terms used in the report



Definition and examples

Department / business function is defined as one of the organizations within an enterprise. It consists of multiple E2E processes

Examples:

Finance and Accounting (F&A), procurement, human resources, and contact center

- An E2E process is a set of sequentially adjacent processes that combine to achieve a subobjective of the department / business function. These can lie within one department / business function, or overlap with more than one

Examples:

Source-to-Contract (S2C) and Procure-to-Pay (P2P) under procurement; Order-to-Cash (O2C) and Record-to-Report (R2R) under F&A; cards, retail account, and lending under banking

- A process is a set of process components that are performed to achieve a subobjective of an E2E process. These are typically aligned to a single E2E process

Examples:

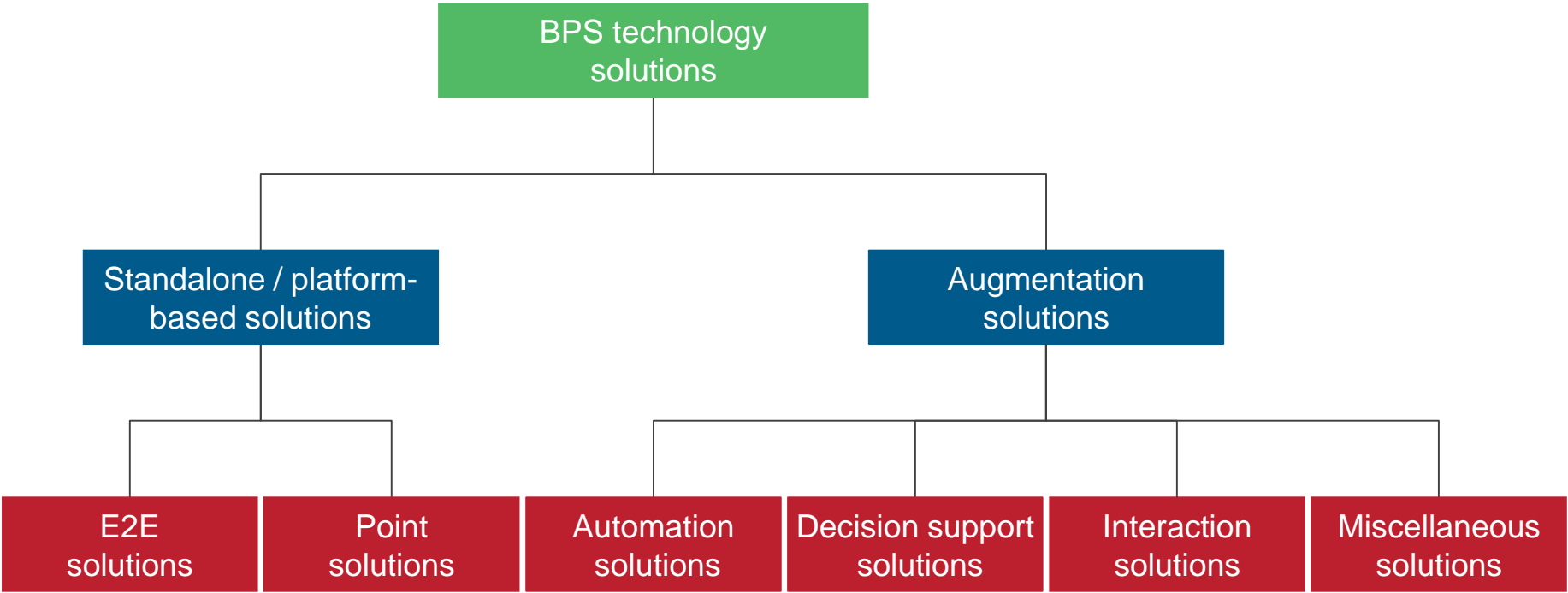
Vendor management and category management under S2C; accounts receivable and order management under O2C; credit evaluation and credit approval under cards

- Several process components cumulatively result in a process. These may span multiple processes as well

Examples:

Data reconciliation, workflow, compliance, and net asset value calculator

Simplified view of Everest Group's framework for BPS technology solution classification



Source: Everest Group (2015)

Everest Group's definition of solution categories (page 1 of 2)

S. No.	Solution category	Definition
1	Standalone / platform-based solutions	<p>Comprehensive solutions supporting specific E2E process/processes, capable of operating independent of other BPS technology solutions</p> <ul style="list-style-type: none"> i. The key differentiator is the presence of a System of Record (SOR) for storage of data/information around the E2E process/processes supported ii. While handling core business processes, these solutions may also incorporate capabilities to handle ancillary components of the business process. For instance, they may incorporate functionality of workflows, reporting dashboards, and data management iii. Everest Group defines multi-client / multi-tenant solutions in this segment alone as “Business-Process-as-a-Service” (BPaaS) solution
1.1	End-to-End (E2E) solutions	<p>Comprehensive solutions that can independently support one or multiple E2E processes</p> <p>Key exclusions: Service suites, which are a combination of augmentation solutions that cumulatively cover the entire E2E process scope, but do not have an SOR, e.g., an O2C service suite comprising digitization, workflow, and reporting dashboard</p>
1.2	Point solutions	<p>These are the solutions that can independently support a single process</p> <p>Key exclusions: Solutions that support only one or few of the process components existing within a process, e.g., net asset value calculator (within asset management) and claims data management (within claims processing)</p>

Source: Everest Group (2015)

Everest Group's definition of solution categories (page 2 of 2)

S. No.	Solution category	Definition
2	Augmentation solutions	<p>Augmentation solutions are technology solutions that bolt on to other systems (usually standalone / platform-based solutions). They provide additional functionality and efficiency for supporting a business process</p> <p>Key characteristics:</p> <ul style="list-style-type: none"> i. They handle ancillary tasks pertaining to an E2E process, such as improving efficiency, compliance, speed, and effectiveness ii. They do not hold data, i.e., they do not have an SOR. As a result, they need other systems for supplying data/information needed for executing a task
2.1	Automation solutions	<p>These solutions replicate/replace a series of human actions/interventions with a software application</p> <p>Key characteristics:</p> <p>Typically, these solutions pull data from underlying systems, perform some operations on the data, and push the output back into the underlying system or to other augmentation solutions</p>
2.2	Decision support solutions	<p>These solutions leverage analytics and support decision-making by describing the as-is / to-be state of business operations</p> <p>Key characteristics:</p> <p>They do not change / alter or push any data back into the SOR, though, they may store certain data elements and depict them on a dashboard when called for</p>
2.3	Interaction solutions	<p>These solutions are leveraged for allowing interactions within buyer organization or between buyer organization and external agents/stakeholders, such as vendors, customers, and employees</p>
2.4	Miscellaneous solutions	<p>These are typically small solutions which handle one or more process components, e.g., a solution within payroll management which just removes duplicate payments, but does not handle other process components</p>

Source: Everest Group (2015)

Service provider technology solution profile (page 1 of 3)

ABC

Company overview

ABC is a global business process services solutions organization. The company provides technology-enabled services and solutions across different horizontal business functions as well as verticals

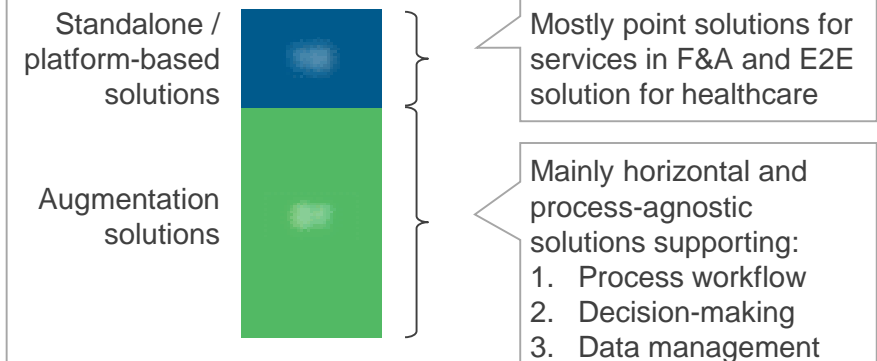
Key technology leaders:

Headquarter:
Website:

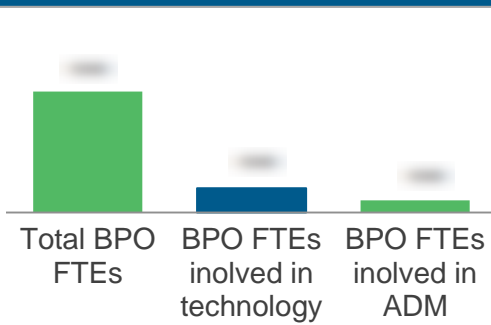
Solution scope characteristics

Share of solution types

Percentage of solutions launched



Technology solution delivery capability

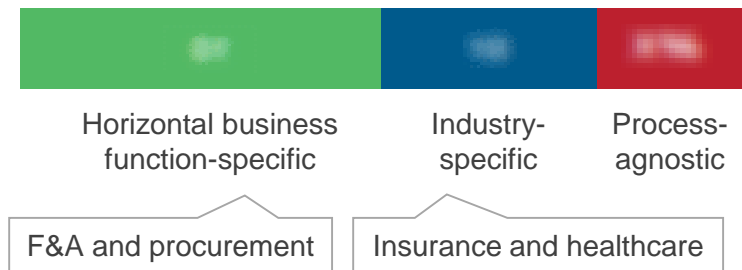


Key locations with BPS technology FTEs:

- Bengaluru
- Chennai
- Gurgaon
- London
- New York

Solution orientation

Percentage of solutions launched



Service provider technology solution profile (page 2 of 3)

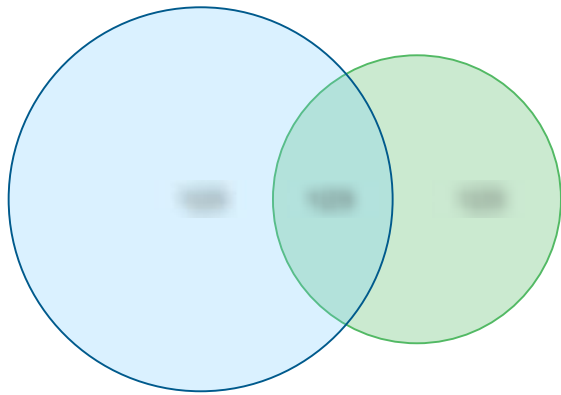
ABC

Solution deployment flexibility

Tenancy characteristics

Percentage of solutions launched

- Only multi-client
- Only multi-tenant
- Both multi-client and multi-tenant

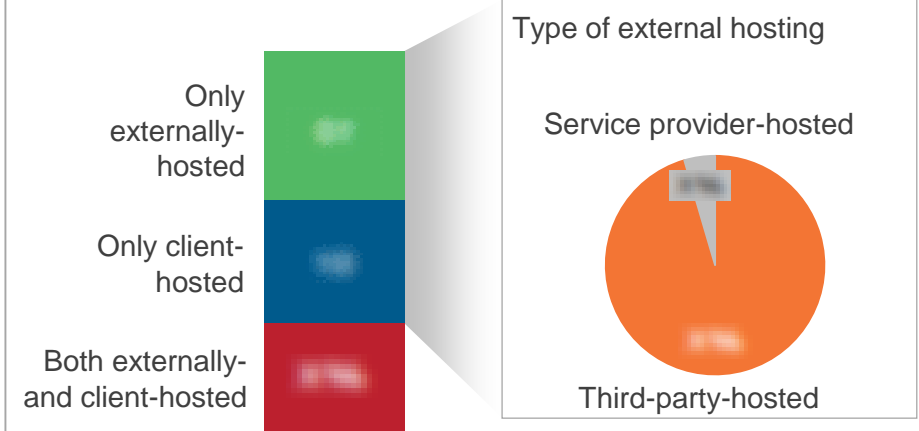


About XX% of the solutions are only single-client

Solution hosting

Hosting characteristics

Percentage of solutions launched



Non-exhaustive list of relevant acquisitions/partnerships in the recent past

Announcement	Deal type	Company	Rationale
December 2014	Acquisition	...	"...This partnership strengthens ABC's offerings in the Finance & Accounting Outsourcing (F&A) value chain through cloud- and mobile-based interaction technology solutions... "
October 2014	Partnership	...	"...to expand its healthcare outsourcing footprint..."
January 2014	Partnership	...	"...to jointly develop Robotic Process Automation (RPA) solutions for pan-BPO service delivery..."

Service provider technology solution profile (page 3 of 3)

ABC

Overall remarks
Coverage <ul style="list-style-type: none">• ...• ...• ...• ...
New-age solutions <ul style="list-style-type: none">• ...• ...• ...• ...
Deployment flexibility <ul style="list-style-type: none">• ...• ...• ...• ...
Pricing <ul style="list-style-type: none">• ...• ...• ...• ...

Source: Everest Group (2015)

List of solutions from pan-BPS service providers (page 1 of 2)

ABC

Augmentation solutions			
Name	Area	Solution category	Functionality
...	Process-agnostic	Automation solution	...
...	Legal	Automation solution	...
...	Utilities	Miscellaneous solution	...
...	Process-agnostic	Decision support solution	...
...	Process-agnostic	Automation solution	...
...	Process-agnostic	Automation solution	...
...	F&A	Automation solution	...
...	Process-agnostic	Automation solution	...
...	Process-agnostic	Automation solution	...

Source: Everest Group (2015)

List of solutions from pan-BPS service providers (page 2 of 2)

ABC

Standalone / platform-based solutions			
Name	Area	Solution category	Functionality
...	Banking and financial service	End-to-end solution	...
...	Insurance	End-to-end solution	...
...	F&A	End-to-end solution	...
...	HR	End-to-end solution	...
...	Procurement	End-to-end solution	...
...	F&A	End-to-end solution	...
...	F&A	Point solution	...
...	Process-agnostic	Point solution	...
...	F&A	Point solution	...
...	F&A	Point solution	...
...	Pharma	Point solution	...

Source: Everest Group (2015)

Technology in BPS research calendar

■ Published
 ■ Current

Topic	Release date
Debunking the Myth of Leveraged AO-FAO Solutions	October 2014
Service Delivery Automation (SDA) Market in 2014 – Moving Business Process Services Beyond Labor Arbitrage	October 2014
Augmenting the FAO Technology Landscape	November 2014
Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2015	February 2015
Service Delivery Automation (SDA) - The Business Case for Robotic Process Automation in Finance and Accounting	March 2015
Reinventing Business Process Services (BPS) – Leveraging Technology to Deliver on New Expectations	March 2015
Technology in BPS – Service Provider Profile Compendium 2015	June 2015
Impact of Social Media and its related analytics on the CCO industry	September 2015
Service Provider Technology Landscape – The Pecking Order	September 2015
Technology innovation in PO	November 2015
Global HR Trends Handbook 2015 - Innovation, technology, outsourcing, and vendors	November 2015

Additional technology research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

- 1. Reinventing Business Process Services (BPS) – Leveraging Technology to Deliver on New Expectations** ([EGR-2015-10-R-1421](#)); 2015. This report takes a top-down approach to decode the complexities in BPS technology landscape and market dynamics. It includes a detailed classification framework and analysis of the BPS technology market from several dimensions, such as solution types, business processes / industries served, deployment characteristics, and pricing models leveraged
- 2. Service Delivery Automation (SDA) Market in 2014 – Moving Business Process Services Beyond Labor Arbitrage** ([EGR-2014-1-R-1264](#)); 2014. This report examines current market conditions, the business case, and service provider strategies for business process automation; sets out a few fundamental principles and definitions for different types of automation technologies
- 3. Augmenting the FAO Technology Landscape** ([EGR-2014-1-R-1291](#)); 2014. This viewpoint highlights how emerging FAO technology models are positioned to support the evolving needs of FAO clients. The key themes include the evolving role of technology in FAO, challenges associated with existing install-base, innovation in FAO technology models and the rise of technology augmentation

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