



Workday-Based Human Resources Business Process Services (HR BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2017

Human Resources Outsourcing (HRO)
Market Report – June 2017 – Preview Deck

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- This full report is included in the following subscription(s)
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* Banking, financial services, and insurance

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Everest Group's Workday-based HR BPS research is based on multiple sources of proprietary information

1

- Everest Group's proprietary database of **operational capability of about 10 Workday-based HR BPS providers** (updated annually)
- The database tracks the following capability elements for each service provider
 - Overall Workday-based HR BPS revenue, total clients, and buyer employees served
 - Recent Workday-based HR BPS developments (investments and partnerships)
 - Workday-based HR BPS delivery locations and level of offshoring
 - Related technology offerings
 - Workday-based HR BPS service suite

Service providers covered in the analysis¹

 **accenture**
High performance. Delivered.

 **alight**

 **CONDUENT**

 **DXC.technology**

 **Hexaware**
TECHNOLOGIES

 **IBM**

 **NGA** Human Resources

 **onesource**
VIRTUAL

 **TATA CONSULTANCY SERVICES**

 **WNS**
Extending Your Enterprise

2

Buyer surveys and interactions

Global surveys and one-on-one executive-level interviews of buyers are undertaken to understand how organizations perceive performance of their Workday-based HR BPS provider. The surveys/interviews focus on different aspects of an outsourcing relationship including:

- Key drivers for outsourcing and choosing Workday
- Contract details (including process scope, signing year, and duration)
- Overall performance of the service provider including key strengths and improvement areas
- Detailed assessment of service provider performance across elements such as driver satisfaction, process expertise, implementation, technology and innovation, relationship management

The analyses in this report are presented at two levels:

- Overall market analysis that highlights the market composition/dynamics
- The current market trends based on deal activities in the last two years

The sample size varies for different analyses based on the deal detail availability.

1 Assessment for **Conduent, DXC Technology, TCS, and WNS** excludes service provider inputs on this particular study, and is based on Everest Group's estimates which leverage Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers

Note: Alight Solutions was formerly known as Aon Hewitt. DXC Technology was formed after the merger of HPE and CSC

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected, will only be presented back to the industry in an aggregated fashion

Overview and abbreviated summary of key messages

This report examines the dynamics of the Workday-based HR BPS service provider landscape. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and delivery capability. Based on the comprehensive Everest Group PEAK Matrix, 10 service providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and areas of improvement.

Some of the findings in this report are:

Workday-based HR BPS PEAK Matrix 2016

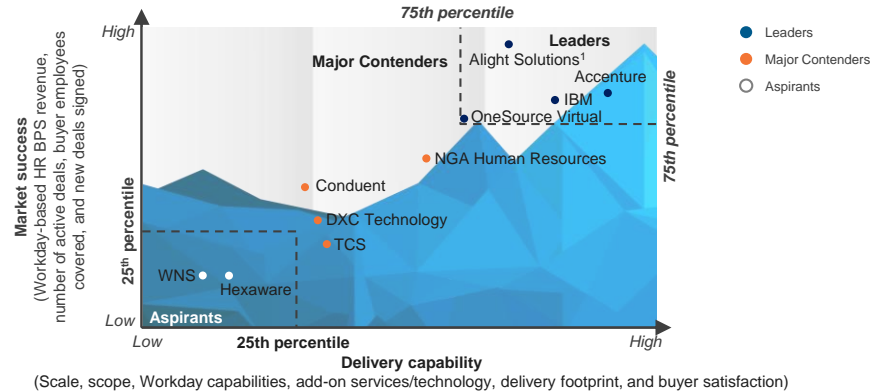
- Everest Group classifies 10 Workday-based HR BPS service providers on Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- The 2017 Workday-based HR BPS PEAK Matrix positioning is as follows:
 - Leaders: Accenture, Alight Solutions, IBM, and OneSource Virtual
 - Major Contenders: Conduent, DXC Technology, NGA Human Resources (NGA), and TCS
 - Aspirants: Hexaware and WNS

Workday-based HR BPS service provider commentary

- Everest Group delineates each of the 10 service provider's strengths and areas of improvement
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

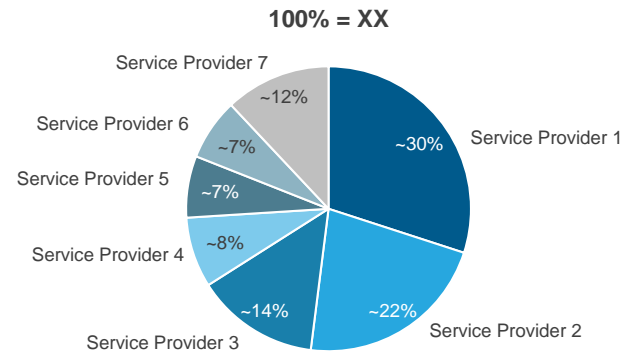
This study contains two sections – Everest Group PEAK Matrix and remarks on each of the service providers; below are few snapshots from the report

Everest Group PEAK Matrix 2017 for Workday-based HR BPS Market



1 Alight Solutions was formerly known as Aon Hewitt. Aon sold most of Aon Hewitt business to Blackstone Group in February 2017

Workday-based HR BPS market share 2016; US\$ millions



Capability assessment

Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

Service provider	Delivery capability							Market success
	Scale	Scope	Workday capabilities	Add-on services/technology	Delivery footprint	Buyer satisfaction ²	Overall	
Service provider 1	●	●	●	●	●	●	●	●
Service provider 2	●	●	●	●	●	●	●	●
Service provider 3	●	●	●	●	●	●	●	●
Service provider 4	●	●	●	●	●	●	●	●
Service provider 5	●	●	●	●	●	●	●	●
Service provider 6	●	●	●	●	●	●	●	●

Everest Group explains each service provider's strengths and areas of improvement

Delivery capability							Market success
Scale	Scope	Workday capabilities	Add-on services/technology	Delivery footprint	Buyer satisfaction ²	Overall	
●	●	●	●	●	●	●	●

Strengths

- Service provider 1, a Leader in Workday-based HR BPS PEAK matrix due to a steady growth of revenue on the back of seven new deals
- With a strong foothold in developed markets, especially North America, it has the expertise to combine HRO with Finance and Accounting Outsourcing (FAO) and/or Procurement Outsourcing (PO), to offer multi-tower solutions

Areas of improvement

- Service provider 1 market success in the fast-growing Asia Pacific space, is relatively low for a large global player, accentuating the need to adapt to this fast growing market
- Buyers highlight the highly contract driven nature of engagements as preventing a more flexible and agile implementation

Source: Everest Group (2017)

HRO research calendar

Published Current

Topic

Release date

Global HR Outsourcing Trends Handbook 2016	November 2016
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2016	December 2016
The Impact of Technology on HR GICs – A Call to Action	January 2017
Technology in BPS – Service Provider Profile Compendium 2016	January 2017
Aon Goes Back to its Roots; the (Re-) Birth of an HR Outsourcing Specialist	March 2017
Payroll Outsourcing in Asia Pacific: Climbing Up the Maturity Ladder	March 2017
Long-Tail HR Operations: Key Challenges and How to Overcome Them	March 2017
Workday-Based Human Resources Business Process Services (HR BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	June 2017
Workday-Based Human Resources Business Process Services (HR BPS) – Market Report 2017	Q2 2017
Multi-Country Payroll Outsourcing (MCPO) – Annual Report 2017	Q2 2017
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	Q2 2017
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2017	Q3 2017
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix Assessment 2017	Q3 2017

Additional HRO research recommendations

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

1. **Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2016** ([EGR-2016-3-R-1831](#)); 2016. This report assesses the MPHRO capabilities of different service providers and evaluates their positioning on the Everest Group PEAK Matrix. It provides insights on how 20 MPHRO service providers are beefing up their capabilities and are differentiating themselves in this market. These providers have been segmented into Leaders, Major Contenders, and Aspirants on the Everest Group PEAK Matrix. The report also includes remarks on service providers, highlighting their key strengths and development areas
2. **Global HR Outsourcing Trends Handbook 2016** ([EGR-2016-3-R-1996](#)); 2016. This report provides a comprehensive overview on the state of the HRO market - both single- and multi-process. The report also identifies key business drivers trends, and the evolving needs of the buyers in the market.
3. **Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2016** ([EGR-2016-3-R-2002](#)); 2016. The objective of this compendium is to provide key stakeholders a snapshot of the offerings and capabilities of 20 major MPHRO service providers. While service providers will be able to benchmark their areas of strength and those of development vis-à-vis other service providers in the marketplace, buyers and potential buyers of MPHRO will be able to assess service providers on their desired set of capabilities

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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