



Service Provider Profiles – Preview Deck

Service Provider Intelligence

Everest Group'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 Group'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

Snapshot 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)

Description of individual service provider profiles on subsequent pages

Snapshot profiles provide information and insights on a number of capability-related dimensions

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

Snapshot profile

Corporate service provider profile

Company ABC

Company description: ABC is a global management consulting, technology services, and outsourcing organization. As a part of its outsourcing segment, Company offers both ITD and BPO services. It primarily serves industries like automotive, communications, electronics & high technology, and media & entertainment, among the others.

Key leaders: William D. Green, Executive Chairman, Plans & Systems, CEO, J. DeDeaux, COO, Pamela J. Craig, CFO, Walter L. Cole, Group Chief Executive - Technology, Michael J. Salovei, Group Chief Executive - BPO

Headquarters: Dublin, Ireland

Service delivery capability: Global delivery centers across Europe, North America, Latin America, Africa, and Asia-Pacific

Major clients: AT&T, BT, Renault, Best Buy, Cable & Wireless, Electrolux, European Commission, Google, Telecom Italia, Telefonica, Unilever, Whirlpool

Service offerings/capabilities: Analytics, application outsourcing, business process outsourcing, consulting, customer relationship management, finance and performance management, human resource management, infrastructure outsourcing, supply chain management

Market event

- Mar 2012: ABC appointed Martin L. Cole as Chief Executive of the company's technology growth platform. Cole would also continue to serve as Chief Executive of ABC's Communications, Media & Technology operating group.
- Feb 2012: ABC opened its new R&D lab in Beijing, China. The new facility will enable ABC to monitor China's Information Technology (IT) needs and deliver solutions to meet the regional requirements.
- Jan 2012: ABC announced its partnership with TI group to launch a new multi-channel customer portal, which provides customers with an access to claim information on TI's website and through mobile devices.
- Jan 2012: ABC announced the release of "ABC Connected Vehicle Integrated Solution". The solution would help auto and truck manufacturers meet growing demand from consumers for in-vehicle technologies such as Wi-Fi access to the ability to process mobile payments for parking, insurance, and tolls.
- Jan 2012: ABC announced plans to hire ~60,000 employees in 2012 after closing with a global headcount of ~104,000 in 2011. The move indicates ABC's aim to maintain its utilization rate at above 85% and growth in its backlog for the year 2012.
- Jan 2012: ABC announced the acquisition of Free Software Analytics, a Spain-based consulting firm specializing in optimization and predictive analytics, for an undisclosed amount.

1: FY ends August 31
2: As on February 2012
Source: Everest Group (Q4'12) public disclosures (last update: June 2012)

	FY 2011	FY 2010	FY 2009
Revenue ¹	1,042,627 M	1,042,103 M	1,042,177 M
Operating margins	13.8%	13.3%	12.3%
Employees	104,000	104,000	101,000
Revenue services mix (2011)	15% Consulting, 41% outsourcing		
Revenue vertical mix (2011)	10% Products, 21% consumer goods and high tech, 21% financial services, 19% resources, 15% health and public service		
Revenue geographical mix (2011)	44% Americas, 43% EMEA, 13% Asia-Pacific		
Key offshore locations:	Argentina, Brazil, Chile, China, Czech Republic, Hong Kong, Hungary, India, Latvia, Malaysia, Mauritius, Mexico, Monaco, Philippines, Poland, Romania, Singapore, Slovakia, South Korea, Turkey		
Quality certifications:	CMMI, ISO 9001, ISO 14001, SAS 70, COC, etc. (see Sigma, ISO 27001, ISO 18001)		
Credit rating:	A- (S&P)		
Recent transactions:	<ul style="list-style-type: none"> • Mar 2012: Guinness Asphor (Ireland) (GAS) - AC contract • Mar 2012: USDO Department of Education and Communities - Australia (USDO) - 1 years, AC contract • Mar 2012: Paragon 1 years, AC contract • Feb 2012: Norwegian National Police Directorate - Norway, AC contract • Feb 2012: Rikspolisstyrelsen (Sweden) - AC contract • Feb 2012: Australian Department of Defense, 1 years, AC contract • Feb 2012: Internal Revenue Service - United States, 10 years, AC contract • Jan 2012: Directorate of Legal & Administrative Information - France, 3 years, AC contract • Jan 2012: Federal Bureau of Investigation (FBI) - United States, 5 years, AC contract 		

Everest Group

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Access our library of profiles at: <http://research.everestgrp.com/SupplierDirectory>

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

BFSI BPO

Cloud Offering

Customer Relationship Management

Finance & Accounting Outsourcing (FAO)

Human Resources Outsourcing (HRO)

Information Technology (IT) Applications

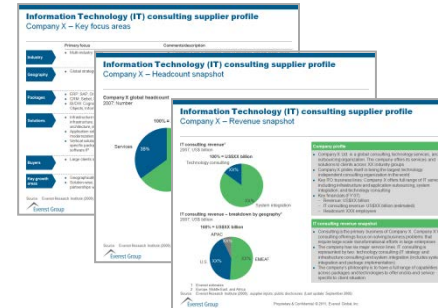
Order-to-cash

Procure-to-pay

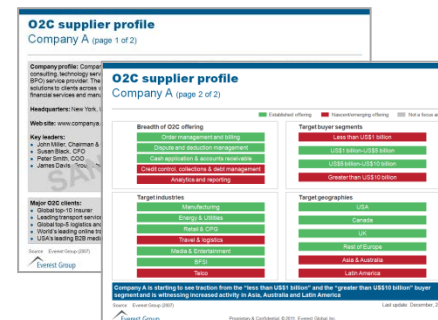
Procurement Outsourcing (PO)

IT-consulting profile

NOT EXHAUSTIVE



Order-to-Cash profile



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

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

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

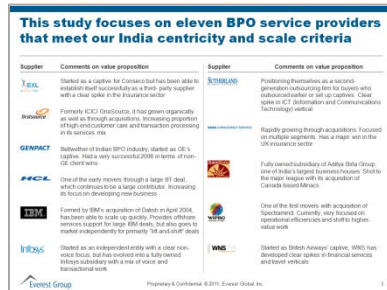
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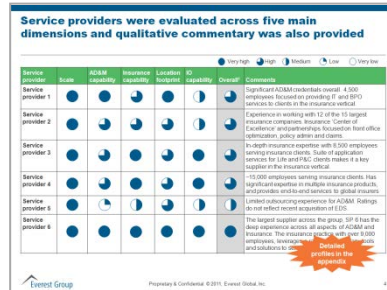
Everest Group's Service Provider Intelligence practice assists organizations with service provider-related decisions at all stages of the sourcing lifecycle



Service Provider landscape



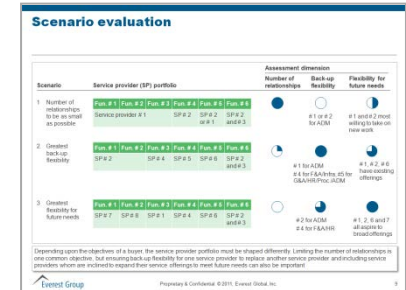
Evaluation framework



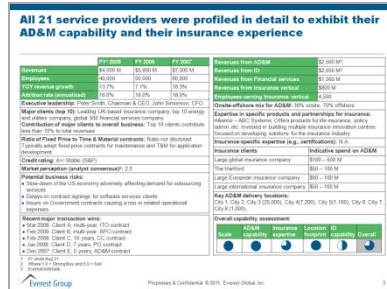
Portfolio developments



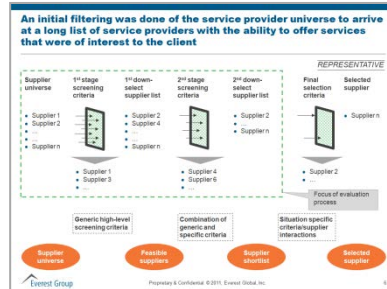
Value proposition analysis



Service Provider profiles



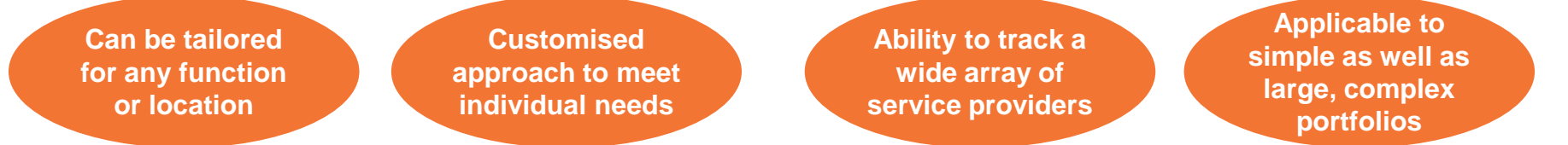
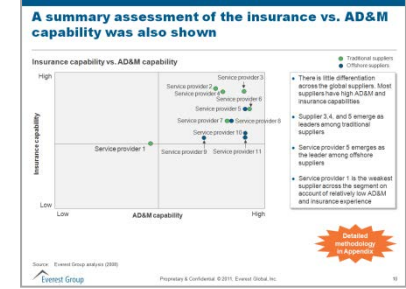
Evaluation results



Service Provider developments



Service Provider positioning



In addition to service provider profiles, we helps 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 Group 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 338 companies across the five regions in scope

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

Service provider landscape

This study focuses on eleven BPO service providers that meet our India-centricity and scale criteria

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

Value proposition assessment

Scenario evaluation

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

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	Rating
Service provider (SP) capability	30%	High
Service provider (SP) cost	20%	High
Service provider (SP) quality	20%	High
Service provider (SP) speed	20%	High
Service provider (SP) risk	10%	High

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

Multi-dimension evaluation

Service providers were evaluated across five main dimensions and qualitative commentary was also provided that were of interest to the client

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

Screening process

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

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

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

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

Service provider prioritization

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

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

Custom profile

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

Source: Everest Group analysis, 2013. Prepared by Everest Group B2B Service Media Inc.

Recommends best-fit Service providers depending on the situation

Contact us to better understand how we can best assist you

Everest Group 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 Group 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:

Email: info@everestgrp.com

Phone: +1-214-451-3110

Web site: research.everestgrp.com

Everest Group

Leading clients from **insight** to *action*

Everest Group is an advisor to business leaders on the next generation of global services with a worldwide reputation for helping Global 1000 firms dramatically improve their performance by optimizing their back- and middle-office business services. With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of global services in their pursuits to balance short-term needs with long-term goals. Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches. Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories. For more information, please visit www.everestgrp.com and research.everestgrp.com.

Dallas (Corporate Headquarters)

info@everestgrp.com

+1-214-451-3000

Toronto

canada@everestgrp.com

+1-416-865-2033

India / Middle East

india@everestgrp.com

+91-124-496-1000

New York

info@everestgrp.com

+1-646-805-4000

London

unitedkingdom@everestgrp.com

+44-207-887-1483

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