



Business Process Services Delivery Automation (BPSDA) – Service Provider Profile Compendium 2017

Service Optimization Technologies (SOT) & Business Process Services (BPS)
Market Report – September 2017: Complimentary Abstract / Table of Content

Our research offerings for global services

▶ Market Vista™

Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ Application Services

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▶ Service Optimization Technologies

▶ Transaction Intelligence

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 report is included in the following subscription(s)
 - **Service Optimization Technologies (SOT), Business Process Services (BPS)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
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* Banking, financial services, and insurance



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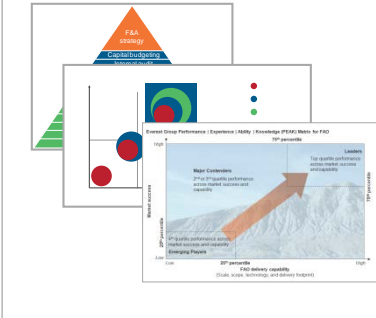
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

1

Robust definitions and frameworks

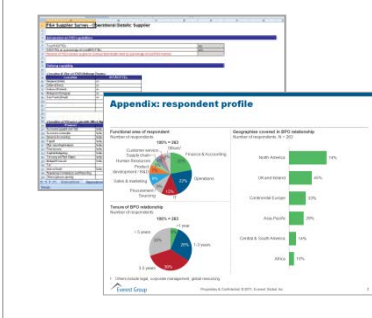
(F&A pyramid, multi-process FAO definition, TVE – Total Value Equation, PEAK Matrix, market maturity)



2

Primary sources of information

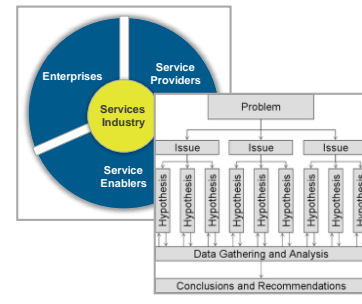
(Annual contractual and operational RFIs, service provider briefings & buyer interviews, and web-based surveys)



3

Diverse set of market touchpoints

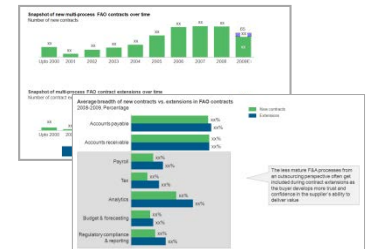
(Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership)



4

Fact-based research

(Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers)



- Proprietary database on Service Delivery Automation (SDA) capabilities of 18 broad-based BPS providers
- Large repository of existing research in SDA technology providers
- Dedicated team for SDA research, spread over two continents
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

Background of the research

Background of the research

- The Business Process Services (BPS) market is being buffeted by strong winds of change. Multiple digital elements are disrupting the status quo in the supply as well as demand landscape – enterprises are expecting not only mundane cost reduction, but also next-generation benefits from their BPS relationships; service providers are recognizing that they need to pivot quickly from the traditional labor arbitrage-driven model to a digital-powered one to provide those benefits to their buyers
- One of the most potent digital levers enabling this transformation is Service Delivery Automation (SDA). A spectrum of SDA solutions is being deployed by service providers to help buyers attain certain key benefits – higher speed, improved accuracy, enhanced customer experience, and reduced cost, among others
- In this context, this report provides a detailed view of 18 broad-based BPS providers' SDA offerings and capabilities

In this study, we look at each BPS provider's SDA capabilities along the following dimensions:

- Company overview
- Recent acquisitions and partnerships
- Offering structures
- Delivery capabilities
- Clients portfolio mix
- Technology solutions
- Measure of capabilities across PEAK Matrix dimensions
- Key strengths and areas of improvement for BPS providers

Principles of Service Delivery Automation (SDA)

1

Automation, at its most basic level, must utilize technology to replace a series of human actions. Correspondingly, not all technologies provide automation, and replacing a single human action with technology (e.g., a mathematical equation in a spreadsheet) is not automation. At the same time, automation can be done by degrees, but some steps will still require human interaction

2

Much automation is already embedded in software systems (e.g., linking client information across marketing and supply chain systems); however, since it is part of the normal feature-functionality of a system, it is generally not considered as automation, but a simply more powerful system(s)

3

Automation for IT is very different from that for business processes:

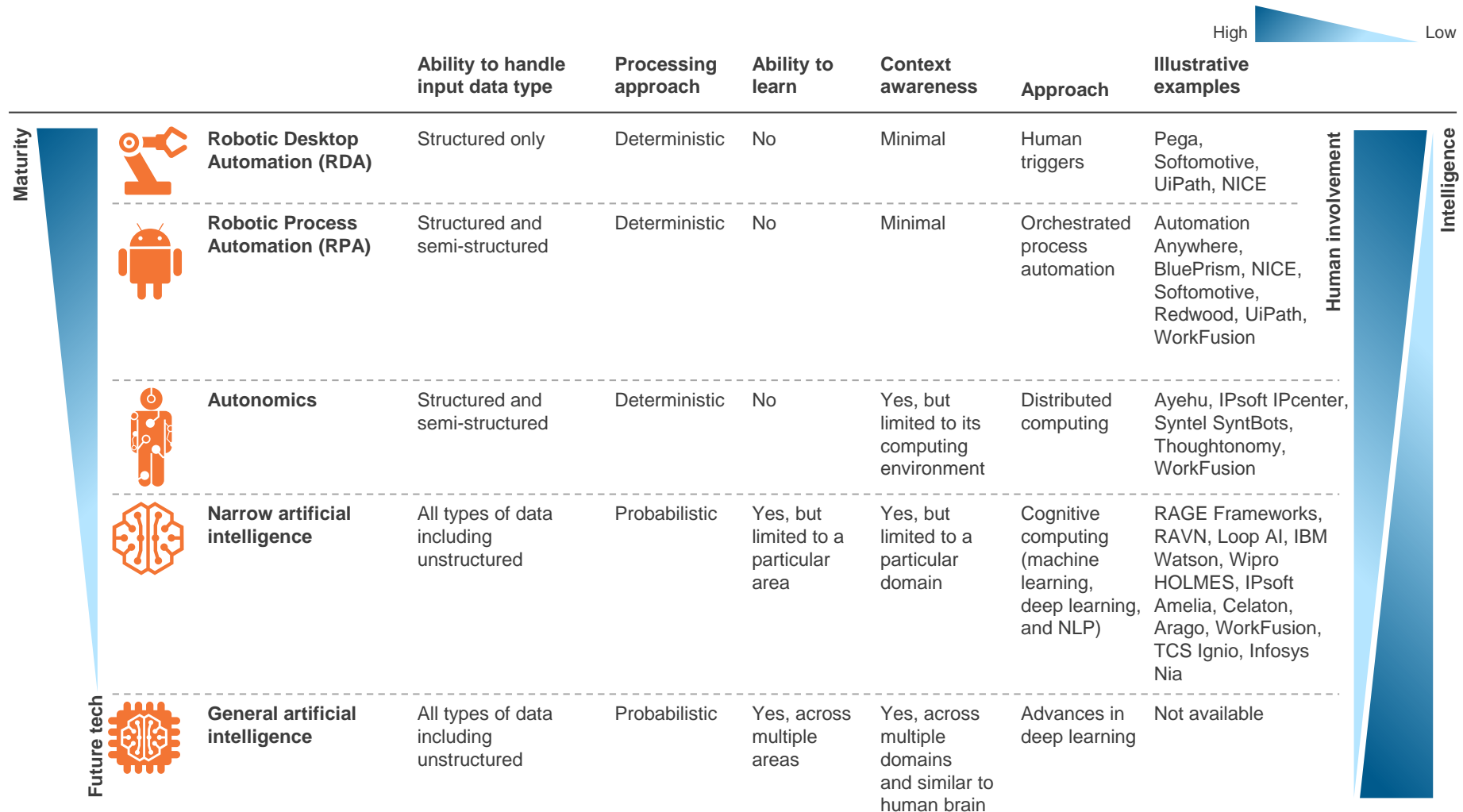
- In IT, automating is generally addressed by improving the core functionality and is handled by the IT system management tools. Further, these activities are owned by central IT, which is naturally incented to create more efficient IT operations
- In business processes, system limitations are generally much more difficult to overcome, and follow a process that spreads across many systems in the organization. As such, the business case for significant system change is generally unappealing. Finally, the benefits of improved processes accrue to the business and are hard to quantify with an ROI that can motivate central IT groups to invest their resources

4

Service delivery automation can be accomplished by combining multiple technologies. For example, traditional Business Process Management (BPM) technologies can be further enhanced by combining with newer UI/robotic process tools. Cognitive computing, although in its infancy, represents the next horizon, as automation not only replicates human behavioral characteristics while executing judgment-intensive IT and business processes, but also creates the potential to spawn new businesses for IP owners and enterprises

Everest Group's SDA Spectrum

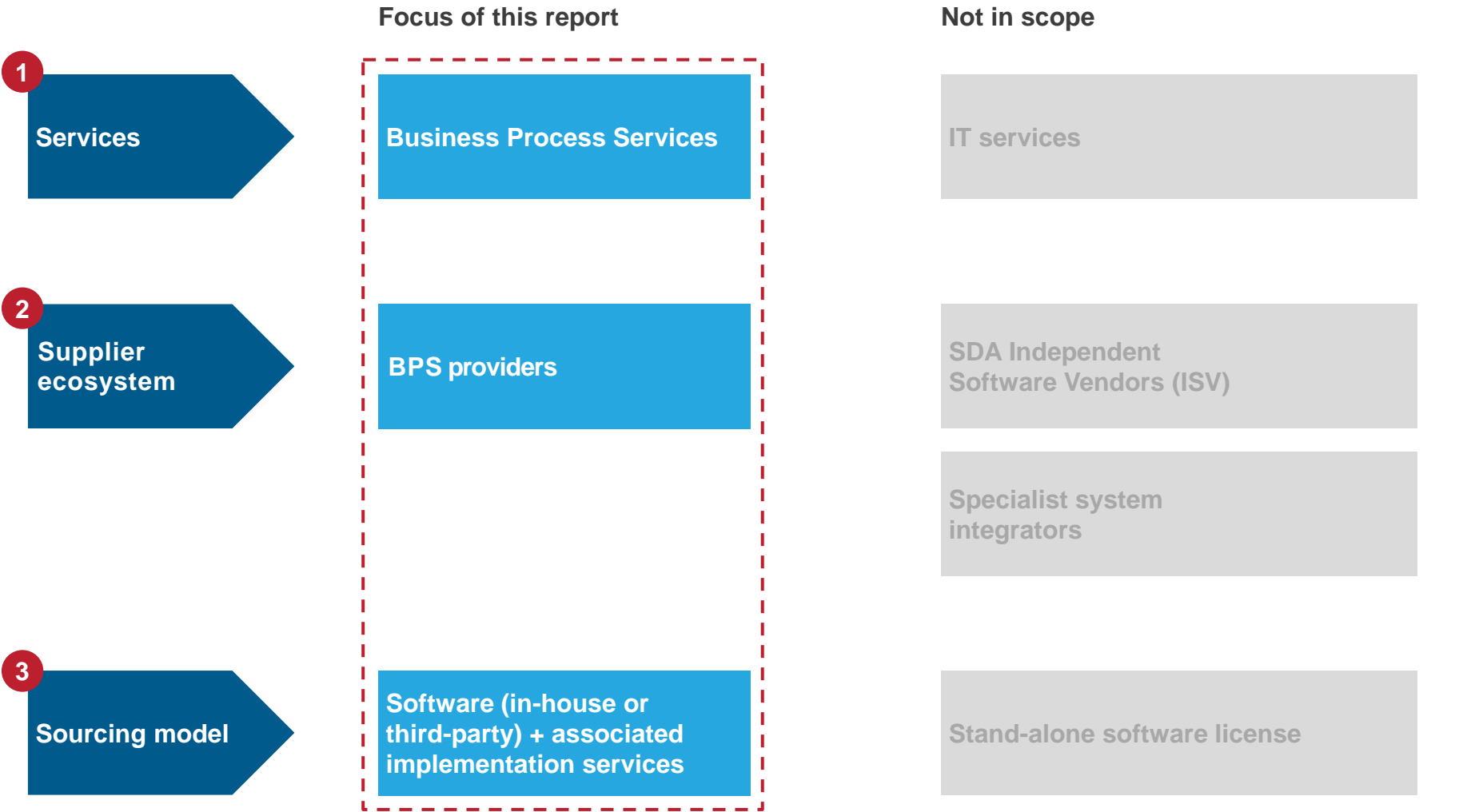
SDA includes a spectrum of automation solutions for delivering global services



Note: In this report we have referred to rules-based / deterministic SDA solution (i.e. RDA, RPA, and Autonomics) collectively as RPA

Focus of this report

We focus on business process automation solutions, containing a services component, offered by prominent BPS providers operating in this space



Everest Group's BPSDA research is based on three key sources of proprietary information

1

Everest Group's proprietary database of BPSDA capability of 18 providers

The database, developed through a comprehensive RFI exercise, tracks each service provider's capability along elements such as

- Clients with BPSDA deployments, BPSDA Proof of Concepts, cost savings, case studies, FTE release rate, and BPSDA bots deployed
- BPSDA client portfolio across buyer sizes, geographies, industries, and BPS segments
- BPSDA vision and strategy, top BPSDA solutions, their value propositions, development mode, and RPA & AI features
- Technology partners and collaborations with academic institutes
- Investments specific to SDA
- Engagement & commercial models
- BPSDA Full Time Employees (FTEs) and their split by scope of services

2

Service provider briefings and demonstrations

- Detailed briefings and demos with service providers for a comprehensive view of their solutions
- Vision and strategy for BPSDA
- Current state of the market
- Opportunities and challenges
- Expected direction of movement in the industry
- Emerging areas of investment (e.g., focus on artificial intelligence and cognitive solutions)

3

Buyer surveys and interactions

Surveys and one-on-one executive-level interviews of reference buyers were undertaken to get their feedback on service providers' BPSDA offerings and their performance in delivering BPSDA solutions. The surveys/interviews focus on aspects such as:

- Deployment details such as scale, business function, type of automation, and services scope
- Drivers of automation and emerging priorities
- Overall performance of the provider including strengths and improvement areas
- Service provider performance across elements such as driver satisfaction, RPA & AI expertise, flexibility in engagement & commercial model, implementation & integration, and proactiveness

Service providers covered in the analysis

 **accenture**

 **Capgemini**
CONSULTING. TECHNOLOGY. OUTSOURCING.

 **Cognizant**

CONDUENT 

 **EXL**
look deeper™

GENPACT

HCL

 **Hexaware**
TECHNOLOGIES
YOUR SUCCESS IS OUR FOCUS

 **HGS**
HINDUJA GLOBAL SOLUTIONS

IBM

Infosys

 **intelenet**

 **Mphasis**
Unleash the Next

NTT DATA

 **SUTHERLAND**

 **SYNTEL**
Consider IT Done™

 **wipro**

WNS
Extending Your Enterprise

Note: 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

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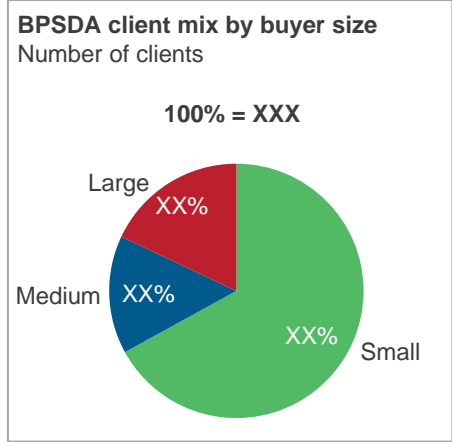
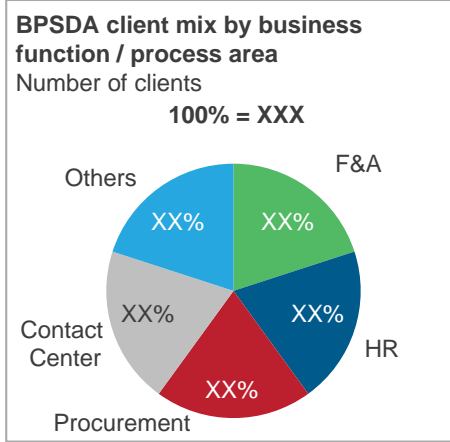
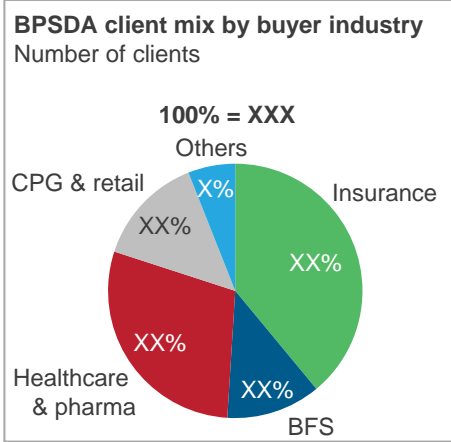
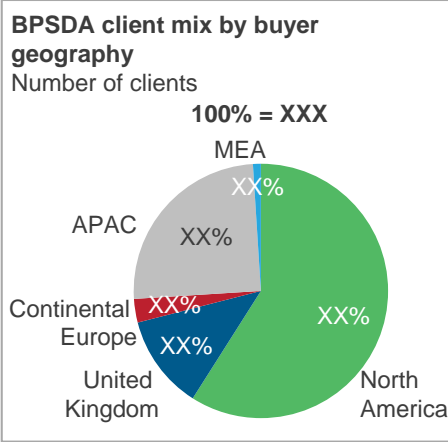
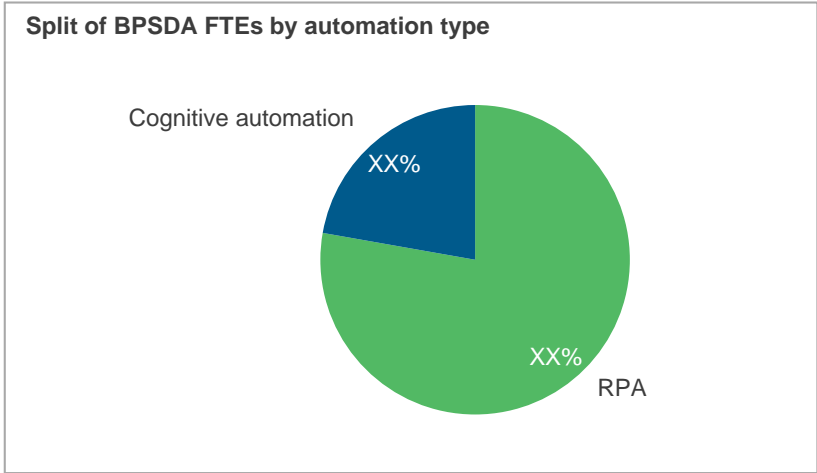
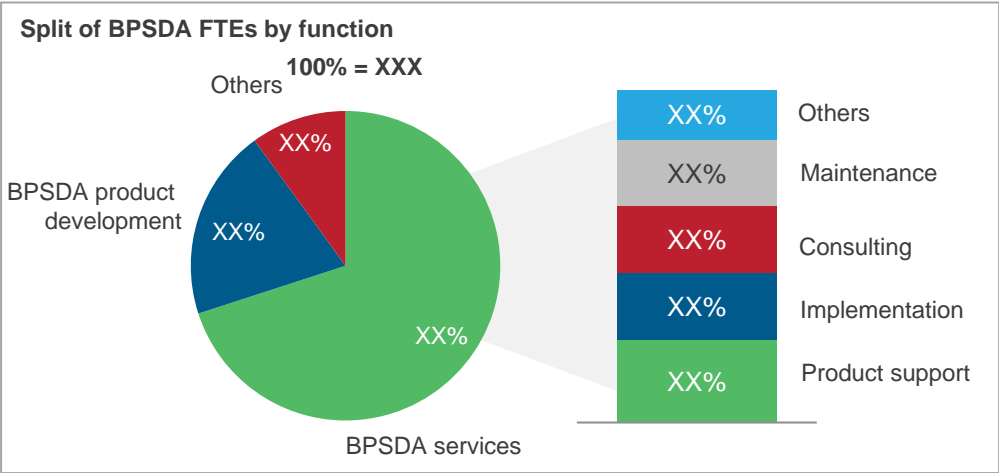
BPSDA – overview

Company overview	Adoption and capability overview
<p><Business description></p> <p>Key BPSDA leaders <Name>, <Designation></p> <p>Key BPSDA clients: <Name/description of client></p> <p>Headquarter: <City>, <Country></p> <p>Website: <Link to company website></p>	<p>Number of active clients with BPSDA deployments: XXX</p> <p>Number of active BPSDA bots deployed: XXX</p> <p>Number of BPSDA FTEs: XXX</p> <p>Key locations with BPSDA FTEs:</p> <ul style="list-style-type: none">• XXX• XXX• XXX <p>Key third-party technology partners: XXX, XXX, XXX</p>
Recent acquisitions/partnerships	BPSDA offering structures
<ul style="list-style-type: none">• XXX• XXX• XXX• XXX• XXX• XXX• XXX	<p>Stand-alone product licenses</p> <p>Product licenses + associated BPSDA services</p> <p>Stand-alone BPSDA services</p> <p>BPSDA as part of broader BPO deal</p>

Offered Not offered

Source: Everest Group (2017)

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BPSDA – capabilities



1 Buyer size is defined as large (>US\$5 billion in revenue), medium (US\$1-5 billion in revenue), and small (<US\$1 billion in revenue)
Note: Based on information as on December 2016
Source: Everest Group (2017)

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BPSSDA – technology solutions

Solution	Business functions	Year launched	Development type	Description	No. of clients
XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX

Source: Everest Group (2017)

<SP name> (page 4 of 4)

Everest Group assessment

Measure of capability

Best-in-class

Very high

High

Medium high

Medium

Medium low

Low

Not mature

Vision & capability							Market impact			
Vision & strategy	Scale	Technology capability	Investments	Implementation & integration	Engagement & commercial model	Overall	Market success	Portfolio mix	Value delivered	Overall
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Strengths	Areas of improvement
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Source: Everest Group (2017)

SOT research calendar

Published
 Planned
 Current release

Flagship SOT reports

Release date

Robotic Process Automation (RPA) - Technology Vendor Landscape with FIT Matrix Assessment	December 2016
Robotic Process Automation (RPA) – Technology Vendor Profile Compendium	December 2016
Robotic Process Automation (RPA) – Technology Vendor State of the Market Report	February 2017
Service Delivery Automation (SDA) in BPS – Service Provider Landscape with PEAK Matrix™ Assessment	July 2017
Service Delivery Automation (SDA) in BPS – Service Provider Compendium	Q3 2017
Artificial Intelligence in Global Services – Market Report	Q3 2017
Service Delivery Automation (SDA) in BPS – Market Report	Q4 2017

Thematic SOT reports

The Impact of SDA on Services TCO	August 2016
IT Infrastructure Services Automation: “Codified Consciousness is the Future”	September 2016
Business Case for Robotic Process Automation (RPA) in Global In-house Centers (GICs)	September 2016
The Service Delivery Automation (SDA) Journey	September 2016
IT Application Services Automation: Think Benefits, Not Costs	November 2016
Rise of Automation in P&C Insurance	January 2017
Pushing the Dial on Business Process Automation	May 2017
Talent Model and Location Hotspots for Service Delivery Automation (SDA) Center of Excellence (CoE)	July 2017
Experience and Learnings from RPA Implementation in GICs	Q3 2017
The Rise of Digital Workforce	Q4 2017

Note: For a list of all SOT reports published by us, please refer to our [website page](#)

Additional SOT research recommendations

The following documents are recommended for additional insight into 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. **Business Process Services Delivery Automation (BPSDA) – Service Provider Landscape with PEAK Matrix™ Assessment 2017** ([EGR-2017-13-R-2243](#)); 2017. This report uses Everest Group's proprietary PEAK Matrix to assess and evaluate automation capabilities of service providers in the business process services space across two key dimensions, market impact and vision & capability. It also includes market share analysis of service providers and Everest Group's remarks on service providers highlighting their key strengths and development areas, with specific focus on automation.
2. **Robotic Process Automation (RPA) - Technology Vendor Landscape with FIT Matrix Assessment – Technologies for Building a “Virtual Workforce”** ([EGR-2016-13-R-2030](#)); 2016. This report uses Everest Group's proprietary FIT Matrix™ to assess and rate RPA technology vendors on the various dimensions of their market impact and vision & capabilities. It also includes Everest Group's remarks on vendors, highlighting their key strengths & areas of development as well as insights into advances in RPA technologies, operating models, capabilities of different platforms, and commercial models
3. **Robotic Process Automation (RPA) – Technology Vendor Profile Compendium** ([EGR-2016-13-R-2036](#)); 2016. This report provides detailed, comprehensive, and fact-based profiles of 10 key RPA technology vendors. Each four page profile provides a detailed picture of the vendor's solution scope, technology & deployment characteristics, scale of operations, as well as an assessment of the provider as part of Everest Group's Features, Implementation, and impacT (FIT) Matrix™. The report also analyzes key strengths and areas of improvement for technology vendors from the perspective of their RPA solutions.
4. **Service Delivery Automation (SDA) – Best Practice Guide to Establishing an SDA Center of Excellence** ([EGR-2016-13-R-1750](#)); 2016. This report provides a guide to setting up and expanding an SDA COE. It is intended for organizations that are setting out to build a COE, service providers looking to build COEs for their clients, and SDA technology vendors seeking insights into the bigger COE picture

For more information on this and other researches published by Everest Group, please contact us:

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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 empower 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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