



**Human Resource Outsourcing (HRO)  
Report: June 2011 – Preview Deck**

**Topic: Multi-Process HRO (MPHRO) Service Provider  
Profile Compendium**

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The Global Multi-Process HRO (MPHRO) Service Provider Landscape – Service Provider Profile Compendium provides accurate, comprehensive, and fact-based snapshots of 15+ service providers. This is accompanied by an assessment of each service provider's delivery capability along four dimensions – scale, scope, technology, and delivery footprint. In addition, each profile highlights the share of each service provider in key market segments

Each profile comprises the following sections in detail:

- MPHRO service capability and strategy
- MPHRO client portfolio
- Key MPHRO delivery locations
- Everest Assessment

This compendium tracks 15+ service providers including:

  
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CALIBER POINT

CAPITA





Infosys





  
be brilliant together

  
Powering mid market



TATA CONSULTANCY SERVICES

  
Applying Thought



- 1 Analysis is based on deals signed as of November, 2010
- 2 Refer to the 'Multi-Process HRO (MPHRO) Service Provider Landscape and Capability Assessment' market update (ERI-2011-3-R-0549) to understand the emerging service provider trends and other key developments in the MPHRO service provider landscape

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# ABC HRO profile (page 1 of 4)

## MPHRO service capability and strategy



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**Company profile:** ABC provides consulting, technology services, and outsourcing services. Its service offerings include Business Process Outsourcing (BPO), application outsourcing, and technology solutions. The company offers its services and solutions to clients in more than 100 countries

**Headquarters:** New York, U.S.

**Key leaders (BPO/HRO business):** ABCD, Group Chief Executive, BPO

**Website:** [www.abc.com](http://www.abc.com)

### Recent MPHRO transactions:

- Not disclosed publicly

### Recent HRO-related developments/announcements:

- May 2010: ABC awarded a contract to support University of XYZ in its shared services strategy for human resources
- Nov 2009: ABC won MPHRO contract from CXZ
- Jul 2008: ABC opened a BPO centre in Mumbai, India
- Feb 2008: ABC opened a BPO centre in Bucharest, Romania

### Current MPHRO market segment focus:

- Buyer segment: Addresses both the large market (>15,000 employees), as well as the mid-market segment (3,000-15,000 employees)
- Geography: North America, Europe, and Asia Pacific

### Current MPHRO technology strategy:

- Overview: ABC is a technology-agnostic service provider. It offers proprietary, ERP-based solutions augmented with best-of-breed point solutions
- Technology models supported:

Tie-and-run	Support/augmentation	Customized replacement/implementation	Platform-based solution
	✓	✓	✓

### Total HRO delivery FTEs = ~XXX

Offshore (India + China+ Southeast Asia)	Nearshore (Eastern Europe + Latin America)	Onshore (U.S. + Canada + Western Europe)
XX	XX	XX

## SERVICE SUITE

Offered as MPHRO solution   Offered on a stand-alone basis   Not offered

Employee relations	Performance management	Regulatory and compliance	Global mobility	Learning	Recruitment and selection	Compensation	Benefits	Payroll	HRIS	Contact center
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# ABC (page 2 of 4)

## MPHRO client portfolio

### HRO Experience:

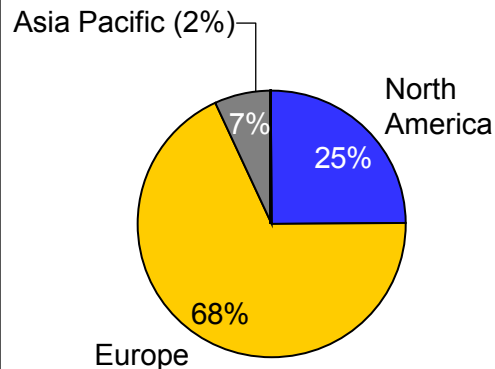
Total number of current HRO clients – X

### Major MPHRO clients:

A large U.S. steel company  
A European utility company  
A French consumer goods company

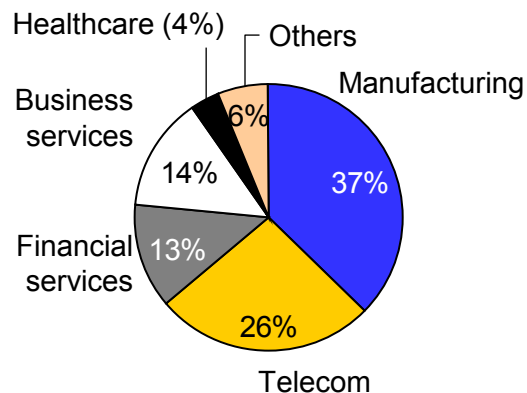
### MPHRO revenue (ACV) geography mix

100% = US\$XX million



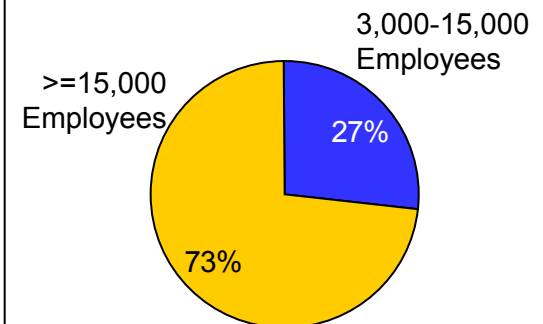
### MPHRO revenue (ACV) industry mix

100% = US\$XX million



### MPHRO buyer size mix

100% = X deals



## Key MPHRO delivery locations



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Note: Map not to scale

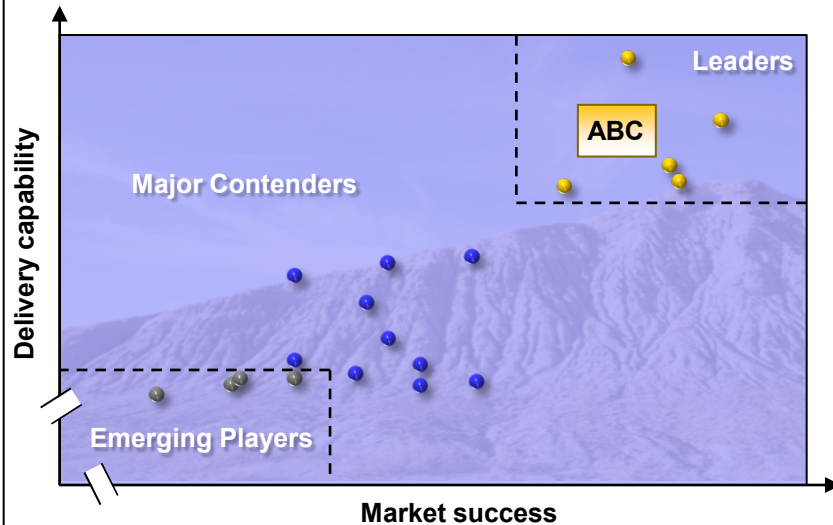
# ABC (page 4 of 4)

## Everest assessment



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### ABC is a Leader on Everest PEAK Matrix for MPHRO

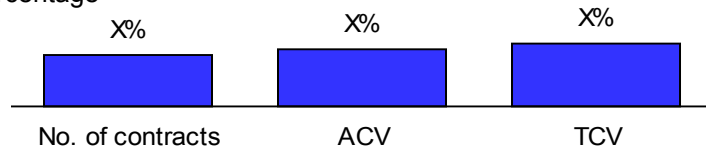


Delivery capability assessment <span>● High</span> <span>◐ Low</span>		
Assessment dimension	Rating	Remarks
Scale	●	Significant scale based on revenue and overall deal signings to date
Scope	◐	End-to-end functional coverage. Wide industry and geography coverage
Technology capability	◐	Strong IT services capability. Significant HR technology investment
Delivery footprint	●	Global delivery footprint and significant FTE growth. High offshore delivery capability
Overall	●	

### Overall market success

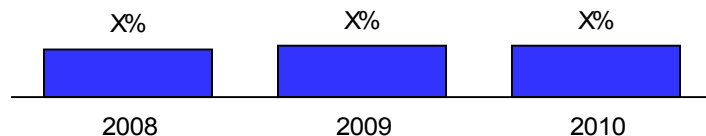
#### Global MPHRO market share

Percentage



#### Global MPHRO market share over time

Percentage share by ACV



### Overall remarks:

- ABC is one of the leaders in the MPHRO market with significant scale and delivery capabilities spanning three continents, namely, North America, Europe, and Asia Pacific
- It has significant global sourcing capability to compete in the market place on cost
- Traditionally focused on large-scope and global opportunities, it is much more flexible in its target market and deal pursuits now
- After witnessing significant changes in the organization structure and leadership of its HRO business in the last few years, ABC seems to have stabilized its HRO business now



# Additional HRO research recommendations

The recommended documents either provide additional details on the topic or complementary content, which may be of interest

1. **Multi-process HRO (MPHRO) Service Provider Landscape and Capability Assessment;** (ERI-2011-3-R-0549); 2011. This report examines the dynamics of the global MPHRO service provider landscape and its impact on the MPHRO market. It gives an overview of the market and the service providers, analyzes the key upcoming trends - their reasons and implications, evaluates market shares, and provides an assessment of delivery capabilities of 15+ leading HRO service providers
2. **HRO Annual Report 2011 – The Revival of Multi-process HRO Market** (ERI-2011-3-R-0518); 2011. This report examines the changing dynamics of the global MPHRO market and the service provider landscape. It gives an overview of the market size, buyer adoption trends, transaction characteristics, and the service providers, highlighting the key developments in 2010 and changing service provider dynamics. It also predicts the Everest outlook for the MPHRO market in 2011
3. **Recruitment Process Outsourcing (RPO) Annual Report 2010 – “A Year of Rapid Growth and Intense Competition”** (ERI-2010-3-R-0487); 2010. This research report provides a comprehensive coverage of the 2010 RPO market and analyzes it across various dimensions such as market overview, key business drivers, buyer adoption trends, transaction characteristics, and service provider landscape. It also includes predictions for the 2011 RPO market
4. **India-to-India (I2I) General & Administrative Outsourcing (GAO) Market: A Phenomenon in the Making** (ERI-2011-10-R-0556); 2011. Though the I2I domestic BPO market is still dominated by voice-related services, in recent years General & Administrative Outsourcing (GAO) services such as Finance & Accounting Outsourcing (FAO), Human Resource Outsourcing (HRO), and Procurement Outsourcing (PO) have also gained notable traction. In this backdrop, this report provides comprehensive coverage of the I2I GAO services market including detailed analysis on market growth and value proposition, buyer adoption trends and contract characteristics, service provider landscape, and current challenges and future outlook

For more information on this and other research published by the Everest Research Institute, please contact us:

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