



Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2015

Human Resources Outsourcing (HRO)
Market Report: November 2015 – Preview Deck

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- 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

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¹ Banking, financial services, and insurance

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Everest Group's HRO research is based on multiple sources of proprietary information (page 1 of 2)

- 1 Everest Group's proprietary database of **625+ MPHRO deals** (updated annually)
 - The database tracks the following elements of each MPHRO deal
 - Buyer details including industry, location, and signing region
 - Deal details including TCV, ACV, contract term, start date, buyer employees served, and primary pricing structure
 - Scope: Process coverage and geographic coverage (employees covered by each region)
 - Technology ownership and maintenance
 - Global sourcing

- 2 Everest Group's proprietary database of **operational capability of 20+ MPHRO service providers** (updated annually)
 - The database tracks the following capability elements for each service provider
 - Major MPHRO clients and recent wins
 - Overall MPHRO revenue, total clients, and buyer employees served
 - Recent HRO-related developments (investments and partnerships)
 - MPHRO delivery locations and level of offshoring
 - Technology offerings within MPHRO
 - MPHRO service suite

Service providers covered in the analysis

accenture
High performance. Delivered.

ADP

Aon Hewitt

CAPITA

CGI

HCL

Hexaware
TECHNOLOGIES

hp

IBM

Infosys®

MIDLANDHR
YOUR STRATEGIC HR PARTNER

NEEYAMO

NGA

PeopleStrong®

talent2

TATA CONSULTANCY SERVICES

WIPRO
Applying Thought

WNS
Extending Your Enterprise

xerox

ZALARIS

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

Everest Group's MPHRO research is based on multiple sources of proprietary information (page 2 of 2)

3

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 MPHRO provider. The surveys/interviews focus on different aspects of an outsourcing relationship including:

- Key drivers for outsourcing MPHRO
- 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:
 - Key MPHRO metrics
 - HR processes
 - Implementation and transition phases
 - Governance and relationship management

The analyses in this report are presented at two levels:

- Overall market analysis that highlights the overall market composition/dynamics
- The current market trends based on deal activities up to December 2014

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

Overview and abbreviated summary of key messages

This report examines the dynamics of the Multi-Process Human Resources Outsourcing (MPHRO) 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, 20 MPHRO 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, besides insights on each of the PEAK Matrix dimensions.

Some of the findings in this report are:

1

MPHRO PEAK Matrix 2015

- Everest Group classifies 20 MPHRO service providers on Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- Everest Group also provides an assessment of each service provider's delivery capability and market success which forms the basis of its positioning on the PEAK Matrix

2

MPHRO service provider commentary

- Everest Group delineates each of the 20 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

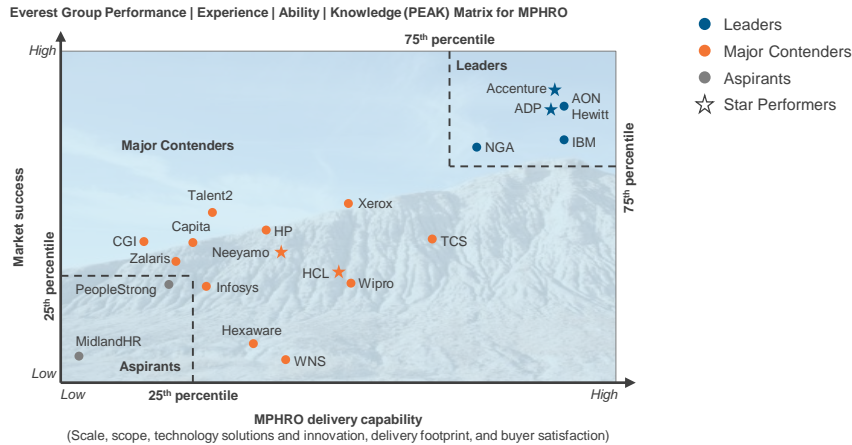
3

Key insights into PEAK Matrix dimensions

- Top service providers across each PEAK Matrix dimension are compared with others to identify differentiating strategy and operational capability

This study contains three sections – Everest Group PEAK Matrix, remarks on service providers and key insights on PEAK Matrix dimensions; below are four charts to illustrate the depth of the report

Everest Group PEAK Matrix – 2015 MPHRO market positions

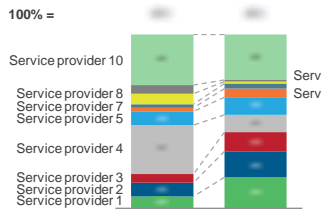


Everest Group explains each service provider's strengths and areas of improvement

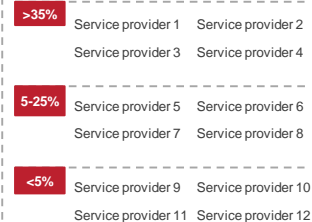
Provider	Strengths	Areas of improvement
Service provider 1	<ul style="list-style-type: none"> With a strong foothold in developed markets, especially North America, it has the expertise to combine HRO with Finance and Accounting Outsourcing (FAO) and/or Procurement Outsourcing (PO), to offer multi-tower solutions 	<ul style="list-style-type: none"> Buyers highlight the highly contract driven nature of engagements as preventing a more flexible and agile implementation
Service provider 2		<ul style="list-style-type: none"> Terminations have been an area of concern for service provider 2 as they have caused considerable erosion of its MPHRO revenue

Market success: The MPHRO market is dominated by the top quartile performers in terms of revenue and active deals and it is more competitive in terms of the former than the latter

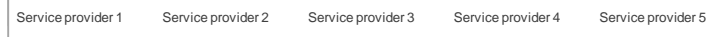
Service provider share distribution (2014)
Number of active deals and active ACV in US\$ billion



Growth of MPHRO revenue
Year-on-year growth in percentage

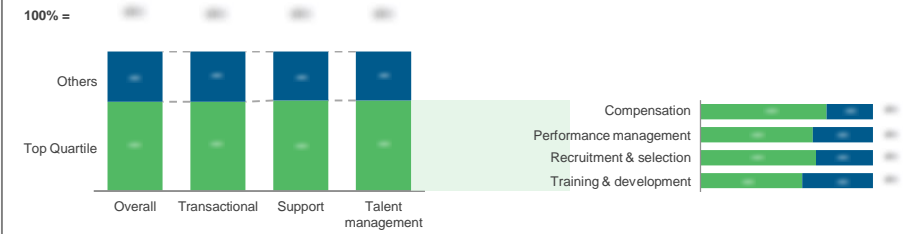


Top quartile performers by market success

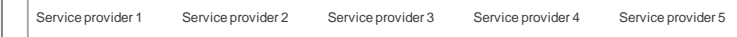


Delivery capability – scope: Top quartile providers perform better than the others in multiple aspects of scope of operations

Active deal split by process category
Number of deals



Top quartile performers by scope | Processes



Source: Everest Group (2015)

HRO research agenda

Published Current

Topic

Release date

MPHRO – Service Provider Profile Compendium 2014	November 2014
Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2015	November 2014
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2015	March 2015
Reinventing Business Process Services (BPS) – Leveraging Technology to Deliver on New Expectations	March 2015
Rise of HR Outsourcing in Asia Pacific: Enabling HR to be Strategic	April 2015
Multi-Country Payroll Outsourcing (MCPO) – On the Verge of a Quantum Leap	June 2015
Technology in BPS –Service Provider Compendium 2015	June 2015
Technology in Business Process Services (BPS) – The Pecking Order	August 2015
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2015	September 2015
Multi-Process Human Resources Outsourcing (MPHRO) – Annual Report 2015	September 2015
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2015	November 2015
Benefits Administration Outsourcing (BAO) – Annual Report 2015	Q4 2015
Benefits Administration Outsourcing (BAO) – Service Provider Landscape with PEAK Matrix Assessment 2015	Q4 2015
Global HR Trends Handbook 2015 – Innovation, technology, outsourcing, and vendors	Q4 2015
MPHRO – Service Provider Profile Compendium 2015	Q4 2015

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) Annual Report – Transition to Changing Realities** ([EGR-2015-3-R-1570](#)); 2015. This report provides a comprehensive coverage of the 2014 global MPHRO market and analyzes it across various dimensions such as market overview and key regional trends, buyer adoption and solution trends, and service provider landscape.
2. **Recruitment Process Outsourcing (RPO) Annual Report 2015 - Broader Adoption, Deeper Execution, Greater Innovation** ([EGR-2015-3-R-1547](#)); 2015. This research provides comprehensive coverage of the 2014 RPO market and analyzes it across various dimensions such as market overview, key business drivers, buyer adoption trends, solution & transaction trends, recruitment technology trends, and service provider landscape
3. **Technology in Business Process Services (BPS) – The Pecking Order** ([EGR-2015-10-R-1533](#)); 2015. This study includes classification of 13 broad-based service providers on BPS technology evaluation framework's four categories: Achievers, Executors, Strategists, and Strivers, remarks on key strengths and areas of improvement for each of the service providers along with relative rating on each of the evaluation dimensions and analysis of the key BPS technology strategies of the service providers
4. **Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2015** ([EGR-2015-10-R-1371](#)); 2015. This report provides insights into the global analytics business process services (BPS) market and examines the service provider landscape and its impact on the market. It focuses on service provider position & growth in the market, changing market dynamics & emerging service provider trends, and assessment of service provider delivery capabilities

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About Everest Group

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