



Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2016

Human Resources Outsourcing (HRO)
Market Report – December 2016 – Preview Deck

Our research offerings for global services

▶ Market Vista™

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

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▶ PricePoint™

▶ BFSI¹ Business Process

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▶ Healthcare & Life Sciences ITS

▶ Procurement

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▶ Human Resources

▶ Application & Digital

▶ Recruitment & Talent Acquisition

▶ Cloud & Infrastructure

▶ Contact Center

▶ Global Sourcing

▶ Service Optimization Technologies

▶ Locations Insider™

▶ 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 full report is included in the following subscription(s)
 - **Human Resources Outsourcing (HRO)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**



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¹ Banking, financial services, and insurance

Everest Group's MPHRO 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 analysis¹



1 Assessment for **MHR** 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, ongoing coverage, the service provider's public disclosures, and interaction with buyers

2 The data on Hewlett Packard Enterprise (HPE) was collected before its merger with 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

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 September 2015
- The sample size varies for different analyses, based on the deal detail availability

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ABC (page 1 of 4)

MPHRO service capability and strategy

Company profile: ABC provides talent, retirement, and health solutions
Headquarters: Xxx, United Kingdom
Key leaders (BPO/HRO business): Xxx, CEO, HR BPO
Website: www.xyz.com

Current MPHRO market segment focus

- Buyer segment: Targets primarily the large-market² segment
- Geography: North America, Asia Pacific, and EMEA

Current MPHRO technology strategy

- Overview: ABC offers ERP-based solutions, augmented with proprietary and best-of-breed point solutions
- Technology models supported:

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

Recent HRO-related developments/investments in 2013-2014

Areas	Developments/investments
M&A/partnership	<ul style="list-style-type: none"> • Xxx • Xxx
HR technology-related	<ul style="list-style-type: none"> • Xxx • Xxx
Analytics and mobile	<ul style="list-style-type: none"> • Xxx
Others	<ul style="list-style-type: none"> • Xxx

Total HRO delivery FTEs = ~XXX

Offshore ¹	Nearshore ¹	Onshore
~XXX	~XXX	~XXX

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

SERVICE SUITE

Employee Relations	Performance management	Regulatory and Compliance	Global Mobility	Learning	Recruitment and selection	Compensation	Benefits	Payroll	HRIS	Contact center
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1 FTEs located in offshore (India, China, and Southeast Asia) or nearshore locations (Eastern Europe and Latin America) and delivering services for North America or Western Europe

2 Mid-market includes 3,000 to 15,000 employees managed. Large market includes over 15,000 employees managed

Source: Everest Group (2016)

ABC (page 2 of 4)

MPHRO client portfolio

MPHRO experience

Total number of current MPHRO clients – XX

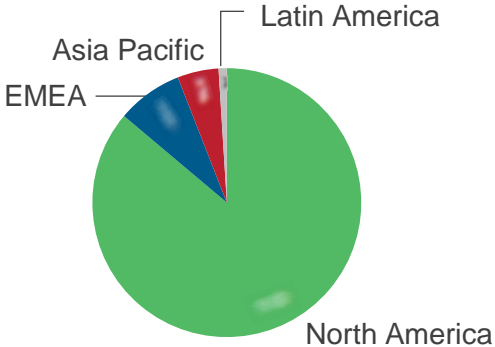
Recent MPHRO wins

- Xxx
- Xxx

Major MPHRO clients

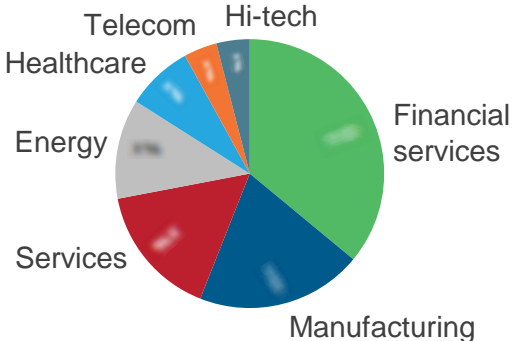
MPHRO revenue (ACV) geography mix

100% = US\$XX million



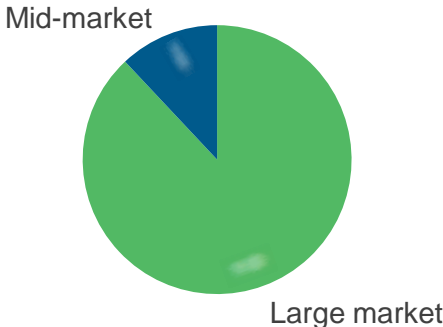
MPHRO revenue (ACV) industry mix

100% = US\$XX million



MPHRO buyer size mix

100% = XX deals



Source: Everest Group (2015)

ABC (page 3 of 4)

Key MPHRO delivery locations



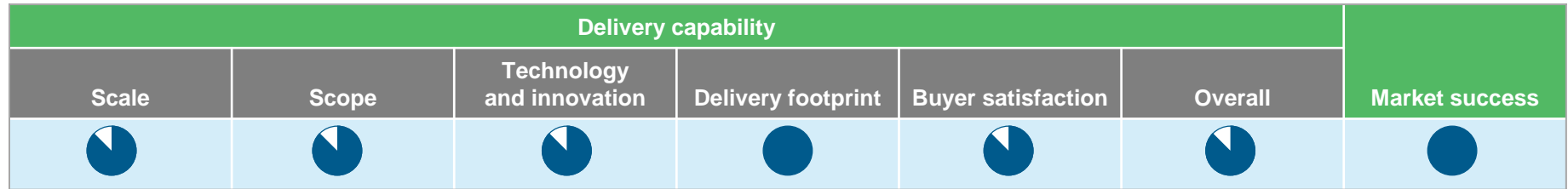
Source: Everest Group (2015)

ABC (page 4 of 4)

Everest Group assessment

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

Leaders Major Contenders Aspirants



Strengths

- ABC, a Leader in MPHRO, also emerged as a Star Performer due to a steady growth of MPHRO revenue on the back of XX new deals
- With a strong foothold in developed markets, it has the expertise to combine HRO with Finance and Accounting Outsourcing (FAO) and/or Procurement Outsourcing (PO), to offer multi-tower solutions
- It has leveraged partnerships extensively, especially the one with Workday on which it has a large number of clients
- Through both organic and inorganic investments, it demonstrated application of advanced analytics and offered flexible options such as ongoing, project-based, and as-a-service analytics
- Reference clients cite high service quality, implementation capabilities, and superior technology as its strengths

Areas of improvement

- ABC's 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 (2015)

HRO research calendar

■ Published
 ■ Current

Topic	Release date
MPHRO – Service Provider Profile Compendium 2015	December 2015
Analytics Business Process Services (BPS) – Analytics Goes Mainstream – Scope Expands Beyond Traditional Clients and Offerings	April 2016
Multi-Country Payroll Outsourcing (MCPO): A Must-check Buffet for MNCs in Asia Pacific	April 2016
Robotic Process Automation in HR Outsourcing: Not the Same as Other Business Process Service Lines	April 2016
Heralding a New Era of Transformative Business Process Services through Technology	April 2016
Multi-Country Payroll Platform Assessment	June 2016
Benefits Administration Outsourcing (BAO) – Service Provider Landscape with PEAK Matrix™ Assessment 2016	June 2016
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2016	August 2016
Benefits Administration Outsourcing (BAO) – Evolving Customer Needs in a Complex Regulatory Landscape	September 2016
Benefits Administration Outsourcing (BAO) – Service Provider Profile Compendium 2016	September 2016
Global HR Outsourcing Trends Handbook 2016	November 2016
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2016	December 2016
Technology in BPS - Service Provider Compendium 2016	Q4 2016

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. Benefits Administration Outsourcing (BAO) – Service Provider Landscape with PEAK Matrix™ Assessment 2016** ([EGR-2016-3-R-1811](#)); 2016. This report gives an overview of the BAO market and analyzes how service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix, each of the 11 BAO service providers are segmented into Leaders, Major Contenders, and Aspirants. The report also identifies Star Performers based on the relative year-over-year movement of different service providers on the PEAK Matrix. This report also provides key insights into the strengths and areas of improvements of each service provider
- 2. 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 the light of these shifts. 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
- 3. 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.

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

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About Everest Group

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