Technology in BPS – Service Provider Profile Compendium 2016

Market Report: January 2017 – Preview Deck

EGR-2017-10-PD-2069

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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- **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

- The full report is included in the following subscription(s)
  - **BFSI BPO, CCO, FAO, HRO, PO, SOT**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
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1 Banking, financial services, and insurance

Table of contents

Background, scope, and methodology of the research

Background of the research
As the realities of the global business environment change, the Business Process Services (BPS) industry is also under pressure to transform. Buyers are increasingly demanding results beyond cost reduction and operational efficiencies. They want BPS to positively impact their business objectives. Technology has emerged as the catalyst as well as the enabler of this transformation.

A wide spectrum of technologies is at play in the BPS market now, and buyers are faced with the decision to evaluate and adopt the right ones. What they should know is that not all technologies have the same impact on the best-in-class BPS outcomes they want to achieve.
A number of next-generation technologies have now burst into the market, which have the potential to profoundly impact the foundations of BPS. Other technologies are evolving to stay relevant among the changing realities of the market. The characteristics of these technologies and their impact have to be top considerations, as buyers evaluate their current relationship, or new would-be buyers venture into the world of BPS.

In this context, this report provides a detailed view of each service provider's offerings and capabilities from the lens of technology solutions for BPS.

In this study, we look at each service provider's technology capability along the following dimensions:
- Company overview
- Delivery footprint
- Traditional augmentation, next-generation augmentation, and platform-based solutions capabilities
- Business function / industry alignment
- Tenancy and hosting characteristics
- Solution development mode and technologies developed through recent partnerships
- A detailed list of technology solutions offered (in the Appendix)

Scope of the study and methodology of this report include:
- Over 900 technology solutions with 57,000+ deployments in the BPS market
- Coverage across 16 BPS providers: Accenture, Capgemini, Cognizant, EXL, Genpact, HCL, HPE, Infosys, Sutherland Global Services, TCS, Wipro, WNS, and Xchanging

Key exclusions:
- Solutions leveraged by the service provider for internal business operations
- Infrastructure-level technologies

Abbreviated summary of key messages

Overview and brief description of content

As the realities of the global business environment change, the Business Process Services (BPS) industry is also under pressure to transform. Buyers are increasingly demanding results beyond cost reduction and operational efficiencies. They want BPS to positively impact their business objectives. Technology has emerged as the catalyst as well as the enabler of this transformation. A wide spectrum of technologies is at play in the BPS market now, and buyers are faced with the decision to evaluate and adopt the right ones. What they should know is that not all technologies have the same impact on the best-in-class BPS outcomes they want to achieve.

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- Company overview
- Technology delivery capability
- Traditional augmentation, next-generation augmentation, and platform-based solutions capabilities
- Business function / industry alignment
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Service provider technology solution profile (page 1 of 2)

ABC

Company overview

ABC is a leading provider of BPS solutions

Key technology leaders (before the acquisition):
xxx, Chief Technology Officer, Data Integration
xxx, Global CIO and COO

Headquarters (before the acquisition): xxx
Website (before the acquisition): http://www.xxx.com/

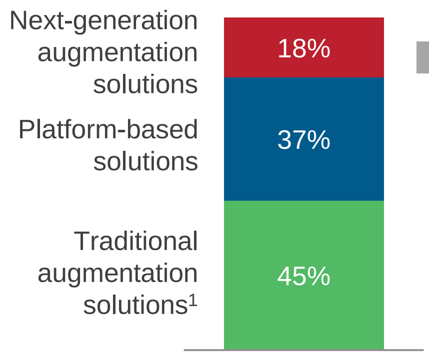
Technology solution delivery capability

Number of technology FTEs: xxx
Key locations with BPS technology FTEs: xxx

Solution scope characteristics

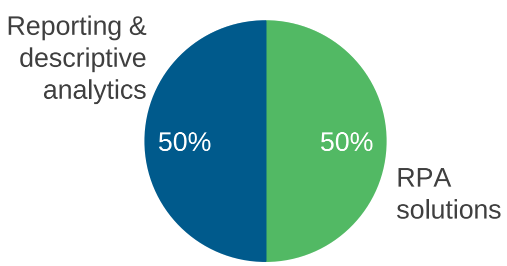
Share of solution types
Percentage of solutions launched after 2012

100%= xx



Next-generation augmentation solutions
Percentage of solutions launched after 2012

100%=xx



Solution orientation
Percentage of solutions launched after 2012

1 Consists of business process management, workflow, data management, digitization, reconciliation/sanitization, and interaction solutions
2 Only major industries and business functions have been called out· Abbreviations used: BFS – Banking & Financial Services, FAO – Finance & Accounting Outsourcing, HLS – Healthcare & Life sciences, HRO – Human resources Outsourcing, PO – Procurement Outsourcing, and SCM – Supply Chain Management

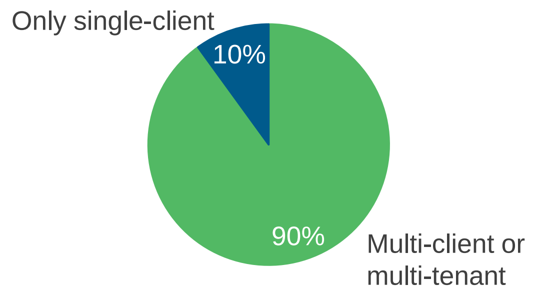
Source: Everest Group (2016)

Service provider technology solution profile (page 2 of 2)

ABC

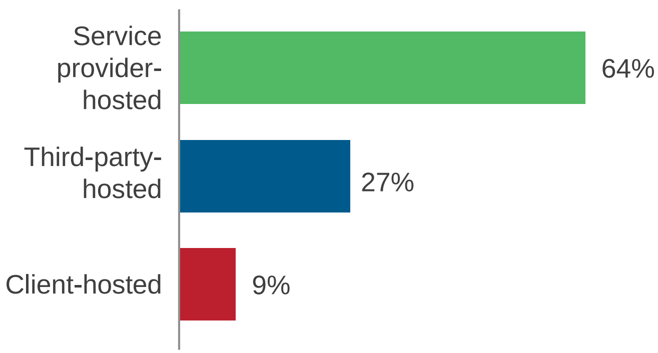
Solution deployment flexibility

Tenancy characteristics
Percentage of solutions launched after 2012



Solution hosting

Hosting characteristics
Percentage of solutions launched after 2012



Solution development mode

Solution development mode
Percentage of solutions launched after 2012

Non-exhaustive list of partners and technologies developed through partnerships

Technology category	Major partners or technologies developed through partnerships
Platform-based solutions	Xxx
Decision support solutions	Xxx
SDA solutions	Xxx

Source: Everest Group (2016)

Service Optimization Technologies (SOT) research calendar

Published | Current

Topic	Release date
Upshifting Value and Talent through Robotic Process Automation (RPA)	January 2016
Clever Machines at Your Service	February 2016
Heralding a New Era of Transformative Business Process Services through Technology	April 2016
Robotic Process Automation in HR Outsourcing: Not the Same as Other Business Process Service Lines	April 2016
Service Delivery Automation (SDA) – Best Practice Guide to Establishing an SDA Center of Excellence	April 2016
WorkFusion Service Delivery Automation (SDA) Profile	May 2016
Harnessing Enterprise-wide Automation Competency in a Center of Excellence	May 2016
Kofax Service Delivery Automation (SDA) Profile	June 2016
Unlocking Next-Generation Value through Technology-Embedded Business Process Services | Part 1	July 2016
Unlocking Next-Generation Value through Technology-Embedded Business Process Services | Part 2	July 2016
Automation Anywhere Service Delivery Automation (SDA) Profile	July 2016
IT Infrastructure Services Automation: "Codified Consciousness is the Future"	September 2016
The Impact of SDA on Services TCO	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
Robotic Process Automation (RPA) – Technology Vendor Landscape with FIT Matrix Assessment	December 2016
Robotic Process Automation (RPA) – Technology Vendor Profile Compendium	December 2016
Technology in BPS – Service Provider Profile Compendium 2016	January 2017

Additional SOT research references

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. **Heralding a New Era of Transformative Business Process Services through Technology** (EGR-2015-10-R-1646); 2016. This report provides an overview of the technologies being used in the Business Process Services (BPS) space. After examining the increasingly important role of technology as a catalyst of transformation in BPS, the report goes on to look at the adoption of the wide spectrum of technologies in various BPS segments. It also identifies a fundamental distinction in the technology landscape now, with some technologies acting as levers of BPS transformation and others driving the traditional BPS objectives of cost and efficiency. The report then deep-dives into Service Delivery Automation (SDA), decision support, platform-based and traditional augmentation solutions to describe their adoption patterns and ability to create next-generation value. Finally, the report describes the imperative for buyers to take a structured and well-thought-out approach to create a technology-embedded BPS model and for service providers to tweak their go-to-market approach to capitalize on this opportunity

2. **Unlocking Next-Generation Value through Technology-Embedded Business Process Services | Part 1** (EGR-2015-10-R-1533) and **Part 2** (EGR-2015-10-R-1533); 2016. Organizations increasingly seek added value – driving agility, speed, and better business outcomes through their BPS initiatives. Technology has emerged as a catalyst and an enabler of this evolution within BPS. It is imperative for enterprises to develop a clear understanding on three things. First, the technology spectrum available and the benefits of creating a technology-embedded BPS model; second, the way technology needs to fit in the overall BPS design and lifecycle anchored in business outcomes; and third, some best practices to make it happen. Part 1 focuses on the first two factors and Part 2 on the third factor

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