



Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2018

Human Resources Outsourcing (HRO)

Market Report – December 2017: Complimentary Abstract / Table of Contents

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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)
 - **Human Resources Outsourcing (HRO)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
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Everest Group's MPHRO research is based on multiple sources of proprietary information (page 1 of 2)

- Everest Group's proprietary database of **700+ 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

- Everest Group's proprietary database of **operational capability of 22+ 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



1 Assessment for **Ascender, Capita, DXC Technology, MHR, Infosys, and TCS** 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

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)

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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 2016

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

This report offers comprehensive overview of the capabilities of various providers in the MPHRO market; below are four snapshots to illustrate the depth of the profiles

MPHRO service capability and strategy

Company profile: XYZ 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 technology strategy

- Overview: XYZ 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
✓	✓	✓	✓

Total HRO delivery FTEs = ~XXX

Offshore ¹	Nearshore ¹	Onshore
~XXX	~XXX	~XXX

Current MPHRO market segment focus

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

Recent HRO-related developments/investments

Areas	Developments/investments
M&A/partnership	• Xxx
HR technology-related	• Xxx
Analytics and mobile	• Xxx
Others	• 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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MPHRO client portfolio

- MPHRO experience**

Total number of current MPHRO clients – XX

Recent MPHRO wins

- Xx

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

Key MPHRO delivery locations



Everest Group assessment

Delivery capability						Market success
Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall	
🌓	🌓	🌓	🌓	🌓	🌓	🌓

Strengths

- XYZ, 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

Areas of improvement

- XYZ'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 (2017)

Research calendar – Human Resources Outsourcing (HRO)

■ Published ■ Planned ▭ Current release

Flagship HRO reports

Release date

Technology in BPS – Service Provider Profile Compendium 2016	January 2017
Workday-Based HR BPS – Service Provider Landscape with PEAK Matrix™ Assessment 2017	June 2017
Workday-Based Human Resources Business Process Services (HR BPS) – Market Report 2017	June 2017
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	June 2017
Multi-Country Payroll Outsourcing (MCPO) – Annual Report 2017 – Evolution of Drivers and Enablers in a Rapidly-growing Market	July 2017
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2017	August 2017
MPHRO – Service Provider Landscape with PEAK Matrix™ Assessment 2017	September 2017
Multi-Process Human Resources Outsourcing (MPHRO) Annual Report – Digital-Driven Market Resurgence	December 2017
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2017	December 2017

Thematic HRO reports

Global HR Outsourcing Trends Handbook 2016	November 2016
The Impact of Technology on HR GICs – A Call to Action	January 2017
Aon Goes Back to its Roots; the (Re-) Birth of an HR Outsourcing Specialist	March 2017
Payroll Outsourcing in Asia Pacific: Climbing Up the Maturity Ladder	March 2017
Long-Tail HR Operations: Key Challenges and How to Overcome Them	March 2017
The Future of HR Services – An Employee-Centric, Digital-First Approach	September 2017

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

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 or complementary content that may be of interest:

1. **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 driver trends, and the evolving needs of buyers in the market
2. **Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017** ([EGR-2017-3-R-2342](#)); 2017. 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. **The Future of HR Services – An Employee-Centric, Digital-First Approach** ([EGR-2017-3-V-2316](#)); 2017. This viewpoint looks at the downsides of the traditional model of HR services, the evolving paradigm of HR services driven by focus on employee experience & engagement, and a new model of digital-first HR services that is differentiated from the traditional model in terms of technology, people, and process. It provides use cases in HR for the disruptive technologies of advanced analytics and Service Delivery Automation (SDA). Further, it describes the immense potential of the new model for service providers and best practices that can drive success for enterprises

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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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