



Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2019

Human Resources Outsourcing (HRO)

Market Report – January 2019: Complimentary Abstract / Table of Contents

Our research offerings for global services

▶ Market Vista™

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

▶ Application Services

▶ BPS | Banking & Financial Services

▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

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▶ Cloud & Infrastructure

▶ Customer Experience Management Services

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▶ ITS | Insurance

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▶ Locations Insider™

▶ PricePoint™

▶ Procurement

▶ Recruitment & Talent Acquisition

▶ Service Optimization Technologies

More about membership

In addition to a suite of published research, a membership may include

- Price book
- Accelerators™
- Data cuts
- Analyst access
- Virtual Roundtables
- Workshops

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

Membership information

- This report is included in the following research program(s)
 - **Human Resources Outsourcing (HRO)**
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com, unitedkingdom@everestgrp.com, or india@everestgrp.com

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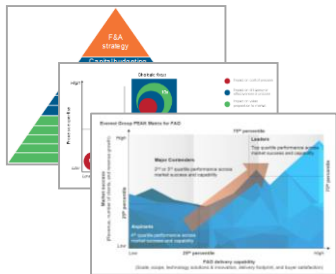
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

1

Robust definitions and frameworks

(Function-specific pyramids, Total value equation, PEAK Matrix, and market maturity)



2

Primary sources of information

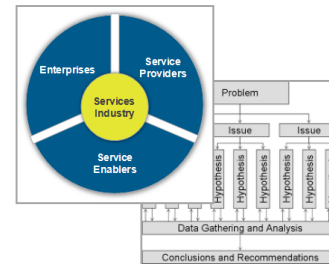
(Annual contractual and operational RFIs, service provider briefings & buyer interviews, and web-based surveys)



3

Diverse set of market touchpoints

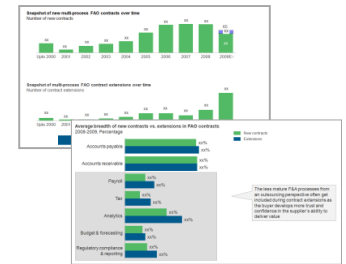
(Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership)



4

Fact-based research

(Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers)



- Proprietary contractual database of 1,400+ MPHRO contracts (updated annually)
- Year-round tracking of 20+ MPHRO service providers
- Large repository of existing research in HRO
- Dedicated team for multiple areas within HRO research, spread over two continents
- Over 20 years' experience of advising clients on HRO-related decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

This report is based on two key sources of proprietary information

- Everest Group's proprietary database of **1400+ 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

- Proprietary database of 20+ MPHRO service providers (updated annually)
- The database tracks the following for each service provider:
 - Revenue and number of FTEs
 - Revenue split by region
 - Number of clients and buyer employees
 - Location and size of delivery centers
 - Recent HRO-related developments
 - Technology offerings within MPHRO

- **Service provider briefings**
 - Vision and strategy
 - Key strengths and improvement areas
 - Annual performance and future outlook
 - Emerging areas of investment

- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Drivers and challenges for adopting workplace services
 - Assessment of service provider performance
 - Emerging priorities
 - Lessons learnt and best practices

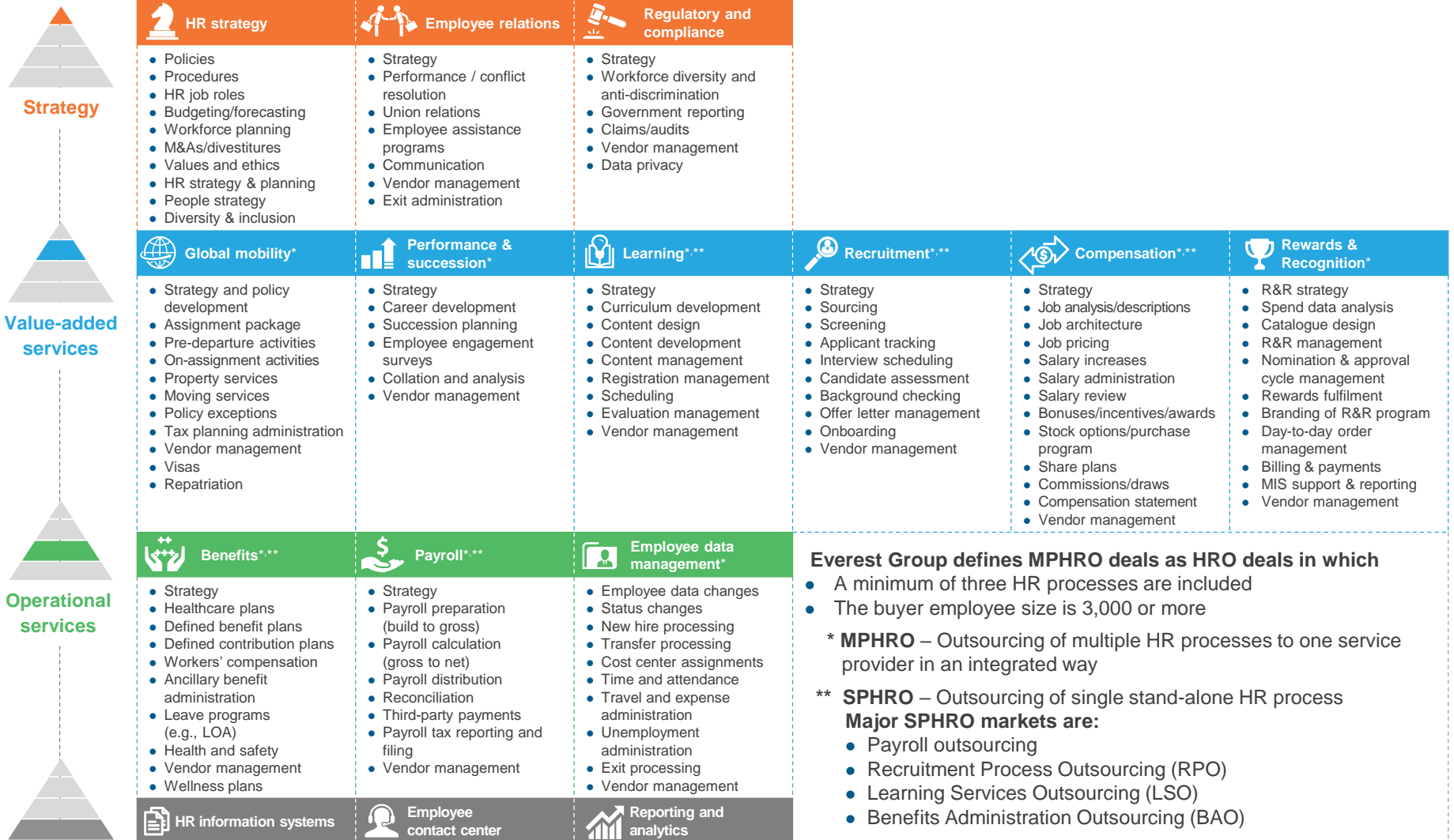
Service providers assessed¹



1 Assessment for Capita, CGI, Hexaware, MHR, Toutatis, and Wipro 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
The source of all content is Everest Group, unless otherwise specified

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 HRO process map



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 market segment focus

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

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
✓	✓	✓	✓

Recent HRO-related developments/investments

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

Total HRO delivery FTEs = ~XXX

Offshore ¹	Nearshore ¹	Onshore
~550	~660	~1122

■ 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 – 23

Recent MPHRO wins

- Xx

Major MPHRO clients

MPHRO revenue (ACV) geography mix

100% = US\$50 million

100% = US\$50 million

Financial services 10%
 Manufacturing 10%
 Hi-tech 30%
 Energy 25%
 Healthcare 15%
 Telecom 10%

MPHRO buyer size mix

100% = 23 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

Research calendar – Human Resources Outsourcing (HRO)

Published
 Planned
 Current release

Flagship HRO reports	Release date
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Rewards and Recognition (R&R) Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Multi-Country Payroll Outsourcing (MCPO) – Annual Report 2019	October 2018
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2019	October 2018
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2019	January 2019
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2019	January 2019
Multi-Country Payroll Platform- Provider Landscape with PEAK Matrix™ Assessment 2019	Q1 2019
Multi-Process Human Resources Outsourcing (MPHRO) – Annual Report 2019	Q1 2019
Workday-based Human Resource Business Process Services (HR BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2019 ...	Q2 2019
Workday-based Human Resource Business Process Services (HR BPS) – Market Report 2019	Q2 2019

Thematic HRO reports	
Re-imagining Payroll in a Digital-First World	July 2018
Key Ingredients for a Successful Digital-First HR Transformation	October 2018
The Mid-Market HCM Landscape in Asia Pacific	Q1 2019
Achieving Employee Experience – a “How-to Guide” for Enterprises (1 of 3)	Q1 2019
Learning function of the future	Q1 2019
Employee Engagement Suites – Evolution of next-generation HR products (2 of 3)	Q2 2019

Note: For a list of all of our published HRO reports, please refer to our [website page](#)

Additional HRO 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. **Key Ingredients for a Digital-First HR Transformation** ([EGR-2018-24-R-2830](#)); 2018. The HR function is facing a wave of transformation. There is a need to move away from the traditional ways of managing workforce to a flexible, fluid and integrated HR operating model. This report provides a comprehensive analysis of the key transformation levers for a successful digital-first HR transformation. It also highlights the advantages of the levers and their current adoption in HRO deals. The report mentions some HR specific use-cases for which the transformation levers can be effectively leveraged
2. **Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019** ([EGR-2019-24-R-3024](#)); 2019. This report assesses the MPHRO capabilities of different service providers and evaluates their positioning on the Everest Group PEAK Matrix. It provides insights into how 20 MPHRO service providers are ramping up their capabilities and are differentiating themselves in this ever-evolving market. These providers have been segmented into Leaders, Major Contenders, and Aspirants on the Everest Group PEAK Matrix. It highlights the key areas where Leaders have been able to prevail over the other service providers. The report also includes remarks on service providers, highlighting their key strengths and development areas.
3. **Multi-Country Payroll Outsourcing (MCPO) Annual Report 2019 – Persistent Growth Amidst Evolving Propositions** ([EGR-2018-24-R-2820](#)); 2018. This research focuses on one of the fastest growing markets in the HR outsourcing space – Multi-Country Payroll Outsourcing (MCPO) market. The MCPO market grew rapidly at a rate of ~20% from 2016 to 2017. With growing awareness of the MCPO value proposition and increasing provider maturity, this momentum is likely to continue for the next couple of years. This report provides a comprehensive coverage of the 2018 MCPO market and analyzes it across various dimensions such as market overview, buyer adoption trends, solution & transaction trends, and service provider landscape.

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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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