

Marketing BPS –Services PEAK Matrix[®] Assessment 2020

August 2020: Complimentary Abstract / Table of Contents



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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

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Background of the research

Organizations are shifting focus from traditional marketing models to digital and data-driven marketing. This shift, caused by the digital disruption, has created a new market with multiple service providers emerging and attempting to capture market share through innovative means. While enterprises primarily look for cost reduction in their marketing portfolio, service providers are tested on their capabilities in building marketing intelligence, omnichannel marketing, and content customization for diverse audiences. Given the growth and huge potential of the market, service providers continue to invest in a host of capabilities including in-house technology and analytics, and partnerships with marketing technology providers. As they strive to create differentiation in the market, intelligent automation through RPA and AI, cognitive capabilities, and predictive analytics are leveraged to attain higher speed-to-market and enhanced customer experience.

In this research, we present an assessment of 14 leading service providers featured on the Marketing BPS services PEAK Matrix®. The assessment is based on Everest Group’s annual RFI process for calendar year 2020, interactions with leading Marketing BPS services providers, client reference checks, and an ongoing analysis of the Marketing services market.

This report includes Everest Group’s view of the following 14 leading service providers featured on the Marketing BPS PEAK Matrix:

- **Leaders:** Accenture and Cognizant
- **Major Contenders:** Concentrix, EXL, HCL, Infosys, Isobar, Merkle, TCS, Wipro, and WNS
- **Aspirants:** HGS, Stefanini, and Webhelp

Scope of this report:



Geography
Global



Service providers
Accenture, Cognizant,
Concentrix, EXL, HCL, HGS,
Infosys, Isobar, Merkle,
Stefanini, TCS, Webhelp, Wipro,
and WNS



Services
Marketing BPS

Overview and abbreviated summary of key messages

This report examines the global 2019 marketing BPS service provider landscape and its impact on the marketing BPS. It focuses on service provider position and landscape in the market, assessment of service provider delivery capabilities and key marketing BPS service provider profiles. It also identifies the key implications of the research findings for buyers and service providers

Some of the findings in this report, among others, are:

Service provider position

- There are 14+ service providers with outsourcing experience in the global market

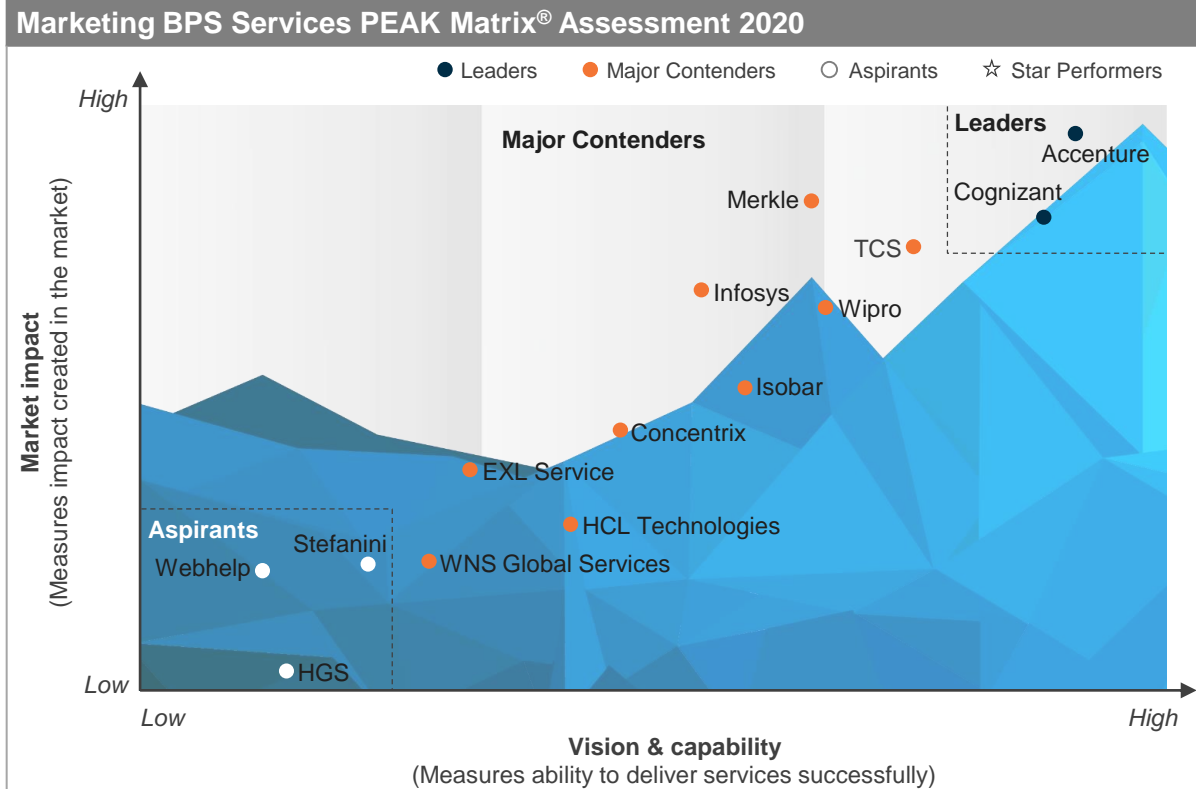
Service provider landscape

- Each of the Leaders (Top providers) hold more than 10% of the marketing BPS market in terms of market share by revenue
- Accenture and Cognizant holds the largest share of marketing BPS engagements in most of the top industry verticals
- Accenture, Cognizant, and TCS are among the major service providers having meaningful presence across all geographies, with multiple service providers displaying strong activity in different regions

Service provider capability

- Marketing BPS service providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture and Cognizant are the current leaders in the global marketing BPS market. However, several service providers are emerging as major contenders

This study offers thee distinct chapters providing a deep dive into key aspects of marketing BPS market; below are three charts to illustrate the depth of the report



Note: Assessments for HGS, Isobar, Merkle, Webhelp, and WNS Global Services excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with marketing BPS buyers

Source: Inputs from market players, recruitment firms, and investment agencies

Capability assessment Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	○	●	●	●	○	●	○	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	●	●	●	○	○	○	●
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	○	○	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	●	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	○	●	○	●	○	○	○	○

Strengths

- The capability to deliver from offshore locations enables XXX to be a cost-efficient player. XXX provides services across the entire gamut of marketing BPS value chain, with a high focus on marketing support
- It has invested in Cognitive Computing Suite for real-time content internet aggregation, omnichannel publishing for PR, and intelligent content extraction for contracts

Areas of improvement

- Although XXX has design studios and labs across the globe, its delivery centres are mostly concentrated in the APAC region. It should consider diversifying its delivery presence outside the APAC region and create a more balanced delivery portfolio to provide a higher degree of localization support
- It should continue to strengthen AI-based automation tools and solutions to further improve speed-to-market

Research calendar

BPS

■ Published
 ■ Planned
 ■ Current release

Flagship BPS reports

	Release date
Multi-Process Human Resources Outsourcing (MPHRO) Annual Report 2020 – Preparing for a Digitally Enabled Decade	January 2020
Supply Chain Management (SCM) Business Process Outsourcing (BPO) Service Provider Compendium 2020	February 2020
Intelligent Automation in Business Processes (IABP) – Solution Provider Landscape with Solutions PEAK Matrix [®] Assessment 2020	March 2020
Procurement Outsourcing (PO) – Service Provider Landscape with Services PEAK Matrix [®] Assessment 2020	June 2020
Insurance Analytics and Insights (A&I) Third-party Services PEAK Matrix [®] Assessment 2020	June 2020
Customer Experience Management (CXM) – Service Provider Landscape with Services PEAK Matrix [®] Assessment 2020	June 2020
Marketing BPS Services PEAK Matrix[®] Assessment 2020	August 2020
Marketing BPS Service Provider Compendium 2020	Q3 2020

Thematic BPS reports

	Release date
Unlocking the Digital Potential in Talent Acquisition	January 2020
Clinical and Care Management (CCM): Is the Value-based Elixir Really Working?	January 2020
Orchestrating Successful WAHA-based Delivery	January 2020
Impact of Recession on the Business Process Services (BPS) Industry	March 2020
The Next Frontier in KYC and AML: Intelligent Automation-led Transformation New	June 2020
Collaboration to Beat Disruption: Future of Contingent Workforce Management (CWM)	June 2020

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