



Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2020

Human Resources Outsourcing (HRO)

Market Report – January 2020: 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	▶ Human Resources
▶ BPS Banking & Financial Services	▶ ITS Banking & Financial Services
▶ BPS Healthcare & Life Sciences	▶ ITS Healthcare
▶ BPS Insurance	▶ ITS Insurance
▶ Catalyst™	▶ IT Services Executive Insights™
▶ Cloud & Infrastructure	▶ ITS Life Sciences
▶ Customer Experience Management Services	▶ Locations Insider™
▶ Data & Analytics	▶ PricePoint™
▶ Digital Services	▶ Procurement
▶ Engineering Services	▶ Recruitment & Talent Acquisition
▶ Enterprise Platform Services	▶ Service Optimization Technologies
▶ Finance & Accounting	

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

More about membership

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

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model™ reports
- PriceBook
- 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

Table of contents (page 1 of 2)

Topic	Page no.
Section I: MPHRO service provider landscape snapshot	7
• Definition of MPHRO	8
• MPHRO service provider landscape	12
Section II: Service provider profiles	13
• Accenture	14
• ADP	18
• Alight Solutions	22
• Capgemini	26
• Capita	30
• CGI	31
• Conduent	32
• DXC Technology	36
• Hexaware	40
• IBM	41
• Infosys	42
• MHR (formerly MidlandHR)	46
• Neeyamo	47
• NGA Human Resources	51
• SD Worx	55
• TCS	59
• Toutatis	63
• Wipro	64

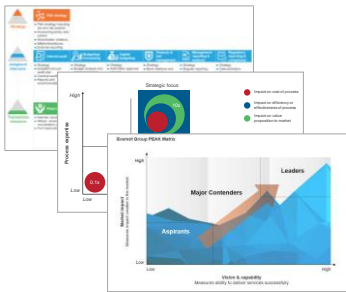
Table of contents (page 2 of 2)

Topic	Page no.
Section II: Service provider profiles (continued)	
• WNS	68
• Zalaris	72
Appendix	76
• Glossary of terms	77
• Research calendar	79
• References	80

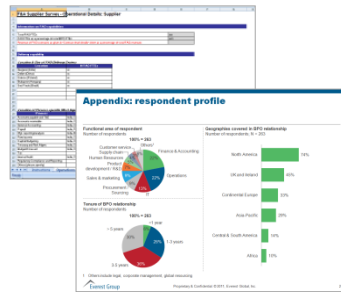
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

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

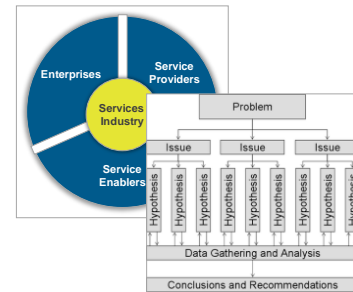
1 Robust definitions and frameworks
 HR pyramid, multi-process HRO definition, Total Value Equation (TVE), PEAK Matrix™, and market maturity



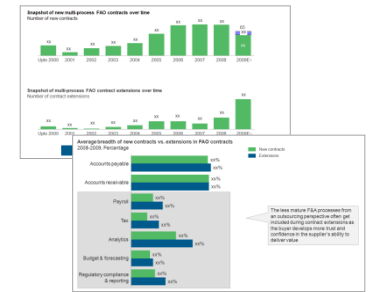
2 Primary sources of information
 Annual contractual and operational RFIs, service provider briefings and buyer interviews, and web-based surveys



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 multiple sources of proprietary information

- Proprietary database of 1,400+ MPHRO contracts of 20+ HR service providers with workplace services in scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including service provider, contract type, TCV & ACV, service provider FTEs, start & end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed

- Proprietary database of IT service providers (updated annually)
- The database tracks the following for each service provider:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different lines of business (LoBs)
 - Revenue split by region
 - Location and size of delivery centers
 - Technology solutions developed

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

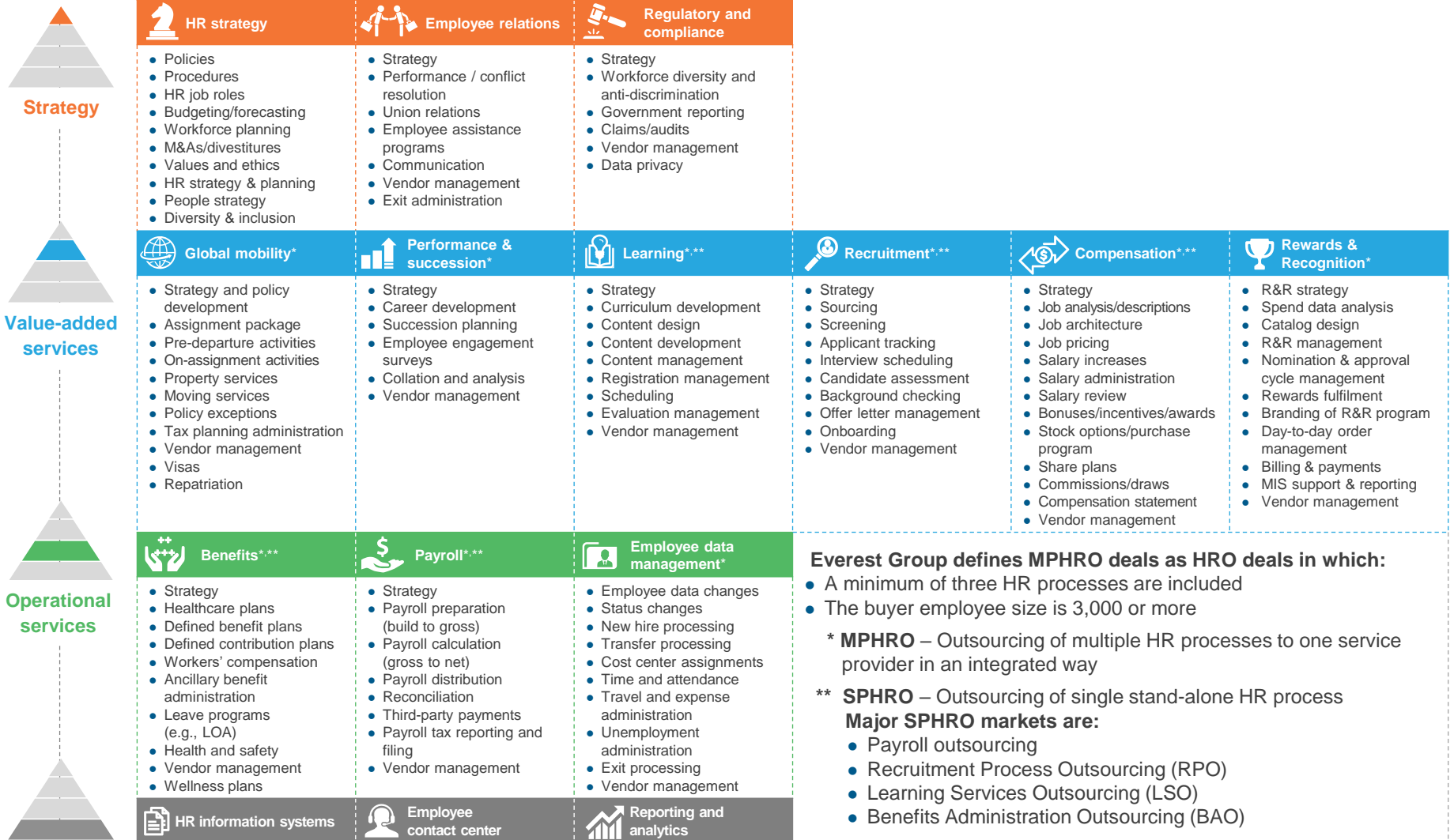
Service providers assessed¹



1 Assessment for Capita, CGI, Hexaware, IBM, MHR, and Toutatis 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-market 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	Nearshore	Onshore
~550	~660	~1122



MPHRO client portfolio

MPHRO experience

Total number of current MPHRO clients – 23

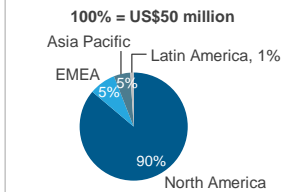
Recent MPHRO wins

- XXX

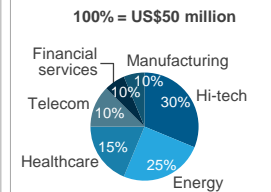
Major MPHRO clients

- XXX

MPHRO revenue (ACV) geography mix



MPHRO revenue (ACV) industry mix



MPHRO buyer size mix



Key MPHRO delivery locations



Everest Group assessment

Measure of capability: ● High ○ Low

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

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

Workday-Based Human Resources Business Process (HR BPS) – Services PEAK Matrix™ Assessment with Service Provider Landscape 2019.....	June 2019
Workday-Based Human Resources Business Process Services (HR BPS) – Climbing up the HR Operating Model Maturity Curve.....	July 2019
Workday-Based Human Resource Business Process Services (HR BPS) – Service Provider Compendium 2019.....	July 2019
Multi-Country Payroll Outsourcing (MCP) – Service Provider Landscape with PEAK Matrix™ Assessment 2019.....	September 2019
Multi-Country Payroll (MCP) Solutions Annual Report 2019 – Moving Toward Unification of Payroll and HR Services.....	October 2019
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2020.....	December 2019
Multi-Process Human Resources Outsourcing (MPHRO) – Annual Report 2020.....	January 2020
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2020.....	January 2020

Thematic HRO reports

The Mid-Market HCM Landscape in Asia Pacific.....	April 2019
Achieving Employee Experience – a “How-to Guide” for Enterprises (part 1 of 3).....	March 2019
Employee Engagement Suites – The Catalysts Driving Superior Employee Experience (part 2 of 3).....	June 2019
Start-ups Redefining Employee Experience – Trailblazers (part 3 of 3).....	November 2019
Learning Function of the Future.....	December 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 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. **Achieving Employee Experience – a “How-to Guide” for Enterprises (part 1 of 3)** ([EGR-2019-24-R-3120](#)); 2019. Using a five-step approach to adopt, expand, and scale employee experience projects, this guidebook taps various frameworks, such as Employee Experience Model (EEM), to empower enterprises to conceptualize where they want to go with enterprise employee experience, what capabilities they need to develop to get there, and the ideal path for their journey. It also evaluates winning strategies for building employee experience capabilities and generating greater impact
3. **“Employee Experience Suites – The Catalysts Driving Superior Employee Experience” (part 2 of 3)** ([EGR-2019-24-V-3206](#)) This report introduces employee experience suites, which are add-on technology solutions that are holistic in nature and focused on solving employee experience-related issues. The report highlights some of the potential areas where enterprises can leverage these experience suites. Additionally, this viewpoint tries to understand how the experience suites fit into the overall HR technology framework of an enterprise. It also breaks down these suites into various categories and highlights their characteristics and some of the vendors active in this space

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

Priyanka Mitra, Practice Director

priyanka.mitra@everestgrp.com

Sharath Hari N, Senior Analyst:

sharath.hari@everestgrp.com

Ashwary Chauhan, Information Specialist

ashwary.chauhan@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



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.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog



www.everestgrp.com/blog/

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.