



# **Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2020**

Human Resources Outsourcing (HRO)

Market Report – June 2020: Complimentary Abstract / Table of Contents

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- 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](mailto:info@everestgrp.com)

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# This report is based on two key sources of proprietary information

- Proprietary database of **HR and Learning Services** providers
- 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 Learning Service providers
- The database tracks the following for each service provider:
  - Revenue
  - Number of clients
  - FTE split by different 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 learning service solutions and programs
  - Assessment of service provider performance
  - Emerging priorities
  - Lessons learnt and best practices

## Service providers assessed<sup>1</sup>



<sup>1</sup> This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service provider public disclosures, and interaction with buyers. It has also taken inputs through RFIs for providers including Accenture, Capgemini, CGS, Conduent, Cognizant, Infosys, Learning Tribes, MPS Interactive, and TTEC

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

# Overview and abbreviated summary of key messages

This report examines the global Learning Services market and its service provider landscape. It provides a deep-dive analysis of how the service providers shape up in terms of their market impact and vision & capability. Based on the comprehensive Everest Group PEAK Matrix, 18 MCPS service providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and areas of improvement.

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

## Service provider position and growth

- Everest Group classified 18 Learning Services providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants
- The 2020 Learning Services PEAK Matrix positioning is as follows:
  - **Leaders:** Accenture, GP Strategies, and Raytheon Professional Services
  - **Major Contenders:** Capgemini, Capita, CGS, Cognizant, Conduent, IBM, Infosys, Infopro Learning, Learning Tribes, MPS Interactive, NIIT, and TTEC
  - **Aspirants:** G-Cube Solutions, The Learning Factor, and Upside Learning

## Learning Services market overview

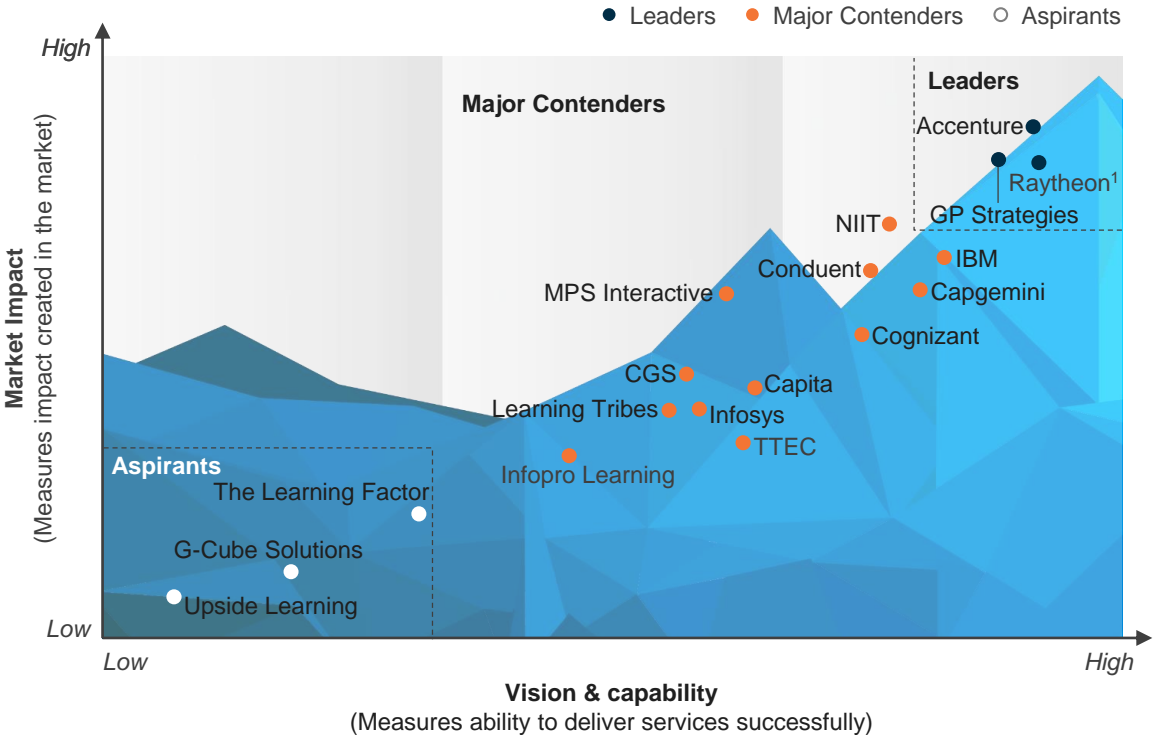
- This section provides the Learning Services provider landscape in terms of revenue, active deals, along with geographically dominant service providers

## Learning Services provider delivery capability

- Everest Group delineates each of the 18 service provider's strengths and areas of improvement
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

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

## Assessment of Learning Services Providers



Note This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service provider public disclosures, and interaction with buyers. It has also taken inputs through RFIs for providers including Accenture, Capgemini, CGS, Conduent, Cognizant, Infosys, Learning Tribes, MPS Interactive, and TTEC

1 Raytheon here refers to Raytheon Professional Services

Source: Everest Group (2020)

## 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 |
| ○               | ○             | ●               | ○       | ●                   | ○                         | ○                          | ○                  | ○       |

- |  |   |
|--|---|
| <p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently</li> <li>It largely focuses on project-based engagements above a certain threshold</li> </ul> | <p><b>Areas of improvement</b></p> <ul style="list-style-type: none"> <li>Service provider 1 should increase offerings of value-added services such as consulting, technology maintenance, and contact center support</li> <li>It should try to expand into larger learning services deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region</li> </ul> |
|--|---|

# Research calendar – Human Resources Outsourcing (HRO)

Published
  Planned
  Current release

## Flagship HRO reports

### Release date

|  |                  |
|--|------------------|
| Multi-Process Human Resources Outsourcing (MPHRO) Annual Report 2020 – Preparing for a Digitally Enhanced Decade .....         | January 2020     |
| Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2020 .....                             | January 2020     |
| Rewards and Recognition (Learning Services) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020 .....       | April 2020       |
| <b>Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2020 .....</b>                                    | <b>June 2020</b> |
| Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Service Provider Landscape 2020 .....                    | Q2 2020          |
| Learning BPO Service Provider Profile Compendium 2020 .....  | Q2 2020          |
| Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020 .....                       | Q3 2020          |
| Multi-Country Payroll (MCP) Solutions Annual Report 2020 .....   | Q3 2020          |
| Multi-Country Payroll (MCP) Solutions Service Provider Profile Compendium 2020 .....   | Q3 2020          |
| Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment with Services Provider Landscape 2020 ..... | Q4 2020          |
| Multi-Process Human Resources Outsourcing (MPHRO) Annual Report 2020 .....   | Q4 2020          |
| Multi-Process Human Resources Outsourcing (MPHRO) Service Provider Profile Compendium 2020 .....                               | Q4 2020          |

## Thematic HRO reports

|   |               |
|---|---------------|
| Start-ups Redefining Employee Experience – Trailblazers (part 3 of 3) .....                     | November 2019 |
| Learning Function of the Future .....   | December 2019 |
| Digital Adoption Platform (DAP): Accelerating the Journey from Transformation to Adoption ..... | February 2020 |
| Impact of Recession on the Business Process Services (BPS) Industry .....                       | March 2020    |

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



## Additional HRO research references

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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. Start-ups Redefining Employee Experience – Trailblazer (part 3 of 3)** ([EGR-2019-24-R-3413](#)); 2019. This research includes a comprehensive evaluation of the start-ups in the employee experience space based on parameters such as business maturity, investor confidence, solution capability, and innovation, novelty of solutions in terms of innovation and underlying technologies, partnership ecosystem, market adoption, and investor confidence and profile
- 2. Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix™ Assessment with Service Provider Landscape 2020** ([EGR-2019-24-R-3453](#)); 2019. This report examines the dynamics of the Multi-Process Human Resources Outsourcing (MPHRO) service provider landscape. It provides a deep-dive analysis into how the service providers shape up in terms of their market impact and vision & capability. Based on the comprehensive Everest Group PEAK Matrix, 20 MPHRO service providers are segmented into Leaders, Major Contenders, and Aspirants
- 3. Digital Adoption Platform (DAP): Accelerating the Journey from Transformation to Adoption** ([EGR-2020-24-V-3564](#)); 2020. This report explores the key challenges faced by enterprises when undergoing digital transformation and how DAP can help address these issues. It also discuss various use cases, special platform features, partner ecosystem, and market outlook.

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## About Everest Group

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