



Intelligent Automation in Business Processes (IABP) – Solution Provider Compendium 2020

Service Optimization Technologies (SOT)

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

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Background of the research

The Business Process Services (BPS) market is facing strong winds of change. Multiple digital elements are disrupting the status quo in the supply as well as demand landscape – enterprises are expecting not only mundane cost reduction, but also next-generation benefits from their BPS relationships. Solution providers are recognizing that they need to pivot quickly from the traditional labor arbitrage-driven model to a digital-powered one to provide those benefits to their buyers. One of the most potent digital levers enabling this transformation is Intelligent Automation in Business Processes (IABP). A spectrum of IABP solutions is being deployed by solution providers to help buyers attain certain key benefits – higher speed, improved accuracy, enhanced customer experience and reduced cost, among others. In this context, this report provides a detailed view of 24 major IABP solution providers. Each profile includes scope, technology solutions, geographic and industry split of clients, business processes covered by automation, delivery locations, and Everest Group's assessment of the provider.

In this study, we look at each solution provider's Intelligent Automation capabilities along dimensions that include, but are not limited to:

- Solutions suite and scope of operations: includes key leaders, technology solutions, FTEs, and recent developments
- Delivery locations: covers country-level details of key delivery locations across the world
- Capabilities and clients: includes major engagements, revenue split by geography, FTE split by process coverage, and the number of contracts by buyer size
- Technology solutions: presents brief profiles of key technology solutions
- Everest Group assessment: includes the position of the service provider on the Everest Group PEAK Matrix, undertakes market share & delivery capability assessment, and includes overall remarks on the capabilities of service providers

The scope and methodology of this report includes:

A focus on Intelligent Automation in Business Processes (IABP) solutions, offered either on a standalone basis or as part of a broader BPO deal, along with the associated implementation, consulting and maintenance services

- **Services scope:** Business Process Services (BPS)
- **Geographic scope:** Global
- **Solution provider scope:** 24 providers, including leading broad-based BPS providers, consulting firms, and specialist system integrators whose offerings fall in one of the 3 categories
 - IABP Services which includes implementation, consulting, and maintenance, without the automation technology license
 - IABP Solutions where the solution provider sources the automation technology as well as provides implementation, consulting, and maintenance services
 - Intelligent automation offered as part of a broader BPO deal within areas such as procurement, HR and banking

The IABP solution provider profile compendium contains profiles of 24 diversified providers, including BPS providers, specialist system integrators and consulting firms

Provider- Overview

Company overview

XXX is a professional services network of more than 276,000 people and with offices in 157 countries. It primarily delivers value in assurance, tax and advisory services, which it provides to 85% of the global Fortune 500 companies and more than 100,000 entrepreneurial and private businesses.

Key IABP leaders

- A, Chairman and CEO
- B, Chief Operating Officer
- C, Chief IT Officer

Key IABP clients: N/D

Headquarter: London, UK

Website:

Adoption and capability overview

Number of active clients with IABP deployments: 121

Number of IABP FTEs: 450

Key locations with IABP FTEs:

- Asia Pacific (India, China)
- North America (the United States)

Key third-party technology partners: Automation Anywhere, Blue Prism, Kofax, UiPath and WorkFusion

Offered Not offered

IABP offering structures

Stand-alone product licenses

Product licenses + associated IABP services

Stand-alone IABP services

IABP as part of a broader BPO deal

Recent acquisitions/partnerships

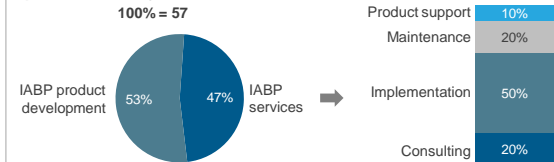
- 2019: ABBYY and XXX signed a Joint Business Relationship agreement under which ABBYY will provide their joint customers with a technology platform for intelligent automation, while XXX will contribute with its industry experience along with a broad range of business services and client insights
- 2019: Blue Prism and XXX formalized a strategic global collaboration to deliver intelligent automation solutions and help enterprise clients drive innovation and digitally transform services with RPA

Provider Technology Solutions

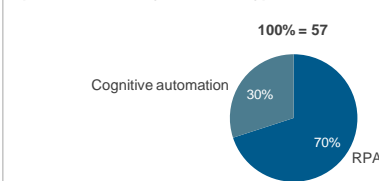
Solution	Business functions	Year launched	Development type	Description	No. of clients
Intelligent Automation Platform	Cross-functional	2019	In-house/proprietary	Unified 3-in-1, cloud enabled, scalable and end-to-end integrated automation platform for applications, IT and business operations powered by advanced AI self-learning capabilities and proactive decisioning. It also offers a Platform Command Tower for bot orchestration, monitoring, analytics and a FastTrack Hub with a rich pool of pre-built solutions & accelerators	6
Cognitive Document Processing	F&A, HR, procurement, banking and insurance	2018	In-house/proprietary	XXX's proprietary end-to-end solution that automates the ingestion, organization, evaluation and processing of digital documents rapidly, securely and at reduced cost. CDP is a solution built with best-of-breed technology based on ML and AI bundled with highly optimized business processes	6
CallerBot	SCM, FI, CO, MM, HR and SD	2018	In-house/proprietary	Solution to provide voicebot, live chat and web/mobile self-service, along with a Fuzzy Logic & NLP engine for ML based error fixing and a Central Management Application (CMA) for managing the flow and data exchange	5
Command Center	F&A, HR, procurement, banking and insurance	2018	In-house/proprietary	The Command center is a real-time monitoring, orchestration, visualization and analytics platform used to manage service delivery for clients. It provides up-to-date visibility of process execution, SLA management and maintains a data set that is used to feed analytics components, which in turn are used to generate process insights and root cause analyses	101
Intelligent Automation Design Authority	F&A, HR, supply chain and procurement	2019	In-house/proprietary	Dedicated Technology Excellence & Standardization team and a repository of selected bots to augment or fully automate operations delivery. The repository has over 100 pre-built components ranging from pre-trained AI solutions, integration paths between machine learning and RPA, NLP enablers and query classifiers. IA Design Authority & Repository builds on thousands of projects built by XXX teams and partners to accelerate AI adoption in business processes	10

Technology Capabilities

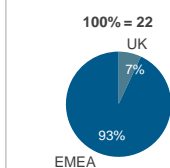
Split of IABP FTE by function



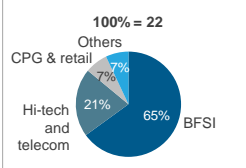
Split of IABP FTEs by automation type



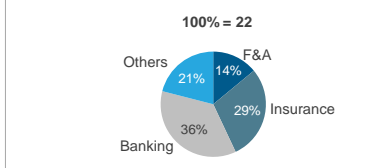
IABP client mix by buyer geography



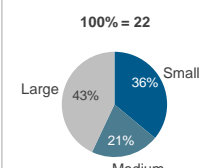
IABP client mix by buyer industry



IABP client mix by business function / process area



IABP client mix by buyer size



Provider Comments

Measure of capability: ● High ○ Low

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision & strategy	Technology capability	Services capability	Innovation & investments	Engagement & commercial model	Overall
●	●	●	●	●	○	○	○	○	○

Strengths

- XXX leverages combination of different types of analytics including data, speech, text and predictive analytics to deliver insights on optimization of bot performance, gaining an understanding of the issues that impact upstream and downstream processes and developing a future automation roadmap
- It has partnered with MIT (USA) for computer vision and automated defect remediation. It has also collaborated with Stanford University and University of California Berkeley to develop training programs on AI/ML
- Referenced buyers have highlighted XXX's ability to increase and decrease the team size depending on the need of the business and have also lauded its factory model for automation implementations
- Referenced buyers have also highlighted the technical expertise of XXX in terms of understanding different types of automation which is a testament to its training capabilities across different automation technology tools

Areas of improvement

- Referenced buyers feel that XXX can train its resources better to have a more standardized domain expertise across different business analysis skills
- Referenced buyers also feel that XXX can fasten the deployment or improve the time to market of its intelligent automation solution to enable strategic decision making
- Referenced buyers showed concern around XXX's handling of issues and escalations and feel that these issues should not affect implementation timelines

Research calendar – Service Optimization Technologies (SOT)

Published
 Planned
 Current release

Flagship SOT reports

Release date

Robotic Process Automation (RPA) Annual Report 2019	September 2019
Enterprise RPA Automation Adoption – Pinnacle Model® Analysis 2019	December 2019
Intelligent Automation in Business Processes (IABP) Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2020	March 2020
Intelligent Automation in Business Processes (IABP) Solution Provider Compendium 2020	March 2020
Intelligent Automation in Business Processes (IABP) –State of the Market Report 2020.....	Q1 2020
IVA products PEAK Matrix™ Assessment 2020.....	Q1 2020
Process Mining (PM) – Technology Vendor Landscape with PEAK Matrix Assessment	Q1 2020
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2019	Q1 2020

Thematic SOT reports

Intelligent automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes	March 2019
Advanced Content Intelligence – Pivotal Technology to Empower the New Age Organization	May 2019
Intelligent Document Processing (IDP) Annual Report 2019 – Let AI Do the Reading	May 2019
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	Q3 2019
AI in Business – A Primer.....	Q1 2020
UiPath Playbook	Q1 2020

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

Additional SOT research references

The following documents are recommended for additional insight on 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. **Intelligent Automation in Business Processes (IABP) – Solution Provider Landscape with Solutions PEAK Matrix® Assessment** ([EGR-2020-38-R-3586](#)); 2020. This report examines the global IABP solution provider landscape. It focuses on solution provider positioning and growth in the IABP market, changing market dynamics, and emerging solution provider trends, and assesses solution provider delivery capabilities. It also outlines our research findings' key implications for buyers and solution providers.
2. **Intelligent Automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes** ([EGR-2019-38-V-3088](#)); 2019. This viewpoint examines how enterprises can adopt an automation strategy that embraces Intelligent Automation to successfully accelerate from short-term wins to long-term strategic business outcomes
3. **Creating Business Value Through a Next-Generation Smart Digital Workforce** ([EGR-2018-38-V-2548](#)); 2018. A viewpoint focusing on leveraging RPA and AI-based automation solutions to create smart digital workforce and generate business value for enterprises
4. **Artificial Intelligence in Global Services – State of the Market Report** ([EGR-2017-13-R-2397](#)); 2017. This report helps bring about a better understanding of the AI market from the purview of global services. In particular, it includes a holistic definition of AI, buyer adoption trends, learnings from early adopters and a deep-dive into the AI technology vendor landscape

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