Everest Group®

Market Report | Human Resources Outsourcing

# Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2021

Everest Group PEAK MATRIX®

June 2021: Complimentary Abstract / Table of Contents

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# Background of the research

COVID-19 has shaken up the traditional learning practices among organizations. There is now increased focus on digitization of learning and agile learning strategies among enterprises to prepare the employees for future challenges and disruptions. After an initial setback to growth of the market, enterprises are looking to rope in learning service providers, beyond virtualization of classroom learning, to focus on more end-to-end transformation. Thus, the learning services market is expected to grow at a significant pace as more buyers look to outsource parts of their learning & development activities to providers.

In this research, we present and assess the strengths and weaknesses of providers featured on the Learning Services PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading learning services providers, client reference checks, and an ongoing analysis of the learning services market.

**This report includes the profiles of the following 21 leading learning services providers featured on the Learning Services PEAK Matrix®:**

- **Leaders:** Accenture, IBM, GP Strategies, and Raytheon
- **Major Contenders:** Capgemini, Capita, CGS, Cognizant, Cegos, Conduent, Infosys, Hemsley Fraser, Infopro Learning, Learning Tribes, MPS Interactive, NIIT, The Judge Group, and TTEC
- **Aspirants:** G-Cube Solutions, The Learning Factor, and Upside Learning

**Scope of this report:**

**Geography**
Global

**Service providers**
Accenture, IBM, GP Strategies, Raytheon, Capgemini, Capita, CGS, Cognizant, Cegos, Conduent, Infosys, Hemsley Fraser, Infopro Learning, Learning Tribes, MPS Interactive, NIIT, The Judge Group, TTEC, G-Cube Solutions, The Learning Factor, and Upside Learning

**Services**
Learning services


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# This report is based on key sources of proprietary information

- Proprietary database of **HR** and **learning service** 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 (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
  - 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 assessed[1]**

accenture, Capgemini, Capita, CGS, cegos, CONDUENT, Cognizant, GP STRATEGIES, G-CUBE, IBM, Infopro Learning, hemsleyfraser, Infosys, Judge, Learning Tribes, MPS Interactive, NIIT, Raytheon Professional Services, THE learning factor, ttec, UPSIDE LEARNING

1 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 for providers including Accenture, Capgemini, CGS, Conduent, Cognizant, IBM, Infosys, Infopro Learning, Learning Tribes, 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


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

01

**Robust definitions and frameworks**

HRO pyramid, multi-process HRO definition, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02

**Primary sources of information**

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

03

**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

04

**Fact-based research**

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

Proprietary contractual database of more than 300+ learning services contracts (updated annually)

Year-round tracking of 20 learning service providers

Large repository of existing research in HRO

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, service providers, technology providers, and industry associations


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# Everest Group HRO process map

## Strategy

### HR strategy
- Policies
- Procedures
- HR job roles
- Budgeting/forecasting
- Workforce planning
- M&As/divestitures
- Values and ethics
- HR strategy and planning
- People strategy
- Diversity and inclusion

### Employee relations
- Strategy
- Performance / conflict resolution
- Union relations
- Employee assistance programs
- Communication
- Vendor management
- Exit administration

### Regulatory and compliance
- Strategy
- Workforce diversity and anti-discrimination
- Government reporting
- Claims/audits
- Vendor management
- Data privacy

## Value-added services

### Global mobility*
- Strategy and policy development
- Assignment package
- Pre-departure activities
- On-assignment activities
- Property services
- Moving services
- Policy exceptions
- Tax planning administration
- Vendor management
- Visas
- Repatriation

### Performance and succession
- Strategy
- Career development
- Succession planning
- Employee engagement surveys
- Collation and analysis
- Vendor management

### Learning*
- Strategy
- Curriculum development
- Content design
- Content development
- Content management
- Registration management
- Scheduling
- Evaluation management
- Vendor management

### Recruitment
- Strategy
- Sourcing
- Screening
- Applicant tracking
- Interview scheduling
- Candidate assessment
- Background checking
- Offer letter management
- Onboarding
- Vendor management

### Compensation
- Strategy
- Job analysis/descriptions
- Job architecture
- Job pricing
- Salary increases
- Salary administration
- Salary review
- Bonuses/incentives/awards
- Stock options/purchase program
- Share plans
- Commissions/draws
- Compensation statement
- Vendor management

### Rewards and Recognition (R&R)
- R&R strategy
- Spend data analysis
- Catalog design
- R&R management
- Nomination and approval cycle management
- Rewards fulfillment
- Branding of R&R program
- Day-to-day order management
- Billing and payments
- MIS support and reporting
- Vendor management

## Operational services

### Benefits*,**
- Strategy
- Healthcare plans
- Defined benefit plans
- Defined contribution plans
- Workers' compensation
- Ancillary benefit administration
- Leave programs (e.g., LOA)
- Health and safety
- Vendor management
- Wellness plans

### Payroll*,**
- Strategy
- Payroll preparation (build to gross)
- Payroll calculation (gross to net)
- Payroll distribution
- Reconciliation
- Third-party payments
- Payroll tax reporting and filing
- Vendor management

### Employee data management*
- Employee data changes
- Status changes
- New hire processing
- Transfer processing
- Cost center assignments
- Time and attendance
- Travel and expense administration
- Unemployment administration
- Exit processing
- Vendor management

***Scope of Learning Services mentioned on next page**

### HR information systems

### Employee contact center

### Reporting and analytics


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# Everest Group learning services and process map

*NOT EXHAUSTIVE*

## Content development and curation

**A1 Curriculum design**
- Designing courseware structure
- Campaign design
- Training program design

**A2 Content curation**
- Identifying the right mix of content
- Content discovery

**A3 Content development**
- Development of training content
- Custom content development

## Content delivery

**B1 Facilitated training**
- Virtual instructor-led training
- Classroom training

**B2 Technology-based learning**
- M-learning
- E-learning
- Gamification
- Immersive learning (through AR/VR)
- Microlearning
- Social learning (enable communities, blogs, breakout rooms, etc.)

## Learning administration

**C1 Registration and scheduling**
- Register events
- Scheduling – course and trainer

**C2 Logistics**
- Catalog management
- Track learning events

**C3 Maintenance**
- Curriculum management/maintenance
- Knowledge management

**C4 Contact center**
- Helpdesk

## Learning spend management

**D1 Sourcing**
- Instructor sourcing
- Vendor sourcing
- Technology sourcing

**D2 Reporting & analytics**
- Measurement and reporting
- Cost analysis
- Benchmarking analytics

**D3 Vendor management**
- Third-party vendor solution integration
- Managing vendor operations


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# 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, 21 learning 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:**

**Everest Group Learning Services PEAK Matrix® 2021**

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 21 established learning services providers assessed are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Accenture, IBM, GP Strategies, and Raytheon
- **Major Contenders:** Capgemini, Capita, CGS, Cognizant, Cegos, Conduent, Infosys, Hemsley Fraser, Infopro Learning, Learning Tribes, MPS Interactive, NIIT, The Judge Group, 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 21 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


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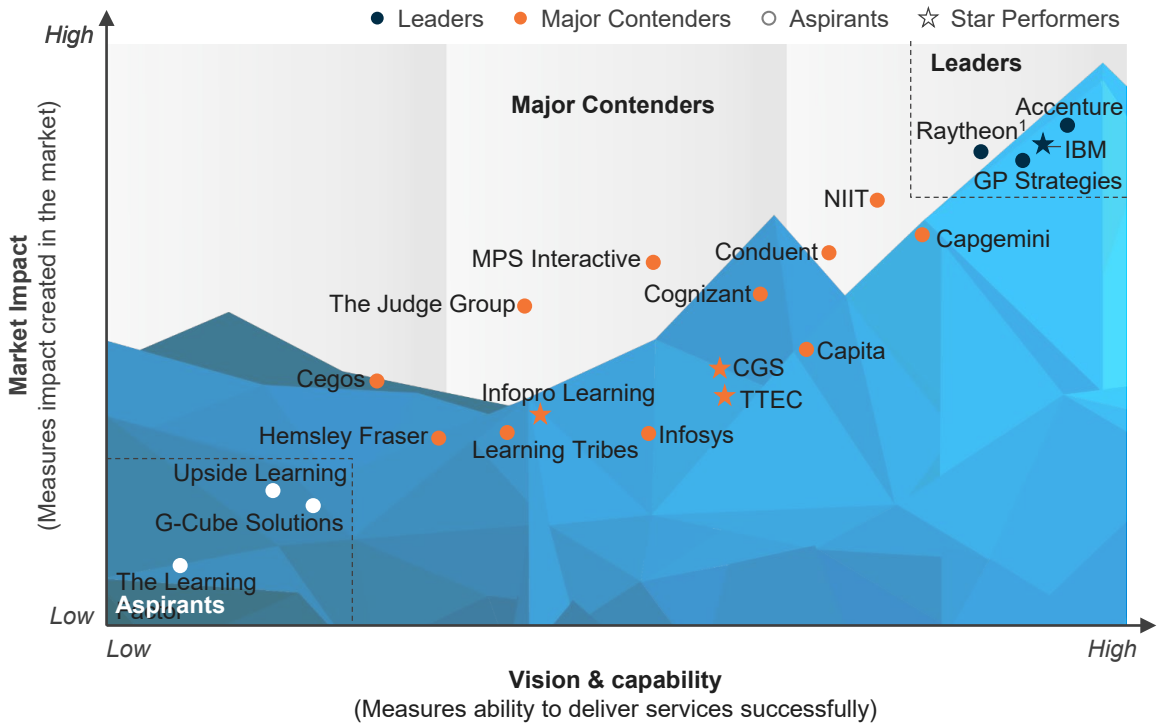
# This study offers three distinct chapters providing a deep dive into key aspects of learning services market; below are three charts to illustrate the depth of the report

## Learning Services PEAK Matrix® Assessment 2021




1 Raytheon here refers to Raytheon Professional Services

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

Source: Everest Group (2021)

## 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: ◔ Low ● High

| 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**

- 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
- It largely focuses on project-based engagements above a certain threshold

**Areas of improvement**

- Service provider 1 should increase offerings of value-added services such as consulting, technology maintenance, and contact center support
- 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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# Research calendar
## Human Resources Outsourcing

Published | Planned | Current release

| Flagship HRO reports | Release date |
|---|---|
| Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment with Services Provider Landscape 2021 | January 2021 |
| Multi-process Human Resources Outsourcing (MPHRO) Services – Service Provider Compendium 2021 | February 2021 |
| Multi-process Human Resources Outsourcing (MPHRO) – State of the Market Report 2021 | February 2021 |
| Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2021 | March 2021 |
| Rewards and Recognition (R&R) Solutions State of the Market Report 2021: The Era for Modernizing Employee Engagement | June 2021 |
| **Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2021** | **June 2021** |
| Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Service Provider Landscape 2021 | Q3 2021 |
| Learning Services Provider Profile Compendium 2021 | Q3 2021 |
| Digital Adoption Platform (DAP) Products Provider Profile Compendium 2021 | Q3 2021 |
| Multi-country Payroll (MCP) Solutions PEAK Matrix® Assessment 2021 | Q3 2021 |
| Multi-country Payroll (MCP) Solutions Annual Report 2021 | Q4 2021 |
| Multi-country Payroll (MCP) Solutions Service Provider Profile Compendium 2021 | Q4 2021 |

| Thematic HRO reports | Release date |
|---|---|
| Impact of Recession on the Business Process Services (BPS) Industry | March 2020 |
| Price Trends in HRO | September 2020 |
| Employment Outsourcing Models | March 2021 |
| Employee Experience Management (EXM) Platforms | June 2021 |

Note: For a list of all of our published Human Resources Outsourcing reports, please refer to our website page


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