Multi-Process Human Resources Outsourcing (MPHRO) Services – Provider Compendium 2023

November 2023: Complimentary Abstract / Table of Contents

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- Process Orchestration
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- Retirement Technologies
- Revenue Cycle Management
- Rewards and Recognition
- SAP Services
- Service Optimization Technologies
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- Supply Chain Management (SCM) Services
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Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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This report is based on multiple key sources of proprietary information

Providers assessed[1]

- Proprietary database of 1,500+ MPHRO contracts of 20+ HR service providers with MPHRO 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 provider, contract type, TCV & ACV, 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 20+ HRO service providers (updated annually)
- The database tracks the following for each 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

- 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 provider performance
  - Emerging priorities
  - Lessons learnt and best practice

accenture | ADP | alight | ASCENT HR

Capgemini | CGI | CONDUENT | IBM

Infosys | MHR | onesource VIRTUAL | sdworx

sopra hr SOFTWARE | tcs TATA CONSULTANCY SERVICES | wipro | WNS

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1   Assessments for CGI, MHR, and OneSource Virtual exclude 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 MPHRO buyers
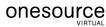
The source of all content is Everest Group unless otherwise specified
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

Background and scope of the research

Background of the research

In today's Volatile, Uncertain, Complex, and Ambiguous (VUCA) world, organizations are constantly seeking ways to optimize their operations and enhance their overall efficiency. Ongoing talent shortage, surging inflation, recessionary environment, and geopolitical instability, coupled with the volatility that the pandemic left the enterprises in, have increased enterprises' openness to leverage third-party provider support for their HR function. The drive for digital transformation, increasing number of first-time outsourcers, and increasing demand for next-generation technology and high-end HRO work from mature outsourcers is expected to continue driving market growth in 2023.

To meet these evolving demands and be an orchestrator for their clients, providers are continuously enhancing their capabilities by cultivating domain-specific expertise, taking a design thinking approach, developing transformation frameworks and next-generation innovative offerings leveraging automation and analytics, and forging strategic technological and consulting partnerships. The providers have also invested in proprietary Employee Experience (EX) solutions to engage the workforce, along with adding an experience layer to their products, and are striving to provide a seamless, integrated experience to their users. The purpose of this research is to understand and assess MPHRO providers based on their vision and capabilities and impact on the market, and to position them on the Everest Group PEAK Matrix®.

In this research, we present detailed profiles of 17 MPHRO service providers, featured on Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2023. Our assessment is based on Everest Group's annual RFI process for 2022, interactions with leading MPHRO providers, client reference checks, and an in-depth analysis of the MPHRO market.

This research includes the following components:

- PEAK Matrix assessment of MPHRO service providers
- Detailed profiles of 17 MPHRO service providers

Scope of this report

Geography
Global

Providers
This research covers the following 17 HRO providers with multi-process capability: Accenture, ADP, Alight Solutions, Ascent HR, Capgemini, CGI, Conduent, IBM, Infosys, MHR, OneSource Virtual, SD Worx, Sopra HR, TCS, Wipro, WNS, and Zalaris

Services
MPHRO services

Overview and summary of key messages

This report provides detailed profiles of providers analyzed in the Multi-process Human Resources Outsourcing (MPHRO) Service Provider Landscape with PEAK Matrix® Assessment, Aug 2023 study. This report provides comprehensive snapshots of the 17 major MPHRO service providers. Each profile highlights the service provider's services and delivery capability along with presence across geographies, industry, and buyer sizes sub-segments.

The key findings of this report are:

MPHRO provider landscape snapshot

- This section provides a snapshot of how the 17 MPHRO service providers have been positioned on the PEAK Matrix® assessment
- It also helps understand the research methodology and framework adopted to conduct the analysis

MPHRO vendor profiles

- MPHRO service capability and strategy – Includes company overview, HRO leadership, target market segment, MPHRO service suite, technology strategy, technologies supported, partnerships, key MPHRO-related developments, and spread of MPHRO FTEs globally
- MPHRO client portfolio – Includes total number of clients, major MPHRO clients, recent MPHRO wins, split of revenue by geography, and industry, and split of deals by buyer size
- MPHRO delivery locations – Includes city-level detail of key delivery locations across the world
- MPHRO sourcing considerations – Includes assessment of the performance of the provider as per the PEAK Matrix® along with key strengths and limitations

The study provides detailed view of MPHRO providers' offerings & capabilities as well as key strengths & areas of improvement | snapshots to illustrate the depth of report

Research calendar
Human Resources

Reports title	Release date
Earned Wage Access and Financial Wellness Solutions (EWA & FWS) in the US State of the Market Report 2023	November 2022
Learning Experience Platforms (LXP) State of the Market Report 2023	December 2022
Fluid Payroll: Multi-country Payroll (MCP) Solutions State of the Market Report 2023	December 2022
Nine Employee Experience Solutions Enterprises Need – Is Surviving the Recession Enough?	March 2023
People Analytics Platforms	March 2023
Unlocking the Full Potential of Users Through Userization and DAPs	March 2023
Rewards and Recognition (R&R) Solutions PEAK Matrix® Assessment 2023	April 2023
Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2023	August 2023
Employee Experience Management (EXM) Platforms PEAK Matrix® Assessment 2023	August 2023
Digital Adoption Platforms (DAP) PEAK Matrix® Assessment 2023	September 2023
Employer of Record (EOR) Solutions PEAK Matrix® Assessment 2023	September 2023
Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment 2023	October 2023
Digital Adoption Platforms (DAP) – Provider Compendium 2023 – Update	October 2023
Multi-Process Human Resources Outsourcing (MPHRO) Services – Provider Compendium 2023	**November 2023**
Multi-process Human Resources Outsourcing (MPHRO) Services – State of the Market 2023	Q4 2023

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