Marketing Services – Provider Compendium 2024

June 2024: Complimentary Abstract / Table of Contents

Provider Compendium
Marketing Services

Everest Group®

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- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG IT Services
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

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Background of the research

The marketing industry is constantly evolving, largely driven by shifting consumer preferences and the emergence of disruptive technologies. As consumers become more discerning and technology savvy, marketers are compelled to focus on delivering a comprehensive and impactful Customer Experience (CX) by developing a 360° view of their customers, creating immersive and personalized experiences across customer journey touchpoints, and driving relevant brand campaigns.

As a result, the marketing provider ecosystem is undergoing significant transformation, driven by investments in disruptive technologies, such as generative Artificial Intelligence (AI), Augmented Reality / Virtual Reality / Extended Reality (AR/VR/XR), Customer Data Platforms (CDP), and Web3. Providers are focusing on unifying highly fragmented customer data to understand consumer sentiment and drive personalization, loyalty, and interactive experiences. Additionally, they continue to expand the marketing services delivery landscape by identifying and investing in low-cost, talent-rich regions to enable localized and cost-efficient marketing operations.

In this research, we present an assessment and detailed profiles of 34 marketing service providers. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, and domain investments. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading marketing providers, client reference checks, and an ongoing analysis of the marketing services market.

This report includes the profiles of the following 34 marketing service providers:

Accenture Song, Capgemini, Cognizant, Comviva, Concentrix, DDB, Deloite Digital, Dentsu Creative, Digitas, eClerx, Exela Technologies, EXL, FCB, Firstsource, Genpact (Rightpoint), Grazitti Interactive, HCLTech, HGS, HH Global, IBM, Infosys, Initiative, Media.Monks, Merkle, OMD, PwC, Randstad Digital (Cella), RRD Go Creative, Stefanini, TCS, Tech Mahindra, Telus Willowtree, VML, Wipro

Scope of this report

Geography: Global

Providers: 34 marketing service providers

Services: Marketing services

Overview and abbreviated summary of key messages

The report examines the detailed profiles of 35 global marketing service providers. Each profile highlights the provider's marketing services capabilities across the marketing value chain along with presence across geographies, industries, buyer-sizes, and sub-segments.

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

Marketing services provider characteristics

- Leading providers have developed end-to-end capabilities across the marketing services value chain, including creative production, media services, content management, CX strategy and design, loyalty services, commerce, and data and analytics

- Providers are actively focusing on organic and inorganic investments to bridge the portfolio gaps and become a one-stop-shop for all marketing services requirements

- They are building capabilities to serve different geographies and industry segments while specializing in specific regions and verticals

Key insights on marketing service providers

- The report provides an overview of each provider and any recent developments/investments made by them

- It provides insights on provider client portfolio, their key service locations, and their proprietary tools/solutions

The Marketing Services Provider Compendium 2024 has 34 provider profiles

Provider 1 profile (page 1 of 4)
Overview

Vision for mainframe services
Provider 1 provides transformational solutions and services spanning the customer life
across healthcare, banking and financial services, communications, media and technol
other industries. It helps organizations reinvent operations and reimagine business mod
enabling them to deliver moments that matter and build competitive advantage. Its capa
offerings in marketing services include content marketing, campaign management, and
support operations.

Overall mainframe services revenue (YTD 2023)

<US$200 million	US$200-500 million	US$500 million-US$1 billion	>U

Provider 1 profile (page 2 of 4)
Developments/Investments

Recent developments

Area	Type of development	Details
Partner 1	Partnership	Partnered with XYZ for campaign, cha
Partner 2	Partnership	Partnered with XYZ, a digitalized mar
Partner 3	Partnership	Partnered with a global leader in Conv

Provider 1 profile (page 3 of 4)
Case studies

CASE STUDY 1
Helped a Buy Now, Pay Later (BNPL) company reduce collection costs
Business challenge
The client needed to reduce collection costs while quickly resolving its debt to maintain c
loyalty and business growth.
Solution and impact
Provider implemented an omnichannel, data-driven collections approach, utilizing real-tim
and personalized engagement to prioritize and resolve debt efficiently. The solution redu
cost-to-collect by 20%, achieving significant liquidations and generating XYZ million in co
within four months.

Key marketing services engagements

Client name	Process se
Client 1	Not available
Client 2	Not available

Provider 1 profile (page 4 of 4)
Proprietary technology solutions

[R E P R E S E N T A T I V E   L I S T]   [I L L U S T R A T I V E]   [N O T   E X H A U S T I V E]

Proprietary solutions

Technology name	Process served	Year launched	Details
Solution 1	Customer	Not disclosed	This is a solution that provides omnichannel customer interactions, including smart AI bots that auto-handle inbound interactions. It is backed by IA and cloud-based platforms.
Solution 2	Customer	Not disclosed	This cloud-enabled and modular platform powered by AI and ML technologies, helps digitize document-centered business processes, harness the data, and drive customer insights.
Solution 3	Customer and content	Not disclosed	This is a proprietary tool that comprises a platform and a digital self-service portal. The platform combines multiple digital channels such as voice, e-mail, web chat, text, self-service, conversational AI bots, and case management with an intelligent unified desktop for agents. The platform integrates with enterprise legacy applications, different front-end and back-end systems, telephony, e-mail, and SMS gateways, and other third-party services through the use of APIs.
Solution 4	Customer	Not disclosed	This tool is used to derive actionable insights from customer interactions, with in-depth and near real-time analysis of customer sentiment, emotions, and behavior – across multiple communication and feedback channels. The tool uses speech and text analytics to capture interactions (calls, web chat, e-mail, and self-serve) and feedback across different channels (social media, CSAT surveys, and reports) to identify avenues for improving associate productivity and NPS.
Solution 5	Customer and content	Not disclosed	This is an AI-powered platform that enables personalized customer interactions and intelligent decisions with real-time actionable insights to smoothen marketing and operations and augment CX.

Research calendar

Marketing Services

Reports title	Release date
The Ying and Yang of Today's Marketing: Marketing Services State of the Market Report 2023	October 2023
Marketing's Generative AI-ffair: Infusing Generative AI's Magic into Enterprise Marketing Functions	December 2023
Global Marketing Operations: the Central Piece of Your Marketing Transformation	December 2023
Marketing Services PEAK Matrix® Assessment 2024	March 2024
Innovation Watch: Generative AI Applications in Marketing	May 2024
Pledging Allegiance to the Modern Consumer	May 2024
Generative AI Adoption in Marketing Services	June 2024
Marketing Services – Provider Compendium 2024	June 2024
The CIO and CMO Conundrum	Q3 2024
CMO Survey: Enterprise Priorities that Will Craft the Future of Marketing	Q3 2024
Marketing Services State of the Market Report 2024	Q3 2024
The Goliaths of Advertising	Q3 2024
Loyalty Services PEAK Matrix® Assessment 2024	Q3 2024
Loyalty Services – Provider Compendium 2024	Q4 2024
Sales Services PEAK Matrix® Assessment 2024	Q4 2024
In Brands We Trust: the Rise of ESG in Branding	Q4 2024

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