



Marketing Services – Provider Compendium 2024

June 2024: Complimentary Abstract / Table of Contents

Provider Compendium
Marketing Services



Our research offerings

This report is included in the following research program(s):

Marketing services

- ▶ Advanced SciTech
- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Cyber Threat Detection and Response
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Crime and Compliance Operations
- ▶ Financial Services Technology (FinTech)
- ▶ Forces & Foresight
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ 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)

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

Learn more about
our custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk,
technologies

Locations: costs, skills, sustainability,
portfolios

Contents

5	Introduction and overview	52	Exela Technologies
6	Research methodology	57	EXL
7	Key information on the report	61	FCB
8	Background of the research	63	Firstsource
9	Marketing services value chain	67	Genpact (Rightpoint)
10	Provider profiles	70	Grazitti Interactive
11	Accenture Song	75	HCLTech
16	Capgemini	79	HGS
20	Cognizant	84	HH Global
26	Comviva	88	IBM
30	Concentrix	92	Infosys
34	DDB	97	Initiative
38	Deloitte Digital	100	Media.Monks
41	Dentsu Creative	104	Merkle
45	Digitas	109	OMD
48	eClerx	113	PwC Digital
		117	Randstad Digital (Cella)

For more information on this and other research published by Everest Group, please contact us:

David Rickard, Partner

Nishant Jeyanth, Practice Director

Darshita Lohiya, Senior Analyst

Mustafa Pitowala, Senior Analyst

Rashi Garg, Senior Research Specialist

Copyright © 2024 Everest Global, Inc.

We encourage you to share these materials internally in accordance with your license. Sharing these materials outside your organization in any form – electronic, written, or verbal – is prohibited unless you obtain the express, prior, and written consent of Everest Global, Inc. It is your organization's responsibility to maintain the confidentiality of these materials in accordance with your license of them.

Contents

	Provider profiles (continued)
121	RRD Go Creative
126	Stefanini
130	TCS
135	Tech Mahindra
139	Telus WillowTree
143	VML
147	Wipro
151	Appendix
152	Glossary
154	Research calendar

Copyright © 2024 Everest Global, Inc.

We encourage you to share these materials internally in accordance with your license. Sharing these materials outside your organization in any form – electronic, written, or verbal – is prohibited unless you obtain the express, prior, and written consent of Everest Global, Inc. It is your organization's responsibility to maintain the confidentiality of these materials in accordance with your license of them.

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, Deloitte 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

Marketing Services – Provider Compendium 2024 | 1

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 technology industries. It helps organizations reinvent operations and reimagine business models enabling them to deliver moments that matter and build competitive advantage. Its capabilities 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	>US\$1 billion
------------------	---------------------	-------------------------------	----------------

Everest Group® Proprietary & Confidential. © 2024, Everest Global, Inc. | EGR-2024-55-R-6511

Marketing Services – Provider Compendium 2024 | 2

Provider 1 profile (page 2 of 4)

Developments/Investments

Recent developments

Area	Type of development	Details
Partner 1	Partnership	Partnered with XYZ for campaign, channel and content marketing
Partner 2	Partnership	Partnered with XYZ, a digitalized marketing agency
Partner 3	Partnership	Partnered with a global leader in Content Marketing

Everest Group® Proprietary & Confidential. © 2024, Everest Global, Inc. | EGR-2024-55-R-6511

Marketing Services – Provider Compendium 2024 | 3

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 customer loyalty and business growth.

Solution and impact
 Provider implemented an omnichannel, data-driven collections approach, utilizing real-time and personalized engagement to prioritize and resolve debt efficiently. The solution reduced cost-to-collect by 20%, achieving significant liquidations and generating XYZ million in cash within four months.

Key marketing services engagements

Client name	Process served
Client 1	Not available
Client 2	Not available

Everest Group® Proprietary & Confidential. © 2024, Everest Global, Inc. | EGR-2024-55-R-6511

Marketing Services – Provider Compendium 2024 | 4

Provider 1 profile (page 4 of 4)

Proprietary technology solutions

[REPRESENTATIVE LIST] [ILLUSTRATIVE] [NOT EXHAUSTIVE]

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.

Everest Group® Proprietary & Confidential. © 2024, Everest Global, Inc. | EGR-2024-55-R-6511

Research calendar

Marketing Services

	Published	Current release	Planned
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

Note: [Click](#) to see a list of all of our published Marketing Services reports

Stay connected

Dallas (Headquarters)

info@everestgrp.com

+1-214-451-3000

Bangalore

india@everestgrp.com

+91-80-61463500

Delhi

india@everestgrp.com

+91-124-496-1000

London

unitedkingdom@everestgrp.com

+44-207-129-1318

Toronto

canada@everestgrp.com

+1-214-451-3000

Website

everestgrp.com

Blog

everestgrp.com/blog

Follow us on



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Notice and disclaimers

Important information. Please review this notice carefully and in its entirety. Through your access, you agree to Everest Group's terms of use.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.