



HFS Horizons Report

# Digital Marketing and Sales Service Providers, 2023

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Excerpt for Accenture



As enterprises continue to redefine their strategies, refine their value proposition for target customers, and determine how to best engage customers to deliver value, there's a deep need for more customer-centricity and differentiated CX to profitably deliver growth.

Sales and marketing professionals are in dire need of support, especially to navigate the growing martech landscape, augment and supplement talent pools, and scale growing areas like ecommerce. They rely on their service providers to support and co-innovate for growth and data-driven strategies in an increasingly uncertain and disruptive competitive landscape.

Melissa O'Brien, Executive Research Leader

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# 1

## Introduction and key findings

# Introduction

- Initial attempts to improve customer value chain processes—from marketing to customer service—have allowed business operations to run somewhat faster, cheaper, and even a bit better, but is the digital front office truly connected?
- The value proposition for digital marketing and sales services has matured well beyond cost reduction and productivity gains. HFS describes the value across three horizons:
  - **Horizon 1:** Driving business outcomes, cost reduction, and productivity improvements
  - **Horizon 2:** Horizon 1 + improving customer experience (CX) and employee experience (EX)
  - **Horizon 3:** Horizon 2 + unearthing new sources of value to drive growth and manage risks
- This HFS Horizons report for digital marketing and sales services examines the capabilities of 9 service providers and paints the supplier landscape across the three HFS Horizons. Inclusion was based upon digital marketing and sales revenue of at least a \$250M or 10% contribution to overall revenues, and an existing portfolio of services in line with our digital marketing and sales value chain.
- We assessed the service providers across a defined series of criteria
  - The Why: Value proposition
  - The What: Execution and innovation capabilities
  - The How: Go-to-market strategy
  - The So What: Market and client impact
- This report also includes detailed profiles of each service provider, outlining their placement, provider facts, and detailed strengths and opportunities.

# Executive summary

1

Experience is the key differentiator for today's enterprises' competitive distinction. Customers and employees expect to be treated as individuals with unique needs and preferences. Service providers are building frameworks where they help their clients with detailed analytics and reporting to track their customers' engagement, enabling them to make the right decisions and optimize their marketing strategies.

2

The impact of changing consumer expectations and hyped-up channels like the metaverse means that digital marketing and sales professionals' need to support is significantly increasing because it revolutionizes how businesses approach these areas. These changing dynamics create fresh opportunities for businesses to provide customers with immersive and personalized experiences, acquire valuable data, and establish new revenue streams. As this technology continues to develop, companies that adopt it will gain a competitive edge in the digital market, but they rely on partners to scale, access talent, and innovate.

3

Service providers assert that an average of 81% of their digital marketing and sales services engagements successfully achieve digital transformation in line with the HFS OneOffice model. As business leaders strive to manage their customers' increasing demands and complexity, it is crucial to align the entire organizational mindset with digitalization, including developing relationships with internal (IT, in particular) and ecosystem partners (providers and technology providers).

4

Greater EX creates greater CX; for customer-centric services, it is important to provide customers with personalized experiences. Companies are empowering their employees with the right technology and data-driven insights to understand and anticipate customer needs and preferences. Marketing and sales strategies must address both employee and customer journeys and experiences to succeed.

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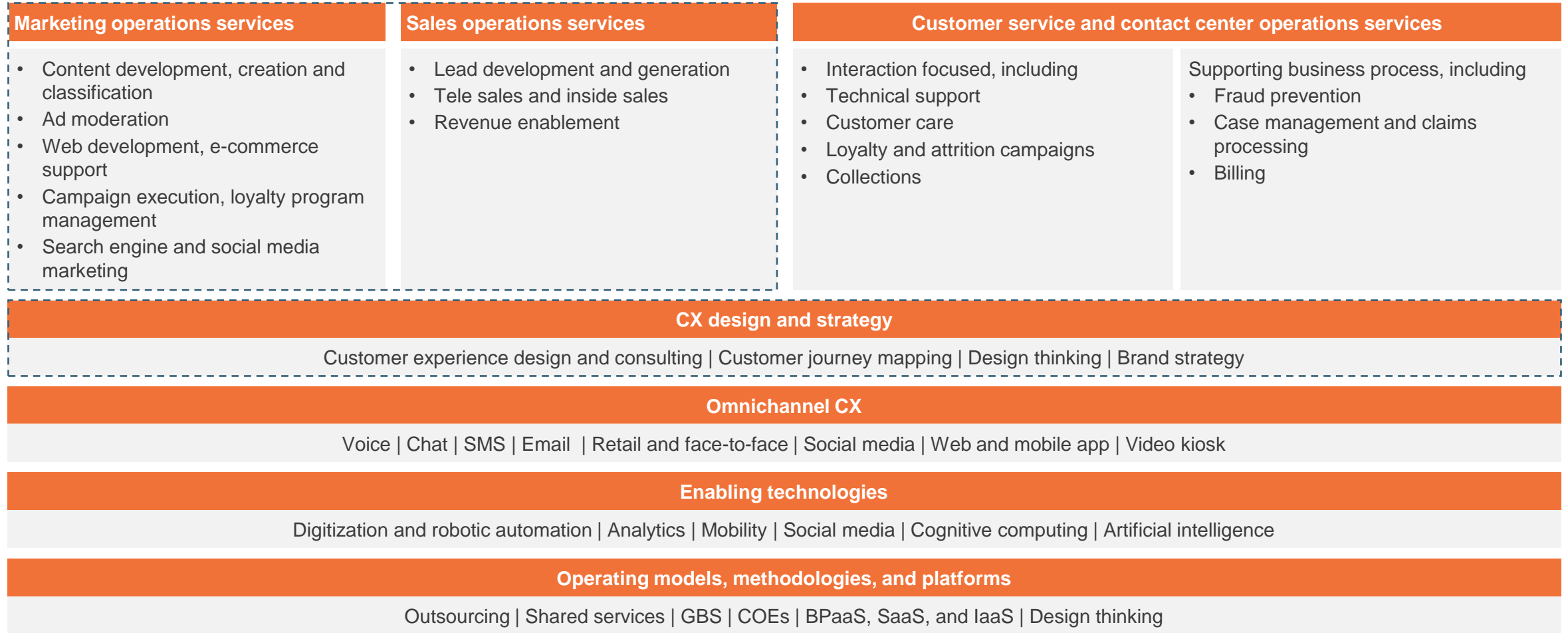
Input and output pricing models continue to be the most chosen pricing strategies. While cost is an increasingly important consideration for operations, a value proposition solely focused on cost may not be enough to attract and retain customers. We see that enterprises that co-innovate with providers achieve more business outcomes for greater value.

6

Data strategy and governance are keys to finding hidden value. Enterprise leaders seek ways to maximize the value of their data and use it as an asset to find new sources of value and create insights for decision making. As a result, there is a growing demand for the data service providers produce for use as data-as-an-asset to find new sources of value and create insights for decision making.

# Our CX value chain aligns to CX design and strategy, bolstered by operations services

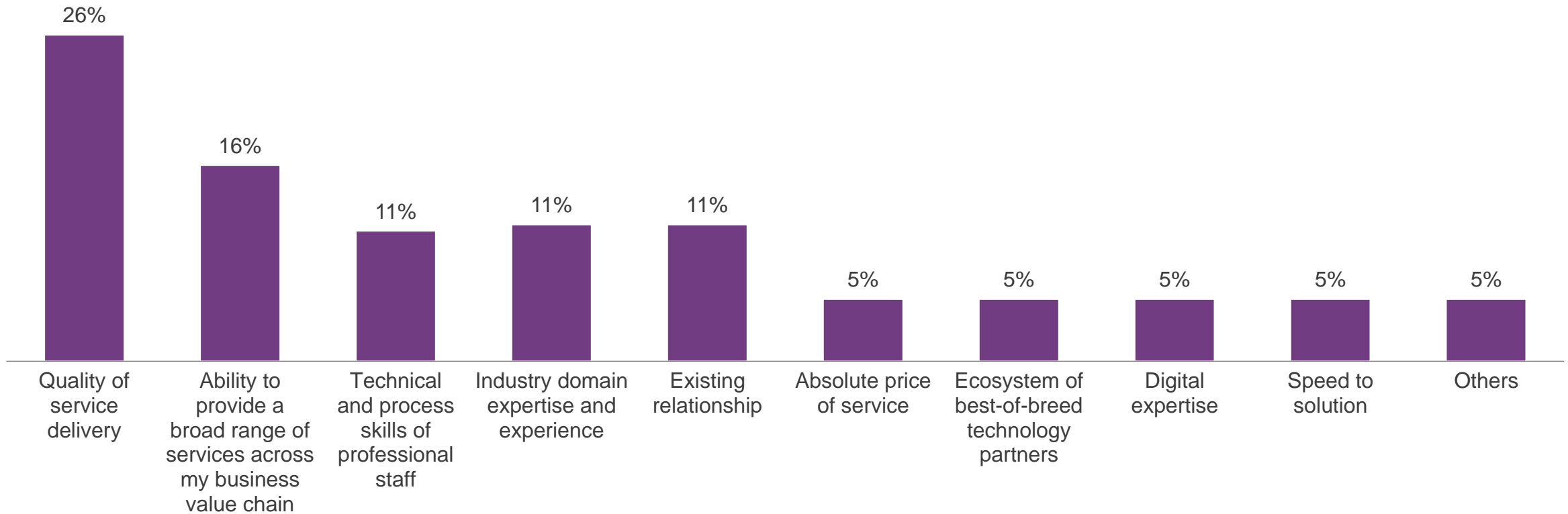
Digital Marketing, Sales and CX Design and Strategy are a key foundational market we cover at HFS



**HFS value chain definition:** Value chain refers to the business units that carry out value-creating activities to design, produce, market, deliver, and support a company's product or service. In this usage, we refer to the range of primary processes and support services that providers offer to their clients.

# Enterprises seek quality and a broad range of digital marketing and sales service offerings from service providers

Which of the following options was the single most important when selecting this provider?  
Percentage of responses

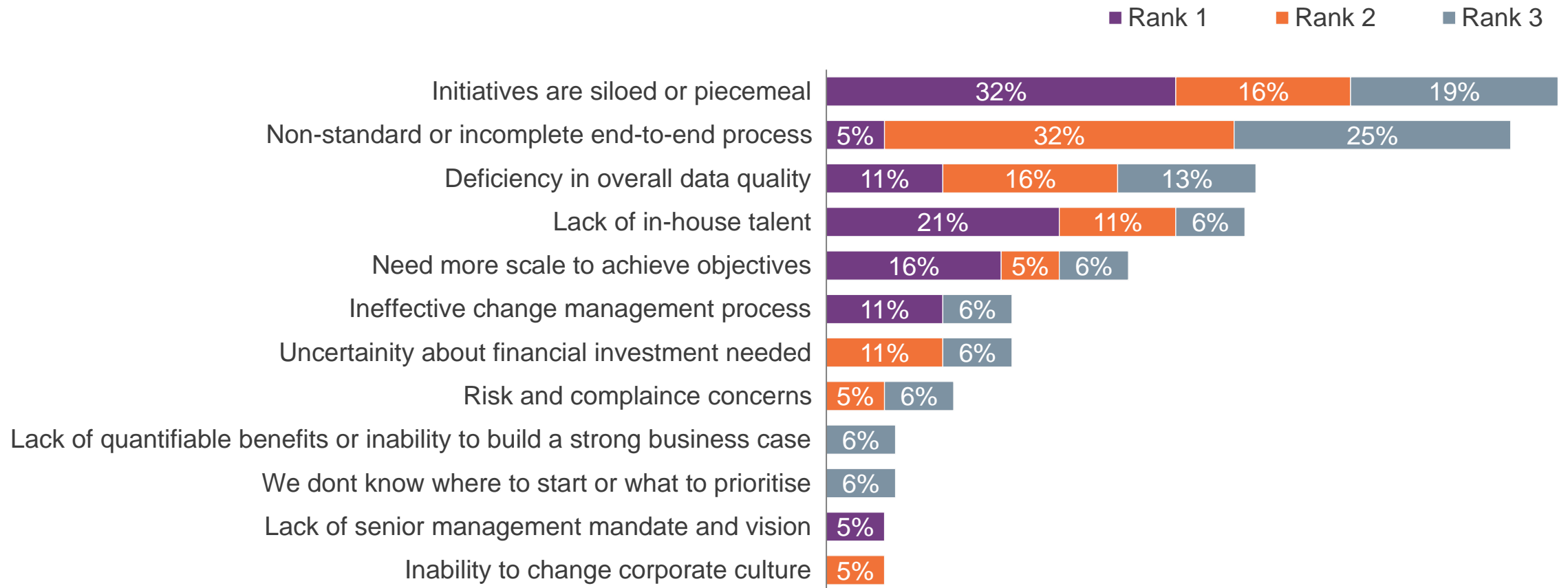


Sample: 19 enterprise leaders, Horizons reference survey  
Source: HFS Research, 2023



# Clearer roadmaps, standardized processes, and building in-house talent will help enterprises plan and execute their successful CX transformation

What are the top three inhibitors holding you back from achieving your CX transformation objectives?

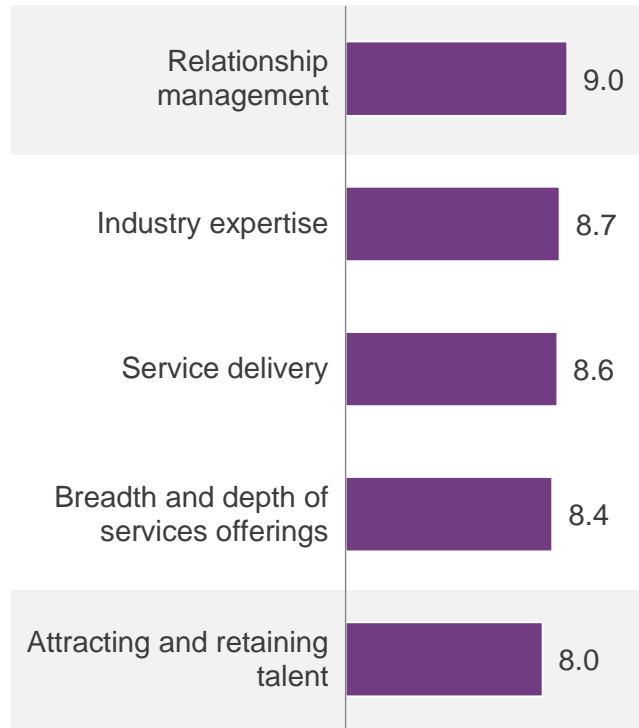


Sample: 19 enterprise leaders, Horizons reference survey  
Source: HFS Research, 2023

# Enterprises expect service providers to be more pro active, provide innovative ideas, drive digital fluency, and help handle change management

Based on your experience, please rate the provider across the following parameters, where 1 is poor and 10 is excellent.

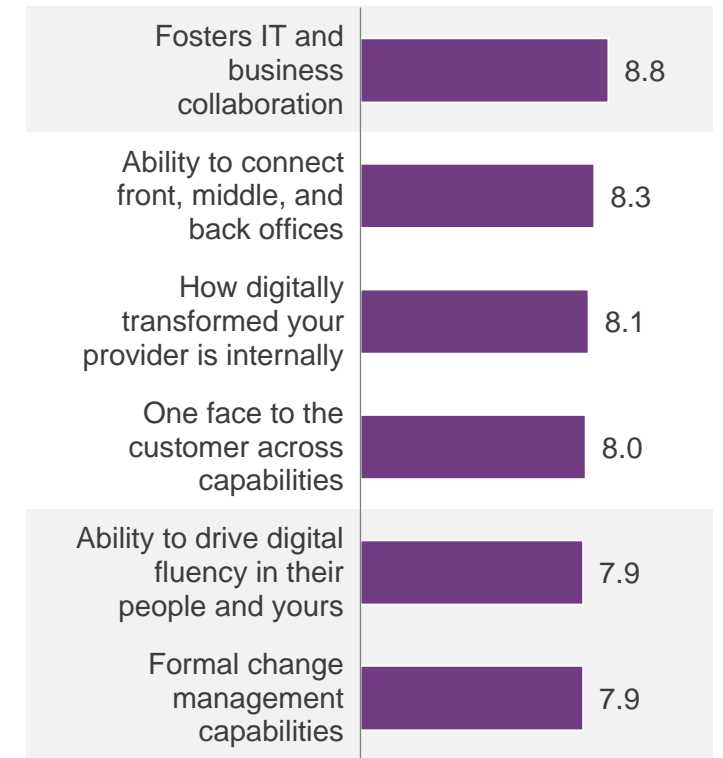
Average execution score  
8.5



Average innovation score  
7.7



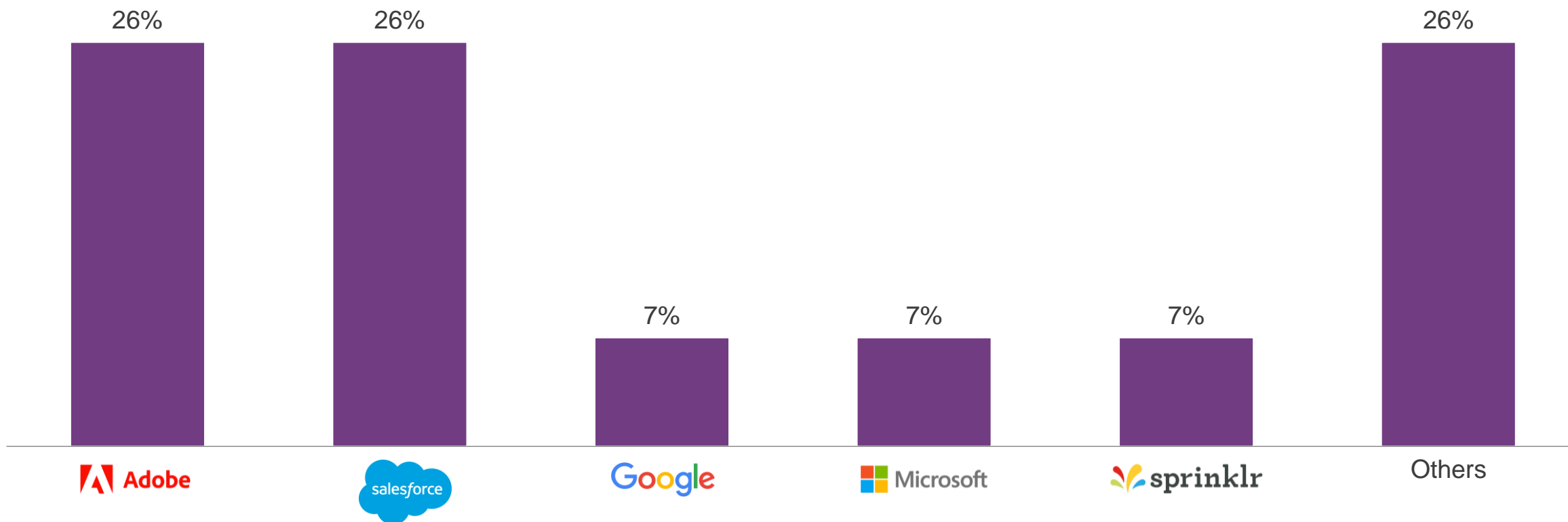
Average digital transformation score  
8.7



Sample: 19 enterprise leaders, Horizons reference survey  
Source: HFS Research, 2023

# Service providers partner with market leaders to bring customized and personalized CX experiences to their clients

Of your key digital marketing and sales services partners, please specify the three most critical third-party partners.  
Percentage of responses

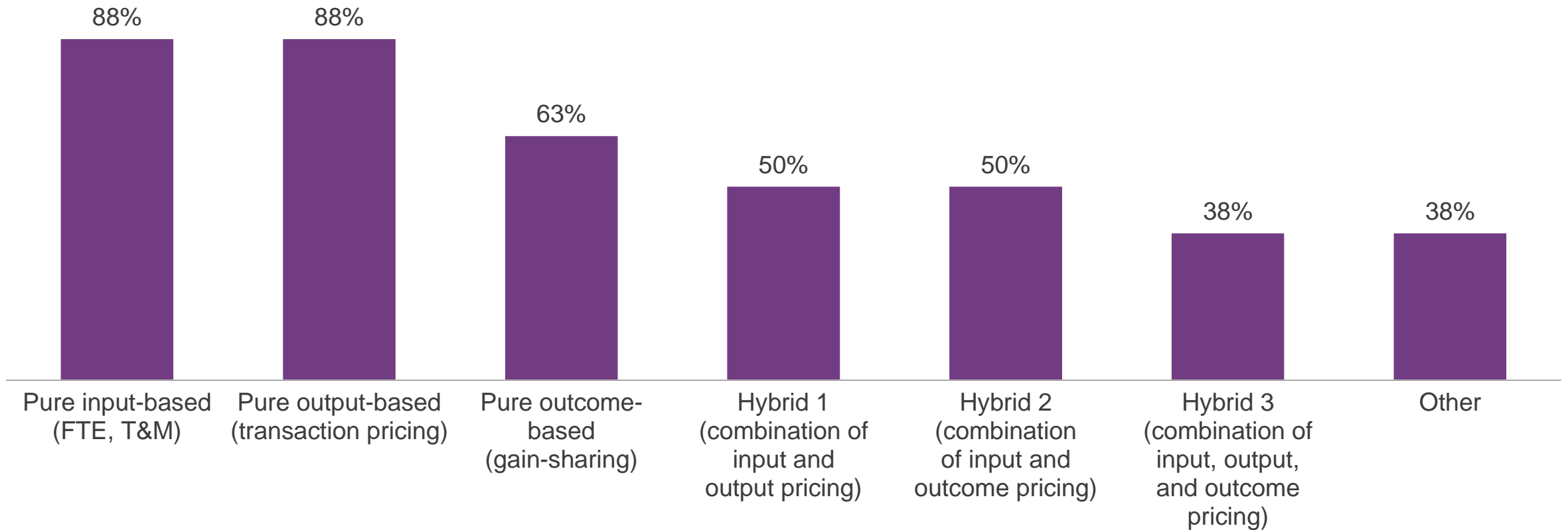


Sample: 9 service providers, 2023 Horizon RFIs  
Source: HFS Research, 2023

# Input-based and output-based pricing remain the favored pricing models, even after the pandemic

What pricing models do you use for digital marketing and sales services contracts?

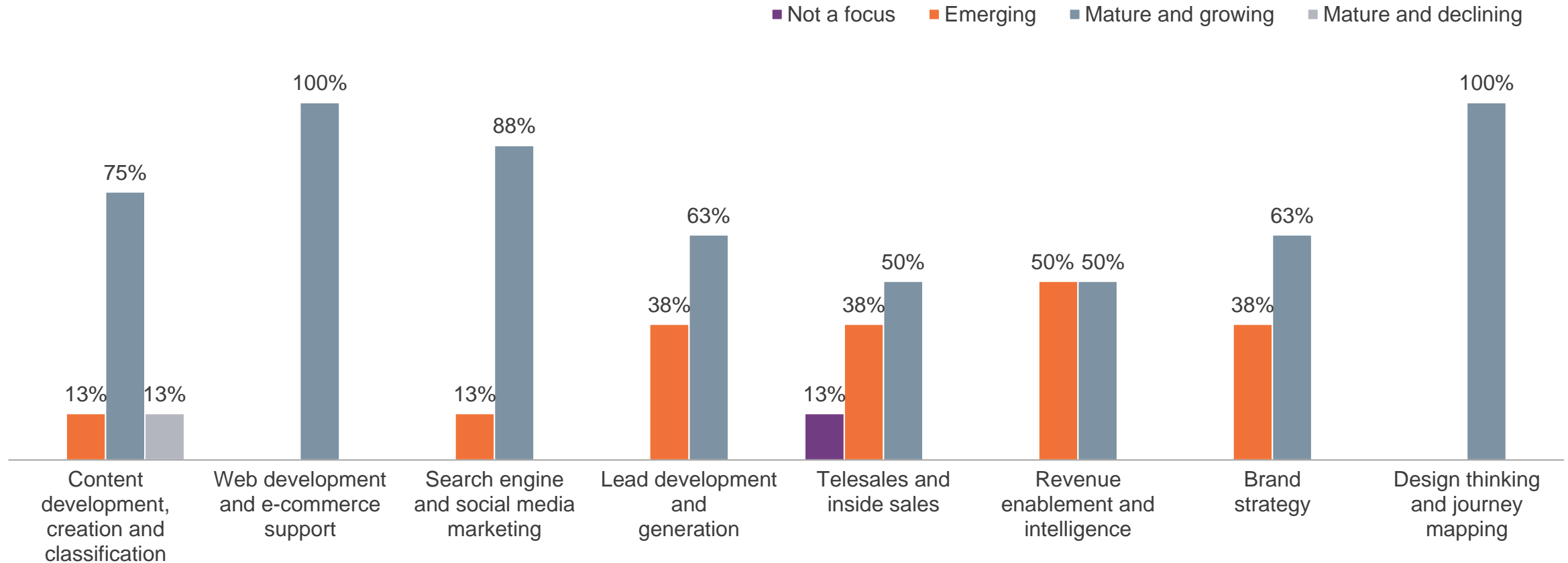
Percentage of responses



Sample: 9 service providers, 2023 Horizon RFIs  
Source: HFS Research, 2023

# E-commerce and design thinking are the most mature and growing aspects of the value chain

Please rate the maturity of your digital front office services, where 1 is not a focus, 2 is emerging, 3 is mature and growing, and 4 is mature and declining.



Sample: 9 service providers, 2023 Horizon RFIs  
Source: HFS Research, 2023

# 2

## Research methodology

# Service providers covered in this report



# Sources of data

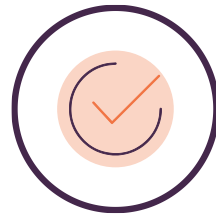
This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the digital marketing and sales service capabilities of the providers covered in our study. Sources are as follows:



## RFIs and briefings

Each participating vendor completed a detailed **RFI**.

HFS conducted **briefings** with executives from each vendor



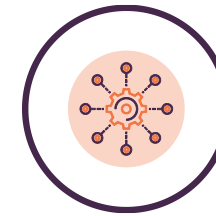
## Reference checks

We conducted reference checks with 23 active clients of the study participants via phone-based interviews and/or detailed surveys.



## HFS vendor ratings

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh from the field HFS Pulse Study data featuring **600+ inputs** across Global 2000 enterprises.



## Other data sources

**Public information** such as press releases and web sites.

**Ongoing interactions, briefings, virtual events, etc.**, with in-scope vendors and their clients and partners.



# Horizons assessment methodology for digital marketing and sales services

The HFS Horizons **Digital Marketing and Sales Service Providers, 2023** report evaluates the capabilities of service providers across a range of dimensions to understand the **Why, What, How, and So What** of their service offerings. The following illustrates how we assessed capabilities:

← Distinguishing supplier characteristics →

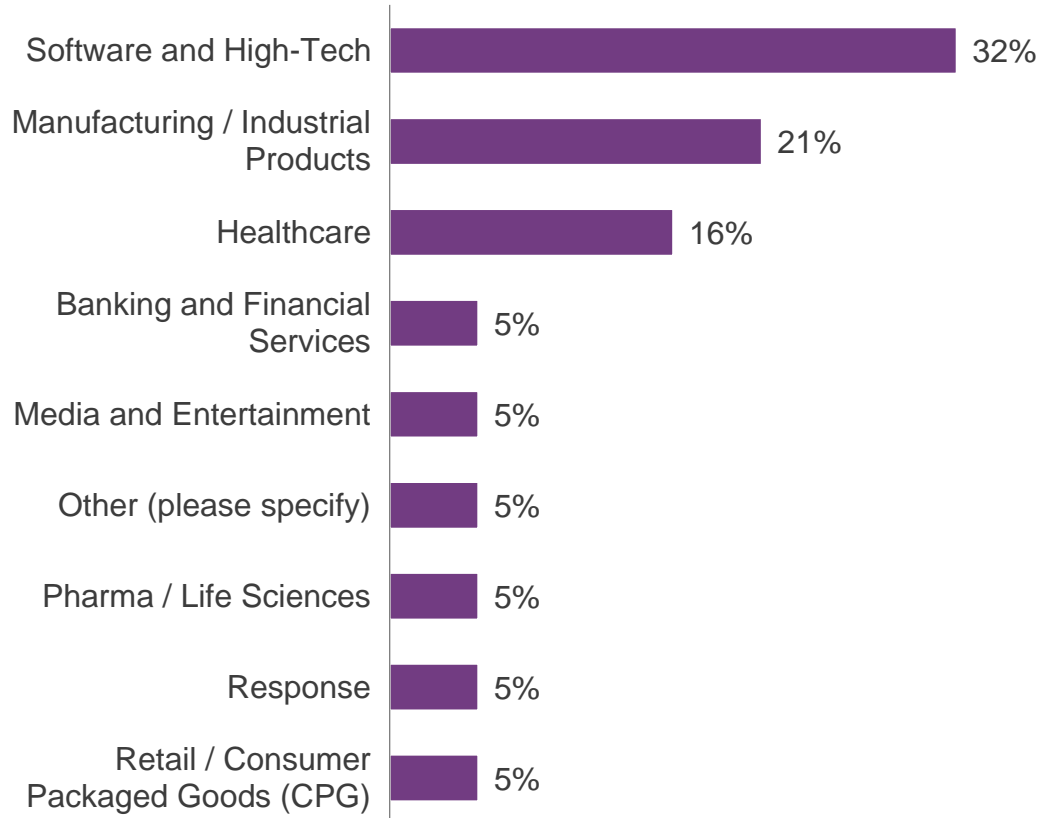
Assessment dimension	Assessment sub-dimension	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
<b>Value proposition: The Why?</b> (25%)	Market vision and strategy	<ul style="list-style-type: none"> <li>Ability to drive <b>functional optimization outcomes</b> through cost reduction, speed, and efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Horizon 1 +</li> <li>Enablement of the <b>OneOffice</b> model of digital marketing and sales services</li> <li>Driving unmatched <b>stakeholder experience</b></li> </ul>	<ul style="list-style-type: none"> <li>Horizon 2 +</li> <li>Ability to drive <b>OneEcosystem synergy</b> via collaboration across multiple organizations</li> <li>Driving completely <b>new sources of value</b></li> </ul>
	Competitive differentiators			
	Technology capabilities			
	Offering maturity			
<b>Execution and innovation capabilities: The What?</b> (25%)	Breadth and depth of marketing and sales services	<ul style="list-style-type: none"> <li>Strong <b>implementation</b> capabilities</li> <li><b>Technology—specific talent</b> focused on key process domains</li> <li>Focused <b>partnerships and strong PX</b></li> <li>Limited industry-specific IP</li> </ul>	<ul style="list-style-type: none"> <li>Horizon 1 +</li> <li><b>Consulting and advisory capabilities</b> in addition to implementation services</li> <li>Investments in <b>internal employee training</b> and development</li> <li>Ability to drive <b>business transformation</b></li> <li>Strong <b>services-specific IP</b></li> <li><b>Broader and deeper partnerships</b> with technology vendors</li> </ul>	<ul style="list-style-type: none"> <li>Horizon 2 +</li> <li>Comprehensive coverage across the digital marketing and sales value chain and beyond</li> <li>Ability to drive IT + business transformation</li> <li><b>Differentiated IP</b> and market-leading proprietary solutions</li> <li>Strong employee investments complemented with access to <b>alternative talent pools</b></li> <li><b>Well-rounded ecosystem</b> of technology vendors, start-ups, and technology vendors</li> </ul>
	Strength of talent pool			
	Services specific proprietary tools and solution accelerators			
	Services specific patents and intellectual property			
	Strength of ecosystem			
<b>Go-to-market strategy: The How?</b> (25%)	Relevant acquisitions and other investments	<ul style="list-style-type: none"> <li><b>Modest scale and size</b> of digital marketing and sales investments</li> <li><b>Targeted industry and geography</b> go-to-market</li> </ul>	<ul style="list-style-type: none"> <li>Horizon 1 +</li> <li>Digital marketing and sales <b>organic investments</b></li> <li>Ability to offer <b>outcome-driven</b> commercial models</li> <li>Ongoing investments in <b>market education</b></li> </ul>	<ul style="list-style-type: none"> <li>Horizon 2 +</li> <li>Front office-focused <b>organic and inorganic investments</b></li> <li>Formalized approach to <b>co-creation</b> with clients and partners</li> <li>Ability to target broad industry and geographical coverage with <b>specific solutions</b></li> <li><b>Purpose-driven</b> client and partner relationships</li> </ul>
	Co-innovation and collaboration approaches			
	Industry and geographic client portfolio			
	Creative commercial models			
	Thought leadership and market education			
<b>Market impact: The So What?</b> (25%)	Size and growth marketing and sales practice	<ul style="list-style-type: none"> <li><b>Modest growth on a low base</b></li> <li>Strong client feedback on <b>driving functional optimization</b></li> <li>Perceived as a credible <b>vendor</b></li> </ul>	<ul style="list-style-type: none"> <li>Strong growth on a <b>sizeable book of business</b></li> <li>Strong client feedback on <b>driving CX and EX</b></li> <li>Ability to target <b>broad industry and geographical coverage</b></li> <li>Perceived as a <b>strategic partner</b></li> </ul>	<ul style="list-style-type: none"> <li><b>Market leading</b> size and growth</li> <li>Strong client feedback on <b>driving new sources of value</b></li> <li>Perceived as a <b>market thought leader</b></li> </ul>
	Proven outcomes showcasing nature of value delivered			
	Voice of the customer			

# 3

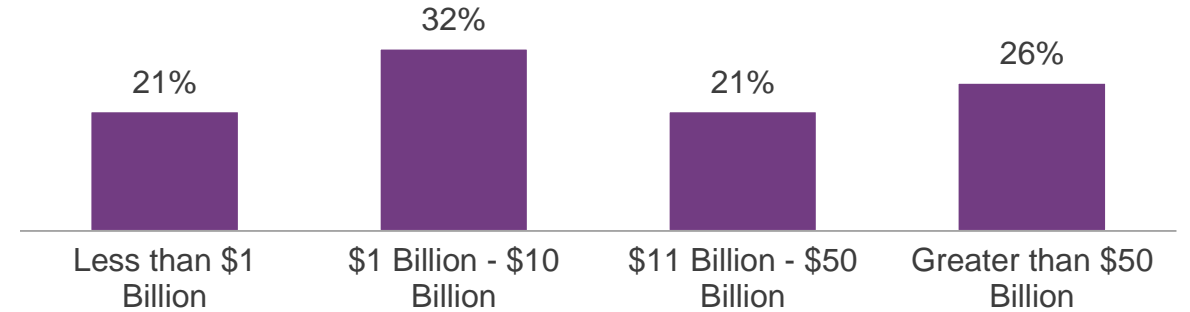
## Client reference demographics and market dynamics

# Client reference demographics

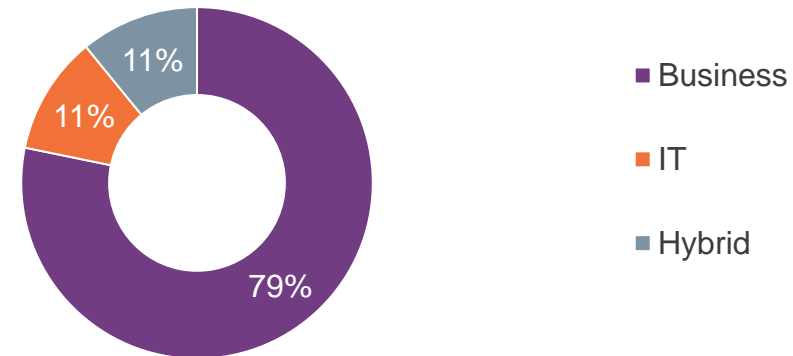
## Client references by industry sector



## Client references by revenue size



## Organizational alignment of client references



Others\*: Professional services  
Sample: 19 client references  
Source: HFS Research, 2023

# Emerging themes and dynamics in digital marketing and sales services



Re-invention of the way sales works in a hybrid reality: remote selling requires new technology and techniques



Increased demand for design and consulting capabilities to outline the strategy: design thinking is mature and growing



Data-driven marketing is creating demand for new and upskilled talent, including data science and analytics



The technology partner ecosystem continues to grow and expand, from traditional CRM and Martech vendors to niche industry and AI providers



Brand responsibility across DEI and sustainability is top of mind for marketers, and they are leveraging partners to help improve customer trust

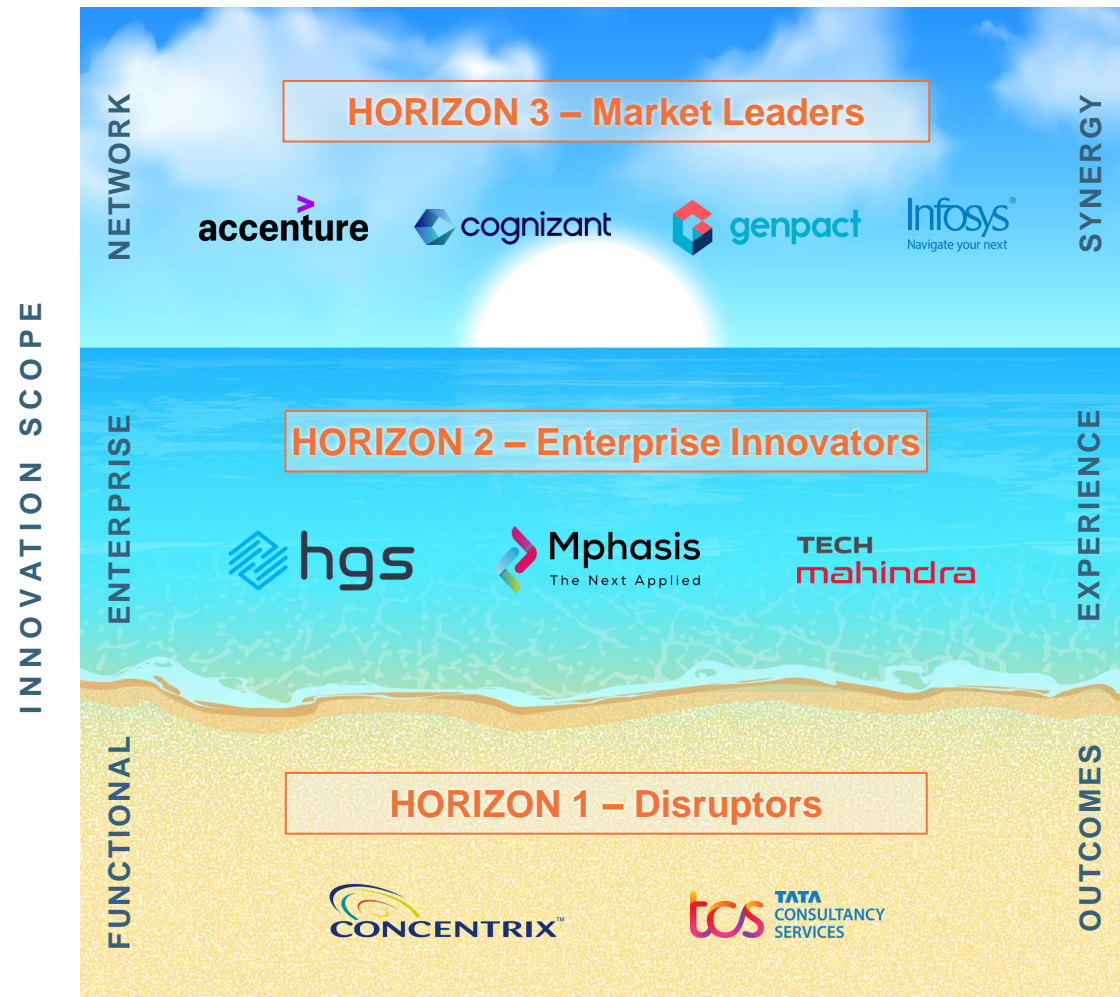
# 4

## Horizons landscape: Digital marketing and sales services, 2023

# HFS Horizons Digital Marketing and Sales Services - Summary of providers assessed in this report

Providers (alphabetical order)	HFS point of view
<b>Accenture</b>	Technology and design excellence provides a comprehensive approach to 'growth services'
<b>Cognizant</b>	Continued investment in CX bolsters robust operations capabilities
<b>Concentrix</b>	A CX leader with growing portfolio of capabilities
<b>Genpact</b>	A data-driven operators' lens for ecosystem innovation
<b>HGS</b>	A refreshed digital brand signals promise for full front-end services
<b>Infosys</b>	Driving Omnichannel strategies with Human centric approach
<b>Mphasis</b>	User experience expertise to drive personalized experiences
<b>TCS</b>	Scale and depth of tech expertise are the foundation for digital experiences
<b>Tech Mahindra</b>	Pushing the envelope with cutting edge services

# HFS Horizons—Digital marketing and sales service providers



## Horizon 3—New sources of value

### Horizon 2 +

Ability to drive **OneEcosystem** synergy driving completely **new sources of value**

- Martech and sales technologies **integrated with other emerging technologies**
- Ability to **drive IT + business transformation** with differentiated IP and proprietary solutions
- Strong **employee investments** complemented with access to alternative talent pools
- **Well-rounded ecosystem** of technology vendors, start-ups, and technology vendors
- Formalized approach to **co-creation** with clients and partners
- **Purpose-driven** client and partner relationships
- Perceived as a market **thought leader**

## Horizon 2—Improving stakeholder experience

### Horizon 1 +

Enablement of the **OneOffice** model of enterprise-wide connected front office driving unmatched **stakeholder experience**

- **Consulting and advisory capabilities** in addition to implementation services
- Strong expertise across **all marketing and sales technologies**
- Ability to drive **business transformation** leveraging robust IP
- Investments in **internal employee training** and development
- Broader and **deeper partnerships** with technology vendors
- Ability to offer **outcome-driven** commercial models
- Strong client feedback on driving CX and EX and perceived as a **strategic partner**

## Horizon 1—Driving business outcomes

- Ability to drive **functional optimization outcomes** through cost reduction, speed, and efficiency
- Strong **implementation** capabilities
- Strong expertise across some **martech and sales technologies**
- Partnerships with leading **technology vendors**
- **Modest scale and size** of digital and marketing services
- **Focused industry and geography** go-to-market
- Perceived as a **credible vendor**

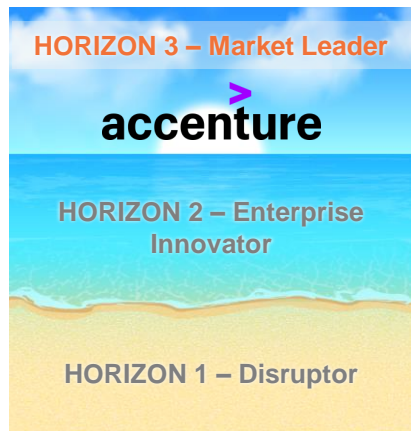
Note: All service providers within a “Horizon” are listed alphabetically

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Accenture profile: Digital marketing and sales services, 2023



# Accenture: Technology and design excellence provides a comprehensive approach to “growth services”



Strengths	Development opportunities
<ul style="list-style-type: none"> <li>• <b>Approach to digital marketing and sales services:</b> Accenture has a structured innovation framework, “Connected Innovation.” Its digital marketing and sales services are clubbed under what Accenture calls “Growth Services,” which provide a comprehensive view of enterprises’ needs to generate revenue.</li> <li>• <b>Key differentiators:</b> Accenture’s N3 acquisition provided a significant capability in the B2B sales space. Accenture’s complementary consulting and agency capabilities are true differentiators, particularly the Accenture Song arm of the business (formerly Accenture Interactive), which enables its significant consulting, design, and creative expertise.</li> <li>• <b>Technology innovation:</b> SynOps is an comprehensive integrated platform bringing together diverse data, work orchestration, human + machine and insights, giving sellers relevant industry specific insights. Human+machine integration provides productivity gain and revenue lift. SynOps agent cockpit enable a data-driven sales approach.</li> <li>• <b>Customer kudos:</b> Clients mention Accenture as their trusted partner that integrates into their environment as part of their team. Clients also appreciate Accenture for its flexibility and ability to understand their business models.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>What to continue:</b> Integrating capabilities across the Accenture pillars, including expanded focus on Song and Experience to continue its holistic capabilities for front office services needs.</li> <li>• <b>Other next steps for development:</b> Accenture, as always, is sophisticated with thought leadership, but there’s an opportunity to simplify its messaging.</li> <li>• <b>Customer critiques:</b> Clients expect the team to bring innovative ideas to the table by developing intellectual or R&amp;D properties. Clients also expect Accenture to handle the common problem of talent retention better.</li> </ul>

Relevant M&A and partnerships	Key digital marketing and sales clients	Global operations and resources	Flagship internal IP related to digital marketing and sales
<p><b>Acquisitions (2019–2022)</b></p> <ul style="list-style-type: none"> <li>• Tambourine, King James Group, Experity, Glamit, Openmind, Entropia, Businet System, Sutter Mills, Bow &amp; Arrow, Yesler, CreativeDrive, N3</li> </ul> <p><b>Partnerships</b></p> <ul style="list-style-type: none"> <li>• Marketing operations: Google, Meta, Amazon, Oracle, Salesforce, Adobe, Marketo, Sprinklr, Salsify, Power BI, Microsoft</li> <li>• Digital commerce operations: Amazon, Salsify, Google, Adobe, Salesforce, Alibaba Group, Meta, Shopify</li> <li>• Customer experience: SAP, Salesforce, Adobe, Microsoft, Oracle, Google, AWS, Alibaba Group, Meta, Reltio, Acquia, Sprinklr, Workfront, Amperity, Automatic, Shopify, Salsify, and others</li> <li>• Sales operations: Salesforce, Microsoft, Oracle, Google, AWS, SAP, Medallia, Adobe, IBM, Conexiom, Celonis, CSO Insights, Zendesk</li> <li>• Digital inside sales: Leadspace, ZoomInfo, RingCentral, AWS Connect, Salesforce, Microsoft, LinkedIn, Celonis, Speechmatics, Google AI/NLP, Franz.com</li> </ul>	<p><b>Number of digital marketing and sales clients</b></p> <ul style="list-style-type: none"> <li>• Marketing: 275+</li> <li>• Sales: 180+</li> </ul> <p><b>Key clients</b></p> <ul style="list-style-type: none"> <li>• World’s largest networking solution provider</li> <li>• Jaguar Land Rover</li> </ul>	<p><b>Digital marketing and sales headcount</b></p> <ul style="list-style-type: none"> <li>• Marketing: 28,000</li> <li>• Sales: 14,000</li> <li>• CX strategy, design, consulting and operations: 55,000</li> </ul> <p><b>Locations</b></p> <ul style="list-style-type: none"> <li>• Accenture has 17 delivery locations that support its digital marketing business and 51 delivery locations that support its sales business.</li> <li>• Twenty of Accenture’s delivery centers are specifically designated as Innovation Labs, and 38 are equipped with Digital Studios.</li> </ul>	<ul style="list-style-type: none"> <li>• CSAT Predictor: Analyzes all CSAT surveys and performs sentiment analysis on each survey to segregate complaints from compliments</li> <li>• Solutions.AI for Marketing: Tracks cross-channel performance of digital interactions on a daily—even hourly—basis to optimize cost savings</li> <li>• Rapid messaging framework: A standard approach to developing compelling messaging content for most complex B2B products</li> <li>• Market Intelligence Assistant: A patented AI-based virtual sales assistant that detects signals and patterns and then uses that data to answer questions of all stakeholders</li> <li>• Sales Concierge: Patented AI advisor supporting sales-specific use cases on inbound inquiries across channels.</li> <li>• Accenture Advanced Sales &amp; Channel Analytics: Provides sales agent performance dashboards, channel performance dashboards, pipeline analytics, and sales coverage and territory analytics</li> </ul>

6

HFS Research authors

# HFS Research authors



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Melissa O'Brien is Research Leader, Customer Engagement, Retail, and Travel Strategies at HFS Research. Melissa leads HFS' research initiatives for digital front office services, including customer engagement operations, digital marketing, cognitive agents and CX design and consulting, focusing on the trends and change agents that are driving customer experience across the enterprise.

In addition, her industry research focuses on key dynamics within retail, CPG, travel, and hospitality, with regard to customer-centric strategies, intelligent operations, and service delivery.



**Krupa K S**

Senior Analyst

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Krupa is a Senior Analyst at HFS Research, and she is part of data products. She is responsible for ITO-BPO outsourcing contracts, merger and acquisition data collection and analysis for different service lines. She also works with practice leads with the focus around Business process services and digital technologies

She has over four years of experience in business research and analysis in Excellence4U Research Services and Futurecorp Consulting. She was the part of the market research team, where her responsibilities were performing secondary research for company profiling, industry analysis and competitive analysis. At Excellence4U, she worked with technology mapping team that helped to know the clients, the products that were used which would help them to understand the need of customers.



# About HFS

Insight. Inspiration. Impact.

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand-side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand-side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as “RPA” (Robotic Process Automation) in 2012 and more recently, Digital OneOffice™ and OneEcosystem™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation and Process Intelligence, Blockchain, the Metaverse and Web3. HFS has deep business practices across all key industries, IT and business services, sustainability and engineering.

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