



# Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2024

Focus on Accenture

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# Introduction

This year, we have seen AI becoming mainstream as more and more enterprises are gearing up to become AI-led organizations. HR has seen multiple challenges such as lack of availability of skilled talent, reduced employee satisfaction, and different expectations from multi-generational workforce. The need for streamlining the HR operations is becoming more important as the enterprises aim to be more agile and scalable to brace for the uncertainties caused by the global turmoil.

Due to these factors, agility and flexibility of HR services emerged as another important factor driving the need to outsource enterprise HR beyond the traditional need to reduce cost. The expectation from providers grew tremendously as enterprises expect AI / gen AI-led service delivery, which has the potential bring unprecedented levels of productivity and efficiency by automating mundane tasks. Buyers now expect their outsourcing

service providers to bring in technology that can impact the stakeholder experience. They are increasingly focusing on being data led to guide their decisions from the insights gleaned from various enterprise systems.

**The full report includes the profiles of the following 18 leading MPHRO providers featured on [Multi-process Human Resources Outsourcing \(MPHRO\) Services PEAK Matrix® Assessment 2024](#):**

- **Leaders:** Accenture, ADP, IBM, Strada, and TCS
- **Major Contenders:** Capgemini, Cognizant, Conduent, Infosys, SD Worx, Sopra HR, Wipro, WNS, OneSource Virtual (OSV), and Zalaris
- **Aspirants:** Ascent HR, CGI, and MHR

## Scope of this report

**Geography:** global

**Industry:** all

**Services:** MPHRO services

# MPHRO PEAK Matrix® characteristics

## Leaders

Accenture, ADP, IBM, Strada, and TCS

- Leaders have become strategic enablers for enterprises by delivering end-to-end HR services, and therefore, have continued to retain their position. They have invested in the key focus areas to establish credibility with buyers to enhance their outsourced as well as retained HR
- They have invested in new-age technology levers such as AI/ML, automation, and advanced analytics to bring in unprecedented level of efficiencies for their buyers. In addition, they have focused on prioritizing gen AI investment to reap the benefits of low hanging fruits

## Major Contenders

Capgemini, Cognizant, Conduent, Infosys, OSV, SD Worx, Sopra HR, Wipro, WNS, and Zalaris

- Major Contenders have a relatively limited set of coverage compared to Leaders across different HR functions, but they are actively investing in expanding the breadth and depth of HR functional capabilities as buyers seek a single outsourcing provider
- They have also focused on channelizing their investments in AI-led initiatives for the buyers to embed AI within the core of their HR. Their capabilities in technology enablement are relatively limited compared to Leaders

## Aspirants

Ascent HR, CGI, and MHR

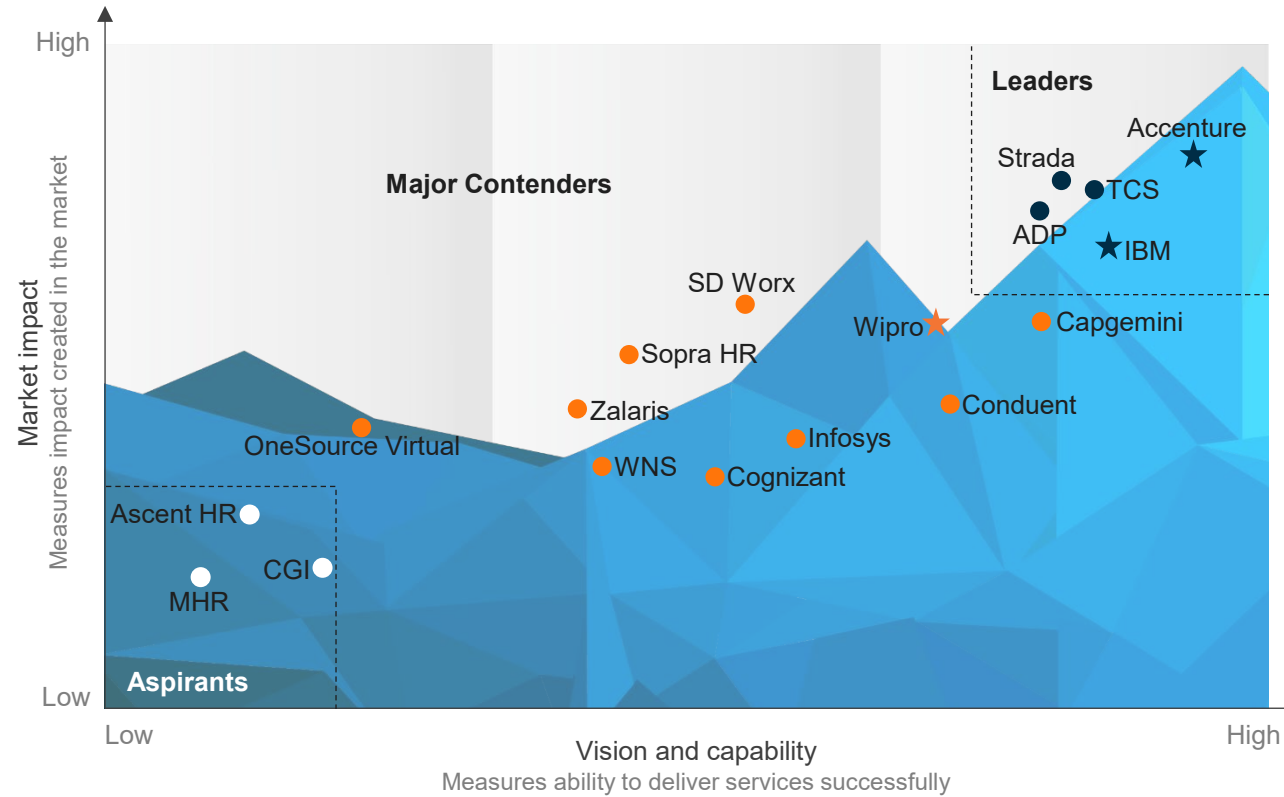
- Aspirants have focused on upgrading their ability to drive value for enterprise HR and enhance employee satisfaction, but their scale of operations is limited in terms of coverage across geographies and HR functional areas
- Their key focus is not on enabling large-scale enterprise transformation, but to ease the administrative task for the enterprise HR with basic technology interventions

# Everest Group PEAK Matrix®

Multi-process Human Resource Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2024 | Accenture is positioned as a Leader and a Star Performer

## Everest Group Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2024<sup>1,2</sup>

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



<sup>1</sup> 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

<sup>2</sup> Assessment of Strada is based on capabilities of Alight Solutions prior to the sale of Payroll and Professional Services business of Alight Solutions

Source: Everest Group (2024)

# Accenture profile (page 1 of 5)

## MPHRO service capability and strategy

### Company profile

Accenture is a professional services firm that offers services and solutions focused on enterprise transformation. It has a presence in 120 countries and leverages its strength in digital capabilities to create value for the stakeholders. With its build-to-operate model, it delivers employee-oriented HR solutions that leverage digital and data for end-to-end HR transformation.

**Headquarters:** Dublin, Ireland

**Website:** [www.accenture.com](http://www.accenture.com)

### Key leaders

- Julie Sweet, Chairperson and CEO
- Karthik Narain, Group Chief Executive, Technology and Chief Technology Officer
- Arundhati Chakraborty, Group CEO

### Key partners

- Workday
- Oracle
- SAP SuccessFactors

### Current MPHRO market segment focus

- Buyer segment<sup>1</sup>: targets buyers from all segments that are interested in the overall value offered in terms of RoI in worker and workforce performance and productivity
- Geography: North America, Europe, Asia Pacific, Latin America, and Africa

### Current MPHRO technology strategy

Accenture supports its clients with on-premise as well as cloud platforms to digitize their HR operations. Accenture SynOps platform helps buyers with data-driven insights by bringing its technology assets and partnership ecosystem together. The embedded automation and AI can enable optimal mix of effort from humans and machines to reduce effort associated with manual tasks

### [SERVICE SUITE]

● Not offered   ● Offered as both stand-alone and MPHRO service   ● Offered as an MPHRO service

### Suite of HR services offered

- Benefits
- Compensation
- Contact center
- Employee data management
- Employee relations
- Global mobility
- HR strategy
- Learning
- Payroll
- Performance and succession
- Recruitment
- Regulatory and compliance
- Rewards and recognition

### Technology supported

● Not supported   ● Supported

Workday	SAP SuccessFactors	Oracle Cloud HCM	SAP On-premise
Oracle/Peoplesoft On-premise		Proprietary solution	Others <sup>2</sup>

Total HRO delivery FTEs: **15,466+**

Offshore <sup>3</sup>	Nearshore <sup>3</sup>	Onshore
8,856	3,289	3,321

<sup>1</sup> Small market segment includes 1,000 to 3,000 employees managed. Mid-market includes 3,000 to 15,000 employees managed. Large market includes over 15,000 employees managed

<sup>2</sup> Others include ServiceNow, ZenDesk, and many other ecosystem platforms

<sup>3</sup> FTEs located in offshore (India and Southeast Asia) or nearshore locations (Eastern Europe and Latin America) and delivering services for global clients

# Accenture profile (page 2 of 5)

## MPHRO service capability and strategy

Recent HRO-related developments/investments

Development	Developments/investments
M&A/Partnership	<ul style="list-style-type: none"><li>• Acquired Udacity, a digital education company and expanded partnership with Touchcast for scaling up its capabilities in the learning space</li><li>• Invested in Praxis Labs, a provider specialized in immersive learning experiences</li></ul>
Digital HR- related	<ul style="list-style-type: none"><li>• Launched LearnVantage for the enterprises to upskill their workforce by identifying skill-gaps and providing tailored learning paths based on individual needs</li><li>• Invested in multiple generative AI PoCs with solutions such as generative AI-based helpdesk support, performance feedback coach, learning content creation, along with multiple other areas of investments</li><li>• Hyperautomation: to combine AI/ML to create an automation framework that can drive better value for the business compared to simplistic automation solutions</li></ul>
Others	Continuous investments in existing delivery centers along with scaling up capabilities to serve LATAM, APAC, and EU markets

# Accenture profile (page 3 of 5)

## MPHRO client portfolio

### MPHRO experience

Total number of organizations served for HR as of March 31, 2024: **132**

### Recent MPHRO transactions

Global medical device retailer, multinational oil and gas company, multinational energy company, healthcare company, American corporation company, global food retailer, Latin American holding company, luxury goods company, manufacturer of fertilizer, chemical manufacturer, multinational fast-food retailer, multinational electronics company, financial services company, French multinational company, Japanese pharmaceutical company, healthcare company, financial services company

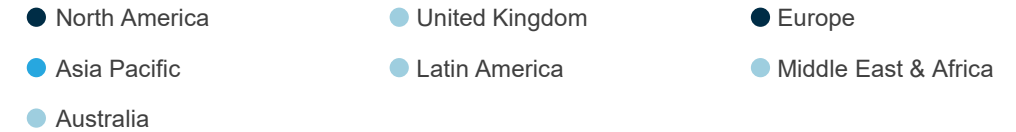
### Major MPHRO clients

Multinational logistics company, multinational software and platform company, online marketplace provider, multinational mining company, large health services provider, international telecom company, industrial manufacturing company, Japanese public company, finance and insurance company, consumer products retailer, multinational manufacturer, life insurance company, international pharmaceutical company, Automobile manufacturer, European power company, European banking company, financial and retail technology company, international food conglomerate, multinational chemical company

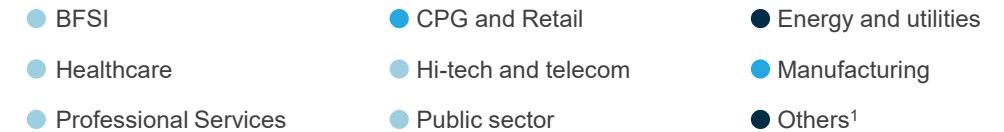
### MPHRO services revenue mix

● Low (<10%) ● Medium (10-20%) ● High (>20%)

#### By signing region



#### By industry



#### By buyer size<sup>2</sup>



<sup>1</sup> Others include travel and logistics, hospitality, fashion and luxury, mining, and media

<sup>2</sup> Small market segment includes 1,000 to 3,000 employees managed. Mid-market includes 3,000 to 15,000 employees managed. Large market includes over 15,000 employees managed

# Accenture profile (page 4 of 5)

## Key MPHRO delivery locations














# Accenture profile (page 5 of 5)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

### Market impact

### Vision and capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

### Strengths

- Accenture offers talent and HR managed services for the organizations looking to transform HR with a digital core. It is continuously investing in enhancing SynOps, a cloud platform powered by next-generation technology levers to deliver tangible business outcomes
- Accenture has a strong focus on enhancing its capabilities in the learning space to help the enterprises upskill their employees with the latest technical skills
  - It launched LearnVantage to leverage advanced technology to help enterprises bridge the skills gaps and offer personalized learning journeys backed by AI and data
  - It acquired Udacity to scale up its capabilities in the learning space and expanded its partnership with Touchcast to embed generative AI in the learning space
- Accenture has continued to invest in expanding its delivery footprint with capability expansion in Argentina, Brazil, and Colombia to serve LATAM regions, Japan, Malaysia, and the Philippines to serve APAC market, and the European locations for nearshore support
- It is expanding its capabilities to serve early adopters of generative AI in HRO with use cases such as employee helpdesk, drafting job descriptions, writing performance feedback for organizations looking to enhance efficiency and employee experience
- Accenture Reporting and Analytics managed services helps businesses embed data and analytics capabilities to improve HR business outcomes with its strong workforce of data architects, data scientists, and technology partners
- Accenture has a technology-agnostic approach with partnerships with major HCM providers such as Workday, SAP, and Oracle with skilled workforce to serve the clients based on their needs
- Referenced buyers have highlighted that Accenture offers a high level of flexibility and is a reliable partner with great industry expertise to serve the HR use cases

### Limitations

- Accenture’s technology and transformation-oriented approach might not be well suited for the enterprises looking to reduce cost through labor arbitrage
- Referenced buyers are fully satisfied with the account leadership team, but have highlighted a room for improvement in the leadership of the operating teams
- Referenced clients expect Accenture to recommend more best practices for innovation in process and technology

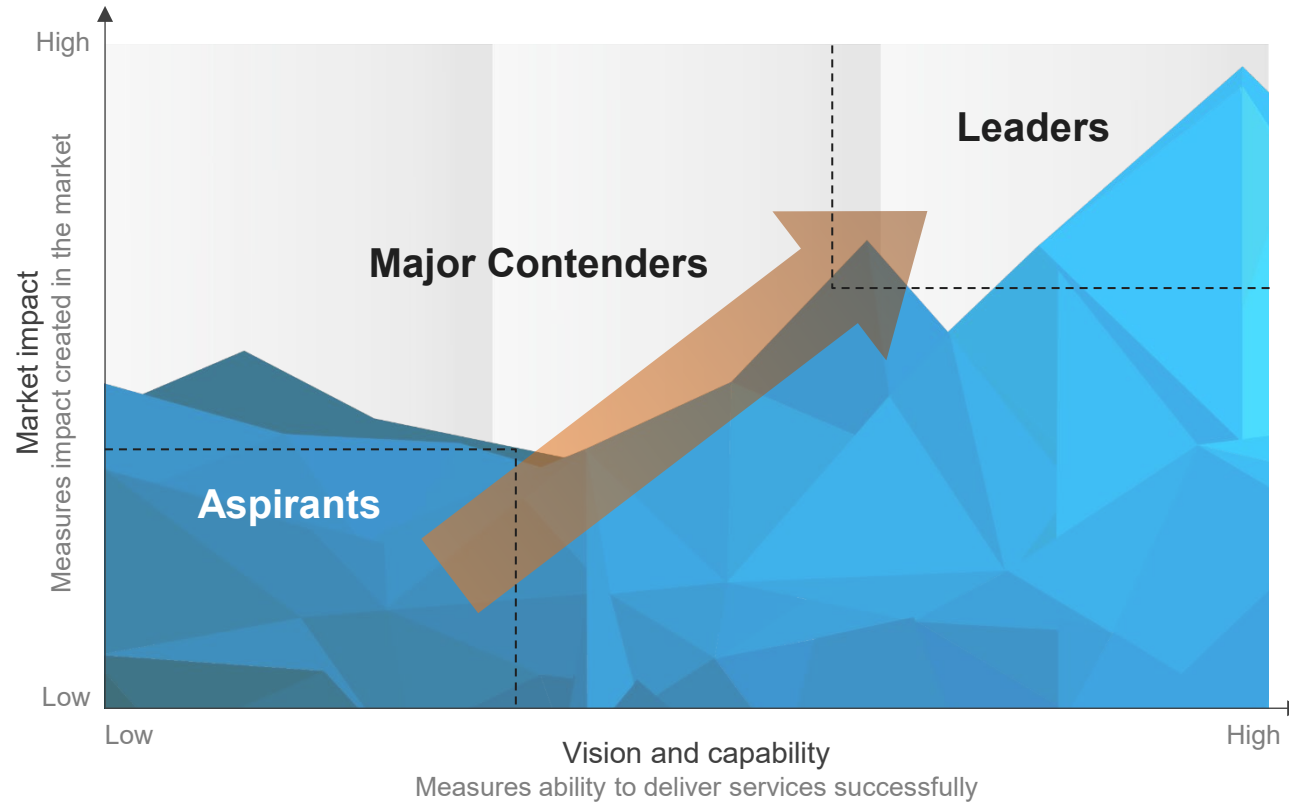
# Appendix

PEAK Matrix® framework

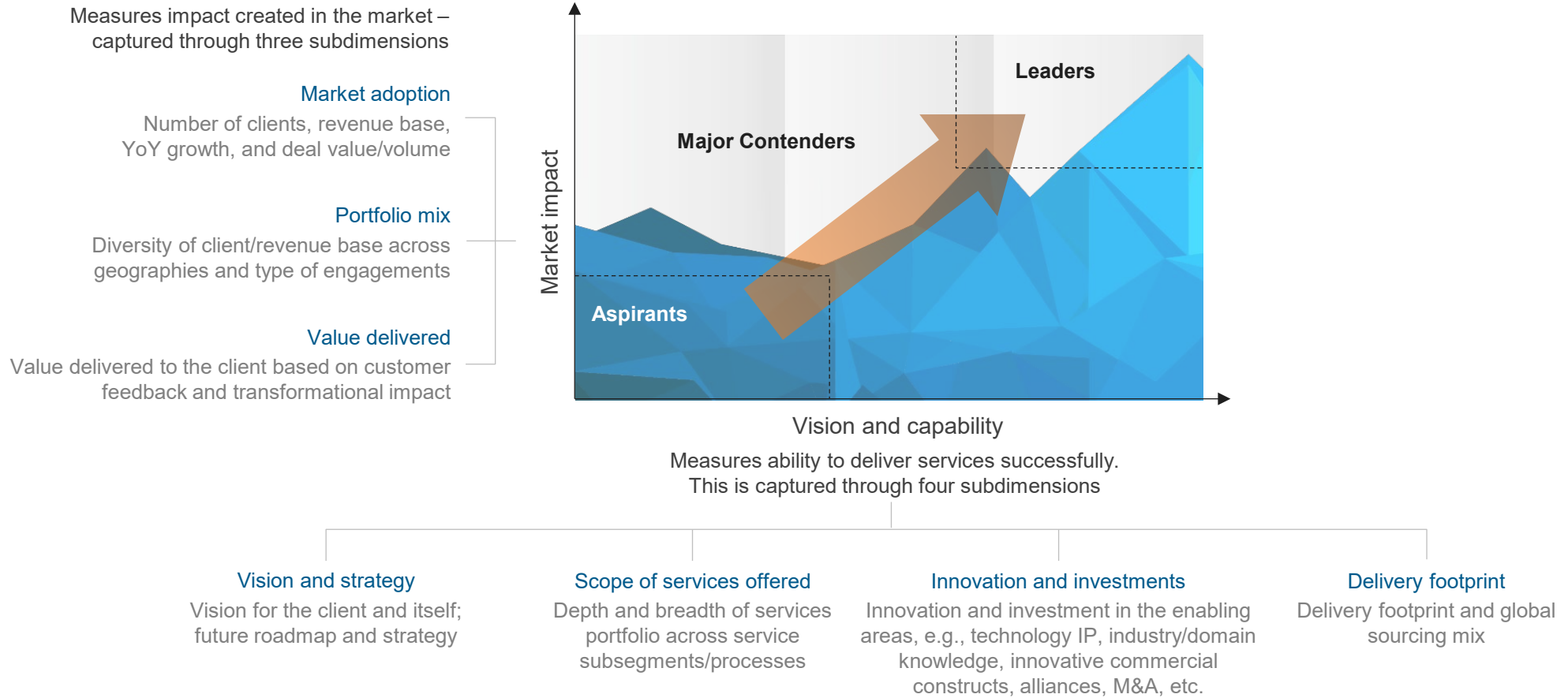
FAQs

# Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



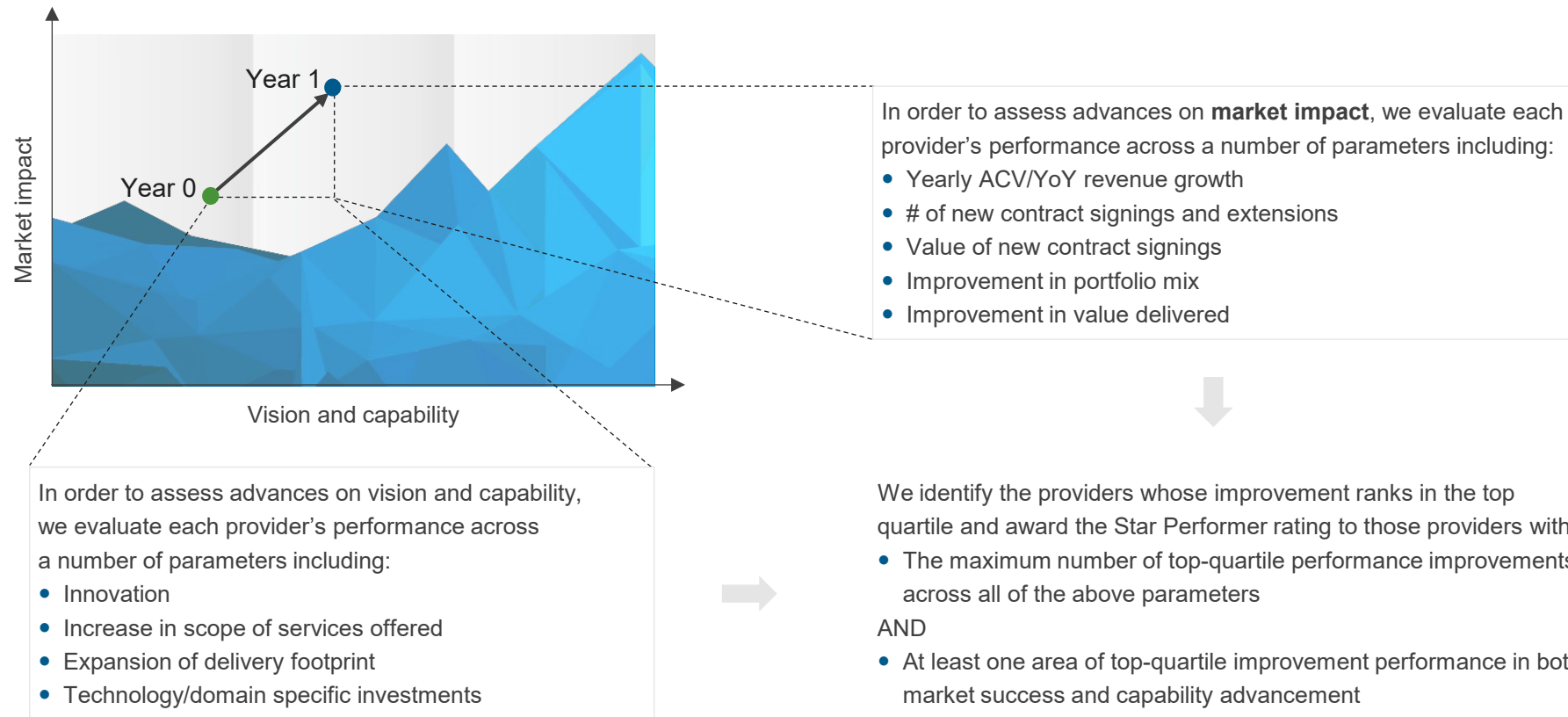
# Services PEAK Matrix® evaluation dimensions



# Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

## Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

## FAQs

**Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?**

**A:** Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

**Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?**

**A:** No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

**Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?**

**A:** A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

**Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?**

**A:** Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

**Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?**

**A:** Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

**Q: Does the PEAK Matrix evaluation criteria change over a period of time?**

**A:** PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

# Stay connected

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