



# Everest Group Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2023

Focus on Accenture  
August 2023



# Introduction

## 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, has 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 on proprietary Employee Experience (EX) solutions to engage the workforce, along with investing in adding an experience layer to their products and are striving to provide a seamless, integrated experience to its 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 the full report, we analyze the global MPHRO provider landscape and its impact on the MPHRO market. In particular, we focus on:**

- [Multi-Process Human Resources Outsourcing \(MPHRO\) Services PEAK Matrix® Assessment 2023](#) including provider capability assessment and Star Performer analysis
- Provider landscape
- Remarks on key strengths and limitations for each MPHRO provider

## 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

## MPHRO PEAK Matrix® characteristics

### Leaders:

Accenture, ADP, Alight Solutions, IBM, and TCS

- Leaders have established themselves as front-runners and continue to consistently deliver end-to-end HRO services to their clients. They have brought in innovative solutions to cater to current economic conditions along with talent shortages and cost pressures
- They leverage deep domain expertise, superior technology capabilities (augmented by heavy investments in next-generation technologies), innovative engagement models, end-to-end digital transformation, and consulting experience to differentiate themselves in the market

### Major Contenders:

Capgemini, Conduent, Infosys, OneSource Virtual, SD Worx, Sopra HR, Wipro, WNS, and Zalaris

- Major Contenders' coverage of the HR value chain is not as comprehensive as that of Leaders, although they have consolidated their capabilities in specific areas of the value chain through investments in people, process, and technology
- These providers focus on developing digital and next-generation capabilities to serve their clients better. While they have been building strong capabilities for both transactional and judgment-intensive HR processes, some of the providers' expertise in the latter is still relatively untested

### Aspirants:

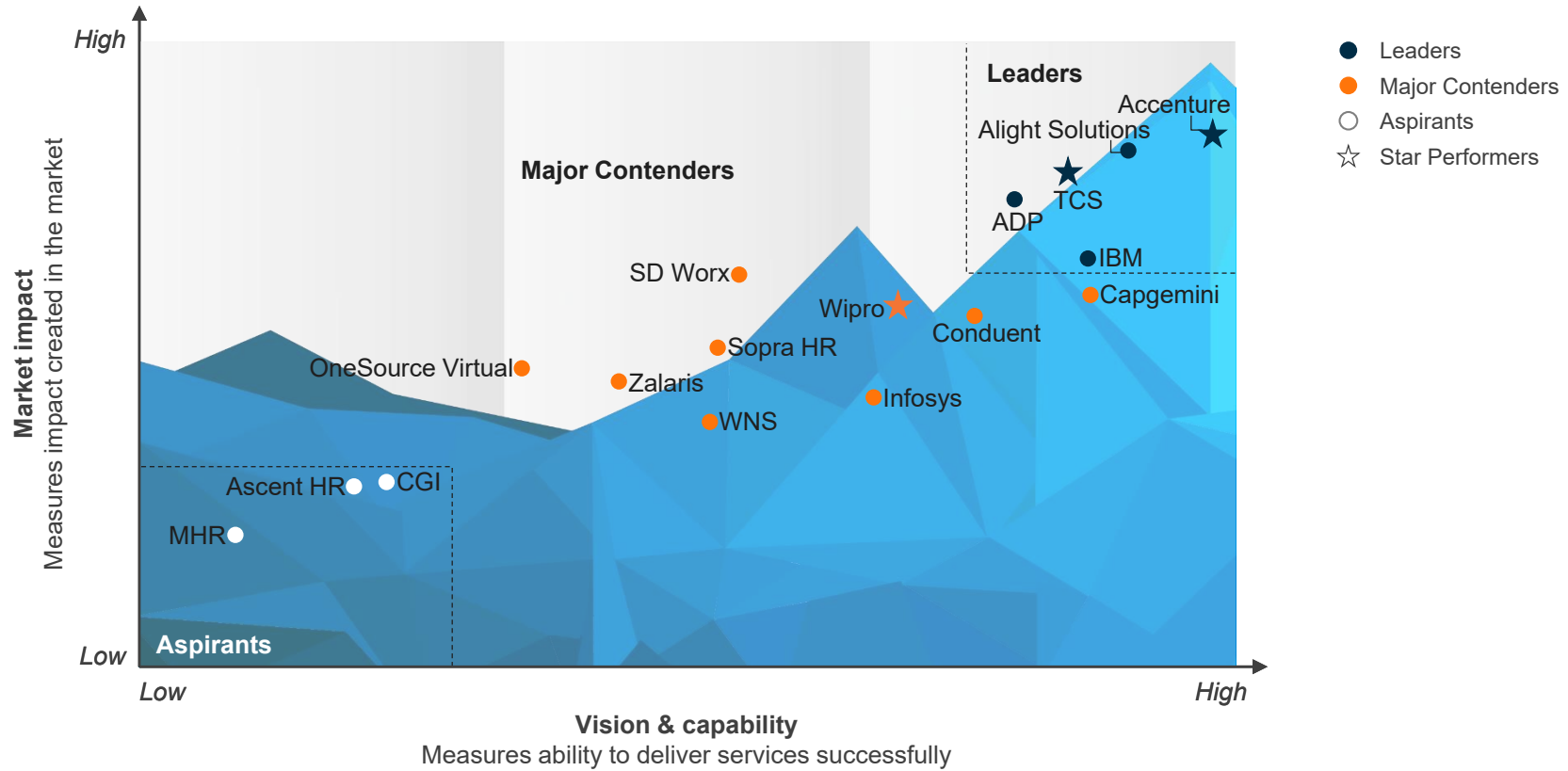
Ascent HR, CGI, and MHR

- Aspirants focus primarily on transactional HR processes. While they continue to strengthen digital capabilities, their current set of capabilities, and limited scale may not be best suited to handle end-to-end requirements for large organizations
- Their current emphasis is on differentiating themselves through developing innovative technology solutions and partnerships with other global providers to win more clients

# Everest Group PEAK Matrix®

## Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2023 | Accenture is positioned as a Leader and a Star Performer

Everest Group Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2023<sup>1</sup>



<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  
Source: Everest Group (2023)

# Accenture profile (page 1 of 4)

## MPHRO service capability and strategy

**SERVICE SUITE**

**Company mission/vision statement**

Accenture is a leading global professional services company that helps the world’s leading businesses, governments and other organizations build their digital core, optimize their operations, accelerate revenue growth and enhance citizen services—creating tangible value at speed and scale. It is a talent and innovation led company with 738,000 people serving clients in more than 120 countries. Accenture combines its strength in technology with unmatched industry experience, functional expertise and global delivery capability and is able to deliver tangible outcomes because of its broad range of services, solutions and assets across Strategy & Consulting, Technology, Operations, Industry X and Accenture Song.

**Headquarters:** Dublin, Ireland

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

**Key leaders**

- **Julie Sweet**, Chairperson and CEO
- **Paul Daugherty**, Group Chief Executive, Technology and Chief Technology Officer
- **Yusuf Tayob**, Group CEO

**Key partners**

- Workday
- Oracle
- SAP SuccessFactors

**Current MPHRO market segment focus**

- **Buyer segment<sup>2</sup>:** targets buyers from all segments that are interested in the overall value offered in terms of RoI in worker performance and productivity
- **Geography:** North America, Europe, Asia Pacific, Latin America, and Africa

**Current MPHRO technology strategy**

Accenture is a technology-independent service provider that works with both cloud and traditional on-premise technology platforms and ecosystem providers. Accenture's operating engine, SynOps for talent and HR, which includes the employee experience platform, work orchestration engines, and a productivity and compliance suite, as well as additional analytics and insights to drive enhanced experiences and superior outcomes, supplements the client's core system of record.

**Total HRO delivery FTEs = 15,150**

Offshore <sup>1</sup>	Nearshore <sup>1</sup>	Onshore
9,970	3,360	1,820

<sup>1</sup> FTEs located in offshore (India, and Southeast Asia) or nearshore locations (Eastern Europe and Latin America) and delivering services for North America and Western Europe

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

Suite of HR services offered					
	Not offered	Offered on a stand-alone basis	Offered as an MPHRO solution		
Benefits				Compensation	
Employee data management				Contact center	
HR strategy				Employee relations	
Performance and succession				Learning	
Rewards and recognition				Recruitment	
				Global mobility	
				Payroll	
				Regulatory and compliance	

**Recent HRO-related developments/investments**

Development	Developments/Investments
M&A/ Partnership	Deepen alliances with key providers such as SAP SuccessFactors, Workday, Oracle, ZenDesk, ServiceNow, and ADP to offer end-to-end solutions that include services and technologies in an integrated service delivery model. Forged partnership with several ecosystem partners that provide virtual assistant solutions for voice that can be embedded with the service management platforms
Digital HR-related	<ul style="list-style-type: none"> <li>• Continued to invest in SynOps, its operating engine which enables organizations to be more flexible, agile and responsive, helping them generate additional value by driving growth and scaling operations quickly</li> <li>• Invested in the immersive learning space via Accenture Ventures by investing in Strivr and Talespin, to enhance learning solutions</li> <li>• Invested in Generative AI and Large Language Models with two patents in this space</li> </ul>
Others	Developed AWARE a one-stop-shop for insights, metrics and accountability to offer comprehensive insights and metrics for workplace diversity and inclusion, fostering accountability and transparency

**Technology supported**

Workday	SAP SuccessFactors	Oracle Cloud HCM	SAP On-premise	Oracle/Peoplesoft On-premise	Proprietary solution	Others
✓	✓	✓	✓	✓	✓	✓

# Accenture profile (page 2 of 4)

## MPHRO client portfolio

### MPHRO experience

Total number of current MPHRO clients as of Q4 2022 – **120+**

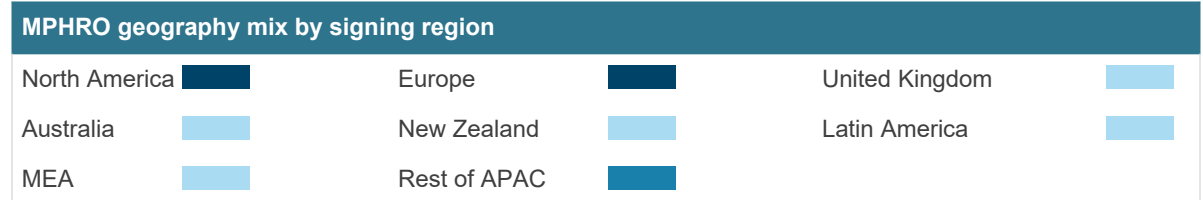
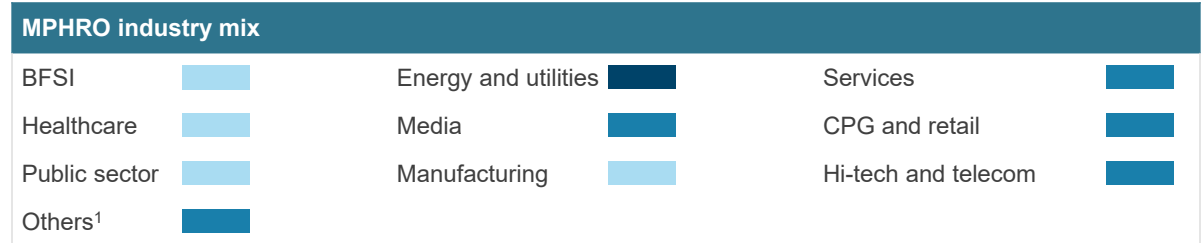
### Recent MPHRO transactions

A US-based e-commerce company, multi-national insurance company, leading European bank, Japanese public company, multi-national fashion company

### Major MPHRO clients

A multinational package delivery company, a European energy company, a multinational hi-tech company, a large telecommunications company, an Asia Pacific-based heavy equipment manufacturer, a large consumer products retailer, a multinational software and platform company, a multinational pharmaceutical company, and a multinational food company

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

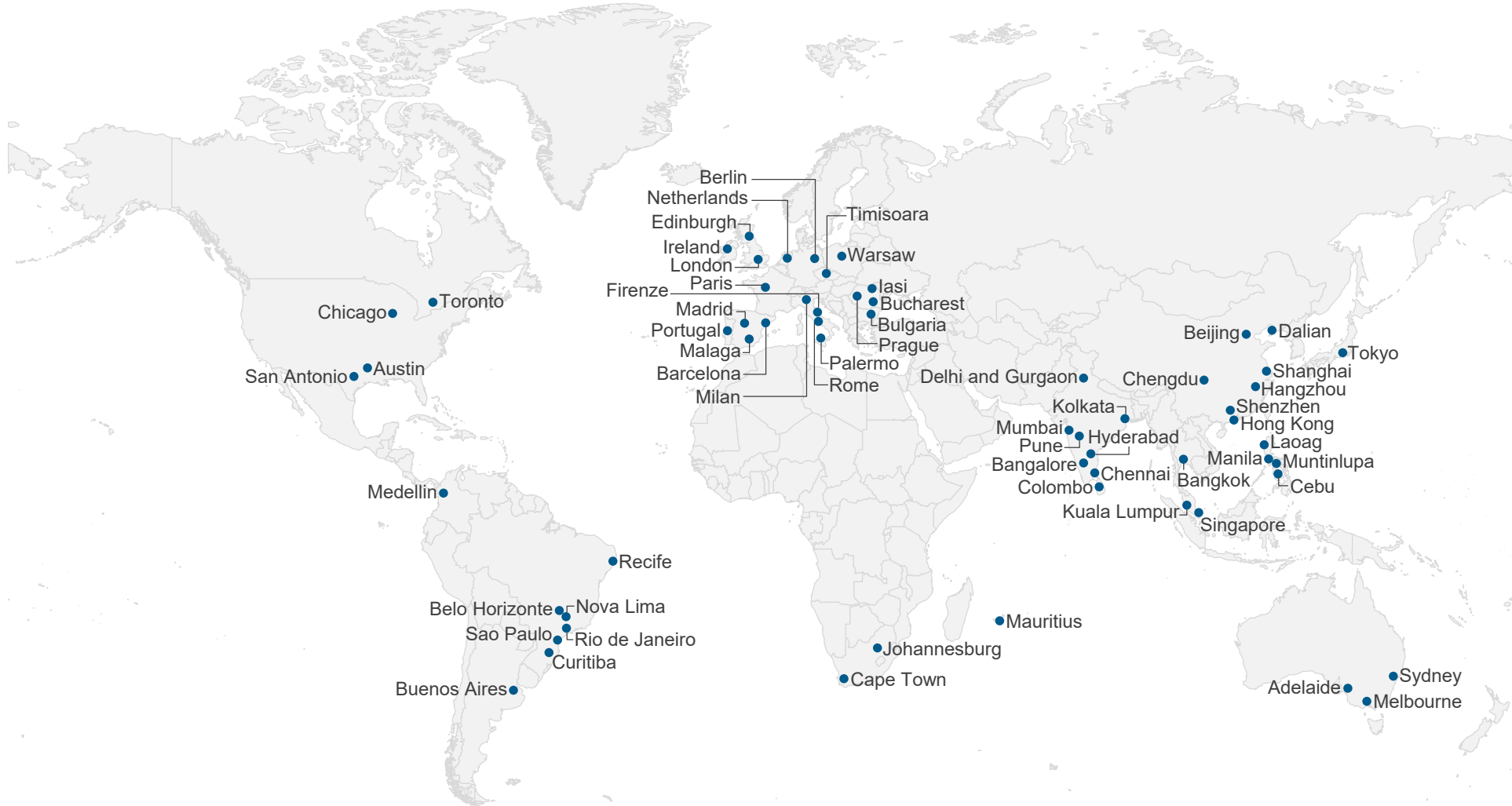


<sup>1</sup> Others include travel & logistics, hospitality, fashion & luxury, and mining

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

## Accenture profile (page 3 of 4)










### Key MPHRO delivery locations



# Accenture profile (page 4 of 4)

## Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

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

### Strengths

- Accenture offers end-to-end talent and managed HR services with a focus on delivering 360-degree business value. Through its Intelligent Talent and HR Operations, backed by SynOps, it focuses on a transformational approach with automation, analytics, data integration, and AI capabilities at scale on a cloud platform
- It has expertise in handling large and complex deals and continues to strengthen its HRO capabilities through multiple in-house solutions, strategic partnerships, acquisitions, and its broader consulting and IT capabilities
- Though it continues to focus on serving large buyers, it is increasing its coverage in the small- and mid-market segments and has a significant presence in the APAC and LATAM regions, besides North America and Europe
- Accenture is making significant investments to bring in next-generation solutions to enhance EX:
  - Brought in Employee Experience Platform (EEP) to add the experience and service management layer on top of clients' HCM and other HRIS systems of record
  - Invested in Strivr, Talespin, and metaverse-skilled professionals to offer immersive learning to its clients
  - Bringing in proprietary virtual assistants including support directly into the flow of work within MS Teams
  - One of the few providers offering digital twin capabilities to help HR organizations with monitoring, simulating, or optimizing business scenarios, and helping drive near real-time decision-making
- Accenture has invested heavily in creating a techno-functional talent pool by leveraging personalized training programs across transactional/strategic HR, next-generation technologies, and leadership/professional skills
  - Its domain expertise and service delivery have been appreciated by the referenced clients

### Limitations

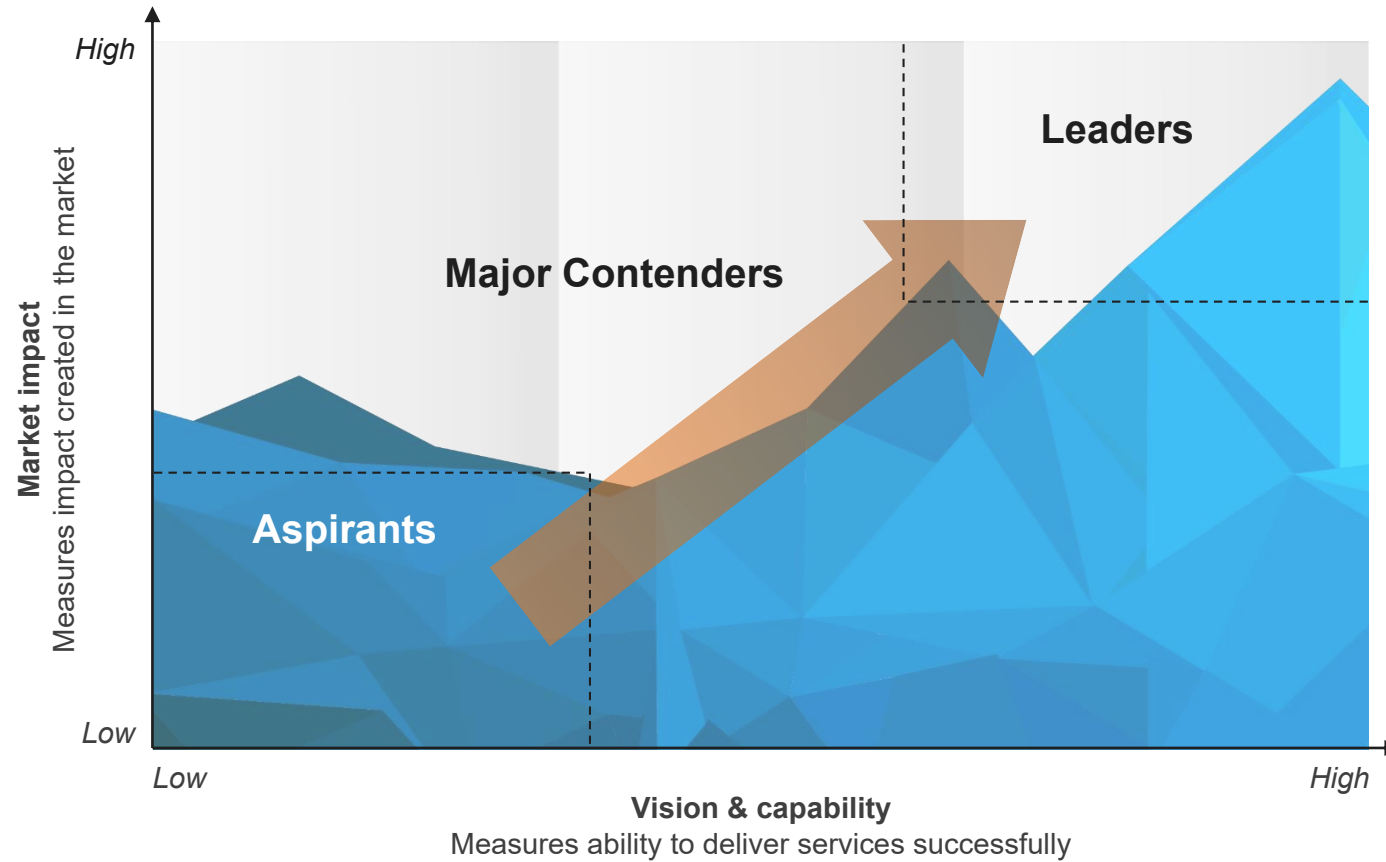
- Organizations looking for a third party to outsource only a small scale of operations and/or achieve cost savings through labor arbitrage may not find Accenture's approach to be relevant for their needs
- Referenced clients expect the provider to align the program design and business case creation better with the enterprise problem statement
- Referenced clients expect Accenture to leverage its extensive analytics capabilities to help its clients improve the as-is business processes



# Appendix

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

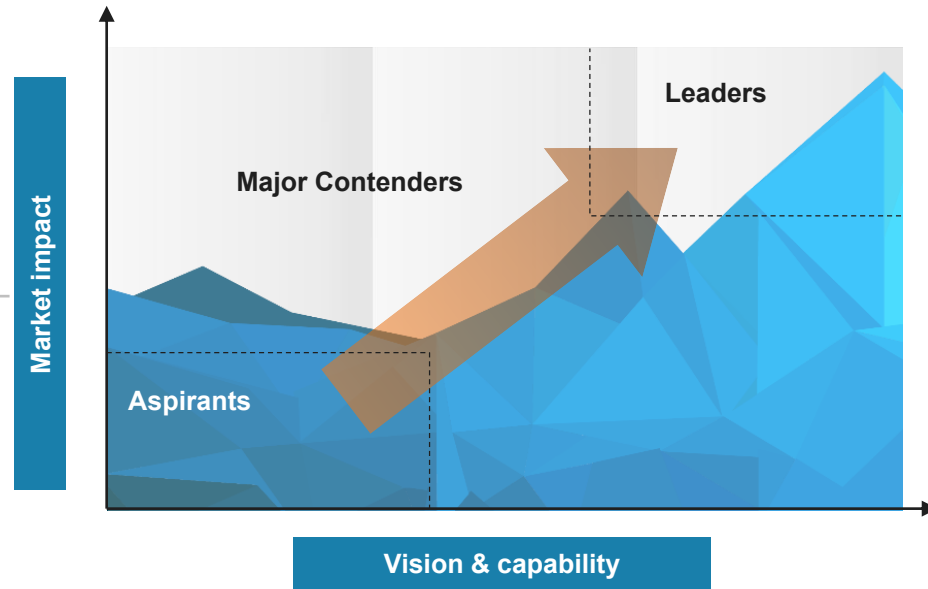
Everest Group PEAK Matrix



# Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**  
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**  
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**  
Value delivered to the client based on customer feedback and transformational impact



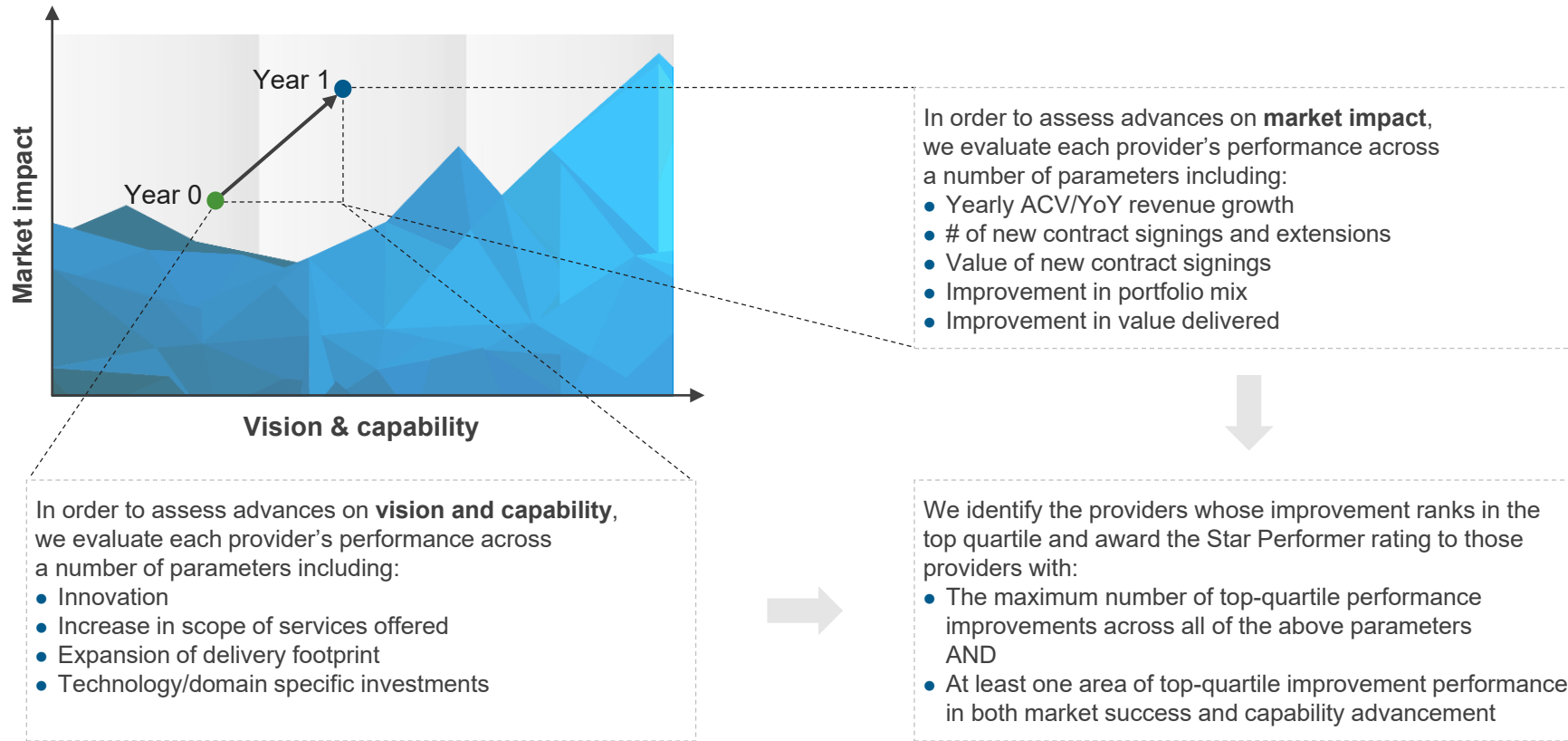
Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**  
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**  
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**  
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**  
Delivery footprint and global sourcing mix

# Everest Group confers the Star Performers 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 Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

# FAQs

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

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.

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

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.

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

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.

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

- 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

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

- 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](#)

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

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.



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](http://www.everestgrp.com).

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