



# HfS Blueprint Report

## Enterprise Analytics Services 2015 Excerpt for Accenture

March 2015

**Reetika Joshi**

Research Director, Consumer-Centric Operations & Analytics Strategies, HfS Research  
[reetika.joshi@hfsresearch.com](mailto:reetika.joshi@hfsresearch.com)

# Table of Contents

TOPIC	PAGE
Executive Summary	3
Research Methodology	10
Service Provider Capabilities	18
Service Provider Profile	28
About the Author	30

# Executive Summary

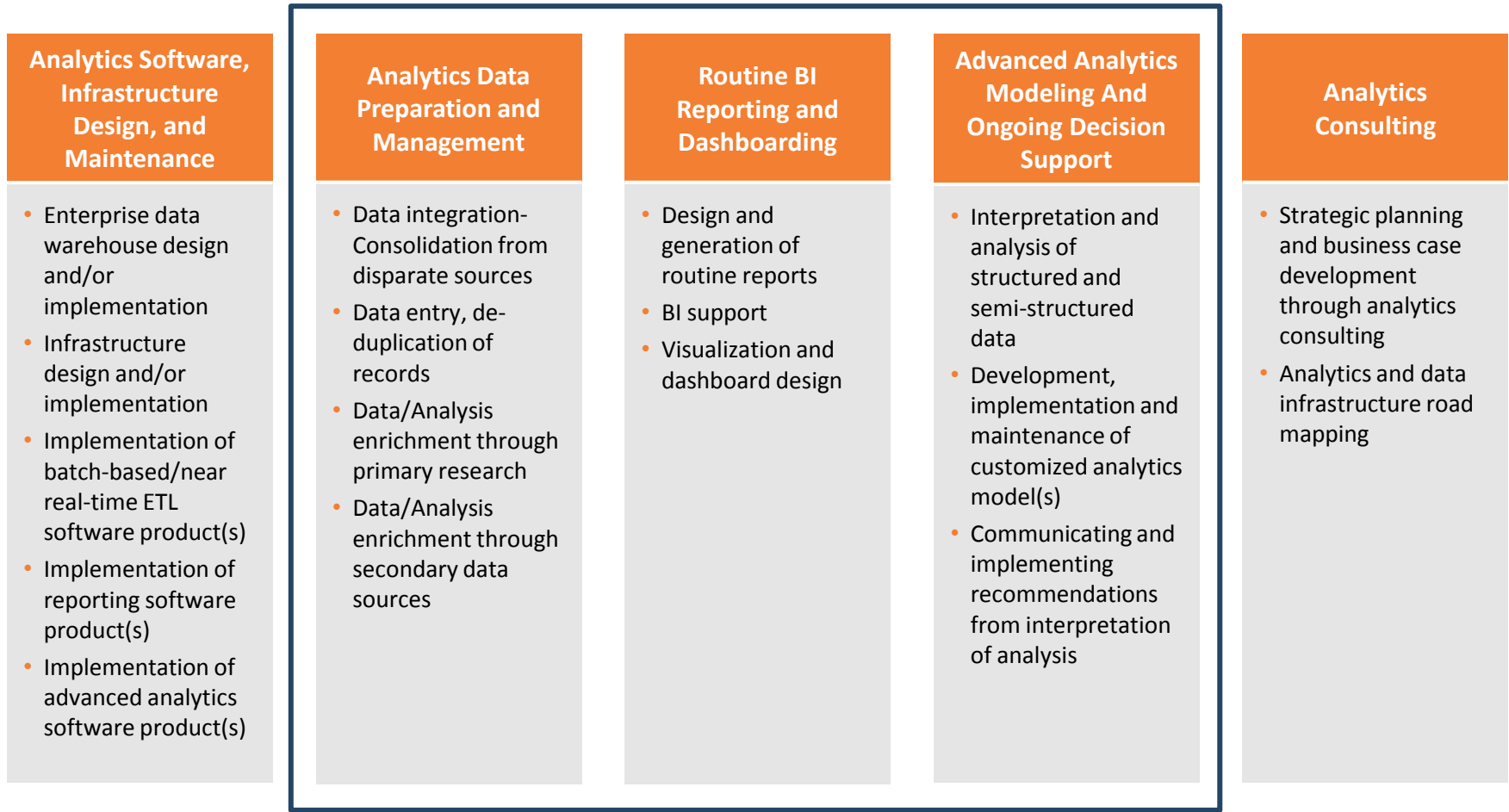


# Introduction to the HfS Blueprint Report: Enterprise Analytics Services 2015

- The 2015 HfS Enterprise Analytics Services Blueprint Report is a refresh on our initial assessment in November 2013. Unlike other quadrants and matrices, the HfS Blueprint identifies relevant differentials between service providers across a number of facets under two main categories: innovation and execution.
- Compared to the first Blueprint on Enterprise Analytics Services, HfS has increased the focus on Innovation in analytics service delivery, with 47% of the Blueprint scoring being tied to proven innovation capability and performance for these engagements, beyond the standardized processes in reporting and data management.
- HfS Blueprint Report ratings are dependent on a broad range of stakeholders with specific weightings based on 1,109 stakeholder interviews from the 2014 State of Outsourcing Survey that covered:
  - Enterprise Service Buyers
  - Service Providers
  - Industry Influencers (sourcing advisors and management consultants)
  - HfS Sourcing Executive Council Members
  - HfS Research Analysts

# HfS Definition of Enterprise Analytics Services

## ENTERPRISE ANALYTICS SERVICES VALUE CHAIN



**In-Scope For This Blueprint**

# Key Highlights – State of the Enterprise Analytics Services Market

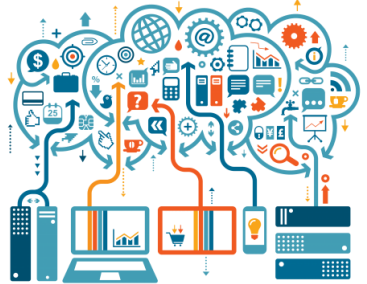
- **The Market for enterprise analytics services continues on an exponential growth path.** For most service providers, big data and analytics services are the fastest growing businesses in their portfolios. Analytics has been a key area of investment to move up the value chain and provide higher value services for all service providers.
- **Demand for managed services grows while analytics project work remains strong.** Services buyers are gradually expanding the amount of ongoing decision support services they do with service providers, beyond short term project based work and routine reporting or data cleaning and consolidation. This is due to the growing adoption of data-driven decision making within different parts of the enterprise and the need for more analytical support than internal staff can support. The market for analytics projects meanwhile continue to remain strong, especially with advancements in big data applicability within specific industry verticals and functions.
- **Winner's Circle features four mainstays and two new players.** Accenture, IBM, Infosys, and Wipro continue to hold onto their market lead based on solid execution of analytics services and delivering on innovation capabilities that are visible to clients. Cognizant entered this group based on its strong connect with clients – account management, playing in its industry specialist niches for advanced analytics and integrating and modernizing its existing information management business. TCS advanced for a focus on developing industry specific solutions.
- **Intense competition among the next hopefuls.** HfS sees strong competition for the Winner's Circle from Capgemini, Genpact, and EXL amongst others. The gap is becoming smaller for this next rung of service providers that are investing aggressively to win in a rapidly changing market that is rewarding success across the analytics value chain.

# Key Analytics Challenges For Services Buyers in 2015



## Lack of enterprise-wide strategy for services

- How to develop internal analytics services infrastructure?
- What service providers to work with, in what capacity?
- What talent to source for future growth, and in what geographies?
- How to evolve career growth plans for analytics?



## Complex big data and analytics technology landscape

- How to maximize existing investments or make new buying decisions?
- How to integrate emerging tech with traditional environment?
- What POC and pilots to invest in?



## Lack of collaboration between IT and business

- How to bridge the gap between business imperatives and technology procurement?
- Stakeholder shift leading to cultural challenges
- Getting IT and Legal to modernize data protection and privacy policies

# Buyers Face Several Challenges In Analytics Adoption

- **Developing a broad and clearly outlined enterprise-wide strategy for analytics services delivery.** Client organizations for the most part still don't have a holistic information management and analytics strategy. One aspect we're seeing advances in is creating a backbone for success with forward-thinking data infrastructure planning. However, companies are still hard-pressed to outline how their workforce across LOBs and functions will derive insights and do predictive modeling on a sustained basis in the long term, with considerations such as centralized analytics COEs or shared services still a long way away.
- **Exploiting existing investments in a complex range of analytics and BI tools and technology.** The advances in big-data exploration, cloud and mobile have led to much experimentation by client organizations with a new generation of tools, on top of existing infrastructure and apps. There is no cutting back on investments in new technologies, and instead buyers are challenged to better integrate and exploit data, reporting and analytics capabilities from multiple sources.
- **Collaborating on analytics within business and IT.** Business function/LOB leaders are gradually expanding their influence with procuring or internally developing analytics and big data tools and technologies rather than leaving it to IT. However, a lot of buyers are facing cultural challenges in relating business-specific needs to IT and collaborating on buying decisions due to different strategic priorities that aren't aligned yet.



# Buyers Face Several Challenges In Analytics Adoption (continued)

- **Selecting and getting real business value from several exploratory pilots.** By its nature, advanced analytics work has been project driven. As each emerging technology matures further, buyers are presented with myriad opportunities to invest in and advance certain use cases, and challenged in seeing beyond the hype and green-lighting initiatives that make strategic sense, rather than going along with the service provider's interesting pilot of the day.
- **Balancing corporate mandates on data privacy/protection and regulation with developing a culture of open innovation and experimentation.** Several buyers in our study mentioned that their corporate structures and policies severely limited the type of work they do with service providers, particularly where blending multiple data sources from partners/suppliers/critical apps are part of the solution.
- **Developing internal talent for multi-disciplinary analytics careers.** Buyers are challenged tremendously to develop internal teams of analysts and data scientists, where due to lack of scale and previous experience, there is inadequate skill development and career planning in place. Added to this is the global talent shortage for analytics skills, and a growing list of specializations within big data and analytics that companies need to facilitate growth for.
- **Getting “future state” out of current service providers.** Our research shows a lack of confidence in current service providers to do more than they are contracted for, and work across the value chain. Barring some successes, buyers are challenged in taking their current providers to leadership levels to drive a higher level of engagement, as perceptions of capability are currently difficult to change. E.g., seeing a service provider as just a research support partner, or just a data integration firm.

# Research Methodology



# Research Methodology

## Data Summary

- Data was collected in Q4 2014 and Q1 2015, covering services buyers, service providers, and advisors/influencers of enterprise analytics services.
- 19 service providers are covered with deep profiles and an additional 5 service providers in a mini format.

## Participating Service Providers



## This Report is Based On:

- **Tales from the Trenches:** Interviews were conducted with buyers who have evaluated service providers and experienced their services. Some were supplied by service providers, but many interviews were conducted by HfS Executive Council members and participants in our extensive market research.
- **Sell-Side Executive Briefings:** Structured discussions with service providers were intended to collect data necessary to evaluate their innovation, execution and market share, and deal counts.
- **HfS “State of Outsourcing” Survey:** The industry’s largest quantitative survey, conducted with the support of KPMG, covering the views, intentions, and dynamics of 1,300+ buyers, providers, and influencers of outsourcing.
- **Publicly Available Information:** Financial data, website information, presentations given by senior executives, and other marketing collateral were evaluated.

# Key Factors Driving the HfS Blueprint

## EVALUATION CRITERIA

Two major factors:

- **Execution** represents service providers' ability to deliver services. It includes:
  - Solutions in the Real World
  - Quality of Customer Relationships
  - Market Share
- **Innovation** represents service providers' ability to improve services. It includes:
  - Vision for End-to-End Process Lifecycle
  - Integration of BPO and ITO
  - Vision to Tailor Solution for Specific Industries
  - Leveraging External Drivers

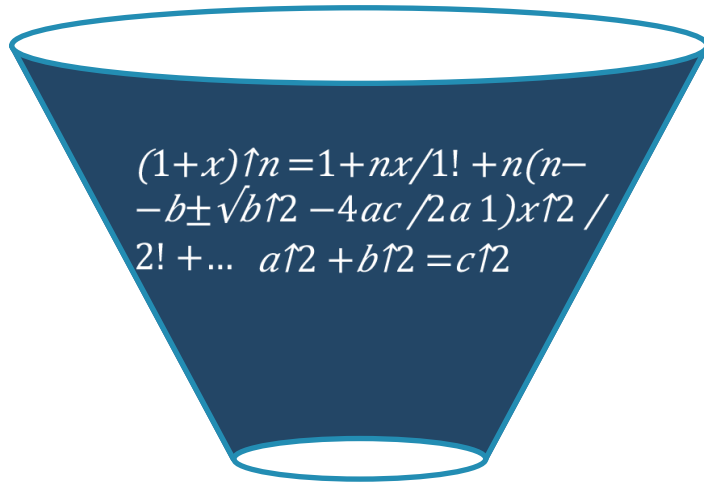
## CRITERIA WEIGHTING

Criteria are weighed by crowdsourcing weightings from the four groups that matter most:

- Enterprise Buyers [\$5B+] (20%)
- Buyers (20%)
- Service Providers (30%)
- HfS Research Analysts Team (20%)
- Advisors, Consultants, and Industry Stakeholders (10%)

Weightings from this report come from HfS's May 2014 State of Outsourcing Study

# How the HfS Blueprint Scores are Compiled



After service providers respond to HfS's Blueprint RFI and client references and fact checking have been completed, HfS analysts conduct a paired comparisons survey of service providers in each category of evaluation. This can be as many as 1,100+ unique service provider comparisons.

The data/rankings are compiled and compared across all provider comparisons to identify inconsistencies within the scores.

After a further data refinement, the criteria weightings are used to give each service provider a score in each evaluation criteria component.

Once aggregation and scoring are complete, the service providers' scores are plotted, producing the HfS Blueprint.

# HfS Blueprint Scoring Percentage Breakdown

## EXECUTION

52.69%

Quality of Customer Relationships	22.70%
Quality of Account Management Team	11.30%
How Service Providers Engage Customers and Develop Communities	4.66%
How Service Providers Incorporate Customer Feedback	6.74%
Real-World Delivery Solutions	16.45%
Actual Delivery of Services for Each Sub-Process	5.78%
<i>Analytics data preparation and management</i>	1.93%
<i>Analytics data preparation and management</i>	1.93%
<i>Analytics data preparation and management</i>	1.93%
Geographic Footprint and Scale	3.18%
Usefulness of Services to Specific Client Needs of All Sizes	7.49%
Flexibility to Deliver End-to-End Solutions and Point Solutions	4.20%
Experience Delivering Industry-Specific Solutions	3.29%
Flexible Pricing Models to Meet Customer Needs	13.54%

## INNOVATION

47.31%

Vision for End-to-End Process Lifecycle	15.10%
Concrete Plans to Deliver Value Beyond Cost and Investment in Future Capabilities	5.06%
Integration of Technology Into Business Process	5.93%
Integration of analytics into ITO/BPO operations	4.11%
Vision for Industry-Specific Solutions	16.86%
Ability to Leverage External Value Drivers	15.35%
Leverage New Technology, Security, Social Media, Mobility, and Cloud Capabilities	8.58%
Talent acquisition and development frameworks	6.77%

## TOTAL

100.00%

# Execution Definitions

EXECUTION	How well does the provider execute on its contractual agreement and how well does the provider manage the client/provider relationship?
<b>Quality of Customer Relationships</b>	<b>How engaged are providers in managing the client relationship based on the following metrics: quality of account management, service provider / client engagement, and incorporation of feedback?</b>
Quality of Account Management Team	What is the quality level of professional skills in the account management team?
How Service Providers Engage Customers and Develop Communities	How well does the service provider engage clients and develop client communities?
How Service Providers Incorporate Customer Feedback	How have service providers taken feedback and incorporated that feedback into their product/solution?
<b>Real-World Delivery Solutions</b>	<b>Does the solution provided compare favorably to the service agreed upon when taking into account delivery of services for each sub-process and geographic footprint and scale?</b>
Actual Delivery of Services for Each Sub-Process	Taking into account each sub-process and the entire macro process, does each sub-process sum to successful delivery of the service being provided? For example, in the Finance and Accounting macro process of Order to Cash, are all sub-processes being delivered upon successfully?
Geographic Footprint and Scale	Specific to the category, to what degree do service providers have geographic locations that offer strategic value, and do they have scale?
Usefulness of Services to Specific Client Needs of All Sizes	How flexible and experienced are providers when tailoring solutions based on client size, location, and type of solution (end-to-end and single point)?
<i>Flexibility to Deliver End-to-End Solutions and Point Solutions</i>	How flexible are providers with delivering multi-process end-to-end solutions versus single point solutions?
<i>Experience Delivering Industry-Specific Solutions</i>	How well does the provider deliver industry-specific or horizontal-specific analytics solutions (for example, depth in verticals such as insurance, retail, or major processes such as Finance and Accounting or Supply Chain)?
<b>Flexible Pricing Models to Meet Customer Needs</b>	<b>How flexible are providers when determining the pricing of contracts? Are they willing to make investments into the client's firm for long-term growth?</b>

# Innovation Definitions

INNOVATION	Innovation is the combination of improving both services and business outcomes.
Vision for End-to-End Process Lifecycle	The strategy for delivery of services to each part of the value chain of processes. For example, in Finance and Accounting, the components of the value chain may include order to cash, record to report, and procure to pay. In Customer Relationship Management, the components may include outbound service, inbound service, quality, training, workforce management, call routing, self service, and customer insights/analytics.
Concrete Plans to Deliver Value Beyond Cost and Investment in Future Capabilities	A clear understanding is present about what value levers exist and how the service provider will deliver that value. Examples of value may include labor arbitrage, technology, analytics, quality, revenue, global scale, and flexibility.
Integration of Technology Into Business Process	How does the service provider integrate applications with manual labor to improve value to clients? Service providers may provide cloud-enabled technology, SaaS, workflow, or analytics applications.
Integration of analytics into ITO/BPO operations	How well does the provider embed data management, reporting and analytics capabilities into existing and new BPO/ITO engagements to create value add into operations and decision making.
Vision for Industry-Specific Solutions	Does the provider have a vision for services specific to certain industries?
Ability to Leverage External Value Drivers	How well have providers integrated external value drivers into their services? Examples include cloud solutions, security enhancements, incorporation of regulatory changes, and use of new collaborative tools.
Leverage New Technology, Security, Social Media, Mobility, and Cloud Capabilities	How well does the provider leverage new technologies / enhancements, mobility functionality, and cloud capabilities into their solutions?
Analytics talent acquisition and development frameworks	How well is the provider updating its strategy towards the recruitment and development of big data and analytics technology, domain expertise and statistical talent to address emerging technology needs.



# Winner's Circle and High Performers Methodology

To distinguish providers that have gone above and beyond within a particular line of delivery, HfS awards these providers a “Winner’s Circle” or “High Performer” designation. The below provides a brief description of the general characteristics of each designation:

## WINNER'S CIRCLE:

Organizations that demonstrate excellence in both execution and innovation.

- From an **execution** perspective, providers have developed strong relationships with clients, execute services beyond the scope of hitting green lights, and are highly flexible when meeting clients’ needs.
- From an **innovation** perspective, providers have a strong vision, concrete plans to invest in future capabilities, a healthy cross-section of vertical capabilities, and have illustrated a strong ability to leverage external drivers to increase value for their clients.

## HIGH PERFORMERS:

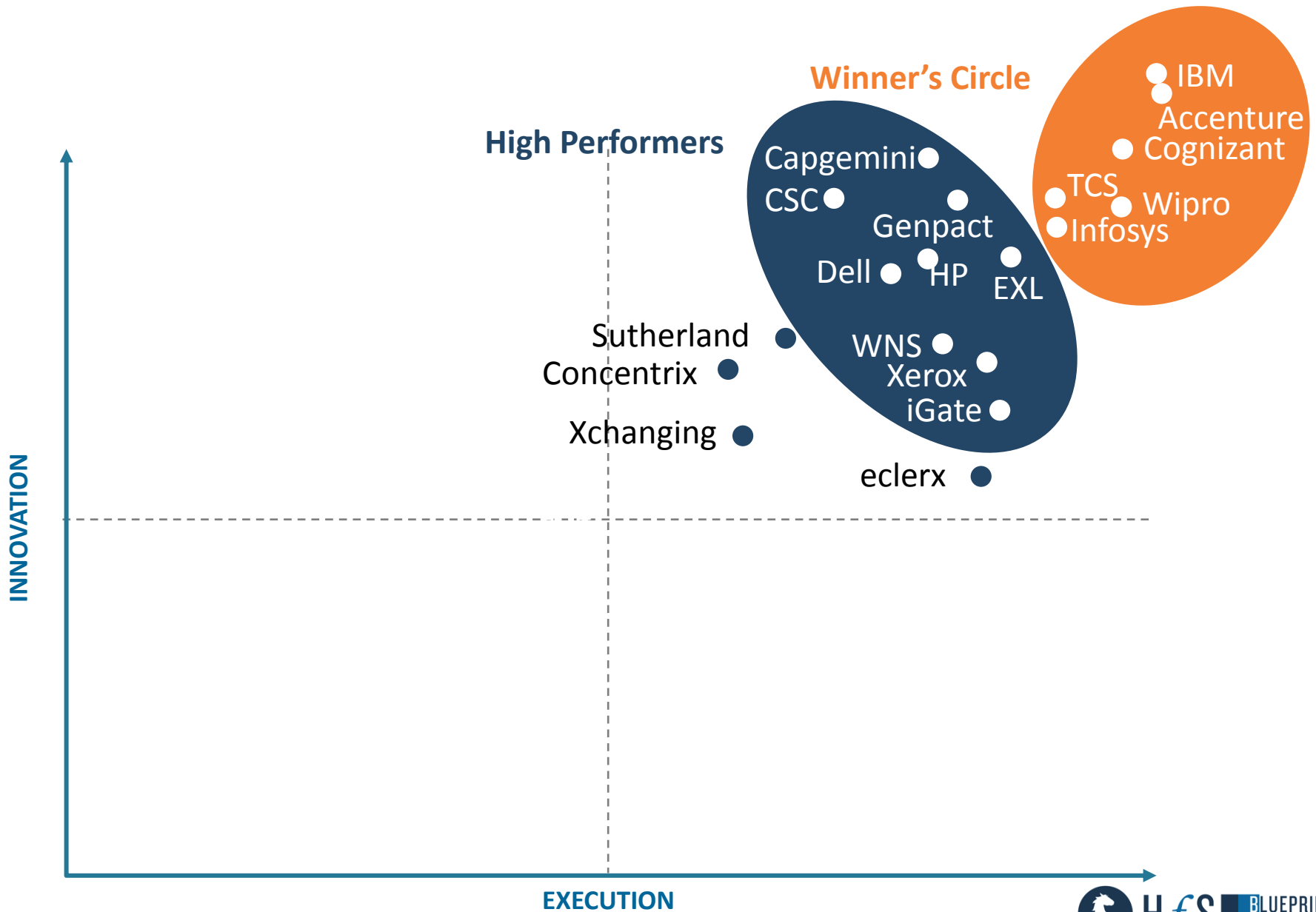
Organizations that demonstrate strong capabilities in both execution and innovation but are lacking in an innovative vision or execution against their vision.

- From an **execution** perspective, providers execute some of the following areas with excellence, but not all areas: high performers have developed worthwhile relationships with clients, execute their services and hit all of the green lights, and are very flexible when meeting clients’ needs.
- From an **innovation** perspective, providers typically execute some of the following areas with excellence, but not all areas: have a vision and demonstrated plans to invest in future capabilities, have experience delivering services over multiple vertical capabilities, and have illustrated a good ability to leverage external drivers to increase value for their clients.

# Service Provider Capabilities



# HfS Blueprint 2015: Enterprise Analytics Services



# Major Service Provider Dynamics – Highlights

## EXECUTION

- **Accenture, Dell and Infosys knock it out of the park with developing customer communities**
  - Clients stressed the need for engaging with peers to learn about their analytics initiatives to help them be more effective over time
  - Accenture, Dell and Infosys had the most satisfied clients for this category, as they have been able to best facilitate roundtable events, forums, joint presentations and interactions between clients.
- **Cognizant, IGATE, Infosys, TCS and WNS bring the most flexibility to analytics engagements**
  - These service providers scored the highest on flexibility, which is an important parameter for analytics services. Clients valued the frameworks created by these service providers to deliver ad hoc requests and respond quickly to last minute changes in scope.
- **Cognizant, CSC and Sutherland Global Services lead account management**
  - Cognizant, CSC and SGS scored high on being responsive, “anticipating needs” and being proactive on short-minute resource requests
  - Account management at different layers of Cognizant came out as a particular strength.

## INNOVATION

- **Accenture and IBM maintain lead for vision for enterprise analytics services with TCS coming on as well**
  - These service providers have the most progressive vision for enterprise analytics services across the analytics value chain because of which they have been able to gain mindshare (and scope expansions) with their clients
- **CSC, Genpact, IBM, Wipro and Xchanging are using emerging technologies in different ways that are resonating with clients, including:**
  - Xchanging’s machine learning capabilities to improve procurement operations outcomes
  - Genpact’s work in social media analytics
  - CSC’s cybersecurity and focus on big data analytics
  - Wipro bringing mobility and cloud to analytics delivery
- **Capgemini, Concentrix, IBM, EXL and WNS performed well on IT-BPO analytics embedding**
  - These service providers have invested significantly in developing horizontal functional analytics capabilities that can add value into ongoing BPO engagements.
  - Capgemini and IBM’s Finance & Accounting analytics and WNS’ CRM BPO analytics embedding came out as particular strengths

# Analytics Services Trends Compared to 2013 Blueprint



## *Comparatively Moving Up*

- More focus on business context
- Collaboration between IT and business
- Integrated analytics solutions
- Deployment of analytics platforms
- IoT and sensor data-driven analytics
- Talent as a differentiator
- Increased deployment of big data programs

## *Here to Stay*

- Industry-focused advanced analytics use case development
- Cross-pollination of analytical techniques across verticals
- Mingling internal/external talent and tech to develop capabilities
- Digital-driven interactive marketing/customer analytics

## *Comparatively Moving Down*

- Pure staff augmentation based models
- Debate of the required storage and software in initial discussions
- Social/digital as 'hype' or not applicable

# A Different Market Than 2013 With New Trends Emerging...

- **More focus on business context and impact.** The market is seeing an overwhelming change - an increased focus on applying business context and doing more meaningful analysis, rather than the isolated procurement of analytics tools and technologies. This is impacting the stakeholder dynamic, the decision-making process and day-to-day relationships with service providers for buyers. This is good news for service providers with analytics consulting backgrounds and/or domain expertise for analytics managed services, as services buyers have greater confidence in working with these service providers for strategic analytics initiatives that are highly visible in the enterprise. This also means more work for analytics service providers who need to change their pitches to become less technical (for a non-IT audience) and offer services and solutions that solve specific business challenges.
- **Standalone analytics business portfolio re-aligned within service providers organizations – but a long way to go towards real “end-to-end”.** The last 18 months has seen the strategic realignment of analytics within most service providers’ organizations. While some such as Accenture and Cognizant have moved analytics capabilities into larger ‘Digital’ initiatives, others that started with strengths in data management/research have broadened and brought together allied capabilities to service the entire stack. However, services buyers are quick to point out relative strengths and weaknesses of the majority of service providers for areas like information management, BI reporting and advanced analytics – both from a capability and perception standpoint. Thus service providers over the next few years will spend much time in a) rebranding their market perception on their ability to service the entire big data and analytics stack and b) integrating and expanding on relatively weak areas. This means more acquisitions to fill gaps, and massive investments in internal capability development.

# A Different Market Than 2013 With New Trends Emerging... (continued)

- **Clients are continuing to use a wide mix of internal and external talent and technology** for different analytics implementations, with no clear model emerging. For some, carving out standardized and repeatable reporting and analysis tasks for third party service providers while honing internal talent to do advanced analytics seems to be the answer. Others are collaborating with service providers for technology decisions and implementations more than ongoing analytics support. Others still are critically reliant on the industry-leading insights generated by their service providers' staffs that are almost seamlessly blended alongside internal teams.
- **Continued verticalization of offerings.** Service providers are turning gained experience into portfolios of pre-packaged industry-specific use cases and catalogues. These help them prove the business cases much faster and speed up onboarding for new engagements. While solutions in earlier years were in consumer-facing industries, primarily for sales & marketing analytics, providers are now taking these learnings to sectors such as healthcare and energy and utilities that have new opportunities due to more data availability.

# A Different Market Than 2013 With New Trends Emerging... (continued)

- **Growing aspiration to become an end-to-end analytics partner to clients.** Service providers are offering more 'integrated' analytics solutions that cut across the analytics value chain (ETL, data prepping and integration, model development, etc.). Instead of focusing on selling these components, providers are promising to integrate them and deliver to business outcomes. Budgets are now coming from multiple business functions and the potential for growth is huge if the service provider is the first to be established as the company's enterprise-wide analytics partner – not just for data integration, BI or analytics projects, but essentially a COE to draw various capabilities across this value chain. There are a few examples of where market leaders are experimenting with buyers on this model; success will be determined by how far the provider is able to penetrate into the client organization's functions and processes and impact day to day decision making.
- **Big data and analytics piloting is in full force in 2015.** We see an across the board willingness by both services buyers and service providers to experiment in different kinds of pilots and POCs that go into the next level of analytics use case development – not just applying cross-vertical learnings (from retail banking to healthcare), but in conjunction with newer sources of data (e.g. sensors, geolocation mobile data), and new uses of other emerging technologies (e.g. cloud based data warehousing, mobile delivery of reports and insights). Of note, a significant portion of these initiatives is being funded by service providers in a bid to develop robust solutions to take to market. The next slide outlines these key developments in emerging technology adoption by analytics service providers.



# Trends in Analytics Spurred By Emerging Technologies

- **Digital creating new analytics opportunities.** Service providers and services buyers are exploring customer/marketing analytics engagements, including attribution modeling for different marketing and communication channels, near real-time targeting, and offer management, and fitting in the relevance of omni-channel into the traditional metrics of customer acquisition, propensities for attrition, loyalty program efficiencies, etc.
- **Early days with industrial IoT/sensor-driven analytics.** GE's push on its industrial IoT agenda has opened up the market to a variety of innovative use cases for sensor data analytics. Major service providers are putting their skin in the game to learn how to make the most compelling use with marquee clients, most prominently in the manufacturing, insurance, and energy and utility industry verticals.
- **Spike in deployments of big data programs.** A lot more clients are willing to make investments in big data platforms and the analytics and reporting services wrapped around them, through careful piloting and experimentation over the last two years. Service providers finally have a growing roster of large-scale client implementations for big data programs, though some are focused in specific functions/industry verticals. We see a significantly higher number of big data platform implementations, along with the surrounding descriptive and predictive analytics layers, reporting dashboards, ongoing decision support and big data consulting capabilities.
- **Analytics platforms and Analytics-as-a-Service is finally moving beyond being a buzzword.** We're also seeing many more demonstrations of using analytics platforms to deliver insights. These are both proprietary technology platforms as well as mash-ups or customized versions of best-of-breed open source data and analytics technologies. Functionality such as flexible backend data integration, sitting in between major enterprise system applications and delivering reports and insights through these platforms hosted on the cloud is leading to the increased realization of what last year was more a vision than a reality: 'analytics As-a-Service'. This model is still emerging, and constitutes not more than 5% of work today, but is promising as a demonstration of future capabilities in de-linking revenues from headcount towards non-linear growth, and leveraging both technology assets and talent to deliver to outcomes.

# How Service Providers Can Differentiate in 2015 & Beyond

- **Find a balance with relevant innovation.** Through trial, a handful of forward thinking / motivated services buyers, and dogged persistence on the part of the service providers, investment in pilots, skills, and technology are starting to show results in changing the nature of engagement between services buyers and service providers, and in distinguishing the leaders from the rest of the pack. The critical juncture is where the service provider and services buyer have figured out how the service provider can maximize the use of available data, technology and skills base together in a way that provides insights that really matter to the business, with context and impact. Service providers that will win will be able to walk the tightrope of investing in innovation that creates impact in areas that are *relevant* to buyers, not necessarily areas that they have been traditionally strong in. Similarly, at the account level, winning account managers will find a balance in gauging these needs and proposing solutions as appropriate, not based on sales targets to recover development costs.
- **Develop data scientist talent pools and hire from industry** to combine business context, domain expertise, and existing and emerging analytics technology and techniques to deliver meaningful, actionable insights. Academic tie-ups to develop this curricula and create future pipeline for emerging skillsets will greatly help to differentiate along these lines. We see leading service providers increasingly looking at fresh college hires from computer science, math and data sciences fields to place in new roles and practices, rather than re-skilling/up-skilling teams from traditional BI backgrounds. However, since there is growing interaction and reporting to business lines within analytics engagements, buyers perceive a gap in soft skills and business and vertical knowledge. Service providers will thus have to continue to experiment with the right ratio of data scientists, analysts, SMEs and managers with industry backgrounds to bring meaningful impact to their clients' businesses.

# How Service Providers Can Differentiate in 2015 & Beyond (continued)

- **Institutionalize creative problem solving**, continuously exploring and proactively demonstrating use cases across industry verticals which clients don't have access to internally. While buyers in our research rated most engagements as being well executed and meeting stipulated contractual obligations, they still have higher expectations about getting more meaningful analysis. Buyers want more customized reporting in cases where analysts are simply following a template, along with higher expectations of incorporating newer, more relevant sources of data, and bringing creativity to solve different business challenges than the existing models. Service providers that are able to embed, encourage and reward creative problem solving within their analytics delivery teams will truly be able to differentiate in this market. Traditionally, global technology and business services firms have relied on embedding process standardization methodologies such as Lean Six Sigma. With analytics, we believe there is a strong potential to apply newer methodologies such as Design Thinking to get different results by focusing on business context.
- **Offer a range of engagement models** for analytics and data management (at the LOB/functional level, at the corporate strategy level, at the analytics COE level), continuously exploring emerging technologies to optimize analytics insight and reporting delivery (e.g. analytics platform based delivery). Several buyers expressed a wish for their service provider to be the 'change agent' or 'evangelizer' for analytics services within the enterprise, particularly to bridge the gap between IT and business departments. While enterprises are still evolving their internal strategies and capabilities for analytics services delivery, winning service providers will proactively experiment with their roles as analytics partners to enable their clients' analytics journeys

# Service Provider Profile



Blueprint Leading Highlights	Strengths	Challenges
<ul style="list-style-type: none"> <li>Vision for Enterprise Analytics Services</li> <li>Analytics talent acquisition and development frameworks</li> <li>Experience Delivering Industry-Specific Solutions</li> <li>Delivery of Advanced analytics modeling and ongoing decision support</li> <li>Geographic Footprint and Scale</li> </ul>	<ul style="list-style-type: none"> <li><b>Experience, scale and domain expertise.</b> Accenture serves 70 of the Fortune Global 100 companies with an analytics portfolio that includes industry-specific offerings, cross-industry offerings and functional solutions. It has one of the largest analytics talent pools, \$3B in analytics revenues in FY14 and globally networked centers of excellence.</li> <li><b>Investments in R&amp;D and alliances.</b> Accenture's clients commended its ability to invest in analytics, including initiatives such as Accenture Innovation Centers, academic alliance with MIT, Accenture Technology Labs, technology alliances and collaborative relationships, and client joint ventures.</li> <li><b>Building assets that enable Analytics As-a-Service.</b> Accenture has developed and acquired several key analytics platforms, models and toolkits, enabling AaaS platform delivery, rapid analytics application development, business function and vertical-specific analytics tools and solutions.</li> <li><b>Great market presence and community development.</b> Clients appreciate the opportunities Accenture creates to engage them in industry-level discussions and interact with the larger analytics community. Its market presence over the last couple years has helped differentiate Accenture Digital including analytics.</li> </ul>	<ul style="list-style-type: none"> <li><b>Perceived as expensive.</b> Clients mentioned that Accenture's premium pricing is a challenge – several competitors with similar capabilities are more accommodating to budget considerations.</li> <li><b>Sales-oriented account management.</b> Accenture's analytics clients noted that when delivery and business development responsibilities are shouldered by the same people, discussions are more sales oriented to growing business rather than customer servicing.</li> <li><b>Customizing analytics innovation to individual account needs.</b> Client feedback mentioned that during account level discussions, they get great ideas from Accenture on digital opportunities, but there is a room for improvement in understanding and addressing company-specific needs.</li> </ul>

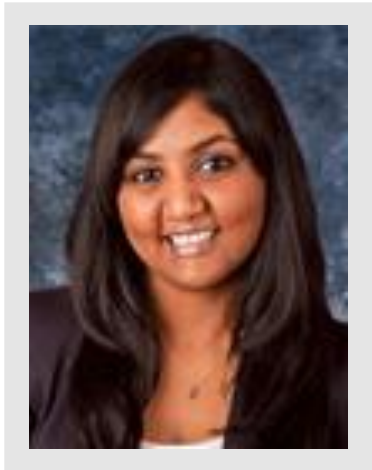
Relevant Acquisitions	Key Clients	Global Operations Centers	Proprietary Technologies
<ul style="list-style-type: none"> <li>2015, Gapso, an advanced analytics services and solutions provider helping solve complex supply chain and logistics challenges</li> <li>2014, i4C Analytics, an advanced analytics software platform provider that offers tailored industry- and function-specific analytics applications</li> <li>2013, Procurian, enhancing Accenture's capabilities in Procurement BPO with analytics and technology assets</li> <li>2013, ChangeTrack® Research and its insight-driven, analytics-based system to plan and manage change to drive successful outcomes</li> <li>2012, Neo Metrics Analytics S.L. to further develop advanced analytical models</li> </ul>	<ul style="list-style-type: none"> <li>ABN AMRO, AstraZeneca, Australian Tax Office, Australia New Zealand Bank, Australia n Rugby Union, Bharti Retail, BMW, Catholic Health Initiatives, CNA Insurance, City of New York, Columbia Pipeline Group, Cricket Australia, Hydro One, Irish Revenue Agency, Lawsons, London Metropolitan Police Service, Marriott, Meetic, NBN Co, Nuovo Trasporto Viaggiatori S.p.A., Procter &amp; Gamble, RBS 6 Nations, Reliance Communications, Rio de Janeiro (Municipal of), Royal Shakespeare Company, San Bernadino County, SCA, Sony Electronics, Trinity Health, Tata Motors, Telefonica, Telstra, Tesco, UIL Holdings, Unilever, US Department of Homeland Security, US Postal Service, Vodafone, Warner Bros., West Midlands Police,</li> </ul>	<ul style="list-style-type: none"> <li>Headcount: 28,000 FTEs in Accenture Digital, including 1,000 data scientists and big data engineers</li> <li>50+ global centers in the Accenture Global Delivery Network, supported by 20+ Accenture Analytics Innovation Centers including 5 Advanced Analytics Centers</li> </ul>	<ul style="list-style-type: none"> <li>Accenture Analytics Applications Platform – acquired through i4C Analytics, enables the agile development of advanced analytics applications</li> <li>Accenture Analytics Platform – cloud-based big data and analytics offering, accelerates analytics capabilities with end-to-end technology, applications, industry knowledge, and services</li> <li>Accenture Marketing Analytics Platform – patented technology to generate more accurate marketing mix models</li> <li>Accenture Data Discovery – uses data visualization tools and interactive interfaces to recognize patterns, uncover actionable insights and build equity in data</li> <li>Accenture BPO Navigator – integrated portal with best-in-class, industry-specific BPO assets</li> </ul>

# About the Author



# Reetika Joshi

Research Director, Consumer-Driven Operations & Analytics Strategies, HfS Research:  
Cambridge, MA



[reetika.joshi@hfsresearch.com](mailto:reetika.joshi@hfsresearch.com)

[@joshireetika](#)

## Overview

- Tracks verticalized technology-enabled BPO opportunities in insurance and retail
- Tracks enterprise analytics services and marketing and digital customer experience management services
- Conducts Blueprint reports on service providers across service areas in global sourcing

## Previous Experience

- Project Manager in the sourcing research wing of the business research and consulting firm ValueNotes, encompassing a range of responsibilities, including research product design and development for the outsourcing community, management of custom research engagements, and development of thought leadership through targeted content and community interaction
- Niche BPO and KPO coverage, including analytics, medical transcription, market research, and e-learning
- Bespoke engagements, including in-depth competitive intelligence studies, market and investment opportunity assessments, demand-side surveys, and marketing communication optimization for outsourcing buyers, providers, consultants, and investors

## Education

- Bachelor's in Business Administration, Symbiosis International University, India
- Master's in Marketing Management with Beta Gamma Sigma honors, Aston Business School, UK

# About HfS Research

**HfS Research** is the leading analyst authority and global network for IT and business services, with a specific focus on global business services, digital transformation, and outsourcing. HfS serves the research, governance, and services strategy needs of business operations and IT leaders across finance, supply chain, human resources, marketing, and core industry functions. The firm provides insightful and meaningful analyst coverage of best business practices and innovations that impact successful business outcomes, such as the digital transformation of operations, cloud-based business platforms, services talent development strategies, process automation and outsourcing, mobility, analytics, and social collaboration. HfS applies its acclaimed Blueprint Methodology to evaluate the performance of service and technology in terms of innovating and executing against those business outcomes.

HfS educates and facilitates discussions among the world's largest knowledge community of enterprise services professionals, currently comprising 150,000 subscribers and members. HfS Research facilitates the **HfS Sourcing Executive Council**, the acclaimed elite group of sourcing practitioners from leading organizations that meets bi-annually to share the future direction of the global services industry and to discuss the future enterprise operations framework. HfS provides sourcing executive council members with the HfS Governance Academy and Certification Program to help its clients improve the governance of their global business services and vendor relationships.

In 2010 and 2011, HfS Research's Founder and CEO, Phil Fersht, was named "Analyst of the Year" by the International Institute of Analyst Relations (IIAR), the premier body of analyst-facing professionals, and achieved the distinctive award of being voted the research analyst industry's Most Innovative Analyst Firm in 2012.

In 2013, HfS was named first in rising influence among leading analyst firms, according to the 2013 Analyst Value Survey, and second out of the 44 leading industry analyst firms in the 2013 Analyst Value Index.

Now in its seventh year of publication, HfS Research's acclaimed blog "**Horses for Sources**" is widely recognized as the most widely read and revered destination for unfettered collective insight, research, and open debate about sourcing industry issues and developments. Horses for Sources today receives over a million web visits a year.

To learn more about HfS Research, please email [research@HfSResearch.com](mailto:research@HfSResearch.com).