



HFS Top 10 Digital Front Office: CX Design, Sales, and Marketing

Excerpt for Accenture

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As we move toward the hyper-connected economy, companies are recognizing the need to break down internal silos to align with customer-centricity and bolster business performance. Customer-centricity should be paramount to the entire organization, and the front office needs to break down its own silos for the design of customer engagement that cuts across the whole customer life cycle. Customer experience design needs to align with marketing and sales execution; companies seek partners that can help with design, strategy, and intelligent operations for executing that vision.

— *Melissa O'Brien, Research Vice President, HFS Research*

What you'll read

Topic	Page
Introduction and value chain	4
Executive summary	9
The HFS Top 10 Digital Front Office: CX Design, Sales, and Marketing	15
Provider profiles	17
About the authors	19

Introduction

- This HFS Top 10 builds upon 2016's [digital marketing operations Blueprint](#). It extends to sales operations services and elements of design, including CX consulting and journey mapping, to reflect the converging nature of business services around customer experience design and execution.
- We analyzed the capabilities of 16 service providers to develop a comprehensive analysis (shown on the next slide) of providers of services and solutions within the value chain for design, sales, and marketing. Slide 6 illustrates our view of customer engagement as a cyclical process, where [customer engagement operations](#) support the broader design and campaigns discussed in this report within the OneOffice framework.
- This Top 10 research is based on interviews with 300 enterprise services clients from the Global 2000. We asked specific questions about innovation and execution performance of the service providers we assessed. We augmented the research with information we collected through provider RFIs, structured briefings, client reference interviews, buyer networking events, and publicly available information sources.

The digital front office—three pillars of customer engagement

This Top 10 report focuses on consulting and CX design, digital marketing, and sales services

Consulting and CX design	Digital marketing and sales services	Interaction management and operations	
<ul style="list-style-type: none"> • Customer experience design and consulting • Customer journey mapping • Design thinking • Digital strategy and design • Brand strategy 	<ul style="list-style-type: none"> • Content creation and development—original ad and follow-on collateral creation and management • Content classification • Ad moderation • Web development, e-commerce support • Marketing consulting—campaign design and management, and product development, etc. • Campaign execution, loyalty program management, and coupon and gift card management • Search engine and social media marketing • Localization • Data security 	<ul style="list-style-type: none"> • Technical support • Customer care • Sales • Loyalty and attrition campaigns • Marketing • Collections • Fraud prevention • Case management • Billing 	<p>Contact center: agent-assisted, self-service, and automated</p> <p>Traditional and digitally enabled channels:</p> <ul style="list-style-type: none"> • Voice • Chat • SMS • Email • Retail and face-to-face • Social media • Web and mobile app • Video kiosk

Enabling technologies

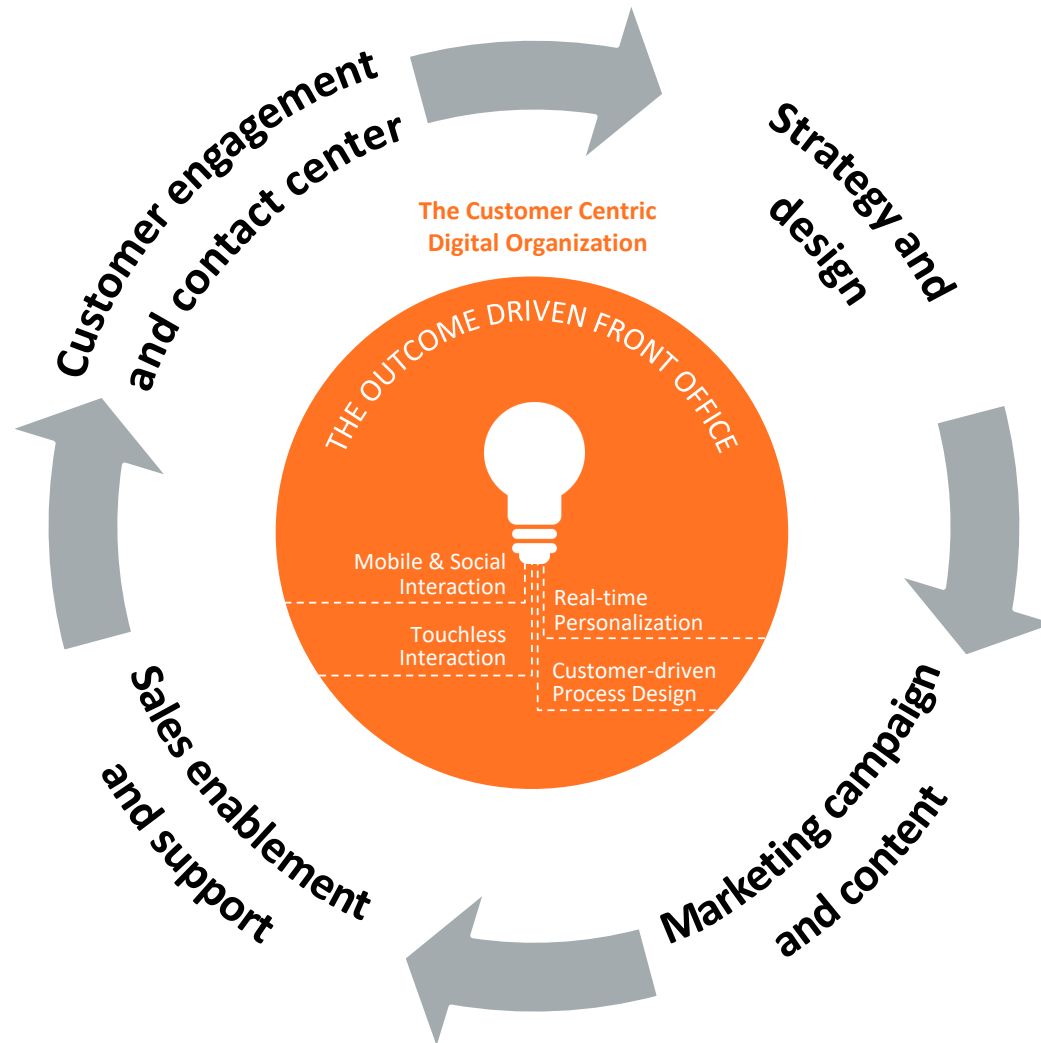
Digitization and robotic automation—Analytics—Mobility—Social media—Cognitive computing—Artificial intelligence

Operating models, methodologies, and platforms

Outsourcing—Shared services—GBS—COEs—BPaaS, SaaS, and IaaS—Design thinking

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.

The cycle of intelligent customer engagement



- ### Enabling technologies
- Digitization and robotic automation
 - Analytics
 - Mobility
 - Social media
 - Cognitive computing
 - Artificial intelligence

The CX services market needs to align with how customers buy



Regular marketing doesn't work anymore. Our usual partners, the WPPs and Omnicom types, just have their standard inflexible offers. We need a collaborative holistic CX partner that brings ideas and helps us improve analytics and our route to market.

VP Marketing, beverage company



Experience partners are now required to help enterprises design and develop digital customer experience



Experience agencies are emerging to address digital customer experience

Investment in design, marketing, and sales services is driven by the need to create digital customer experiences.



Navigating the technology landscape and adopting IA

Service providers are helping clients navigate the ever-growing MarTech landscape and adopt intelligent automation (IA), where marketing and sales has lower IA adoption and investment than other enterprise segments.



Enterprises need a flexible partner for quality and speed

This unique set of service providers offers an alternative or complement to the traditional media agency model in which production is de-coupled from design.



Developing the right blend of talent

This market is not only defined by platforms and technology disruption but also by a savvy approach to talent, including a mix of analytical, creative and technical talent.

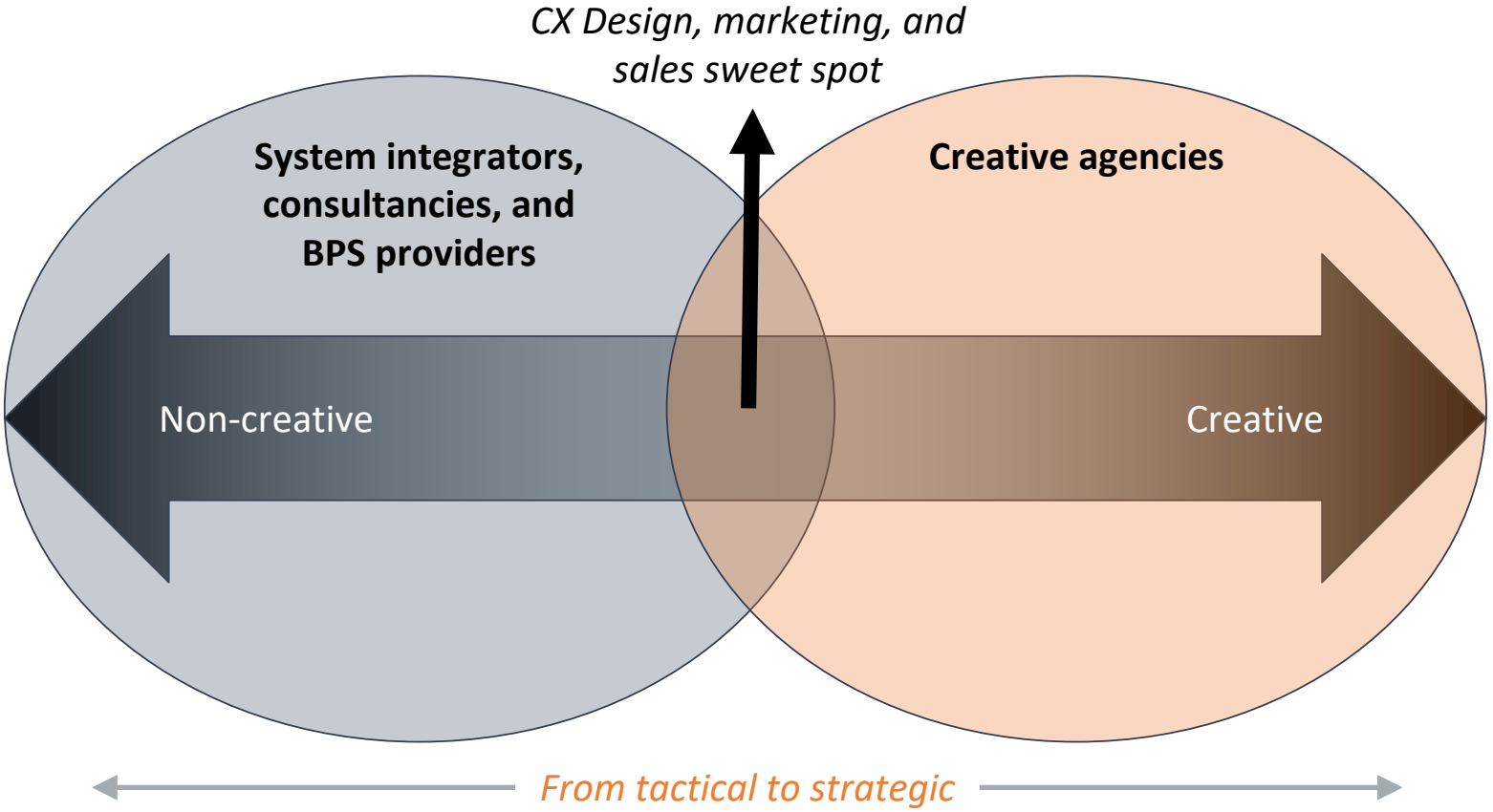
Executive summary (1/2)

- **A new market is emerging from the race to become "experience agencies." Investment in design, marketing, and sales services is driven by digital customer experiences.** Social media advertising, understanding customer segments on the web or mobile apps, purpose marketing, personalization, and sales conversion are all driving the need for speed, efficiency, and more relatable engagement. Because these expectations and preferences are constantly changing, enterprises are tasked with becoming more nimble and efficient organizations in order to be increasingly competitive. Enterprises are relying on a mixture of in-house and partner talent, but that partner landscape is shifting.
- **CMOs and business leaders alike need help navigating the technology landscape and understanding how to take advantage of integrated automation to achieve their business goals.** Despite the pervasiveness of intelligent automation for marketing and sales, adoption and investment are still relatively low compared to other functional areas in the enterprise (see slides 13 and 14). The service provider landscape and technology ecosystems are playing a big role in helping customers identify best-of-breed tools for what they're trying to accomplish.

- **Where clients desperately need help is with filling the gaps between their agency and internal staff for getting content to market with quality and speed.** Comprehensive service providers are helping to bridge the gap between design and brand activation. This is a quickly evolving space that requires multiple players to come together and create an ecosystem for business changing solutions. Digital production is often de-coupled from strategy and creative, which are typically handled by agencies. Many companies have been very vocal about their dissatisfaction with the traditional agency model and are taking marketing work back in-house, or, instead of consolidating providers, they're distributing work to several specialty providers. The opportunity for providers to disrupt in this space is increasing; while it is critical for service providers to partner with agencies, which still have and will continue to have a prominent place in the ecosystem, there is much more opportunity for BPOs to provide strategic level work than in the past. In addition, technology has disrupted the way companies go to market. Martech continues to grow exponentially, and managing an increasingly complex stack is the norm while companies struggle with the pace of change to manage these various systems. If the strategy and operations teams can come together with end-to-end solutions, this set of providers will gain a competitive advantage over the holding companies where everything is still structured and siloed within P&Ls and therefore not organized to meet client requirements (see slides 11 and 12).
- **Providing the right mix of right and left brain talent is required to deliver on experience services.** This market is not just defined by platforms and technology disruption, but by a savvy approach to talent. All types of service providers are looking for the right approach and balance for in-demand talent: creative talent, data scientists, subject matter experts, and vertical expertise. Underlying all of this is a need to foster a nimble talent strategy and culture that embraces change and disruption while maintaining a human-centric and problem solving-oriented outlook.

CX services now require a blend of strategy, creativity, and technology

Creative agencies lack the business outcomes focus and technology prowess needed for digital CX and are prime for disruption



From design to deployment: the building blocks of experience

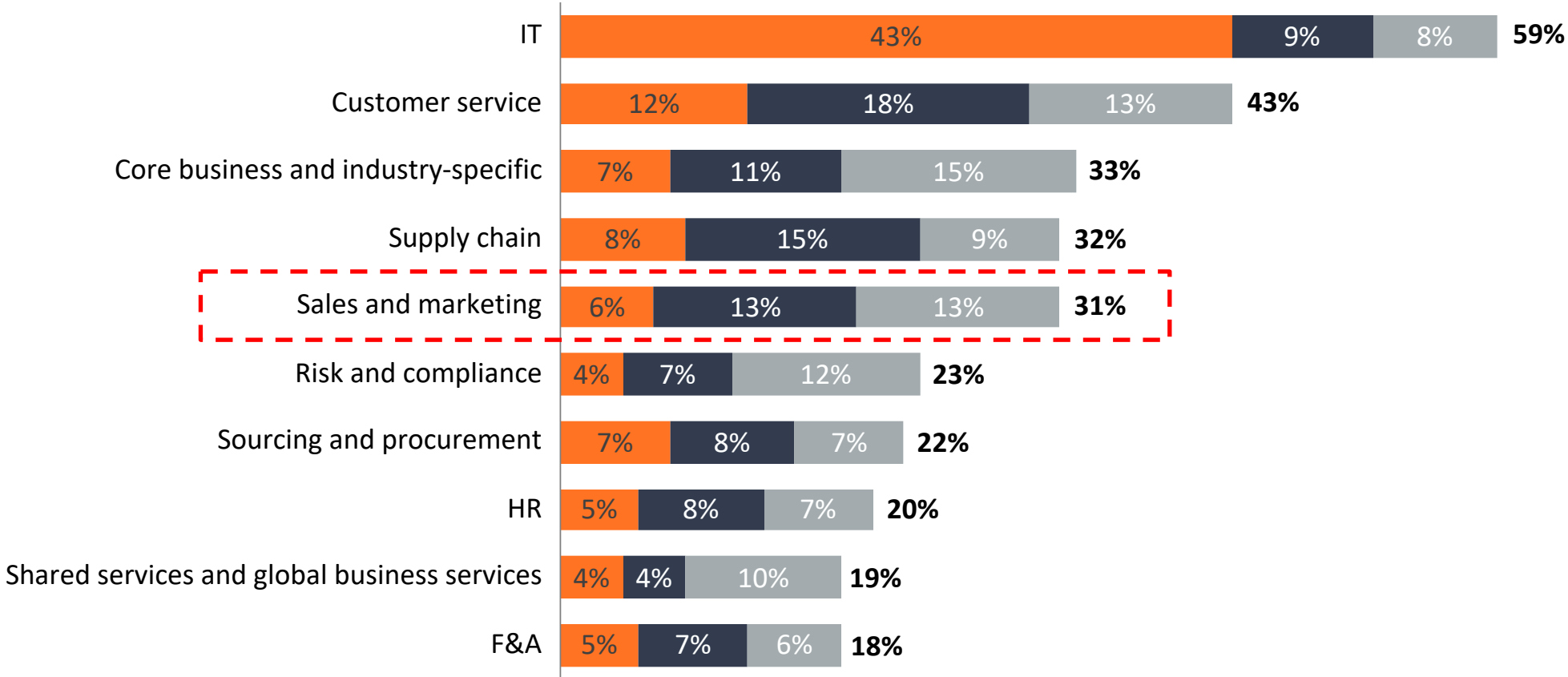


AI adoption levels for sales and marketing are middle of the road

What are the key areas where you are implementing Intelligent Automation (IA) technologies?

n=590

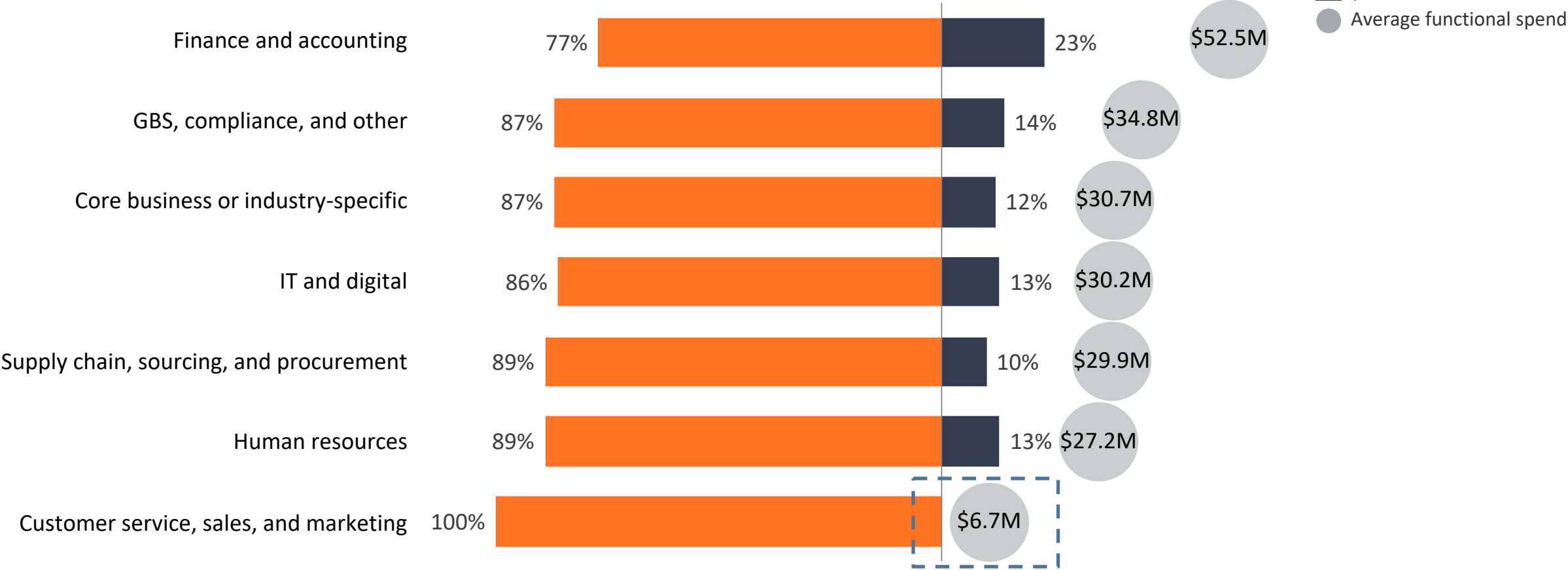
Rank 1
Rank 2
Rank 3



Sample: 590 Business Leaders
Source: HFS Research in Conjunction with KPMG, State of Intelligent Automation, 2018

IA investment is lowest for the front office

What level of intelligent automation-related investment does your function have today?

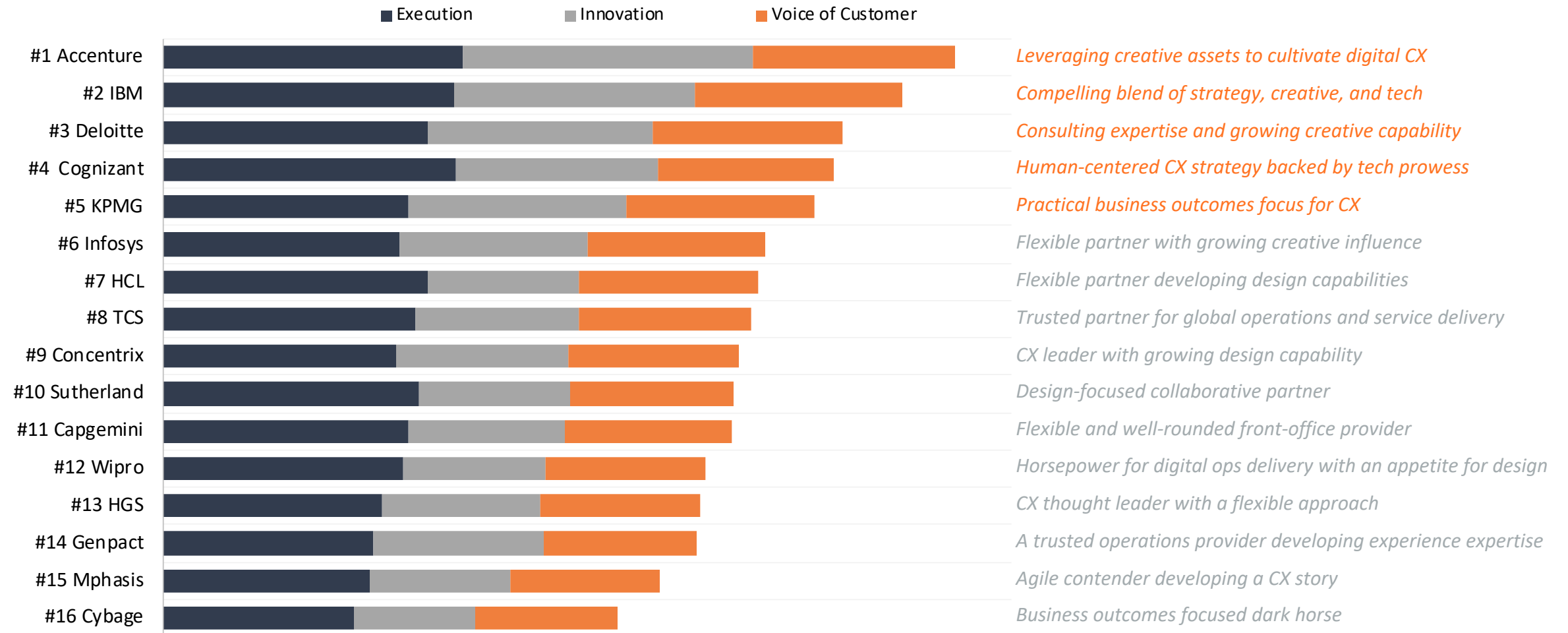


Sample: 590 Business leaders including 100 C-level executives
 Source: HFS Research in conjunction with KPMG International, State of Intelligent Automation, 2019

The HFS Top 10 Digital Front Office: CX Design, Sales, and Marketing


























Design, sales, and marketing services

TOP 10
HFS



Source: HFS Research 2019

HFS top five providers by individual assessment dimensions

HFS ranking	Ability to execute		Innovation capability		Voice of the customer
	Breadth and depth of service offerings	Service delivery	Vision and go-to-market	Digital investment and capability	
#1					
#2					
#3					
#4					
#5					

Source: HFS Research 2019

Provider profiles

Accenture: Robust front-office portfolio leveraging creative assets to help clients cultivate and execute their digital customer strategies

Dimension	Rank	Strengths	Development opportunities					
HFS Top 10 position	#1	<ul style="list-style-type: none"> Breadth and depth of end-to-end capability. Accenture brings end-to-end capabilities to help both B2C and B2B clients achieve their growth agendas. Its laser focus on tangible front-office business outcomes like market share, lead conversion rates, digital sales, top-line revenue improvements, and customer retention is apparent in its results and customer satisfaction. Through Accenture Interactive (its "experience agency") it has created the largest global capability in the market—a competitive juggernaut that spans the breadth and depth of digital customer experience. Leading-edge investment strategy. Accenture is actively investing to bring clients the best innovation across the continuum of marketing, sales, and service, with transformational design, thought leadership, and performance-based execution capabilities in keeping with Accenture's reputation. Along with 20+ recent creative and technology-focused acquisitions, Accenture Operations is dedicating significant investment to scale its B2B growth services business. Innovative talent and use of applied intelligence for more intelligent marketing and sales. Accenture has infused its services with the three key building blocks for more intelligent services: process automation, analytics, and AI. In particular, for data-driven marketing and sales analytics, Accenture has developed impressive solutions for its clients. Accenture continues to grow the talent needed to drive results through acquisitions, targeted hiring, talent development academies, and co-investing with clients. 	<ul style="list-style-type: none"> Buyer maturity in adoption of services. In order to fully take advantage of service providers' experience capabilities, enterprises need to break down their functional silos and better align to customer-led journeys. Accenture's big bet is on its client companies putting aside internal competing priorities and recognizing the opportunity to unlock new, profitable growth through an integrated marketing, sales, and service model, much like HFS' OneOffice concept. As the lines continue to blur in the front office and across business and IT, Accenture will need to continue to lead clients in strategy development and execution, where many clients are still far behind on the curve. M&A culture impacts. There has been much industry speculation about the potential negative impact of forging traditional consulting and creative agency cultures or trying to seamlessly blend services while keeping cultures intact. So far, Accenture seems to be striking the right balance. The strength of Accenture's combination of transformational consulting capabilities, creative acumen, and execution proficiency is an important differentiator in this space. Accenture will need to maintain this combination to bring to bear the full value of its many differentiated capabilities and assets to clients. 					
Execution success								
Breadth and depth of services	#1							
Services delivery	#1							
Innovation capability								
		<table border="1"> <thead> <tr> <th>Key acquisitions and partnerships</th> <th>Fact sheet</th> <th>Highlights and recent developments</th> </tr> </thead> <tbody> <tr> <td> Key acquisitions: <ul style="list-style-type: none"> Droga5 (2019) What If! (2019) Adaptly (2018) MXM (2018) Rothco (2018) Mackevision (2018) Key Partnerships: Google, Microsoft, IBM, Salesforce, Adobe, Amazon Web Services, SAP, and Oracle. Accenture maintains academic alliances with institutions such as Parsons, FIT, MIT, and Hyper Island. </td> <td> Headcount: 45K+ team members with transformational, design, strategy, consulting, ecosystem technology, and managed service expertise. Locations: 30+ countries Sample clients: US west coast technology giant, Silicon Valley-based technology giants, global technology company, global high-tech leader, Subway, Velux, Marriot, International, Adidas, Unilever, global pharmaceutical company, large home-improvement retailer, leading car manufacturer brands </td> <td> <ul style="list-style-type: none"> Recently announced the acquisition of Droga5, a very influential advertising agency, in April 2019. Named Adobe 2018 Global Digital Experience Solution Partner of the Year. Opened design studios and innovation centers globally, including a San Francisco Innovation Hub, a design center in Johannesburg, and a front-office COE in San Jose, Costa Rica. Accenture has launched Synops, an innovative human-machine operating "engine" that optimizes the synergy of data, applied intelligence, digital technologies, and talent. </td> </tr> </tbody> </table>	Key acquisitions and partnerships	Fact sheet	Highlights and recent developments	Key acquisitions: <ul style="list-style-type: none"> Droga5 (2019) What If! (2019) Adaptly (2018) MXM (2018) Rothco (2018) Mackevision (2018) Key Partnerships: Google, Microsoft, IBM, Salesforce, Adobe, Amazon Web Services, SAP, and Oracle. Accenture maintains academic alliances with institutions such as Parsons, FIT, MIT, and Hyper Island.	Headcount: 45K+ team members with transformational, design, strategy, consulting, ecosystem technology, and managed service expertise. Locations: 30+ countries Sample clients: US west coast technology giant, Silicon Valley-based technology giants, global technology company, global high-tech leader, Subway, Velux, Marriot, International, Adidas, Unilever, global pharmaceutical company, large home-improvement retailer, leading car manufacturer brands	<ul style="list-style-type: none"> Recently announced the acquisition of Droga5, a very influential advertising agency, in April 2019. Named Adobe 2018 Global Digital Experience Solution Partner of the Year. Opened design studios and innovation centers globally, including a San Francisco Innovation Hub, a design center in Johannesburg, and a front-office COE in San Jose, Costa Rica. Accenture has launched Synops, an innovative human-machine operating "engine" that optimizes the synergy of data, applied intelligence, digital technologies, and talent.
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Vision and GTM	#1							
Digital investment and capability	#1							
Voice of the customer	#2							

HFS Research authors



Melissa O'Brien
Research Vice President

Melissa O'Brien is Research Vice President, 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, digging into 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 regards to customer-centric strategies, intelligent operations and service delivery. ([View bio and contact details](#)).



Madhuparna Banerjee
Knowledge Analyst

Madhuparna Banerjee is a Knowledge Analyst at HFS Research, supporting the Business Process Services (BPS). Her responsibilities include collecting and analyzing data and information found in databases and/or other primary and secondary research tools, to create blueprints, POV's and custom reports for clients on the scope of the business and economic trends in Finance & Accounting, Procurement and Customer Engagement.

Madhuparna has over three years of research, consulting and business development experience. Madhuparna holds a MA in International Studies and Diplomacy from School of Oriental African Studies, University of London. She completed her Bachelor of Arts in Sociology from Presidency College, Kolkata. ([View bio and contact details](#)).



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