



Everest Group PEAK Matrix™ for Business Process Services Delivery Automation

Focus on Accenture
July 2017



Introduction and scope

Everest Group recently released its report titled “[Business Process Services Delivery Automation \(BPSDA\) – Service Provider Landscape with PEAK Matrix™ Assessment 2017](#)”. This report analyzes the BPSDA solutions provider landscape and assesses BPS providers across several key dimensions.

As a part of this report, Everest Group presents an assessment of 18 leading broad-based BPS providers’ BPSDA market impact and vision & capability using Everest Group’s proprietary framework, the PEAK Matrix, and classifies them into Leaders, Major Contenders, and Aspirants. The report also describes the competitive landscape in the market. Lastly, it provides a commentary on key strengths and areas of improvement for BPS providers, with specific focus on automation.

Based on the analysis, Accenture emerged as a Leader. This document focuses on Accenture’s BPSDA market impact and capabilities. It includes:

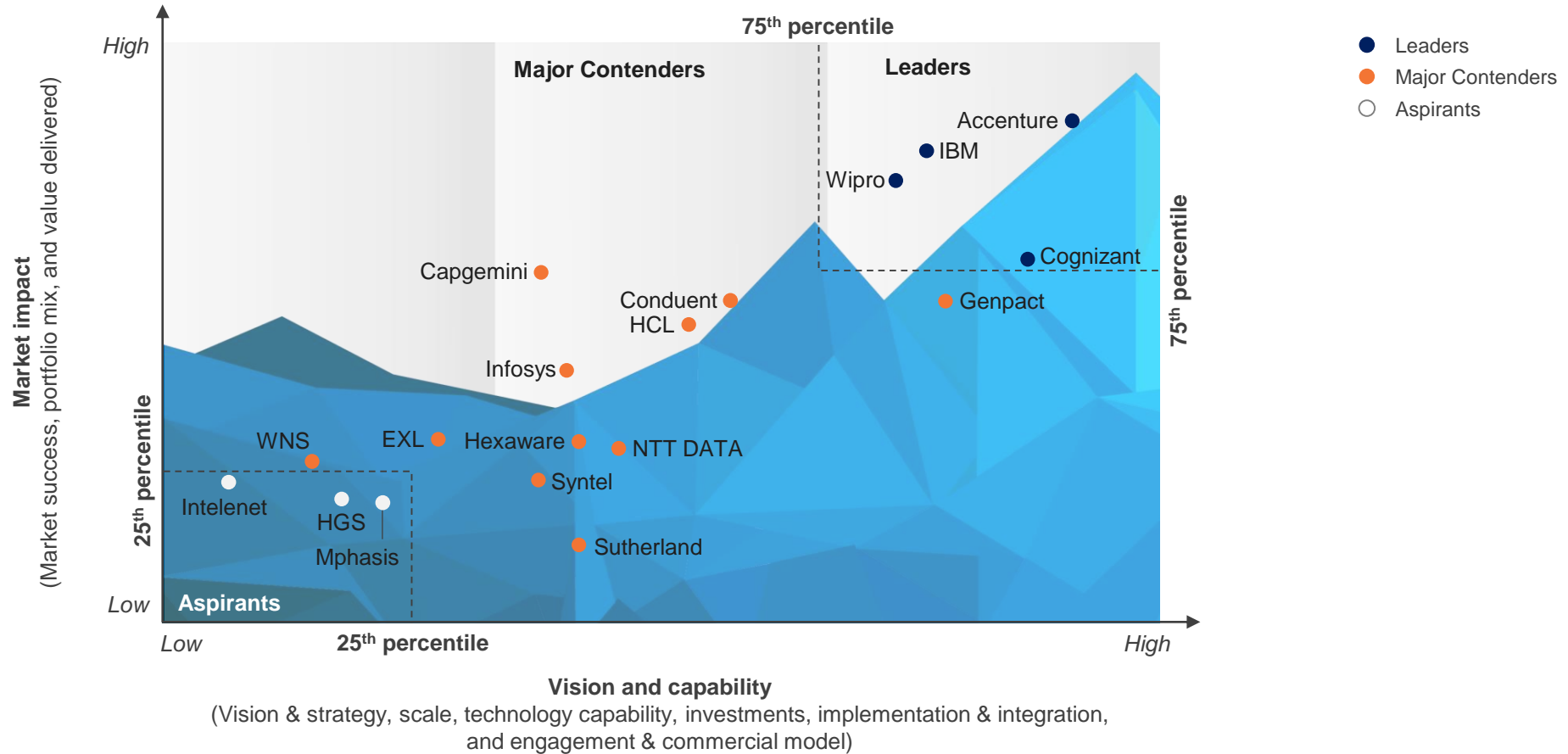
- Accenture’s position on the BPSDA PEAK Matrix
- Detailed BPSDA profile of Accenture

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers’ relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Everest Group PEAK Matrix™

Business Process Services Delivery Automation (BPSDA) – Service Provider Landscape with PEAK Matrix Assessment 2017

Everest Group PEAK Matrix™ for Business Process Services Delivery Automation (BPSDA) solutions



Note: Service providers scored using Everest Group's proprietary scoring methodology
 Source: Everest Group (2017)

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BPSDA – overview

Company overview

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology, and operations. It employs approximately 373,000 people serving clients in more than 120 countries. It was incorporated in Dublin, Ireland, in September 2009.

Key BPSDA leaders

- Michael Corcoran, Growth and Strategy Lead for Accenture Operations
- Kaushal Mody, Global Delivery Excellence & Innovation Director
- Key BPSDA clients: Acosta, Circle K, and Raiffeisen Bank International

Headquarter: Dublin, Ireland
Website: www.accenture.com

Adoption and capability overview

Number of active clients with BPSDA deployments: 270

Number of active BPSDA bots deployed: 2,484

Number of BPSDA FTEs: 2,802

Key locations with BPSDA FTEs:

- Asia Pacific (Singapore, India, Japan, China, New Zealand, the Philippines, and Australia)
- Europe (United Kingdom, Hungary, Germany, Poland, Czech Republic, and Romania)
- North America (United States)

Key third-party technology partners: Automation Anywhere, Blueprism, UiPath, Open Span, Fusion, AI Platforms from Google, Microsoft, Amazon, and IBM, Expert systems, Alteryx, Informatica, SAS, iguana, Datastax, PostgreSQL, Cloudera, Revo R, Qlik, and Tableau

Recent acquisitions/partnerships

- **2017:** Acquired Genfour to expand its capabilities in Intelligent Automation Services
- **2017:** Partnered with Blue Prism to develop RPA solutions to help organizations across industries
- **2017:** Partnered with Automate Anywhere to deliver enterprise-grade RPA solutions to organizations
- **2016:** Partnered with Tricentis to enhance its automation with the model-based testing model
- **2016:** Partnered with Marketo to gain expertise on marketing automation software

Offered Not offered

BPSDA offering structures

Stand-alone product licenses

Product licenses + associated BPSDA services

Stand-alone BPSDA services

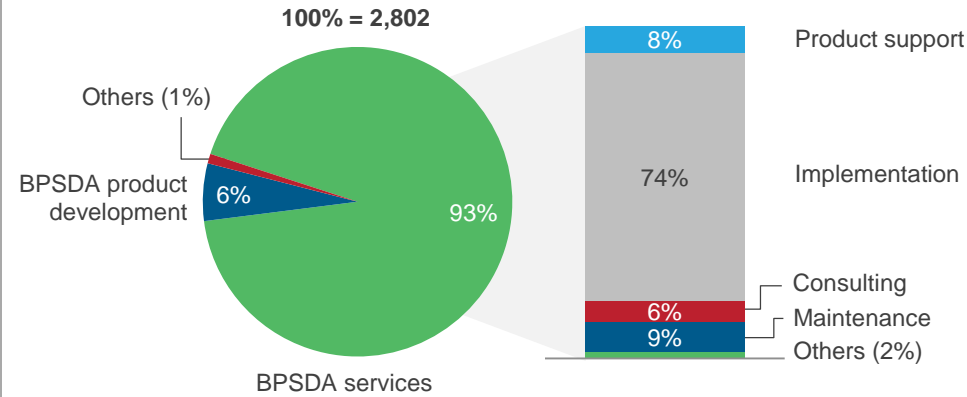
BPSDA as part of broader BPO deal

Source: Everest Group (2017)

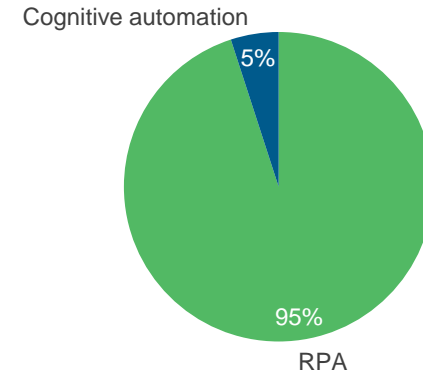
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BPSDA – capabilities

Split of BPSDA FTE by function

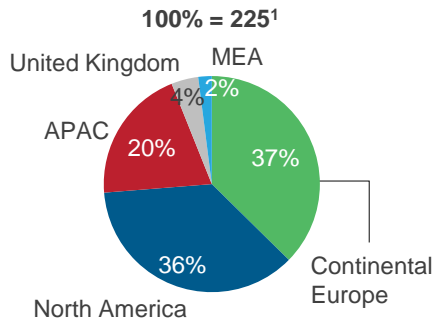


Split of BPSDA FTEs by automation type



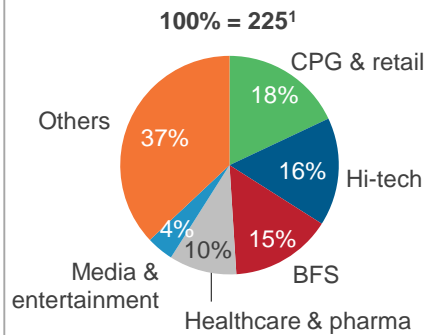
BPSDA client mix by buyer geography

Number of clients



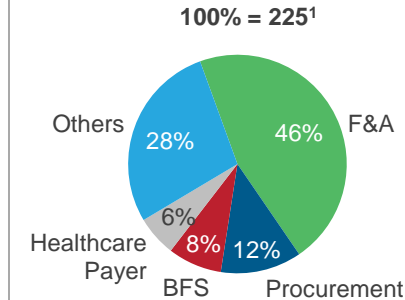
BPSDA client mix by buyer industry

Number of clients



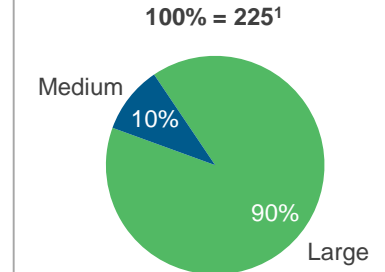
BPSDA client mix by business function / process area

Number of clients



BPSDA client mix by buyer size¹

Number of clients



1 Does not include automation-as-a-service clients

2 Buyer size is defined as large (>US\$5 billion in revenue), medium (US\$1-5 billion in revenue), and small (<US\$1 billion in revenue)

Note: Based on information as on December 2016

Source: Everest Group (2017)

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BPSDA – technology solutions

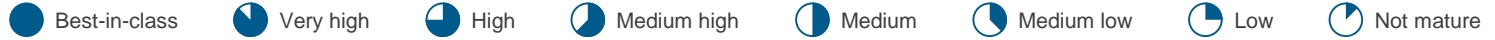
Solution		Business functions	Year launched	Development type	Description	No. of clients
Accelerator Suite	GPH	Process agnostic	2014	In-house / proprietary	Monitor and track agent's productivity, utilization, and efficiency as they undertake manual activities, to understand areas that need attention	265+
	AIDT	Process agnostic	2016	In-house / proprietary	Enabling tool for Business Excellence Team and RPA team, to lessen manual effort in identifying automation opportunities	46
	Robotics NOC	Process agnostic	N/A	In-house / proprietary	Solution for real time monitoring and alerting on the performance of the robot. A layer of business intelligence is being developed to help optimize on business process for automations and license utilization	35
RPA tools		F&A, banking, logistics, HR, and healthcare	2013	Off-the-shelf technology	Rule-based automation-based on standardized and optimized process flow. Examples of automation solutions include cash and bank reconciliation, intercompany payments tool, automated contract creation, automated PO management, cognitive inventory allocation, and automated inventory recording	225+
Domain Platforms (RADIX)	Radix	SCM and PR processing	2007	In-house / proprietary	Rule-based workflow management with capability for both data-based and time-based decisions including the use of automation	200+
	IAP	CCO/helpdesk, F&A, and HR	2015 onwards	Joint development	IAP is the delivery platform for industry and cross-industry BPS. The platform includes lower overall technology costs, rapid technology mobilization, and lower deliver costs across and within BPS client accounts	17
AI Advisors		Service desks, procurement, life sciences, F&A, healthcare, and utilities	2015-2016	In-house / proprietary	Offers diverse set of solutions such as intelligent email advisor, lease abstraction advisor, procurement market intelligence advisor, mortgage underwriting advisor, claims adjudication advisor, text & image content moderator, medical record evaluation advisor, cash apps advisor, and predictive price compliance	100+
Analytics Apps		F&A, procurement, HR, and CCO	2015	In-house / proprietary	Set of 90+ apps including industrialized analytics solutions that address client business outcomes or improve operational efficiency. Some of the apps include workforce manager, period end accelerator, warranty analytics, intelligent collections, intelligent invoice, and spend optimizer	100+

Source: Everest Group (2017)

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Everest Group assessment

Measure of capability



Vision & capability						Market impact				
Vision & strategy	Scale	Technology capability	Investments	Implementation & integration	Engagement & commercial model	Overall	Market success	Portfolio mix	Value delivered	Overall

Strengths

- With one of the largest and fastest growing portfolios of clients with SDA deployments, Accenture is continually achieving success in business process automation
- Its vision for digital transformation is driven by automation, Artificial Intelligence (AI), and advanced predictive & prescriptive analytics, and is supported by appropriate investments
- It has adopted a technology-agnostic approach to develop solutions, and consequently, its SDA suite is dominated by solutions based on partnerships with leading third-party automation technology vendors such as Automation Anywhere, Blue Prism, UiPath, Open Span, and Fusion
- Accenture is focused on leveraging its domain expertise to drive verticalization of SDA solutions and developing industry-specific reusable use cases
- It is continually making investments to enhance/augment its automation capabilities
- It is ahead of many in maturing toward an integrated automation ecosystem by putting in place a Network Operations Center (NOC) to centrally schedule, monitor, and report multiple client automations
- Its clients praised its readiness to proactively propose automation initiatives, relationship management skills, and the ability to effectively evaluate the need for reengineering before automation

Areas of improvement

- Accenture has scope to more effectively operationalize its vision to embed outcome-based pricing models such as gainsharing in its automation-heavy deals
- It should explore means to access rich process-level training data to further train its AI systems for developing more vertical-specific end-to-end solutions
- It can sharpen focus on automation-as-a-service opportunities, while maintaining its orientation to win automation-embedded BPS deals and create more end-to-end impact. We recognize that Accenture is working in this direction and the acquisition of Genfour is an example of this
- While using partner software, it needs to more clearly articulate its AI skills and development capabilities for solutions such as chatbots or virtual agents, and how these can be repurposed and reused for multiple clients
- It should focus on better controlling costs associated with automation, while delivering higher automation rate
- Its clients believe that it should integrate its automation solutions more smoothly with the underlying IT environment

Source: Everest Group (2017)

Appendix

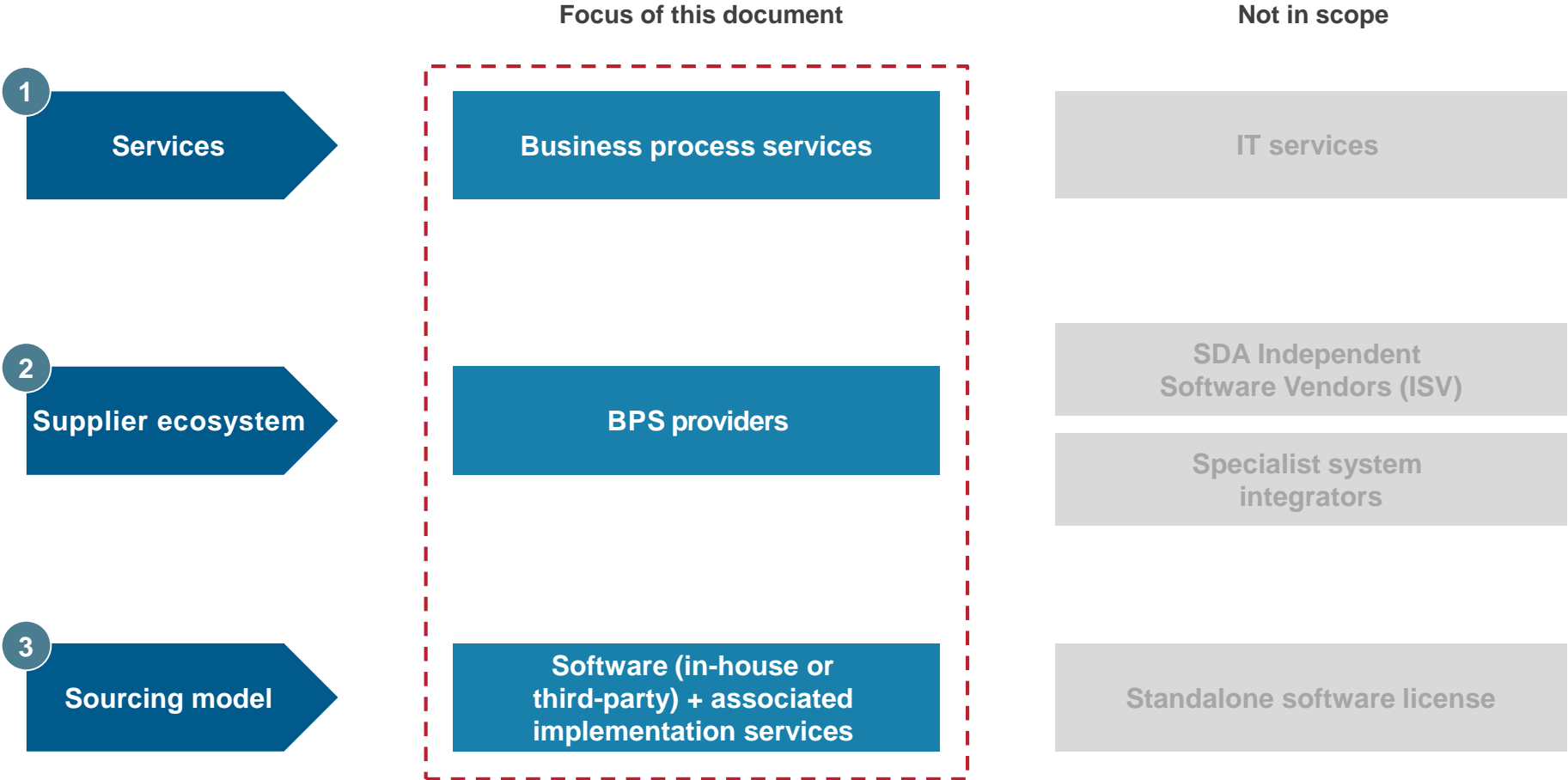
Everest Group's SDA Spectrum

SDA includes a spectrum of automation solutions for delivering global services

		Ability to handle input data type	Processing approach	Ability to learn	Context awareness	Approach	Illustrative examples
Maturity Future tech	Robotic Desktop Automation (RDA)	Structured only	Deterministic	No	No	Human triggers	Pega, Softomotive, UiPath, NICE
	Robotic Process Automation (RPA)	Structured and semi-structured	Deterministic	No	No	Orchestrated process automation	Automation Anywhere, BluePrism, UiPath, Softomotive, NICE, Redwood, WorkFusion
	Autonomics	Structured and semi-structured	Deterministic	No	Yes, but limited to its computing environment	Distributed computing	IPsoft, Ayehu, SyntBots, Thoughtonomy, WorkFusion
	Narrow artificial intelligence	All types of data including unstructured	Probabilistic	Yes, but limited to a particular area	Yes, but limited to a particular domain	Cognitive computing (Machine learning, deep learning, and NLP)	RAGE Frameworks, RAVN, Loop AI, IBM Watson, Wipro HOLMES, IPsoft Amelia, Celaton, Arago, WorkFusion, TCS Ignio, Infosys Nia
	General artificial intelligence	All types of data including unstructured	Probabilistic	Yes across multiple areas	Yes, across multiple domains and similar to human brain	Advances in deep learning	NA

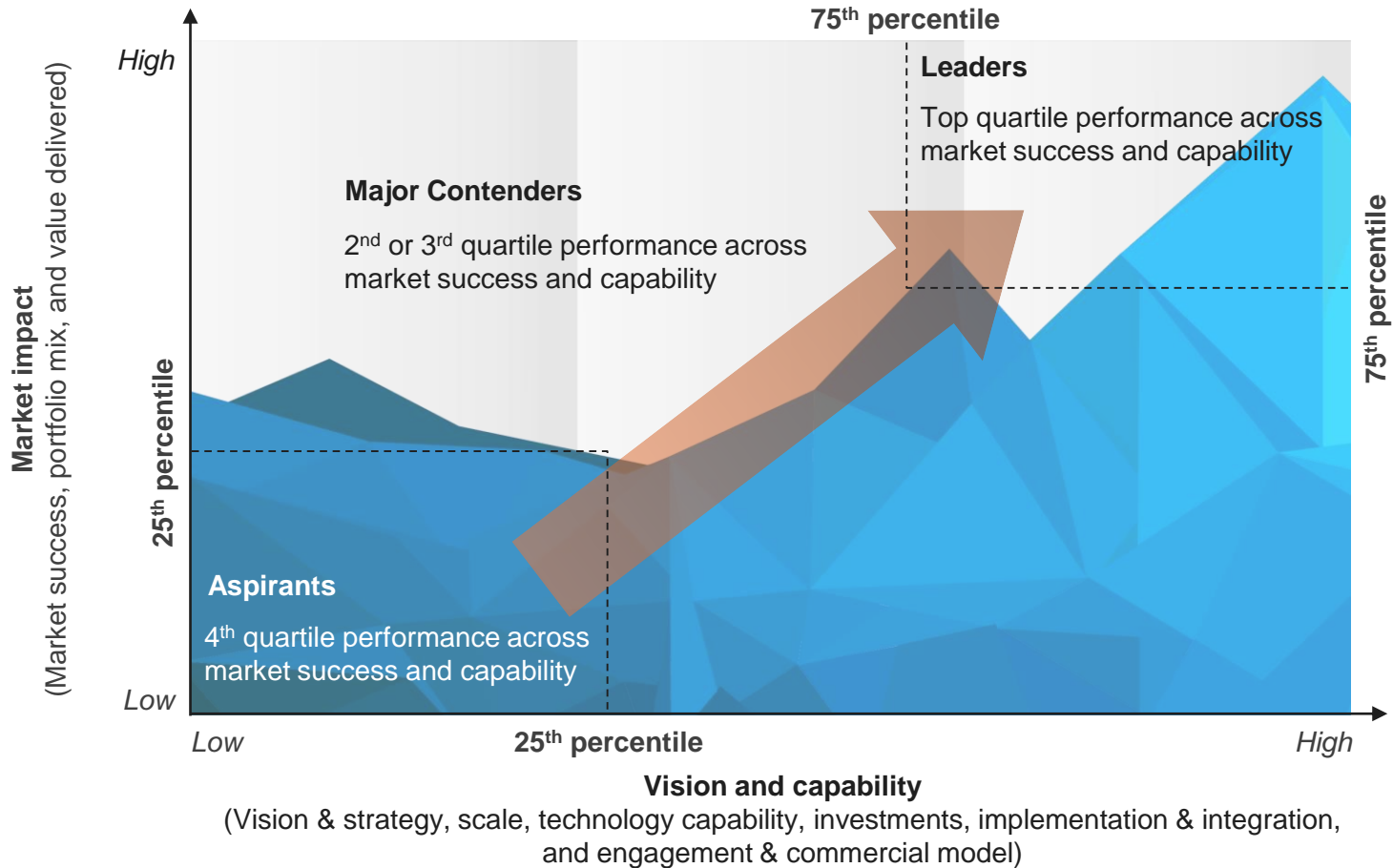
Note: In this document we have referred to rules-based/deterministic SDA solution (i.e. RDA, RPA, and Autonomics) collectively as RPA

We focus on business process automation solutions, containing a services component, offered by prominent BPS providers operating in this space



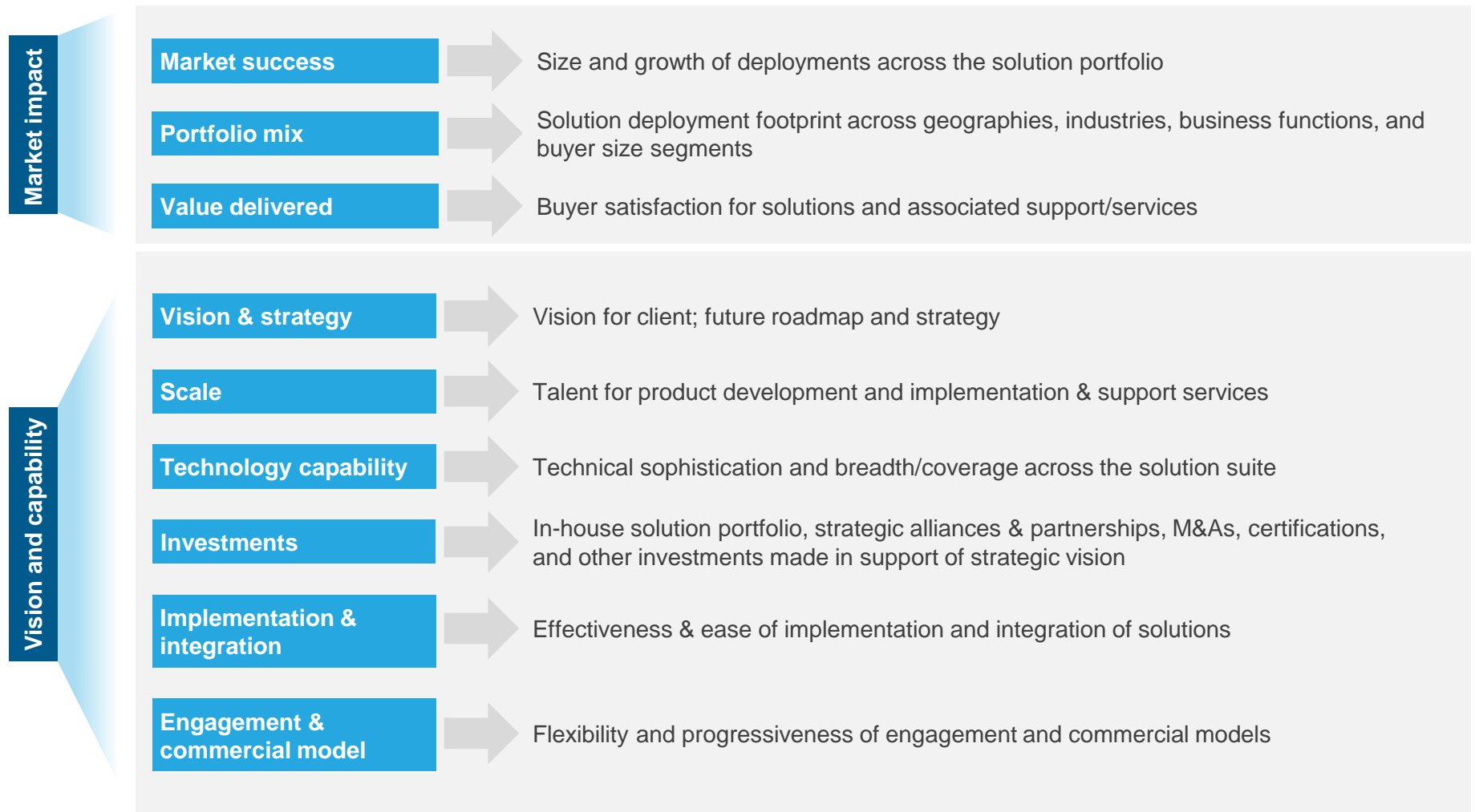
Everest Group classifies service providers into Leaders, Major Contenders, and Aspirants on the Everest Group PEAK Matrix™

Everest Group PEAK Matrix for Business Process Service Delivery Automation (BPSDA) solutions



Source: Everest Group (2017)

Service providers are positioned on the PEAK Matrix™ based on evaluation across two key dimensions



Source: Everest Group (2017)

Glossary of key terms used in this document (page 1 of 2)

Term	Definition
Artificial intelligence	Ability of machines to use cognitive computing to mimic human intelligence, such as visual perception, speech recognition, decision-making, and language translation
Autonomic computing	Autonomic computing refers to the self-managing characteristics of distributed computing resources, adapting to unpredictable changes while hiding intrinsic complexity to operators and users
COE	Center of Excellence is a competency or capability center that specializes in some particular area of focus such as a technology, skill, or discipline
Cognitive computing	Cognitive computing involves self-learning systems that use data mining, pattern recognition, and natural language processing to mimic the way the human brain works
BPM tools	These are process optimization solutions with capabilities of process design, execution (through workflows and orchestration of different BPS technology systems), and monitoring (through analytics)
BPO	Business Process Outsourcing refers to the purchase of one or more processes or functions from a company in the business of providing such services at large, or as a third-party provider
BPSDA deployments	In production or scaled-up deployments of BPSDA solutions
Buyer	The company/entity that purchases outsourcing services from a provider of such services
FTE-based pricing	Input-based pricing structure; priced per resource type with significant price differences between onshore and offshore (e.g., per onshore clerk and per offshore clerk)
FTE	Full-Time Equivalent is a way to measure a worker's productivity and/or involvement in a project. An FTE of 1.0 means that the person is equivalent to a full-time worker
GIC	Global In-house Center (GIC) is a shared service or delivery center, owned and run by a parent organization
Horizontal business processes	Horizontal business processes refer to those processes which are common across the various departments in an organization, and are often not directly related to the key revenue-earning business. Examples include procurement, finance & accounting, and human resource management
Machine learning	A type of artificial intelligence that provides the computers with learning capabilities without explicit programming

Source: Everest Group (2017)

Glossary of key terms used in this document (page 2 of 2)

Term	Definition
NLP	Natural Language Processing refers to machine's ability to interpret human languages
Offshoring	Transferring activities or ownership of a complete business process to a different country from the country (or countries) where the company receiving the services is located. This is primarily done for the purpose of gaining access to a lower-cost labor market, but may also be done to gain access to additional skilled labor, establish a business presence in a foreign country, etc. Companies may utilize offshoring either through an outsourcing arrangement with a third party or by establishing their own Global In-house Centers (GICs) in offshore location, among other business structures
RPA	It refers to a type of automation, which interacts with a computer-centric process through the User Interface (UI) / user objects of the software application supporting that process. It is typically deployed on virtual machines and can enable end-to-end process automation without the need for human triggers
RDA	It refers to a type of automation, which interacts with a computer-centric process through the User Interface (UI) / user objects of the software application supporting that process. It works on agent's desktops, requires human triggers, and is aimed at increasing agent's productivity by integrating and automating processes on the desktop
Semi-structured data	Semi-structured content is one which does not conform to the pre-defined structure of content, but nonetheless, contains tags / other markers to separate semantic elements and enforce hierarchies. In short, it has a self-describing structure. The placeholders of the content can be in varied sequences
Structured data	Structured content is one which conforms to the pre-defined structure of content in terms of tags to separate semantic elements and enforce hierarchies of records and fields. Moreover, the placeholders for the content have a pre-defined sequence
Transaction-based pricing	Output-based pricing structure; priced per unit transaction with significant price differences between onshore and offshore
Unstructured data	Unstructured content refers to information that either does not have a pre-defined data model or is not organized in a pre-defined manner. Unstructured information is typically text-heavy, but may contain data such as dates, numbers, and facts as well
Vertical-specific business processes	Vertical-specific business processes refer to those processes which are specific to a department within an organization, and are often directly related to the key revenue-earning business. Examples include lending process in case of the banking industry and claims processing in case of the insurance industry

Source: Everest Group (2017)

Does the PEAK Matrix assessment incorporate any subjective criteria?

- Everest Group’s PEAK Matrix assessment adopts an objective and fact-based approach (leveraging service provider RFIs and Everest Group’s proprietary databases containing providers’ deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider briefings

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

- No. PEAK Matrix highlights and positions only the best-in-class service providers in a particular functional/vertical services area. 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 PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

- PEAK Matrix position is only one aspect of Everest Group’s overall assessment. In addition to assigning a “Leader”, “Major Contender” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all PEAK Matrix providers assessed in its report. The detailed metric level assessment and associated commentary is helpful for buyers in selecting particular providers for their specific requirements. It also helps providers showcase their strengths in specific areas

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

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider to leverage their PEAK Matrix positioning status ?

- Providers can use their PEAK Matrix positioning rating in multiple ways including:
 - Issue a press release declaring their positioning/rating
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix 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 the designated POC at Everest Group**



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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