



Architects of Global Business

Research • Strategy • Community

Membership for Business Services and Technology Providers

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HfS | Who We Are and What We Do

As the architects of global business,



HfS provides a dedicated environment for collective

research, strategy and **community** — all aimed at helping enterprises explore new operating models and surpass traditional performance thresholds.

HfS Research, by the Numbers

2007

Horses for Sources Blog Founded

2010

HfS Research Founded

19,000

Members in the HfS LinkedIn Community

140,000

Subscribers to the HfS Blog, Website and Communications

Contact HfS today: email insights@hfsresearch.com or call +1 (800) 449-4206 x9

HfS | Who We Are and What We Do

Research

- Continues to produce acclaimed research focused on demand-side trends, market landscapes, supplier evaluations ("Blueprints"), pricing dynamics, market sizing and forecasting
- Won the premier award for "Analyst of the Year" in 2010 and 2011 and beat the likes of Gartner, Forrester, Ovum and IDC to win the most "Innovative Research Firm" in 2012

Strategy

- Recognized as a Top Tier analyst brand focused on business services and global operations frameworks with technology as an enabler
- Guides enterprises with cost-effective, timely, and targeted research-based strategy, leveraging the extensive HfS network to deliver collective insights, data and advice applied to your specific needs

Community

- Facilitates the HfS Sourcing Executive Council, the highest quality network of enterprise executives leading global shared services and outsourcing initiatives
- Provides the most influential and frequently visited community platform in the global services industry with 19,000 LinkedIn community members and 130,000 subscribers to the HfS website and blog

Founded by internationally acclaimed analyst and visionary, Phil Fersht,



HfS provides a dedicated environment for collective research, strategy and community — all aimed at helping enterprises explore new performance thresholds.

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HfS | Who We Are and What We Do

Key Facts

- Award-winning research firm since its inception:



“Analyst of the Year” for 2010 and 2011, followed by “#1 Innovative Analyst Firm” in 2012

- Dedicated analyst team with a global footprint, headquartered in Boston
- Leverages the vast HfS community of global business services professionals to deliver rapid insights on industry trends & developments, surveying the opinions and dynamics of **20,000** organizations in 2011 – 2013
- The ONLY social media and web presence in the business services industry with **130,000** subscribers and the leading blog in the industry (www.horsesforsources.com)
- A well-regarded new generation media outlet qualified as a Google news source and regularly quoted on business trends in the Wall St. Journal, The Economist, CIO Magazine and BusinessWeek

The
Economist

THE WALL STREET JOURNAL
WSJ

CIO
BusinessWeek

Where does the name come from?

HfS is the acronym for “Horses for Sources,” the globally acclaimed blog for the global business services industry. Our name is based on the British phrase “Horses for Courses,” which implies race horses will run better on certain race courses, not dissimilar to outsourcing and enterprises today.

We like to think of it this way: An outsourcing engagement that works well for one firm may not be as successful for another. There is no one-size-fits-all solution when you are dealing with a company's people, processes and technology. And that's why we're here.



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Overview of HfS Analyst Advisory Services

HfS offers a broad range of services:



- HfS Analyst Advisory Membership
- Market Awareness Solutions, such as webcasts, executive interviews, HfS-branded case studies and custom, research-based publications
- Custom Research and Advisory Services to address specific research or data needs

Our Clients and Subscribers

They're Influential

74%

C-level, VP, Director or Managers from multiple industries

They're Buyers

40%

are buyers or evaluators

They're Eager to Participate

93%

want to discuss global business initiatives

They're Willing

79%

want to participate in HfS surveys

2013 Research Agenda



Focused on addressing the Four Key Operational Challenges facing Enterprises today:

Achieving Value Beyond Cost:
Changing the corporate mindset from cost-savings myopia to value-creation and growth

Mastering the Future Operating Model: Leveraging sourcing and Shared Services as vehicles to achieve broad corporate objectives

Redefining Talent Management: Aligning the workforce for global business services by developing talent to go beyond tactical performance

Accomplishing Realistic Innovation: Accomplishing innovation by improving enterprise and provider collaboration to achieve realistic outcomes

For 2013, HfS takes a deep dive into how companies overcome the Four Industry Challenges across major functions and industries; from Finance and Accounting and Human Resources to Insurance and Healthcare.

HfS Analyst Advisory Membership

The HfS Analyst Advisory Membership gives your executives access to expert research and analyst team to produce the following benefits:

- Benefit from both strategic and tactical research-based advice to enhance your business performance
- Gain access to compelling and creative strategic communications support to help enhance your market awareness among key industry stakeholders (i.e., buyers, consultants, lawyers, investors, media and other influencers)
- Access industry-specific data and trends to support your strategic planning and investments
- Validate and develop your strategic marketing and sales planning initiatives
- Gain access to the HfS Research Library, including Premium Research
- Enhance your market positioning and competitive differentiation
- Gain unrivalled insight, perspective and data on the current global business environments

In addition to gaining access to our full range of published research for one year, clients can select a combination of analyst inquiry and strategy sessions, which gives you the ability to make HfS an ongoing strategic partner to you and your executive team.

Premium Research

HfS produces acclaimed research focused on demand-side trends, market landscapes, supplier evaluations, pricing dynamics, market sizing and forecasting. Members are entitled to exclusive access of Premium HfS research, which leverages unique research-based tools and delivers compelling advice to maximize your business outcomes.

Premium research includes, but is not limited to:

- RapidInsight research reports, featuring emerging market dynamics and areas that matter
 - Provider Blueprint Reports, identifying leading service providers through in-depth capability analysis
 - PriceIndicator™ benchmarking reports*, providing detailed price benchmarking data for multiple industries and specialty services
- *PriceIndicator™ reports are available to silver membership levels and above.*

HfS Analyst Advisory Membership *(continued)*

Analyst Inquiry Sessions

Analyst Inquiry Sessions are used for an array of support for your enterprise:

- Market landscape analysis, market strategy, positioning, competitive intelligence, and best practices discussions
- Competitive inquiry, marketing collateral review, market dynamics briefings and sales development
- Preparation for strategy meetings to proactively brief HfS on your company's offerings
- Preparation for in-person meetings or for meetings with HfS at industry conferences or events

Additional analyst inquiry sessions can be purchased over the course of the relationship as needed. **Note:** A minimum of 10 analyst inquiry sessions may be purchased at one time.

Analyst Strategy Sessions

HfS strategy sessions are conducted with an analyst team that leverages existing knowledge and research to help you navigate a particular business challenge. Strategy sessions are conducted local to the analyst team* and can be scheduled for up to four hours. Topics for strategy sessions are determined a minimum of two weeks prior to the date of each session and customized for your specific requirements.

*A session scheduled in an alternative location will incur fees to cover time and travel costs per attending analyst.

Membership Program Fees

Members may opt for any of the following five levels of participation, depending on their needs:

Program Level	Premium Research	PriceIndicator™	Analyst Inquiries	Strategy Sessions	Annual Fee
Bronze	Included	Not Included	12	1	Contact HfS for Pricing Details
Silver	Included	Included	24	2	
Gold	Included	Included	36	3	
Platinum	Included	Included	48	4	

If you would like advice on selecting the right program level for your needs, HfS will be happy to engage with you to determine the best combination of benefits to your organization.

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Market Awareness Solutions

Case Studies

Our analysts will write an analytical, HfS-branded case study about your client's solution implementation endeavor that demonstrates significant business outcomes. Members of the HfS analyst team will interview the client to evaluate the engagement to date. HfS retains editorial control with your input into the report development.

HfS recommends the following key discussion topics:

- Why the client chose to engage with your firm for the discussed business initiatives
- How the client selected your firm as its partner
- What the client's critical business challenges were, and how the challenges have been addressed
- Future plans for the partnership
- HfS Research guidance and recommendations to buyers
- How the client managed its transition and governance processes – what are the successes and challenges
- How the client and your firm have worked on a common roadmap to achieve real business outcomes (i.e., increased productivity and top-line revenue growth)
- Client's advice to industry peers who are evaluating similar operations models

Research Fee: Contact HfS for pricing details

Webcasts

HfS can support and promote a one-hour, industry-wide webcast that involves an HfS analyst presentation, one of your clients discussing their experiences and one of your executives presenting your firm's capabilities. HfS draws large audiences to its webcasts of over several hundred attendees, based on its wide market reach and promotions via its media outlets:

- The HfS corporate website, www.hfsresearch.com
- The HfS bi-monthly "Horses Digest" newsletter, which reaches over 130,000 subscribers
- The Horses for Sources blog, www.horsesforsources.com
- The HfS LinkedIn community
- Twitter

Research Fee: Contact HfS for pricing details

Market Awareness Solutions *(continued)*

Speaking Engagements

HfS Research can provide recognized industry experts to speak at client roundtables and events, industry conferences, webcasts, private briefings, and seminars, to name a few.

Honoraria Fee:

Contact HfS for pricing details

Report Licensing

HfS can provide unlimited license rights to a syndicated report to be shared with clients, prospects, investors, media, etc. Unlimited rights include, but are not limited to website hosting, email distribution and hard copy reprints.

Report Fee:

Contact HfS for pricing details

Executive Interviews

HfS will feature your selected, c-suite executive on the leading blog in the industry, horsesforsources.com. With over 130,000 subscribers to our research, communications and blog, your brand visibility will have a multitude of introductions across the globe. 40% are buyers evaluating or engaging sourcing services, with 74% of those buyers considered decision-makers. In sum, the blog post can generate an introduction of your executive to 52,000 buyers and 38,480 decision-makers.

Research Fee:

Executive Interviews are conducted as part of an overall research membership or with a custom engagement such as a case study or webcast. Please inquire for pricing details.

Custom Publications Hosting, Reprint Rights and Promotional Support

- Your firm will have unlimited web hosting and print/reprint rights.
- HfS Research will provide you with written press quotes to support and promote the custom publication.
- HfS will include the report in a future "Horses Digest" newsletter, which reaches 130,000 subscribers.



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HfS Custom Research and Advisory Services

HfS provides tailored services to support providers with custom market intelligence needs:

Industry Surveys

HfS leverages its vast network of **130,000** subscribers to produce unparalleled industry surveys and studies amongst buyers, providers, advisors and influencers in the Global Business Services industry.

SWOT Analysis and Positioning

HfS helps you understand the competitive climate and industry trends through our SWOT analysis and positioning services. Using research, data and our vast network, HfS discretely identifies strengths, weaknesses, opportunities and threats, recommending strategies and tactics to compete more effectively, close any gaps, and, most importantly, grow market share.

Marketing Materials and Messaging Guidance

HfS leverages the experience and strategic communications experts to help you modify and develop successful outreach communications. We will aggressively recommend a complete rewrite of materials, if necessary, and will have support on-hand to help you do that quickly.

Sales Effectiveness Analysis

HfS supports a gap analysis program to identify weaknesses with your current sales approach via win/loss analysis, an independent post-contract review to help determine which processes, behaviors, clients, tactics and team members are most likely to lead to growth.

Strategic Partnership Analysis

HfS identifies and introduces potential partners that will enhance your existing offerings without the cost in dollars and time of a formal merger or acquisition. The strategic partnership analysis would recommend:

- Future investments and partnerships that support growth in market share while broadening your business services portfolio.
- Organizations with synergy in marketing and lines of business that do not overlap
- Organizations that will integrate easily through marketing, branding and technology

ROI Tool Development

HfS crafts and designs an ROI tool specific to your business that enables your sales and business development teams to improve return on investment (ROI) and lead generation capabilities.

End-To-End Sales Process Analysis

HfS analyzes your sales process from lead generation to close, working with you to determine areas for improvement and then help you redesign it.

What are you waiting for? Contact Us



Contact us today:

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call: +1 (800) 449 4206 ext 9

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