



A Buyers' Guide to Hinduja Global Solutions (HGS)

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HGS: Quick Primer, 1

Hinduja Global Solutions (HGS), originally incorporated as HTMT Global Solutions, is a subsidiary of Hinduja Group of Companies, a conglomerate. Initially, it was a captive unit carrying out activities related to the group's media business. Later, it went public in May 2006.

HGS predominantly began servicing the domestic market in India across Telecom, Banking, and Retail.

The team at HGS realized that in order to go global and target external clients, they needed to expand beyond the Tier-III city of West Bengal location. Hence, backed by a cash-rich conglomerate parent company, HGS started to expand its global delivery footprints with a series of acquisitions: Affina in the US, Careline Services in the UK, OLS Inc. in Canada, and C-Cube in the Philippines. It still continues to grow inorganically with the most recent acquisition of Colibrum, a healthcare BPO in the US, and a large part of Mphasis Group's BPM business in India.

On a similar note, HGS started organic delivery center expansions across Tier-I and Tier-II cities in India and the Philippines. The organic and inorganic growth strategy was executed well in a span of six years and it gave enough throttle for HGS to take off on its Global BPO Provider journey.

Since 2006, HGS has an aggressive sales team in place to acquire new clients across the globe with new and enhanced services as well as industry markets. Revenue grew almost ten times in 10 years to \$555M.

HGS is breaking its traditional barrier of providing customer management services, although this is still one of its major strengths, to more industry specific and transactional work.

The customer experience management offerings are evolving from single to multi- and omni-channels with the help of digital tools and technologies such HGS Digital Natural Assist (DNA) and HGS DigiCX, a suite of digital customer experience services.

HGS believes that it has a compelling case to continue to grow based on its success of balancing great customer experience with the operational ability to reduce costs for its clients. This is the base for its expansion strategy as well.

HGS has realized the importance of "think global, act local." The top management is supported by geographic as well as vertical heads, with local leadership teams staying close to clients' location. This leadership style has been largely responsible for the smooth integration of multiple companies that have been acquired in a short span of time.

HGS: Quick Primer, 2

Over the years, HGS has built multiple capabilities across the breadth of customer experience services by integrating automation into the architecture designed for an omnichannel experience and analytics to provide additional value for timely insights.

Other Quick Facts about HGS are:

Total number of employees: 44,237 as on March 31, 2017

Geographic Presence (Estimated):

- The US and Canada: ~14%
- India (Serving Local and Global Clients) – Domestic center employees:45% and Offshore Delivery for Global Clients: 21%
- Philippines: ~16%
- The UK and Other European Countries: ~3%

Strategy

- HGS's strategy, from the last few years, has been tied to its revenue target for FY 2017-18, which is targeted at \$1B. This target may be realized by 2020 and will continue to influence the growth strategy.
- HGS focuses on a suite of solutions aimed at finding the right balance between digital and traditional customer engagement for a unified customer experience. This squarely sits behind the strategy to develop packaged service offerings with centers of operational excellence, new commercial models, and transformational value propositions that match market opportunities.
- After the acquisition of Colibrum, HGS is aggressively building healthcare domain expertise by recruiting SMEs like doctors, registered nurses, clinicians, and ICD 9 and 10 medical coders in India and the Philippines. It is also investing in enhancing the features and functionalities of the Tuo platform.
- Building and training sales teams to target more and more healthcare clients across the US, the UK, India, and the Middle East.
- The sales team is also strategically targeting more and more mid-sized and public sector markets across geographies.
- Using media to reach out to create more awareness and brand building for its capabilities that now go beyond CRM.
- The goal is to become a full-circle Customer Experience partner as one of its recent unique client win was an RPA consulting project from a bank in the US.
- Enter and grow in the Public Sector marketplace in European and Canadian markets. HGS recently appointed a new CEO in the UK for its European operations to enhance the HGS brand and to drive growth in the region.
- Aggressive expansion plans for HGS Interactive (HGSi); its digital solutions company services to capitalize in the areas of Strategy & Consulting, Digital Marketing, DigitalCx, and Social CRM.
- Looking at Latin America for inorganic growth mainly to augment the near-shore delivery capabilities.
- HGS expects to increase share of wallet with existing clients while still exploring new client opportunities.

Strengths and Weaknesses

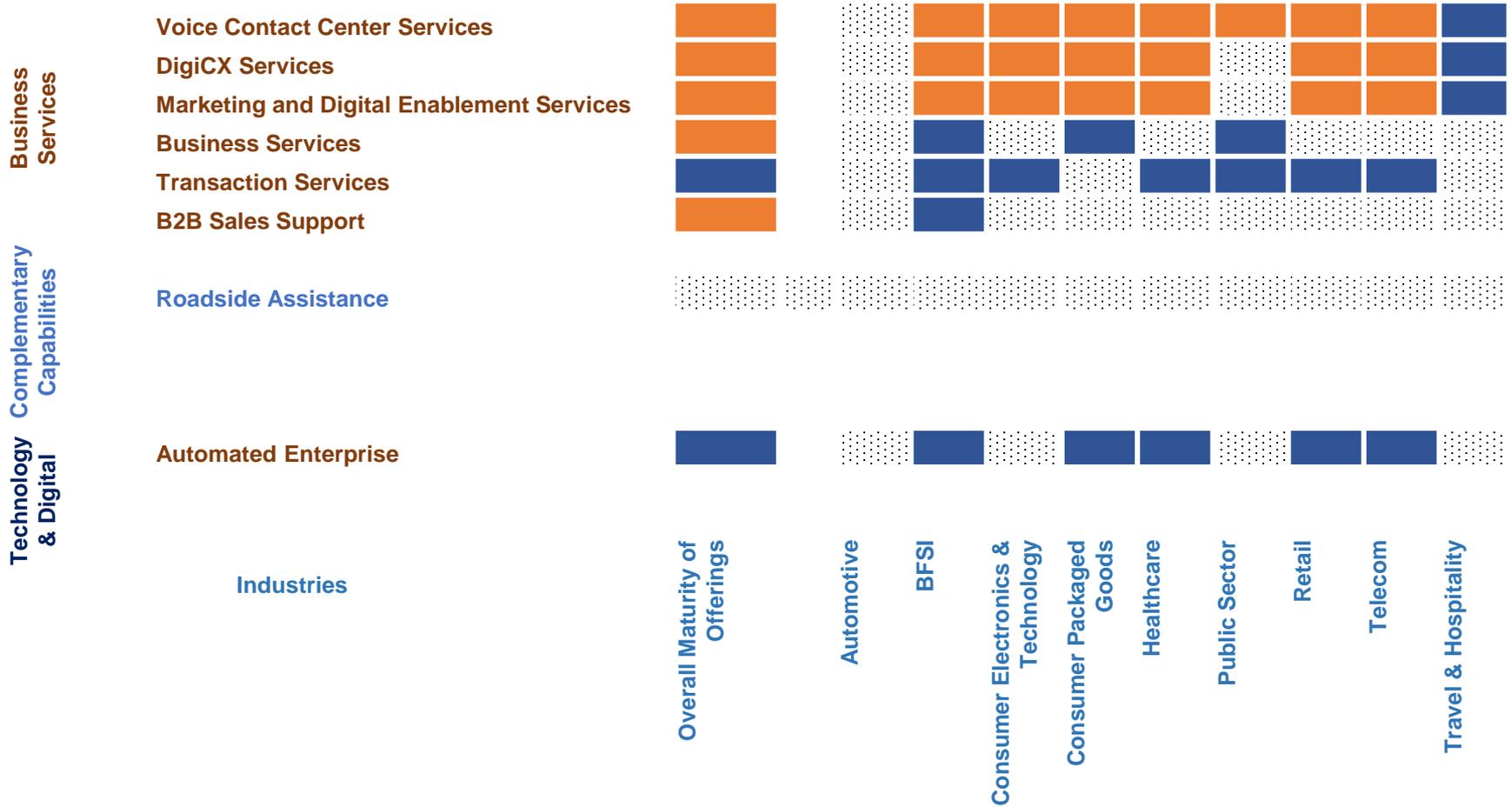
Strengths

- HGS is excellent at listening and incorporating feedback into ongoing operations.
- Act Local approach: Being an Indian heritage company, the leadership across global geographies is local.
- HGS is using a smart self-service strategy to drive digital customer experience and an omnichannel vision.
- Clients appreciate the quality of Account Management teams.
- Automation and RPA: An automation methodology to identify and implement effective use across engagements.
- Delivery Performance and Continuous Improvement using analytics: Emphasis on analysis of client data shared with HGS has led to suggestions that help their clients improve interactions with members and providers.
- Flexible and Competitive Pricing: Although it started off with FTE pricing model, HGS is quite flexible to convert to transaction price inclusive of the SLAs and to outcome-based models over the course of engagement.
- Investing in Talent & Technologies with the right strategy of talent Acquisition and Management: HGS's specialists engage in peer training.
- ~68% of the revenues are contributed by clients who have remained engaged with HGS for more than a decade.

Weaknesses

- To increase proactive interactions and dialogues with clients; collaborate and innovate together rather than implement feedback.
- Although the acquisitions are integrated with adequate efforts, clients express concerns on getting the full benefits and synergies of the acquisition through a focus on how it can impact business results.
- Lack of cross-account networks, forums, or sharing outside of industry events like NASSCOM.
- Some challenges in large size projects—clients expect precise scoping of projects and implementation within given timelines.
- Lacks expertise and presence in horizontal BPO offerings such as HRO and F&A.
- Organic growth and diversification in new service areas and geographies remains a challenge without acquisitions.

Service Offerings Grid



Legend

-  HfS Blueprint Assessments Highlight These Services at Par Excellence
-  HfS Research Sees Tremendous Potential backed by Investments and Traction
-  Not Enough Data to Make an Assessment

Clients*



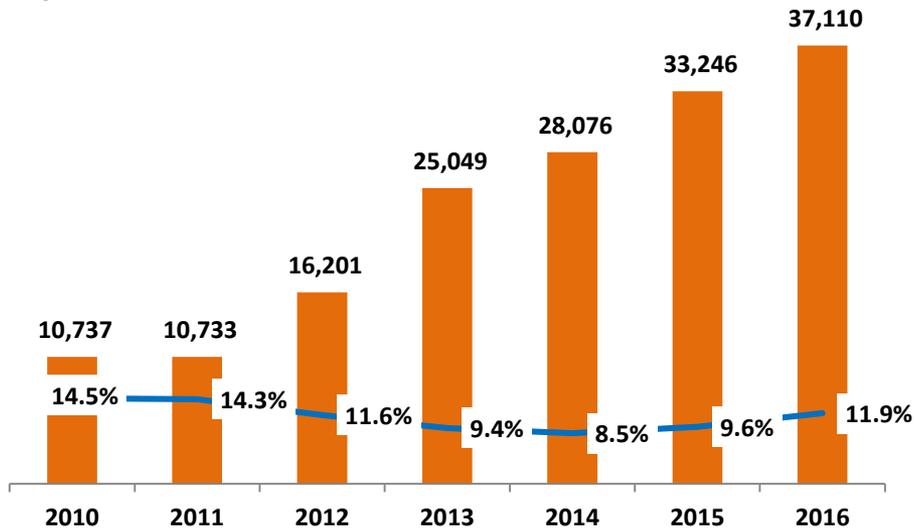
A Global Electronics Firm

Media and communications client

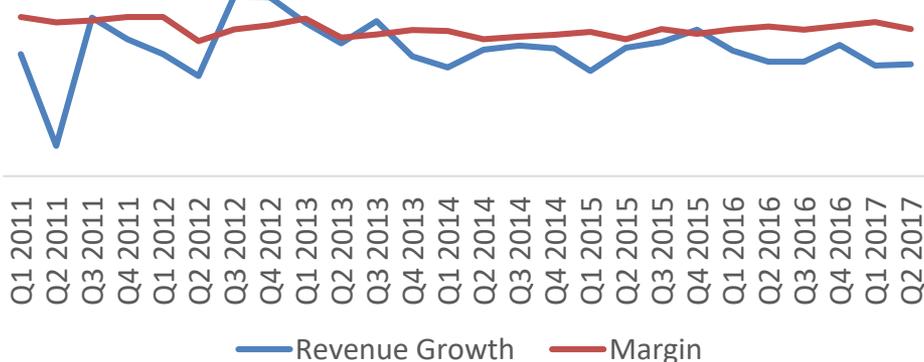


HGS's Financial Performance

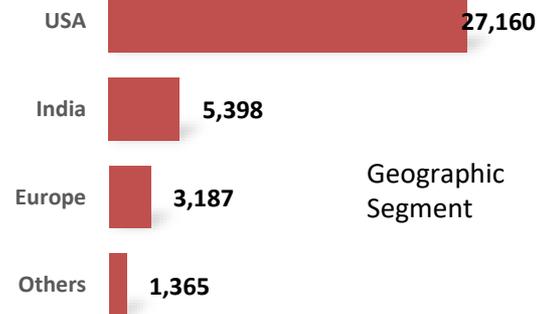
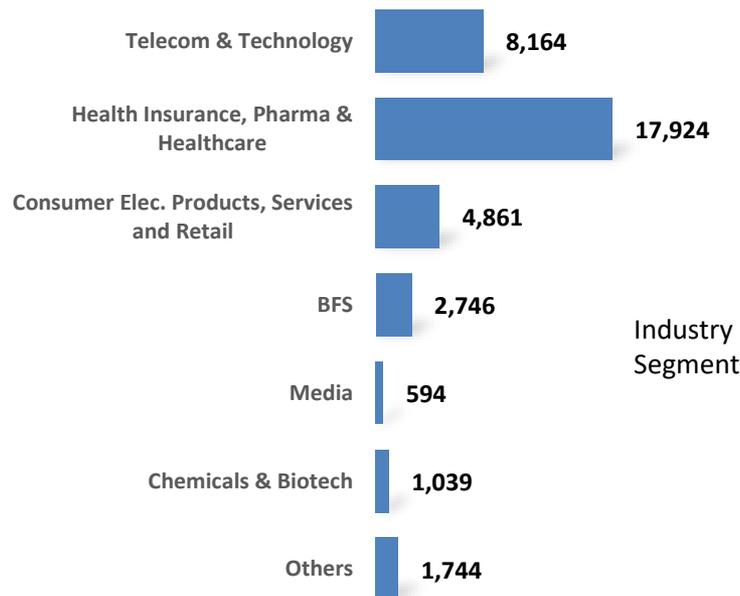
Revenue (Millions of Indian Rupees(₹))/Operating Margin % by Financial Year



Growth vs. Operating Margin by Quarterly Intervals



FY 2017 Revenue (Indian Rupees(₹)) by Business Divisions



Source: HfS Research, Revenue Tracker, 2017

Blueprint Performance



HGS Profiles From HfS Blueprints (2014–2017)

This report contains service provider profiles of HGS from 16 current HfS Blueprints covering business processing and engineering services.

HGS was already seen by our team of analysts at HfS this year:

- *Increasing evidence of proactive and insightful action in combination with its heritage for running a quiet operation. (Barbra Sheridan McGann, Managing Director, Research, Healthcare Payer Operations, 2015)*
- *Quiet, smooth, dedicated operation with unique linkages to hospital for talent, delivering what's asked. (Barbra Sheridan McGann, Managing Director, Research, Population Health and Care Management, 2015)*
- *A traditional CEM provider evolving digital capabilities, particularly for an Indian clientele. (Reetika Flemming, Research Director, Consumer-Driven Operations & Analytics Strategies, HR Operations in the As-a-Service Economy, 2016)*

Blueprint Performance Summary

5 Blueprints from 2014 to 2017

Winner's Circle	High Performer	Execution Powerhouse	High Potential
<ul style="list-style-type: none">1. Insurance As-a-Service, 20172. Insurance As-a-Service, 20153. Insurance BPO, 2014			HR Operations in the As-a-Service Economy, 2016

HGS

As-a-Service
Winner's Circle

Smart self service strategy is driving digital customer experience and omnichannel vision



Blueprint Leading Highlights	Highlights	Examples	What to Watch
<ul style="list-style-type: none"> Ability to Execute Digital Interactions Investment in Omnichannel Talent Strategy Developing New Insights 	<ul style="list-style-type: none"> DigiCX Offering: HGS' newly announced DigiCX offering brings a fresh perspective to the combination of digital and talent, the key value proposition being the pivot between human-assisted and automated interactions using the DNA platform (described below). HGS' references were some of the few examples where clients are actually using the service provider for multi-channel (chat, online site monitoring) Blend of Talent Strategy and Digital Capability: HGS "Digital Brand Ambassador/ Concierge" vision embraces the changing role of talent, and speaks to the maturity of its client relationships. The service provider is advanced in its digital and Unified Customer Experience ® strategy and vision. HGS' Digital Natural Assist (DNA) platform stood out as a differentiator, demonstrating tangible client examples of cross channel capabilities. HGS is adopting text, video chat and Visual IVR, all of which are important contact center trends to watch. "Unified CX agents" have access to channel pivot, switch between voice and digital channels (on the same interaction) with additional support for co-browsing, desktop takeover, e-commerce support, social profiling, and customer journey view. Developing New Insights: HGS' clients rated them highly under the innovation category of "Developing New Insights," which refers to thought leadership in the marketplace, demonstrating that HGS' Unified Customer Experience Strategy is resonating with customers. 	<ul style="list-style-type: none"> Web Self-Service: For a global VISA helpline, HGS integrated a 'digital first' solution on a client website allowing applicants access to self-service, email, web chat, and voice, through a single portal, results including a decrease in calls and AHT as well as an increase in CSAT. Video Chat: HGS is using video chat for one of its luxury high-end purchase clients, leveraging the digital ambassador vision. 	<ul style="list-style-type: none"> Brand: HGS's biggest challenge is its brand, or lack thereof, for contact center services. The service provider can use this to its advantage to "re-invent" an image that is a more digitally focused service provider. Proactivity for Process Improvements: Buyers indicated this was an area of improvement HGS; they are looking for providers to be more proactive in bringing ideas to the table. HGS should leverage its DigiCX offerings and examples to do just that.
Value Chain Services Coverage:			
Digital Interactions			
Social Media	SMS		
Web Self-Service Including Mobile App and Visual IVR			
Chat	Video Chat		
Analytics	Consulting		
Relevant Acquisitions/Partnerships		Client Profile	Proprietary Technologies
<p>Acquisitions:</p> <ul style="list-style-type: none"> Mphasis, 2015, experience domain expertise, transition of over 8,000 employees, 7 delivery locations in India. Entry into premier logos in BFSI space, new telecom and ecommerce clients Colibrum, 2015, technology platform and several hundred licensed health insurance agents. <p>Key Partnerships:</p> <ul style="list-style-type: none"> OneReach, two-way text messaging Synthetic, Knowledge Management & Ticketing Nice: Speech Analytics Valero, Live Person, Synthetic: Chat Platforms Amazon Cloud Services; hosting platform IBM SBSS; Text Analytics Vee24, video chat 		<p>Total number of clients: 175 Key verticals include- Healthcare, Telecom, CPG & Retail, Consumer Electronics, Financial Services Key clients include:</p> <ul style="list-style-type: none"> UKVI Infiniti Unilever Danone A major consumer electronics company Fast foods major USA based corporation Media telecommunications content provider and distributor 	<ul style="list-style-type: none"> <i>Digital Natural Assist (DNA) and DigiWEB</i>(Combination of web based technologies from Synthetix and HGS proprietary toolset) <i>DigiINSIGHT Interaction Analytics.</i> <i>Colibrum 360.</i> CRM capabilities and risk and retention profiling.

Hinduja Global Services (HGS)

High Performer

Building out a nicely comprehensive capability for enabling “healthy behaviors” and interactions between consumers, payers, and healthcare providers



Blueprint Leading Highlights	Strengths	Challenges
<ul style="list-style-type: none"> Quality of Service Delivery Incorporates Feedback Effectively Flexible Contracting and Pricing Models Investing in Future Talent and Technology Highly Valued Performance for Pricing 	<ul style="list-style-type: none"> Service Expansion and Value: HGS is offering increasingly complex services to a broader client base—moving from simple care coordination and triage offerings to address industry reforms and initiatives, and mapping investments into talent and technology, such as remote monitoring, telehealth, and digital customer care (DigiCX). Clients tell HfS that HGS wins more work from them because they “outperform,” and clients believe HGS provides real value for basic operations. HGS describes its vision as enabling healthy behaviors between consumers, payers, and healthcare providers, leading to high satisfaction and loyalty. Moving Into New Regions and Industries: In addition to supporting health and care management services for U.S.-based payers, HGS is expanding to cover quality reporting and care coordination for providers and in the global market with after hour care. HGS also supports insurance companies and provides nurse/midwife access to new mothers for a consumer goods client, so is broadening the applicability of health and care management beyond the healthcare industry. Use of Automation: HGS is increasingly building automation to its work, such as sets of macros that support activities that require work in multiple legacy medical management systems. It is currently exploring opportunities for robotic process automation in retrospective reviews and clinical audits. Diverse Clinical and Non-Clinical Talent Pool: HGS has one of the more diverse groups of health care specialists available with a good representation of doctors, midwives, dietitians, and therapists as well as nurses. The value in this spectrum for clients is that HGS specialists train one another on relevant policies and experience and the delivery teams can be an effective and flexible mix. 	<ul style="list-style-type: none"> Bring Omnichannel Experience to Healthcare: DigiCX is a thoughtful approach to bring a consumer focused omnichannel approach to life. (link) While HGS has yet to realize DigiCX in healthcare, HfS believes it has the tools to “show and tell” what it can do with healthcare organizations interested and willing to engage and create a new consumer experience for “self service,” and balance with digitally enabled customer service agents called Digital Ambassadors. Brand Perception: HfS hears strategic direction and examples of moving the needle on business impact from HGS. However, there is a challenge in that clients are not really sharing the story. If HGS wants to be more than a well-kept secret for its capability to deliver innovation, it needs to have more public statements and examples of being innovative beyond standard operational excellence. Quality at Scale: HfS has heard some concerns that as HGS has taken on more scope and services, its responsiveness and interaction has sometimes been slower than expected. Clients would also like to have HGS teams be more forthcoming on analysis of performance, and articulations of business issues and relevant ideas. Analytics As-a-Service: With a partner, HGS offers a proprietary data management and analytics platform-as-a-service for aggregating data types including EHRs, claims, HEDIS/Star reports. While HGS described analytics thought leadership such as on utilization management, looking for patterns and opportunities for which it can make suggestions for changes in the review process, it has yet to have momentum or case studies to share.
<p>Value Chain Coverage:</p>		
<p>Population Data Mgmt / Analytics</p>		
<p>Consumer Engagement</p>		
<p>Utilization Management</p>		
<p>Care Coordination</p>		
<p>Performance Mgmt & Operational Analytics</p>		

Acquisitions / Partnerships	Client Profile	Service Delivery Operations	Proprietary Technologies
<p>Acquisitions:</p> <ul style="list-style-type: none"> Colibrum Partners and Colibrum Direct (2015) for platform and services supporting health plan sales and service <p>Partnerships include:</p> <ul style="list-style-type: none"> Partner for telemedicine platform Partner for data management and analytics platform as-a-service 	<ul style="list-style-type: none"> Population Health and Care Management Business Process Outsourcing Services Clients: <10 Geographic scope: U.S., Canada, UK, Middle East for clients; also handle authorization requests from members in Europe & Middle East through Global Insurance portfolio. Clients include: Consumer Goods Provider (helpline for new mothers); State Coops, ACOs, Blues 	<ul style="list-style-type: none"> Population Health and Care Management offerings started 2010 Accreditation: URAC-HUM, Philippines Healthcare Headcount: 12,000 Specialties: Doctors, Nurses, Midwives, Pharmacists, Wellness Coaches, Dentists, Psychologists, Clinical Dietitians, Physical and Occupational Therapists Center locations: India, (52%), Philippines (41%), U.S. (7%) 	<ul style="list-style-type: none"> Automated Documentation template to check appropriate clinical guidelines Performance Automation Tool (PAT): to monitor agent SLAs, gaps in knowledge, improvement opportunities, agent performance metrics and progression path; analytics from the PAT serves point of reference for agent improvement plans Patient enrollment software tool: can be configured to engage the enrollee in a health risk assessment at the point of enrollment

HGS

High Performer

Strategic acquisitions and partnerships for health insurance industry expertise and omnichannel vision



Blueprint Leading Highlights	Strengths	Challenges
<ul style="list-style-type: none"> Account Management Incorporates Feedback Ability to Execute Multi-Channel Interactions Partnership Strategy Talent Strategy Developing New Insights 	<ul style="list-style-type: none"> Smart Acquisitions and Partnerships: HGS has made smart strategic acquisitions including Colibrum, a health insurance technology platform and a scalable telesales operation of nationwide licensed health insurance agents, providing HGS with a strong vertical expertise in this area. This acquisition of a health insurer technology and services company in the US market complements and increases the already strong healthcare payer servicing capability of HGS. Account Management: Clients said that account management staff are flexible, creative thinkers, very quick to “come to the table” and help solve problems. Blend of Talent Strategy and Digital Capability: HGS is advanced in its digital and Unified Customer Experience[®] strategy and vision. HGS’ Digital Natural Assist (DNA) platform stood out as a differentiator, demonstrating tangible client examples of cross channel capabilities. HGS is adopting, text, video chat and Visual IVR, all of which are important contact center trends to watch. “Unified CX agents” have access to channel pivot, switch between voice and digital channels (on the same interaction) with additional support for co-browsing, desktop takeover, e-commerce support, social profiling, and customer journey view. Also, the concept of representatives as “brand ambassadors” embraces the changing role of talent, and speaks to the maturity of its client relationships. Developing New Insights: HGS was one of the only service providers in our Blueprint process whose clients rated them highly under the innovation category of “Developing New Insights,” which refers to thought leadership in the marketplace, demonstrating that HGS’ Unified Customer Experience Strategy is resonating with customers. 	<ul style="list-style-type: none"> Proactivity for Process Improvements: Buyers indicated this was an area of improvement HGS; they are looking for providers to be more proactive in bringing ideas to the table. Reporting Consistency: Some clients cited issues with the group that generates reports, finding reporting inconsistencies during weekly reviews. Issues like this can be resolved with operational standards and training, but there is also a possibility that automation could potentially take the human error out of some of the issues.

Value Chain Services Coverage:

Interaction Management	
Traditional Channels	Digital Channels
Back Office Contact Center Support	
Consulting	Analytics

Relevant Acquisitions/Partnerships	Client Profile	Service Delivery Operations	Proprietary Technologies
<p>Acquisitions:</p> <ul style="list-style-type: none"> Mphasis, 2015, experience domain expertise, transition of over 8,000 employees, 7 delivery locations in India. Entry into premier logos in BFSI space, new telecom and ecommerce clients Colibrum, 2015, technology platform and several hundred licensed health insurance agents. <p>Key Partnerships:</p> <ul style="list-style-type: none"> Veeva, video chat OneReach, SMS Synthetic, Knowledge Management & Ticketing Nice: Speech Analytics Valero, Live Person, Synthetic: Chat Platforms Amazon Cloud Services; hosting platform IBM SBSS; Text Analytics 	<p>Total number of clients: 175 Key verticals include- Healthcare, Telecom, CPG & Retail, Consumer Electronics, Financial Services</p> <p>Key clients include:</p> <ul style="list-style-type: none"> UKVI Prudential Infiniti Unilever Danone A major consumer electronics company 	<ul style="list-style-type: none"> Contact Center Operations Headcount: 31,900 Contact center delivery locations: 65 Delivery location highlights: 12 countries, including US, Canada, UK, India, Philippines, Jamaica, Netherlands, Germany, France, Italy, Colombia, UAE Total number of home based agents: 124, US based Languages supported: 37 	<ul style="list-style-type: none"> <i>Digital Natural Assist (DNA) and Web as a Channel:</i>(Combination of web based technologies from Synthetic and HGS proprietary toolset) <i>Interaction Analytics</i> <i>Colibrum 360:</i> CRM capabilities and risk and retention profiling.

Hinduja Global Solutions (HGS)

Winner's Circle

Increasing evidence of proactive and insightful action in combination with its heritage for running a quiet operation



Business Operations Maturity:

Claims Services	Member Services	Provider Services	Health & Care Mgmt	Admin: Mktg, F&A
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Blueprint Leading Highlights

- Quality of Account Management
- Delivery Performance and Continuous Improvement
- Flexible and Competitive Pricing
- Investing in Talent & Technologies
- Talent Acquisition and Management

Path to As-a-Service

HGS's theme is to put the "care" back into healthcare. This maps well to the Design Thinking Ideal which is about understanding the target customer and the clients' environment in solving and solutioning. HGS has shared examples of where work in the back office has then driven suggestions and changes in the front office, both of which impact customer and provider engagement and satisfaction. The Colibrium platform adds to the as-a-service capability with a cloud-based platform and services for member services.

Strengths **Challenges**

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| <ul style="list-style-type: none"> • Acquisition of Colibrium creates an extended seamless consumer/member lifecycle operation for clients: Colibrium has a well-regarded platform for sales, enrollment, and member management in healthcare which it also used to stand up call center capability for clients; but lacked scale, industrialization, and best practices to drive insight and quality. Clients look forward to how HGS will leverage their expertise here, especially going into the next enrollment period which will test the multi-channel campaign, enrollment, and management capabilities. The platform helps payers "write off legacy," by providing logic and capabilities for newer requirements like ACA member level billing. • Dedicated, flexible, and responsive: The HGS team responds quickly to requests and concerns, and delivery performance is consistently above expectations, per clients. In one situation, to clear a backlog, RNs were sourced and trained with live scenario based content for only 4 weeks. HGS has also rolled out an automation methodology to identify and implement effective use, such as a 50% reduction in effort for account maintenance processing including exception scenarios by referencing a third party database. • Connecting the front and back office and across clients using analytics: Behind the scenes analysis on data sets and work that crossed geographic and business lines has led to suggestions that improve interactions with members and providers such as changes to client web sites and scripts, and well as points of interaction and information exchange. As another example, a team has been using analytics to reduce provider complaints and improve accuracy of finding overpayments. | <ul style="list-style-type: none"> • Take a thoughtful approach to account management and integration between Colibrium and HGS: Clients are a bit wary of "overselling" by Colibrium and "cross selling" by HGS. Account teams for each service provider are fairly well regarded, however, some feedback indicates that clients want to be sure that they are receiving the benefits and synergies of the acquisition through a focus on how it can impact business results. • Increase the level of dialogue with and between clients for innovation: Clients expressed interest in having more interactive dialogue with HGS and peers on what they are looking to accomplish and what may or may not work and what capability could map to it. HGS is "innovative but could do more." As HGS plans to host a Community event in 2015, and increasingly shares ideas across clients, HfS expects clients' perception of HGS in this area to change. • Recognition in the market for value beyond cost reduction: HGS is not as well known for and not expected typically by clients to share a vision for healthcare. However, in these turbulent times of change in the industry, having the point of view like "putting the care back in health" and articulating broadly what that means can create a new level of interaction and alignment with clients to change the dialogue and potential long term value of the relationship. |
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Relevant Acquisitions / Partnerships	Client Profile	Service Delivery Operations	Proprietary Technologies
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<ul style="list-style-type: none"> • March 2015, Acquired 89.9% stake in Colibrium for its marketing, sales, care management platform; a cloud-based platform for online self-service; and licensed health insurance agents <p>Partnerships:</p> <ul style="list-style-type: none"> • An automation software vendor • A partner for multi payer data integration, master data cleansing and integration for population health management services • A partner for care management and utilization management workflow • Hinduja Hospital collaboration for talent development: clinicians can go on cycles between BPO work and hospital work • For CRM and Analytics: Microsoft, Salesforce.com, I3 	<ul style="list-style-type: none"> • BPO: Yes • Platform Based BPO: Yes • BPaaS: Yes <p>Including:</p> <ul style="list-style-type: none"> - Payers - Healthcare Providers - COOPs 	<ul style="list-style-type: none"> • Healthcare Payer Operations for >15 years • Healthcare Headcount: 10,300; 1,500 nurses • Specialties: Doctors, Nurses, CPC / CCS Coders, Dieticians, Psychologists; Alternate Medicine Doctors, Physical/Occupational Therapists, Midwives. • Center Locations: Philippines, India, Jamaica, U.S. 	<ul style="list-style-type: none"> • Colibrium 360 Platform: • TUO Sales and Marketing • TUO Service for member management. • TUO Wellness • Proprietary auditing tool and clinical performance management tool
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Hinduja Global Solutions

High Performer

Quiet, smooth, dedicated operation with unique linkages to hospital for talent, delivering what's asked.



Business Process Service Maturity:

Consumer / Patient Engagement	Utilization Management	Care Coordination	Performance Mgmt. & Analytics
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Blueprint Leading Highlights	Strengths	Challenges
<ul style="list-style-type: none"> Quality of Account Management Delivery Performance Talent Acquisition and Management 	<ul style="list-style-type: none"> Dedicated, flexible, and responsive. For an industry with high turnover, HGS has been lauded for having key talent stay on an account and continuously deliver what is needed. "Ahead of the game" on staffing; seems to have resources ready as needed. Smooth, noiseless, ready operations. HGS is very good at running the processes, identifying process improvements, and investing where it is needed to make sure it works well. HGS builds scope steadily with clients over time based on this flexibility, predictability and reliability. Competitive pricing. Will work to get the lowest cost solution and deliver it. Most engagements start out as per hour/FTE pricing, and then with benchmarking, efficient operations, and use of partner capabilities look to convert to transaction price inclusive of the SLAs and to outcome-based models. Staying power with robust training and talent development. Ties with Hinduja Hospital Nursing Academy and partnerships with nursing education and hospitals includes: (1) unique opportunity for clinicians to rotate between BPO and hospital work, (2) training nurses across benefits and medical coding in order to bring together support for care coordination benefits, and claims. 	<ul style="list-style-type: none"> Be more thought-provoking and interactive with clients. While meeting SLAs and responsiveness is appreciated by clients, some increased level of questioning and debate would also be welcome, particularly as the relationship is underway. Client feedback is that HGS does come forward with useful improvements based on operational analysis. Doing this more proactively or often may require HGS to step out of a "comfort zone," requiring some level of targeted training and change management in the workforce. Lack of evident vision for healthcare business services: Clients are not typically looking to or expecting HGS to share a vision for healthcare. Yet, HGS has ideas in development for payer/provider integration and roadmaps and partnerships to address technology; and could be more proactive and engaging in this area with the industry in general. Hiring a Chief Medical Officer could bring in industry and thought leadership. Narrow client focus with little networking. HGS delivers on account, but does less compared to the competition to create cross-account networks, forums, or sharing outside of industry events like NASSCOM.
Strategic Approach		
<p>Provide a fully integrated approach through partnerships to address:</p> <ol style="list-style-type: none"> Data accuracy; Quality of reviews Effectiveness of outreach; Measurement of savings Customized population stratification and wellness programs 		

Relevant Acquisitions / Partnerships	Client Profile	Service Delivery Operations	Proprietary Technologies
<ul style="list-style-type: none"> March 2015, acquired 89.9% stake in Colibrum for its marketing, sales, care management platform, in particular a cloud-based platform for online self-service and licensed health insurance agents A partner for multi payer data integration, master data cleansing and integration for population health management services A partner for care management and utilization management workflow Hinduja Hospital collaboration for talent development: clinicians can go on cycles between BPO work and hospital work 	<ul style="list-style-type: none"> Population Health and Care Mgmt Clients: <10 Including support for Dental, Insurance-Workers' Comp, Health Plan Total Healthcare Clients: 25 + Including 5 of top 10 payers and leading providers, COOPs 	<ul style="list-style-type: none"> Population Health and Care Management business process services started with utilization management in 2009 Accreditation: URAC Core; (URAC Utilization Management in process) Healthcare Headcount: > 9,000 Specialties: Doctors, Nurses, CPC / CCS Coders, Dietitians, Psychologists; Alternate Medicine Doctors, Physical/Occupational Therapists, Midwives. Center locations: Philippines, India, Jamaica, U.S. 	<ul style="list-style-type: none"> Proprietary auditing tool and clinical performance management tool.

Hinduja Global Solutions

A traditional CEM provider evolving digital capabilities, particularly for an Indian clientele



Blueprint Leading Highlights	Strengths	Challenges
<ul style="list-style-type: none"> Quality of Account Management Team Delivery of Digital CEM Concrete Plans to Deliver Value Beyond Cost and Investment into Future Capabilities 	<ul style="list-style-type: none"> Differentiated capabilities in serving regional digital needs. While HGS has experience in providing CTM BPO solutions to clients in the U.S., the UK, and Asia, we saw differentiated capabilities in the way in which HGS is helping its Indian clients leapfrog into their digital journeys. The service provider is increasingly engaging with Indian clients (in addition to its global clientele) to work on digital projects, developing an area in which it can leverage regional expertise. Commitment to growing digital marketing capabilities. HGS has invested in developing a unit within the company to harness such capabilities as strategy, customer journey mapping, user experience design, social engagement, search engine optimization, web design, social analytics, mobile device enablement (as a channel), and the enabling and executing of proactive campaigns across channels. A practice within this unit is HGS' Marketing & Digital Enablement Services, which is working to translate traditional CRM BPO engagements into the digital context to better attract, engage, and retain customers on behalf of clients. 	<ul style="list-style-type: none"> Shaping the market and educating client organizations about a new operational model. HGS faces a challenge in evolving this space beyond the isolated engagements that currently exist around social media campaigns, e-commerce support, email, and chat to deliver a more comprehensive range of marketing services. Evolving solution set in digital. HGS' digital CEM practice is still in its early stages and will need concerted effort on the part of the service provider in terms of repositioning the company in the eyes of clients and investing in new technologies to keep up with competition in the end-to-end digital marketing space. Project management for large implementations. Some clients mentioned that HGS is challenged in scoping projects and delivering implementations within given timelines, which adversely impacts client experiences.

Relevant Acquisitions/Partnerships	Key Clients	Global Operations Centers	Proprietary Technologies
<p>Partnerships with:</p> <ul style="list-style-type: none"> Simplify 360 and Salesforce's Radian 6 (for social media management) Synthetix (a knowledge base system to enable web self-service for both agents and consumers) Live Person & Log Me In (for chat support) Vee24 (for video chat) NICE (for speech analytics) KANA (for email support) 	<ul style="list-style-type: none"> Berger Paints India Carrot Banana Peach (CBP) A leading private bank in India Hinduja Hospital Tata AIA Life Gulf Oil India UK government agency Large European consumer products company European luxury vehicle retailer 	<ul style="list-style-type: none"> Headcount: 300 FTEs Delivery primarily out of centers in India, the Philippines, the U.S., and the UK 	<ul style="list-style-type: none"> N/A

Service Area Maturity

Content Dev. & Mgt.

Campaign Management

Digital CRM

Data Mgt., Reporting & Analytics

About the Author



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Overview

Hema Santosh is one of the versatile analysts who enjoys quantitative and qualitative aspects of the research at the same time. Hema is responsible for The Buyers Guides and supports various Data analytics initiatives at HfS Research.

Over the last decade, Hema has worked across all the facets of IT Services and BPO research providing insights that are key to taking strategic decisions. She understands the nuances and dynamics of the BPO and Technology industry. Her experience ranges from custom research, competitive analysis, outsourcing deals analytics, location assessments, quantitative studies to qualitative research. She has held senior research positions in organizations such as, Information Services Group, Accenture, NTT DATA and ITFinity Solutions.

Academically, Hema holds an MBA specializing in Marketing from Manipal University, a full time 'Management Program for Women Entrepreneurs' from Indian Institute of Management (IIM), Bangalore and a Bachelor's degree in Commerce from the University of Mumbai.

Apart from HfS Research, Hema has one more full time job and that is, rearing her three young sons. Her sojourn is travelling to wild-life sanctuaries and solving a SuDoKo puzzle whenever she can grab some free time.

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