



HFS Top 10 RPA Service Providers 2018

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TOP 10
HFS

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“Despite signs of vibrant growth such as the latest billion+ valuations of the most prominent RPA software firms, RPA is still a nascent market with enterprise strategies continuing to percolate and a notable dearth of experienced talent. Service providers have a critical role to play in the evolution of the RPA market.”

– *Elena Christopher, Research Vice President*

What you'll read

Topic	Page
<u>Introduction, methodology, and definitions</u>	<u>4</u>
<u>Executive summary</u>	<u>10</u>
<u>The HFS Top 10 RPA service providers results</u>	<u>14</u>
<u>RPA service provider profiles</u>	<u>19</u>
<u>About the authors</u>	<u>49</u>

Introduction, methodology, and definitions

Introduction

- Robotic Process Automation (RPA) has emerged as a powerful change agent, with enterprises around the globe embracing it as a means to automate manual processes and create a bridge to a digital future. Despite signs of vibrant growth such as the latest billion+ valuations of the most prominent RPA software firms, RPA is still a nascent market with enterprise strategies continuing to percolate and a notable dearth of experienced talent.
- In a first of its kind report, the HFS RPA Services Top 10 report examines the role service providers are playing in the evolving RPA market. We assessed and rated the RPA services capabilities of 29 service providers across a defined series of innovation, execution, and voice of the customer criteria. The report highlights the overall ratings for all 29 participants and the top five leaders for each sub-category.
- This report also includes detailed profiles of each service provider, outlining their overall and sub-category rankings, provider facts, and detailed strength and weaknesses.
- While we may refer in passing to broader intelligent automation or elements of artificial intelligence as part of providers' capabilities, make no mistake, we focused this report squarely on RPA and assessed all providers only on their RPA services capabilities.

Service providers covered in this report

accenture

Atos

Capgemini

Cognizant

CONDUENT

Deloitte.

DXC.technology

EXL
business process solutions

EY

genpact
Transformation Happens Here

HCL

HEXAWARE

IBM

Infosys®

KPMG

LTI

MINDFIELDS
GROW FOR TOMORROW

Mphasis
The Next Applied

NTT DATA

pwc

ROBOYO

SUTHERLAND

Symphony

SYNTEL
Consider IT Done®

TATA
TATA CONSULTANCY SERVICES

Tech
Mahindra

VIRTUAL
OPERATIONS

wipro

WNS
Extending Your Enterprise

Research methodology

The RPA Services Top 10 report assessed and scored service provider participants across execution, innovation, and voice of the customer criteria. The inputs to this process were detailed RFIs we conducted with 29 service providers, reference checks with 58 RPA clients, briefings with leaders of RPA Services practices within service providers, HFS surveys with 659 Global 2000 enterprises, and publicly available information sources. Specific assessment criteria and weighting include:



33.3%

Ability to execute

- **Depth and breadth of RPA offerings** including capabilities across the HFS RPA services value chain, use case identification, change management, and governance expertise
- **Scale** including deployments, clients, RPA trained resources, and commercial traction and growth
- **Delivery of value** including the ability to drive value through end-to-end process approach rather than short-term cost-cutting



33.3%

Innovation capability

- **RPA strategy and roadmap** including vision and credibility of strategy, integration with broader intelligent automation strategy, and identifiable investments in RPA strategy
- **Focus on business outcomes and process transformation** including the ability to deliver outcomes, models for co-innovation around process transformation, and transformation consulting
- **Technology innovation** including depth and breadth of internal RPA-related IP and external partnerships for RPA



33.3%

Voice of the customer

- **Direct feedback from enterprise clients** via reference checks, surveys, and case studies critiquing provider performance and capabilities

- HFS uses the [IEEE](#) (Institute of Electrical and Electronics Engineers) definition of **Robotic Process Automation**: a preconfigured software instance that uses business rules and predefined activity choreography to complete the autonomous execution of a combination of processes, activities, transactions, and tasks in one or more unrelated software systems to deliver a result or service with human exception management. The primary value proposition of RPA is to increase efficiency and productivity through manual labor reduction by automating transaction-intensive activities. RPA implementations require human intervention for judgment-intensive tasks and to make changes and improvements. RPA tools can typically handle structured data and are user-interface-based (code free), application agnostic, non-disruptive to legacy IT, and business user-friendly. RPA excels at performing high-volume rules-based transactional tasks, including record maintenance, queries, calculations, and transactions.
- **RPA Services** is the provision of planning, implementation, management, operations, and optimization services in support of enterprise utilization of RPA software, processes, and resources to achieve digital transformation and defined business outcomes. HFS depicts RPA Services in a value chain, as detailed on [page 9](#).

The HFS RPA Services Value Chain

Plan	Implement	Manage	Operate	Optimize
<ul style="list-style-type: none">• Technology advisory• Vendor selection support• Automation use case identification and assessment• Business case development for automation deployment• Operating model evaluation• Automation roadmap• Compliance and risk assessment• Security implications• HR and talent strategy management• Change management• Governance policy• Rollout strategy	<ul style="list-style-type: none">• Program management for process automation• Process automation and customization• Exceptions identification• Solution and technical design• Process recording, mapping and updating• Data extraction from heterogenous systems• Leverage repository of pre-built components and utilities• Intelligent automation integration• Enterprise systems integration	<ul style="list-style-type: none">• Governance management• Maintenance of automated processes• Optimization of BPO contracts and shared service centers• Upgrade support• Help desk• Support and maintenance• Testing and QA• New releases and update coordination• Training and certification• Acceptance testing• Change management• CoE management	<ul style="list-style-type: none">• Infrastructure management• Application management• IT help desk• BPO• RPA-as-a-Service• Real-time analytics• Identify changes in service delivery to support changing business requirements (e.g., M&A, new IT)• Mandatory regulatory adjustment ramification and resolution	<ul style="list-style-type: none">• New feature value identification and benefit analysis• Ongoing adds, upgrades, migrations and consolidation• Integration of AI and smart analytics• Best practice documentation and curation• User community participation

Executive summary

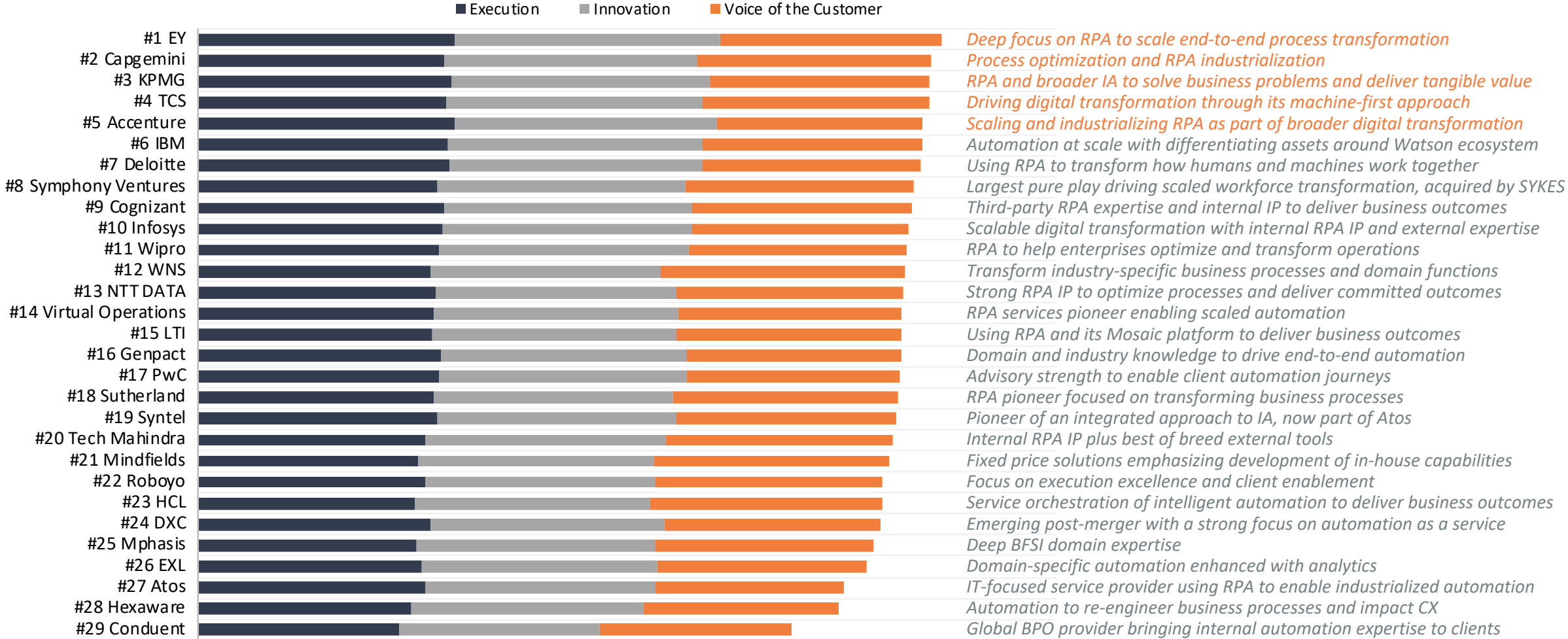
- **A first-of-its-kind comprehensive study of 29 RPA service providers:** The HFS Research RPA Services Top 10 report is a first of its kind study where we rated 29 service providers across elements of service execution, innovation, and voice of the customer.
- **No single type of services firm stood out as the de facto leader for RPA services:** Our resultant Top 10 leaders are a mixed bag of consultants, global system integrators, and RPA services pure play firms—all supporting customers across the [RPA Service Value Chain](#). The broad roles of the services players reflect a growing but still nascent market with limited talent resources and services firms jockeying to secure their role as the service provider of choice as enterprises scale RPA.
- **The overall Top 10 leaders are** EY, Capgemini, KPMG, TCS, Accenture, IBM, Deloitte, Symphony Ventures, Cognizant, and Infosys. These firms exhibited a strong mix of service execution excellence, applied innovation and vision, and verified customer satisfaction to rise to the top of our RPA services study.
- **Being adept at provision of AI-focused services does not make a provider an RPA expert:** RPA and the various building blocks of AI are different technologies requiring distinct skills. Many services firms who fared well in our [AI Services Blueprint](#) have not necessarily cultivated deep capabilities in RPA. While they complement one another in the intelligent automation context of our [Triple A Trifecta](#), it is critical to ensure your provider has actual RPA chops.
- **Trained RPA talent is growing, but experience is thin:** The average number of trained RPA resources across the 29 providers in our study is 1,160, with the median at 675 and total resource base at 32,474. However, HFS estimates that at least 80% of these have less than two years of direct RPA experience.

- **Enterprise satisfaction with RPA services is squarely mediocre:** Customers have spoken! The average satisfaction score for our study was 77% out of 100%, with many firms that usually achieve high satisfaction scores receiving lower than typical ratings from both their hand-picked references and HFS' survey-based ratings. We believe part of the causality lies in enterprise frustration with time to benefits. Transformation takes time. While many small RPA initiatives at a single process or function level can be quickly implemented and proven to show benefits, broader scaling and movement to a hybrid digital and human workforce takes time. The market hype, often from RPA software vendors, continues with its mantra of "RPA is quick and easy," thus continuing to obscure the reality that RPA and broader intelligent automation is not a quick-hit lever but part of broader scaled digital transformation.
- **Change management and governance capabilities are lacking:** Service providers' ability to provide change management capabilities and assist with setting up and ensuring solid ongoing governance were the lowest rated execution criteria, reflected as an element of depth and breadth of RPA capabilities. Enterprises and service providers alike need to implement these capabilities as ongoing elements of their automation strategies and not just pay them lip service.
- **High satisfaction is tied to focused RPA engagements:** The providers that scored well in the voice of the customer metric generally had a very focused approach to how they are offering and delivering RPA—as part of optimizing business processes as with BPO firms or as their sole focus as with the RPA services pure plays. As one enterprise executive put it "the focused approach helps us achieve targeted benefits and then move on without the pressure and expectation of a visible center of excellence and loads of expenditure on licenses." This belies the lack of scaled RPA initiatives.
- **The biggest gap in RPA services capabilities is in post-implementation:** Service providers have built strong depth of capabilities in RPA planning and implementation services. They are less experienced at supporting clients after go-live for management, operations and optimization services. As enterprises continue to scale RPA and broader intelligent automation, HFS expects clear needs to emerge in line with supporting in-house implementations versus managed services.

- **Service providers' greatest contribution to the RPA market is their IP:** While RPA technology skills are valuable, the various frameworks, accelerators, libraries and enabling tools that are being developed by the service provider community to facilitate RPA adoption are their greatest contribution. Much of this IP has been focused on process automation identification and feasibility studies, quantifying potential ROI, and fast tracking implementations. This is now shifting to enablement of RPA extension (RPA+cognitive or AI elements), building industry and domain-specific accelerators, and vendor neutral (and multi-tool) management platforms for integrated human and digital workforces.
- **The prevailing approach to RPA software by services firms is best-of-breed agnostic:** All 29 service providers included in our study refer to themselves as RPA software agnostic. This list includes the seven firms that have developed their own RPA software. These firms will generally defer to client choice or existing investments in other tools, but do position their own tools as powerful greenfield options.
- **Of the “big three” RPA software products, service providers have the most experience with UiPath:** All service providers in our study have built their RPA services capabilities around some variation of the RPA software big three of Automation Anywhere, Blue Prism, and UiPath. UiPath ranks as the RPA software product that service providers have the most experience with, followed by Blue Prism and then AA.
- **Beyond the big three, Pega, Nice, WorkFusion, and Softomotive rose to the top:** Service providers have complemented their big three RPA focus with various other firms. Many global service providers already have Pega or Nice practices based on their broader platform capabilities, and RPA is an add-on. This has helped propel Pega and Nice into the fourth and fifth slots, respectively, for depth of use by service providers. WorkFusion was noted as a viable option for BFSI clients, and Softomotive was noted as cost-effective.

The HFS Top 10 RPA service providers results

HFS Top 10 RPA service providers 2018






































Source: HFS Research 2018



HFS Top 5 RPA service providers by individual assessment criteria

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HFS Ranking	Ability to execute			Innovation capability			Voice of the customer
	Depth and breadth of RPA service offerings	Scale	Delivery of value	RPA strategy and roadmap	Focus on business outcomes and process transformation	Technology innovation	
#1							
#2							
#3							
#4							
#5							

Source: HFS Research 2018

RPA services value chain heatmap

- Provider capabilities across the RPA Services value chain are based on depth of experience.
- The depth of experience scale levels are as follows: (1) no experience; (2) emerging with fewer than 10 engagements; (3) intermediate with 10 to 25 engagements; (4) expert with more than 25 engagements



	Accenture	Atos	Capgemini	Cognizant	Conduent	Deloitte	DXC	EXL	EY	Genpact	HCL	Hexaware	IBM	Infosys	KPMG
Plan	4	4	4	4	3	4	4	3	4	4	4	4	4	4	4
Implement	4	3	4	4	4	4	4	4	4	4	4	4	4	4	4
Manage	4	4	4	4	2	4	4	4	4	4	4	3	4	4	4
Operate	4	4	4	4	2	4	4	3	4	4	4	3	4	3	4
Optimize	4	4	4	4	4	3	4	2	4	4	3	3	4	4	4

	LTI	Mindfields	Mphasis	NTT DATA	PwC	Roboyo	Sutherland	Symphony	Syntel	TCS	Tech Mahindra	Virtual Ops	Wipro	WNS
Plan	4	4	4	4	4	4	4	4	4	4	3	4	4	4
Implement	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Manage	4	3	4	4	4	4	4	4	4	4	3	4	3	4
Operate	3	3	3	4	4	4	4	4	4	4	2	4	2	3
Optimize	4	3	4	4	3	3	3	4	4	4	2	4	2	2

Source: HFS Research 2018

Service provider depth of capability by RPA software

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No experience <10 engagements 10-25 engagements >25 engagements

	Antworks	Automation Anywhere	Blue Prism	Contextor	Datamatics	Jidoka	Kofax	Kryon	NICE	PEGA	Redwood Software	Softomotive	Thoughtonomy	UiPath	WorkFusion	Internal RPA tool
Accenture																NA
Atos																NA
Capgemini																NA
Cognizant																HPA
Conduent																CAS
Deloitte																NA
DXC																NA
EXL																NA
EY																NA
Genpact																NA
HCL																NA
Hexaware																NA
IBM																NA
Infosys																AssistEdge
KPMG																NA
LTI																NA
Mindfields																NA
Mphasis																NA
NTT DATA																AFTE
PwC																NA
Roboyo																NA
Sutherland																SmartRPA
Symphony																NA
Syntel																SyntBots
TCS																NA
Tech Mahindra																Uno-R
Virtual Ops																NA
Wipro																NA
WNS																NA

Source: HFS Research 2018

RPA service provider profiles

EY: Global professional services firm leveraging RPA to support and scale end-to-end process transformation



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#1	<ul style="list-style-type: none"> • Holistic approach to automation: Robotics and intelligent automation is part of EY's global Technology practice within its Advisory business. Its internal and go-to-market approach with RPA focuses on applying technology to achieve end-to-end process transformation, with a strong focus on rationalizing and refining upstream and downstream functions impacted by change. This includes strategy, processes, controls, change management, talent, and governance elements. • RPA is more than a Band-Aid: EY continues to develop use cases that demonstrate its focus on the industrialization of enterprise RPA. Recent examples include its use of TrustPortal to enable multiple methods for digital front ends to access legacy systems via RPA and with SAP for RPA-enabled S/4 Hana migrations. • Change management expertise: EY is one of the few suppliers that actively focuses on change management as a standard component of its RPA engagements. • Internal utilization of RPA informs client engagements: Before bringing RPA to its clients, it tested and launched it internally. It currently runs 1000 bots across the firm, from shared services to tax and audit, and plans to more than double this by 2022. Its real-world use of RPA informs its development of IP and tools, accelerators, and helps refine its advisory approach. • Technology agnostic with broadest experience across third-party tools: EY is agnostic when it comes to RPA tools, which has led it to cultivate a significant depth of experience with the big three (AA, Blue Prism, and UiPath) as well as Kofax, Kryon, Redwood, Pega, and others. HFS analysis suggests EY has the broadest RPA tools experience base. • Strong R&D: EY continues to invest in its RPA capabilities, developing new offerings such as reusable bots focused on sector-specific use cases like order management in telecom, an automated process mapping tool, and co-innovation with partners. 	<ul style="list-style-type: none"> • Market perception as advisory only: EY's positioning as an advisory firm and its strong push to educate the market about the art of the possible with RPA have resulted in the perception that its focus is defining strategy and proof of concepts only. Myriad enterprises indicate they used EY up front and then moved on to work with implementation or managed services partners. EY needs to make it clear that it offers a full solution approach focused on end-to-end process transformation. • More structured governance processes: Some clients noted that governance processes were less structured than they would like, specifically calling out a need for better communication and management. • Justification of price points: EY's pricing is perceived as uncompetitive by some clients. While RPA services pricing tends to vary because there is no set baseline of value and results, EY can help its clients better validate its commercials by illustrating outcomes that go beyond technology to business impact. 		
Ability to execute					
Depth and breadth of RPA offerings	#3				
Scale	#1				
Delivery of value	#3				
Innovation capability		Relevant acquisitions & partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#2	<p>Acquisitions include:</p> <ul style="list-style-type: none"> • Cognistreamer: 2017 • NorthPoint Digital: 2015 • InWave: 2015 <p>Partnerships include:</p> <ul style="list-style-type: none"> • Blue Prism: platinum delivery partner, gold capability partner • Automation Anywhere: platinum business partner • UiPath: strategic partner • WorkFusion: global strategic partner • Pega (OpenSpan): partner • Redwood: alliance • Kryon • Kofax • SiriusIQ: workflow automation • BlackLine: finance automation • RPA-focused Alliances: Microsoft and SAP 	<p>>700 enterprise RPA clients including:</p> <ul style="list-style-type: none"> • Global integrated transport and logistics company • Multinational retailer • The city council for a major city • International bank and financial service provider • One of the largest coal and heavy minerals mining companies • Leading independent oil and natural gas exploration and producer • Leading, integrated provider of construction, repair, and engineering services for distribution and transmission powerlines and substations • American entertainment company that produces, acquires, and distributes filmed entertainment through multiple platforms • Canada's largest telecommunications company • One of the largest communications company in America • Multinational technology company • Multinational investment bank and financial services company • Multinational professional services firm • Global financial services provider 	<p>Headcount: 1,880</p> <p>Delivery locations:</p> <ul style="list-style-type: none"> • North America: 19% (US and Canada) • LATAM: 15% (México, Costa Rica, Brazil, Colombia and Guatemala) • UK: 3% • EMEA: 16% (Belgium, France, Germany, Greece, Italy, Poland, Romania, Russia, Spain, Sweden, Switzerland) • India: 24% • Philippines: 5% • Other APAC: 19% (Japan, Malaysia, Singapore) 	<ul style="list-style-type: none"> • EY Sight: Automated process mapping tool • Myley: Unstructured to structured data conversion • ResQ: Automated data conversion • Intelligent S/4 Hana Migration Factory: Supports multiple transformation scenarios like technical upgrades, green field, etc. to S/4 Hana enabled by RPA and IA • EY Optics: Supports a shifting audit approach • EY Tax Analyser: Enables client assessments of their current and desired future state tax function maturity • EY Aleph: A tool that optimizes litigation decisions • EY Helix: A suite of data and analytics offerings designed to assist in providing high-quality audits and insights to clients • Smart Information Retrieval Engine (SIRE): A tool for document information extraction and processing leveraging RPA and machine learning • EY Lighthouse An analytics-driven forecasting solution that combines elements of RPA and AI to minimize forecast errors. Powered by Microsoft, delivered by EY
Focus on business outcomes and process transformation	#1				
Technology innovation	#1				
Voice of the customer	#13				

Capgemini: Global service provider focused on process optimization and RPA industrialization



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#2	<ul style="list-style-type: none"> Unified Automation practice yielding dividends: Capgemini centralized its investments and expertise in RPA and intelligent automation under the Automation Drive umbrella in 2016. This centralized approach helped refine its focus on delivering business outcomes through process optimization and scalable operating models. Strength across the RPA services value chain: Capgemini has strong credentials across the value chain supported by its eSOAR (eliminate, standardize, optimize, automate, and robotize) methodology to help drive process optimization prior to automation, its factory approach to COE set-up, and its Virtual Delivery Center for governance. Depth and breadth of tools experience: Rated in the top quartile of our assessment of providers' experience with leading third-party RPA tools, inclusive of the big three (AA, Blue Prism, and UiPath) and beyond to providers like WorkFusion and Celaton. Sizable talent pool and strong focus on training and knowledge management: Capgemini is in the top three for sheer volume of RPA trained resources. It has developed strong internal training (Automation Drive Academy) focused on comprehensive third-party tools training and training on internal tools, methodologies, and resources to help continually skill up resources. Knowledge is captured and curated in a global knowledge hub (Automation Drive Library). Flexibility: Clients were pleased with its ability to adjust to varying RPA needs and application concepts and deploy skilled resources accordingly. 	<ul style="list-style-type: none"> Expertise on large-scale unattended RPA: Clients indicate that the firm could broaden its experience around unattended bot deployment. Slightly more than a quarter of Capgemini's RPA engagements are focused on less complex RPA. As RPA scales, it is critical to ensure that resources are available to manage complex unattended bot farms. Perceived lack of process and organizational knowledge: Some clients commented on a lack of process and organizational knowledge. This is likely partially tied to implementation resources with fresh RPA knowledge but limited industry or business process context. A broader perspective on and understanding of large client organizations would enable deeper consulting capabilities and enterprise-wide use case identification. Organizational complexity: Despite the launch of its unified automation practice, some clients continue to have challenges with Capgemini's organizational structure indicating that expertise can be siloed. 							
Ability to execute										
Depth and breadth of RPA offerings	#9									
Scale	#10									
Delivery of value	#11									
		<table border="1"> <thead> <tr> <th>Relevant acquisitions and partnerships</th> <th>Key clients</th> <th>Operations</th> <th>Internal IP and technologies</th> </tr> </thead> <tbody> <tr> <td> Acquisitions include: <ul style="list-style-type: none"> LiquidHub (2018): A digital customer engagement firm with innovation labs known as LiquidLabs focused on R&D including advanced RPA capabilities like Text/OCR digitization and assimilating cognitive technology in future bots. iGATE (2015): Expanded footprint in North America and brought significant capabilities and traction on Blue Prism RPA engagements for clients principally in Banking and Insurance sectors. 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KPMG: Global professional services firm focused on RPA and broader intelligent automation to solve business problems and deliver tangible value



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#3	<ul style="list-style-type: none"> • Global integration of RPA and cognitive capabilities under its Lighthouse center of excellence: KPMG has aligned its RPA and cognitive capabilities as well as its cognitive tax capabilities with its existing data and analytics Lighthouse. The Lighthouse CoE is an internal hub between its member firms worldwide. This alignment brings together the HFS Triple A Trifecta change agents to create a powerful hub for service orchestration. • Early adopter with a clear vision of transformation potential: KPMG was an early adopter of RPA, starting in late 2012 as a transformation tool for its global business services outsourcing. It has grown its capabilities since then by building advisory expertise, process knowledge, and technology skills. This relatively early start has enabled the firm to develop a strong experience basis, especially around advisory and long-term vision. It also has a growing number of clients that are well down the path towards scaled and industrialized RPA and intelligent automation. • Internal use of RPA: KPMG is applying RPA internally to both enhance service delivery in knowledge domains like tax and audit and its own internal functions like HR, payroll, and IT support. • Broad footprint of innovation and collaboration centers: The firm has a strong network of intelligent automation labs and innovation centers around the globe to support collaboration with clients as well as partners. • Strength in governance: KPMG's depth of RPA experience has educated it on the need for strong and enduring governance process for RPA and broader intelligent automation transformation. While this is still an area in flux as enterprises continue to come to grips with what it means to manage a hybrid digital and human workforce, KPMG's clients lauded the company for its strong governance skills • Development of internal IP: KPMG has developed a number of internal tools, accelerators, and frameworks to accelerate RPA adoption. It is also applying RPA to drive process optimization into back-office solutions such as Finance ERP, Procurement ERP and HR functions through its Powered Enterprise solutions. 	<ul style="list-style-type: none"> • Increasing its client base in Europe: While KPMG has an ample footprint in Europe, where enterprise adoption of RPA is somewhat further along, the majority of its clients are US based. • Change management: While the firm was lauded by clients for its broader governance capabilities, change management capabilities leave something to be desired. While some of this challenge likely also lies with clients who actually need to make and manage change especially with its human workforce, KPMG can certainly redouble its efforts to support this critical success factor. • Depth of experience with third-party RPA tools: Clients noted that there is still a distinct learning curve for some resources around code quality and development and use of reusable scripts. KPMG's continued focus on employee education will help. 							
Ability to execute										
Depth and breadth of RPA offerings	#2									
Scale	#5									
Delivery of value	#2									
Innovation capability		<table border="1"> <thead> <tr> <th>Relevant acquisitions and partnerships</th> <th>Key clients</th> <th>Operations</th> <th>Internal IP and technologies</th> </tr> </thead> <tbody> <tr> <td> <p>Acquisitions include:</p> <ul style="list-style-type: none"> • 2015-18: Acquired several RPA teams from other consultancies, technology companies, start-ups, etc. • 2014: Acquired Safira for BPM and Intelligent Automation, including RPA <p>Partnerships include:</p> <ul style="list-style-type: none"> • Blue Prism: silver delivery partner • Automation Anywhere: platinum business partner • UiPath: strategic partner • Pega Robotics (OpenSpan): advisory partner • WorkFusion </td> <td> <p>120+ enterprise RPA clients, including:</p> <ul style="list-style-type: none"> • Fortune 100 US telecom company • Fortune 100 global insurance company • Fortune 100 global bank • Large US utility • Fortune 100 global automotive company • Fortune 500 global pharmaceutical company • Fortune 500 global healthcare company • Major UK bank • Major German bank • Fortune 500 global telecom company </td> <td> <p>Headcount: 2,000</p> <p>Locations:</p> <ul style="list-style-type: none"> • North America: 40% (split across 90+ US offices) • LATAM: 10% (mostly in Brazil and Columbia) • UK: 10% (19 offices across the UK) • EMEA: 20% (split across 10+ countries including COE in Portugal) • India: 10% (includes COE in India) • Other APAC: 10% (mostly in Japan and Australia) </td> <td> <ul style="list-style-type: none"> • IGNITE: Proprietary platform bringing RPA and AI tools together. • RPA Workbench: Includes accelerators across cognitive automation patterns to help teams quickly develop PoCs for clients. • Powered Enterprise: Multiple "powered" solutions for the back-office across platforms (WorkDay, Oracle, ServiceNow, etc.) that have RPA bots built on top to further drive process optimization. </td> </tr> </tbody> </table>	Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies	<p>Acquisitions include:</p> <ul style="list-style-type: none"> • 2015-18: Acquired several RPA teams from other consultancies, technology companies, start-ups, etc. • 2014: Acquired Safira for BPM and Intelligent Automation, including RPA <p>Partnerships include:</p> <ul style="list-style-type: none"> • Blue Prism: silver delivery partner • Automation Anywhere: platinum business partner • UiPath: strategic partner • Pega Robotics (OpenSpan): advisory partner • WorkFusion 	<p>120+ enterprise RPA clients, including:</p> <ul style="list-style-type: none"> • Fortune 100 US telecom company • Fortune 100 global insurance company • Fortune 100 global bank • Large US utility • Fortune 100 global automotive company • Fortune 500 global pharmaceutical company • Fortune 500 global healthcare company • Major UK bank • Major German bank • Fortune 500 global telecom company 	<p>Headcount: 2,000</p> <p>Locations:</p> <ul style="list-style-type: none"> • North America: 40% (split across 90+ US offices) • LATAM: 10% (mostly in Brazil and Columbia) • UK: 10% (19 offices across the UK) • EMEA: 20% (split across 10+ countries including COE in Portugal) • India: 10% (includes COE in India) • Other APAC: 10% (mostly in Japan and Australia) 	<ul style="list-style-type: none"> • IGNITE: Proprietary platform bringing RPA and AI tools together. • RPA Workbench: Includes accelerators across cognitive automation patterns to help teams quickly develop PoCs for clients. • Powered Enterprise: Multiple "powered" solutions for the back-office across platforms (WorkDay, Oracle, ServiceNow, etc.) that have RPA bots built on top to further drive process optimization.
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RPA strategy and roadmap	#4									
Focus on business outcomes and process transformation	#2									
Technology innovation	#3									
Voice of the customer	#15									

TCS: Global service provider driving digital transformation through its machine-first approach



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#4	<ul style="list-style-type: none"> • Formalization of Enterprise Intelligent Automation business unit is yielding dividends: TCS centralized its intelligent automation capabilities in 2017 to focus on driving automation across its business into processes, IT operations, and application services. This move has helped drive a more holistic automation strategy with its unifying focal point of its “Machine First Delivery Model.” • Growing focus on business outcomes using a toolbox approach: Its machine-first model is essentially an approach to digital transformation—solving business problems and enhancing business operations using various technologies. RPA is one of the tools in the toolbox, with the focus increasingly on using a combination of resources, such as RPA + NLP + ML to automate financial spreading, to achieve desired results. • Client satisfaction with process targeting and delivery of results: TCS clients ranked them highly for identification of automation use cases and subsequent delivery of value and benefit beyond cost savings. While these effusive results suggest that clients were pleased with focused process or function-specific results rather than broad transformation initiatives, HFS is finding that effective incremental results can lead to broader initiatives. The flip side is that broader transformation initiatives can suffer from long ROI cycles with grim satisfaction for still nascent tech. • Strong focus on internal IP: TCS has a three-fold approach to RPA and IA-related IP: (1) domain-specific frameworks, libraries, and accelerators developed from engagements; (2) formal products such as Ignio; and (3) its internal innovation group that drives ideas into use. This IP enables strong service delivery of RPA as well as leverages RPA as a critical enabler/input to broader IA solutions. 	<ul style="list-style-type: none"> • Tell the story: TCS needs to stay focused on its machine-first narrative and load up the marketplace with examples and use cases that demonstrate machine first and what TCS is delivering to clients. • Greater transparency into the role of RPA in solutions: While clients are fundamentally more interested in outcomes than tools and methodologies, TCS somewhat buries the role of RPA in many of its solutions, thus making it invisible to clients. The risk is a lack of trust in RPA by clients and a lack of knowledge of TCS’ capabilities. • RPA scale growing pains: TCS clients vent frustration around post-production challenges inherent in RPA such as optimizing and managing bots and scalability. TCS needs to directly address these challenges to both help clients manage their own engagements and provide resources, such as its command center, to help manage engagements. 		
Ability to execute					
Depth and breadth of RPA offerings	#10				
Scale	#6				
Delivery of value	#7				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#5	<p>Acquisitions include:</p> <ul style="list-style-type: none"> • N/A <p>Partnerships include:</p> <ul style="list-style-type: none"> • UiPath: strategic partner • WorkFusion: global strategic partner • Pegasystems: SI partner • Blue Prism: partner • Automation Anywhere: business partner • NICE • Kofax 	<p>139 enterprise RPA clients, including:</p> <ul style="list-style-type: none"> • Large pan European insurance company • Large UK insurer • Large US-based retailer • Large ANZ-based financial institution • Large Australia-based telecom provider • Large multinational financial services company • Large multinational health insurance company • Large US-based asset management company • Large European telecom equipment provider • Large Canadian financial services company 	<p>Headcount: ~1575</p> <p>Locations:</p> <ul style="list-style-type: none"> • North America: 13% (USA, Canada) • LATAM: 5% (Brazil, Mexico, Columbia, Peru, Uruguay) • Europe: 18% (England, Scotland, France, Finland, Germany, Switzerland, Belgium, Sweden, Netherlands, Norway, Denmark) • EMEA: 2% (UAE, South Africa) • India: 57% (Bangalore, Chennai, Hyderabad, Pune.) • Other APAC: 5% (Malaysia, Singapore, Japan, Thailand, Hong Kong, Australia) 	<ul style="list-style-type: none"> • RPA assets and methodologies: 10+ such as product evolution, implementation methodology, and maturity assessment • RPA accelerators: <ul style="list-style-type: none"> Identify and configuration management Document conversion Chat framework integration • Domain-specific frameworks using RPA: For example, financial spreading, KYC, pharmacovigilance, order management, underwriting calculations. • Integrated Command Center for RPA: Vendor-agnostic platform to manage and track unattended bots • ROBOExtractor: Content to system • ROBOFormatter: System to content • ROBOUniter: System and document consolidation • ROBOImpressario: Workload manager • Ignio: Digitate’s cognitive automation platform that leverages RPA for data collection and orchestration
Focus on business outcomes and process transformation	#3				
Technology innovation	#5				
Voice of the customer	#8				

Accenture: Global service provider focused on scaling and industrializing RPA as part of broader digital transformation



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#5	<ul style="list-style-type: none"> • Early and continued investment in RPA: Accenture formalized an RPA practice in 2013 focused on process optimization of shared services and launched an automation CoE. It continues to invest and scale its capabilities through talent investment, innovation centers, development of assets and accelerators, acquisitions, deep RPA partnerships, and training capabilities. • Drinking its own RPA champagne: The firm has and continues to actively automate its internal business operations using RPA. Its internal use of Automation Anywhere is one of the AA's largest implementations. • Deep expertise across leading RPA software: 5000+ resources trained across leading RPA software tools, with deep relationships with Blue Prism, AA, UiPath, Pega, and Workfusion. Best of breed agnostic approach. Clients laud its ability to provide talent onshore or offshore. • Full complement of capabilities across the RPA Services value chain: Accenture's broad capabilities across the RPA services value chain are enhanced by strong process knowledge gained from its BPO business and internal use, IT expertise for development and engineering efficacy, and strong industry knowledge. • Integration with broader intelligent automation capabilities: While Accenture views RPA as a "brilliant basic," it is actively extending RPA functionality through use of complementary technologies such as machine learning, natural language processing, analytics, OCR, and BPM to deliver broader business benefits. RPA is routinely included in broader transformation initiatives to help achieve business outcomes. • Development of IP and assets to accelerate and industrialize RPA: Investment in internal resources such as the Accenture Robotics Platform to help extend RPA with cognitive capabilities, the Automation Ripple Effect Qualifier to measure the impact of automation on business KPIs, and tools such as its Process Analyzer, code review tools, and Bot Management Framework to help drive and scale engagements. 	<ul style="list-style-type: none"> • Talent: While Accenture has the largest talent pool of RPA resources in the industry, depth of experience and subject matter expertise were raised as issues by some clients. • Speed: Bot development, delivery, and deployment are perceived as slow by some clients. While Accenture clearly needs to manage client expectations, the continued pervading market hype that RPA is easy and therefore quick to implement likely adds to the perception of slowness. • Governance expertise quality: Some clients expressed frustration with the service provider's ability to help transition to and manage their integrated human and digital workforces. Some of this may stem from RPA engagements being a component of broader transformation initiatives. 		
Ability to execute					
Depth and breadth of RPA offerings	#1				
Scale	#2				
Delivery of value	#4				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#1	Acquisitions include: <ul style="list-style-type: none"> • Genfour (2017): a pure play automation service provider with strong UiPath credentials Partnerships include: <ul style="list-style-type: none"> • Blue Prism: Accenture is a Gold Delivery provider and a strong contributor to Blue Prism license revenues. • Automation Anywhere: Accenture has a large pool of AA certified resources and has been named as an implementation partner for its cloud-based RPA solution, BotFarm. • UiPath: Accenture added significant UiPath skills through the acquisition of Genfour and has since trained an additional 2300+ resources. • Pega: Accenture is a Pega Platinum Partner with strong skills and assets built around its broader product portfolio. Specific to RPA, it has 370+ skilled Pega Robotics (OpenSpan) practitioners. 	450 enterprise RPA clients including: <ul style="list-style-type: none"> • Large US-based financial player • Global oil and gas major • European-based leading consumer goods company • Global automobile company • A large US health insurance company • A large global financial institution • An Asian broadband network provider • A leading North American CPG sales and marketing company • A large managed care company • A leading European television, media, and telecommunications company 	Headcount: 5,000+ RPA professionals Locations: Delivery centers serve clients in 120 countries including <ul style="list-style-type: none"> • Americas: 27% • Europe: 31% • APAC, Africa, and the Middle East: 42% 	<ul style="list-style-type: none"> • Accenture Robotics Platform: A five-part solution that combines RPA with more advanced AI capabilities. These assets are used to enhance the capabilities of RPA software solutions in the market. • Accenture Cognitive Insights Platform: Facilitates ingestion of raw data and trains the data using ML techniques. • Accenture Robotics Operations Center: Manages bots deployed across clients and enables bot lifecycle management. • Accenture Machine Learning Text Analyzer: Supports the automated classification of incoming text, based on historic data. • Accenture myWizard: An intelligent automation platform for the enterprise that enables a common data fabric and integration of multiple proprietary and third-party automation and AI solutions. • Other solutions include: Process Analyzer Tool; Automation Advisor; Vendor Selection Toolkit; Performance Management Framework; Automation Methodology; Automation Security Practices; Robotics Architecture Options; Bot Management Framework; Code Review Tool, Business Case Analyzer; Automation Ripple Effect Qualifier; Environment Advisor
Focus on business outcomes and process transformation	#4				
Technology innovation	#2				
Voice of the customer	#26				

IBM: Global service provider driving automation at scale with differentiating assets around the Watson ecosystem

Dimension	Rank	Strengths	Development opportunities								
HFS Top 10 position	#6	<ul style="list-style-type: none"> • Broad automation capabilities: IBM Automation is part of IBM Services and offers a full complement of capabilities across HFS' RPA services value chain including advisory, design, build, operate, and managed services. It additionally has driven RPA into software offerings from IBM Cloud including business process management and Operational Decision Manager (ODM), its business rules management system. This approach combined with its Watson ecosystem provides myriad options and entry points to clients. • RPA + Watson AI: IBM's investment in Watson has created both a market-leading set of cognitive capabilities as well as a strong automation brand. IBM brings Watson and other smart tools together with RPA to create end-to-end intelligent automation solutions. Assets such as the "Golden Bridge" aka IBM Automation with Watson enable integration between cognitive assistants (interpretation, assignment) and RPA bot(s) (task execution, resolution). • Use of RPA to optimize IT and business processes: IBM's top use case for RPA is IT. With its strength in infrastructure and applications outsourcing, it has been leveraging RPA and broader IA to help automate IT functions such as application development workflows and system and server monitoring. While it also has deep experience automating business processes, particularly in F&A and HR, its use of RPA for IT cracks open a largely ignored opportunity for industrialized RPA. • Deep client base and governance best practices: IBM has one of the largest RPA client bases across our study participants, garnered through its multi-faceted approach to RPA and IA. While governance remains one of the weak points of RPA implementations across the market, IBM's clients complimented its strong governance capabilities and highly structured approach to RPA delivery. 	<ul style="list-style-type: none"> • Ability to drive value from RPA: Some clients noted they are not yet satisfied with the value achieved from RPA. While IBM might need to do a better job managing client expectations, its use of RPA for transformation initiatives will likely require more time for maximum benefit achievement. • Experience and speed: The depth of experience of RPA developers has sometimes found to be lacking by clients specifically around technical knowledge (e.g., testing, access provisioning). Additionally, some clients perceive implementations are slow. While these comments likely reflect a still nascent RPA market with too much messaging around speed and ease, IBM needs to continue its RPA resource development as well as broad market education. • Change management expertise: Despite its kudos for governance, clients called out IBM for a lack of change management expertise in large transformation engagements. Helping clients effectively transition to a hybrid human and digital workforce model is still a weak point in the industry overall. 								
Ability to execute											
Depth and breadth of RPA offerings	#6										
Scale	#4										
Delivery of value	#8										
Innovation capability											
RPA strategy and roadmap	#3	<table border="1"> <thead> <tr> <th>Relevant acquisitions and partnerships</th> <th>Key clients</th> <th>Operations</th> <th>Internal IP and technologies</th> </tr> </thead> <tbody> <tr> <td> Acquisitions include: <ul style="list-style-type: none"> • N/A Partnerships include: <ul style="list-style-type: none"> • Automation Anywhere: platinum business partner • Blue Prism: silver delivery partner, silver service partner • UiPath: strategic partner • Softomotive: alliance partner • NICE: alliance partner </td> <td> 1,000+ enterprise RPA clients, including: <ul style="list-style-type: none"> • Amerisource Bergen • APMM (Maersk) • Development Bank of Singapore • Cemex • Mondi • Smart Meter Texas • Suntory • Sysco • Tyco • Walgreens </td> <td> Headcount: 1,400+ RPA and RDA developers based in IBM's delivery centers, with the highest numbers concentrated in: <ul style="list-style-type: none"> • Bangalore, Dalian, and Krakow • Additional teams in Baton Rouge, LA; Lansing, MI; and Nova Scotia, Canada • Largest practice areas based in Europe and North America </td> <td> <ul style="list-style-type: none"> • IBM Automation Platform: Composable automation services including: <ul style="list-style-type: none"> • A hybrid cloud-based delivery framework for automation from Business Process through Application Support to Infrastructure. • Golden Bridge: An integration layer that orchestrates responses and alerts between a cognitive assistant and RPA solutions. • Automation Command Center: For real-time visualization of automation performance • Digital Business Automation: A software product offering from IBM Hybrid Cloud that includes integrated software technologies from BPM and ECM that integrate with RPA. </td> </tr> </tbody> </table>	Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies	Acquisitions include: <ul style="list-style-type: none"> • N/A Partnerships include: <ul style="list-style-type: none"> • Automation Anywhere: platinum business partner • Blue Prism: silver delivery partner, silver service partner • UiPath: strategic partner • Softomotive: alliance partner • NICE: alliance partner 	1,000+ enterprise RPA clients, including: <ul style="list-style-type: none"> • Amerisource Bergen • APMM (Maersk) • Development Bank of Singapore • Cemex • Mondi • Smart Meter Texas • Suntory • Sysco • Tyco • Walgreens 	Headcount: 1,400+ RPA and RDA developers based in IBM's delivery centers, with the highest numbers concentrated in: <ul style="list-style-type: none"> • Bangalore, Dalian, and Krakow • Additional teams in Baton Rouge, LA; Lansing, MI; and Nova Scotia, Canada • Largest practice areas based in Europe and North America 	<ul style="list-style-type: none"> • IBM Automation Platform: Composable automation services including: <ul style="list-style-type: none"> • A hybrid cloud-based delivery framework for automation from Business Process through Application Support to Infrastructure. • Golden Bridge: An integration layer that orchestrates responses and alerts between a cognitive assistant and RPA solutions. • Automation Command Center: For real-time visualization of automation performance • Digital Business Automation: A software product offering from IBM Hybrid Cloud that includes integrated software technologies from BPM and ECM that integrate with RPA. 	
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Focus on business outcomes and process transformation	#9										
Technology innovation	#6										
Voice of the customer	#16										

Deloitte: Global professional services firm leveraging RPA as part of a broader cognitive agenda to transform how humans and machines work together



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#7	<ul style="list-style-type: none"> Strong capabilities across the RPA services value chain: Deloitte covers the full gamut of RPA services, from planning to optimization, with notable offering elements such as vision definition, workforce transition to help with organizational design, and RPA Insights to use analytics to help manage and optimize operations. Global strategy and operations for robotics and cognitive: Deloitte established a Global Robotics & Cognitive Executive Committee to set the strategy for RPA and cognitive and an Operating Committee organization representing 20+ markets to activate the strategy locally. This approach helps ensure consistency in vision and go-to-market across its network of independent member firms around the globe. Investment in internal automation: Deloitte is eating its own dogfood applying RPA and cognitive internally, with more than 350 processes automated across core businesses and corporate functions and internal teams focused on identifying and executing on continued internal automation opportunities. Top quartile for depth and breadth of third-party tools experience: In HFS' assessment of RPA tools experience, Deloitte is a leader with the top third-party RPA software companies as well as various other RPA ecosystem players. Development of internal IP: investment and development in assets to accelerate and optimize RPA engagements such as its Global RPA Methodology and Digital Heartbeat for digital workforce management. RPA extension to cognitive: Aligned with its consultative Cognitive Advantage approach, Deloitte looks at RPA as an opportunity to help clients begin their cognitive journey and realize greater benefits. An example for this is its D-ICE solution, which combines image recognition scripting, NLP, and RPA to eliminate the risks of data entry errors. 	<ul style="list-style-type: none"> Uneven geographical growth: The majority of Deloitte's RPA engagements are focused on North American headquartered clients. This is despite a strong footprint in markets such as the UK, Australia, and Japan that are actively adopting RPA and IA. This is contrary to many of its peers, which have a near-even split between North America and Europe. Geographic inconsistency: Despite its Global Robotics & Cognitive Executive Committee and Operating Committee, the scale of Deloitte's global network can sometimes lead to an inconsistent approach to, and quality of, RPA delivery between markets. Capabilities should thus be assessed globally and locally. Intermediate level of experience with RPA optimization: While Deloitte has strong experience across the RPA service value chain, enterprise clients sometimes opt to conduct ongoing optimization work such as adds, upgrades, migrations, and consolidation themselves or work with other service providers perceived to be less expensive or with whom they already have ongoing outsourcing relationships. 							
Ability to execute										
Depth and breadth of RPA offerings	#4									
Scale	#3									
Delivery of value	#9									
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RPA strategy and roadmap	#7									
Focus on business outcomes and process transformation	#5									
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Voice of the customer	#18									

Symphony Ventures: The largest of the pure plays leveraging deep RPA chops to drive scaled workforce transformation, just acquired by SYKES*



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#8	<ul style="list-style-type: none"> • Living and breathing the vision for the future of work: Founded in 2014, Symphony has scaled to become the largest of the pure play RPA-focused services firms, due in no small part to tenacious focus on thought leadership and market education. It competes regularly against the Big 4 and global SIs, punching above its weight due to its deep (“unmatched” according to clients) technical skills and a clear focus on creating and scaling effective digital workforces, underpinned by speed and nimbleness. Acquired by SYKES in October 2018. • Multi-faceted growth: It recently opened a new near-shore center in Poland, expanded into the LATAM market in 2017 through its RPA4Excellence acquisition, and developed partnerships with Automation Anywhere and Thoughtonomy to intensify its focus on providing automation-as-a-service. 2017 also saw the launch of Symphony Labs to drive innovation for clients and within Symphony itself, and a £3.5 million investment from PE firm Livingbridge to further fuel growth. • End-to-end focus: Symphony differentiates itself from some larger providers by supporting its customers throughout their automation journeys. The company has established dedicated CX teams to ensure the RPA experience is seamless for its clients. This goes beyond simply solving problems for clients, but enabling them to build out their own automation capabilities and knowledge by providing coaching and training around RPA, as well as readily available on-the-ground RPA specialists. Moreover, Symphony has strong training capabilities, reinforced by its training partnerships with Blue Prism and UiPath. Every new hire is trained to become a specialist with at least one of these tools, but most often with a wide array. • Process focus: Symphony prioritizes process discovery and optimization before attempting to automate clients’ processes, through its SAVO (simplify, automate, virtualize, orchestrate) methodology, thus eschewing the all-too-common “hammer looking for a nail” approach to RPA exhibited by some vendors and service providers. • Battle scars got Symphony to where it is today: Symphony has been in the game since RPA’s earliest days and has seen what has and hasn’t worked and learned from it. Being a smaller player, it has had to fight for its prominent position and takes nothing for granted. This is a powerful driver behind its present focus on building cognitive elements into RPA, aware of market shifts in that direction as AI becomes an indispensable automation element, adding cognition to RPA. 	<ul style="list-style-type: none"> • Cultivation of industry and domain expertise. While Symphony’s clients laud it for deep automation expertise, they are also somewhat critical of their lack of institutional knowledge. While this can be addressed client by client, it can also be mitigated by honing industry-specific and domain-focused expertise. • Management and optimization. Symphony is quite astute at identifying the greatest need of the moment such as its focus on training services. As many clients seek to scale post-implementation or consider new models for consuming automation and enabling digital labor, there is an opportunity for Symphony to formalize its management and optimization capabilities. • Project planning and capacity assessment. Its ambitions and vision mean Symphony is wary of incremental changes. However, to play to its strengths it may consider starting small and scaling, especially as it still learns to navigate large enterprise clients’ needs and pace. 							
Ability to execute										
Depth and breadth of RPA offerings	#13									
Scale	#19									
Delivery of value	#1									
Innovation capability		<table border="1"> <thead> <tr> <th>Relevant acquisitions and partnerships</th> <th>Key clients</th> <th>Operations</th> <th>Internal IP and technologies</th> </tr> </thead> <tbody> <tr> <td> Acquisitions include: <ul style="list-style-type: none"> • 2017: RPA4Excellence Partnerships include: <ul style="list-style-type: none"> • Automation Anywhere: business partner • Blue Prism: gold capability provider, silver delivery partner • Celaton: cognitive vendor partner • Decisions.com: workflow partner • Enate: workflow partner • Nice: authorized partner • OEE Consulting: indirect channel partner • The Hackett Group: benchmarking and consulting partner • Thoughtonomy: strategic vendor and support partnership • UiPath: implementation partner, training partner </td> <td> 100 enterprise RPA clients including: <ul style="list-style-type: none"> • Leading Telco infrastructure provider • Large BPO provider • Large logistics company • Large mobile provider • Second-largest police force • Large streetside UK bank • Fifth-largest food and beverage company and third-largest brand • Large point-of-sale terminal manufacturer • Global confectionery and food company </td> <td> Headcount: 200 FTEs Locations: <ul style="list-style-type: none"> • North America: 16% (Dallas, Boston, Indianapolis, Atlanta, San Francisco) • LATAM: 5% (Mexico City) • UK: 34% (London, Uxbridge, Cardiff) • EMEA: 30% (Poland) • India: 15% (Bangalore) </td> <td> <ul style="list-style-type: none"> • Process targeting: Templated tool to focus on the process that will most likely generate the maximum benefit for RPA implementation. • Benefits calculator: Template to calculate the likely FTE benefits of a process to be automated. • Automated code build: Accelerator tool to build Blue Prism Objects and UiPath elements from a process definition. • Hosted integrated platform: Symphony Cloud hosted platform. • Industry solutions: Pre-packaged solution accelerators and frameworks. • Best practices, standards, frameworks: Development standards and best practices across Blue Prism and UiPath to ensure excellence of build. </td> </tr> </tbody> </table>	Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies	Acquisitions include: <ul style="list-style-type: none"> • 2017: RPA4Excellence Partnerships include: <ul style="list-style-type: none"> • Automation Anywhere: business partner • Blue Prism: gold capability provider, silver delivery partner • Celaton: cognitive vendor partner • Decisions.com: workflow partner • Enate: workflow partner • Nice: authorized partner • OEE Consulting: indirect channel partner • The Hackett Group: benchmarking and consulting partner • Thoughtonomy: strategic vendor and support partnership • UiPath: implementation partner, training partner 	100 enterprise RPA clients including: <ul style="list-style-type: none"> • Leading Telco infrastructure provider • Large BPO provider • Large logistics company • Large mobile provider • Second-largest police force • Large streetside UK bank • Fifth-largest food and beverage company and third-largest brand • Large point-of-sale terminal manufacturer • Global confectionery and food company 	Headcount: 200 FTEs Locations: <ul style="list-style-type: none"> • North America: 16% (Dallas, Boston, Indianapolis, Atlanta, San Francisco) • LATAM: 5% (Mexico City) • UK: 34% (London, Uxbridge, Cardiff) • EMEA: 30% (Poland) • India: 15% (Bangalore) 	<ul style="list-style-type: none"> • Process targeting: Templated tool to focus on the process that will most likely generate the maximum benefit for RPA implementation. • Benefits calculator: Template to calculate the likely FTE benefits of a process to be automated. • Automated code build: Accelerator tool to build Blue Prism Objects and UiPath elements from a process definition. • Hosted integrated platform: Symphony Cloud hosted platform. • Industry solutions: Pre-packaged solution accelerators and frameworks. • Best practices, standards, frameworks: Development standards and best practices across Blue Prism and UiPath to ensure excellence of build.
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RPA strategy and roadmap	#8									
Focus on business outcomes and process transformation	#16									
Technology innovation	#12									
Voice of the customer	#5									

* Profile represents Symphony capabilities pre-acquisition

Cognizant: Global service provider offering complement of third-party RPA expertise and internal IP to deliver business outcomes

Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#9	<ul style="list-style-type: none"> • A true best of breed approach: Cognizant has cultivated solid third-party RPA expertise, deep process knowledge from its BPO capabilities, and an internal RPA option via its HPA tool acquired with TriZetto in 2014. • Robots as a Service (RaaS): Through its HPA toolset, Cognizant offers a viable and well subscribed RaaS offering with a commercial model based on successful transactions. Originally developed for the healthcare sector, it has expanded use cases to insurance, banking, and travel and hospitality. Its precise workflow process validation approach enables its commercial model. It has 80 clients and 1800 unattended bots. Cognizant is currently supporting US clients and has plans for expansion. • RPA as part of broader intelligent automation approach: Cognizant's RPA capabilities are housed within its Digital Operations business and AI and analytics are managed from its Digital Business. They integrate via the HiveCenter, a comprehensive approach to automation across industry and processes. Cognizant were early users of tools such as ABBYY and Celadon to help enhance RPA with intelligent capabilities such as smart intake. • Strong internal IP: In addition to its HPA tool, Cognizant has developed various tools, frameworks, and utilities such as reusable code, "bot resumes," code testing, bot management, including industry-specific POVs to help accelerate and optimize RPA engagements. • Innovative commercial model: Cognizant's RaaS model is truly transaction-based offering predictability with no license, implementation, or maintenance costs. 	<ul style="list-style-type: none"> • Balancing its vendor-agnostic approach with its own RPA toolset: From a client perspective, the duality offers choice. However, Cognizant needs to carefully manage which toolset it leads with in order to truly retain its best of breed approach. • Geographic expansion of its RaaS offering: This offering is scaling well beyond its roots in healthcare, but is still primarily a US-based offering. • Less depth of experience with Blue Prism: Compared with many of its peers, Cognizant has less depth of experience with Blue Prism for RPA services engagements. It has a greater depth of experience with Automation Anywhere and UiPath, as well as its internal HPA tool. 		
Ability to execute					
Depth and breadth of RPA offerings	#5				
Scale	#7				
Delivery of value	#15				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#10	Acquisitions include: <ul style="list-style-type: none"> • TriZetto (2014), which includes its HPA tool Partnerships include: <ul style="list-style-type: none"> • WorkFusion • UiPath • Automation Anywhere • Blue Prism • Pega Robotics • Kofax • Softomotive (WinAutomation) • Xceptor • Contextor • A2IA • Nuance (OmniPage Capture SDK) • Metasource (Captiva) • Captricity • ABBYY 	Enterprise RPA clients include: <ul style="list-style-type: none"> • One of the largest not-for-profit healthcare companies in the US • An American multinational investment bank and financial services company • One of the largest US-based insurance and financial services companies • United States-based investment and insurance company • World's second-largest reinsurer • A leading global bank • Swiss multinational investment bank and financial services company • British multinational energy and services company • An American retailing company • An American diversified global insurer 	Headcount: 1,600+ Locations: <ul style="list-style-type: none"> • North America: 12% • UK: 1% • EMEA: 1% • India: 85% • Other APAC: 1% (Australia) 	<ul style="list-style-type: none"> • Assessment Framework • REBOT • Digital Intake Fabric • Digital Operations Fabric (DOF) • NLP Dev Platform • Intelligent Data Capture System (IDCS) • Csaar • IPA COE Team • IPA Experience Center • Automation Bot Suite • Automation POV • Command Center • HPA
Focus on business outcomes and process transformation	#10				
Technology innovation	#11				
Voice of the customer	#14				

Infosys: A global service provider that combines internal RPA IP with external best-of-breed expertise to help drive scalable digital transformation



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#10	<ul style="list-style-type: none"> Progress with rebalanced automation strategy: A new automation leadership team was installed after the departure of former CEO Vishal Sikka. Among Infosys' top priorities were better integration of its AI platform, Nia, with its RPA tool, AssistEdge and improved openness and expertise with third-party tools. We are seeing progress with the strategy on two fronts: first, improved integration with Nia to enable end-to-end automated workflows and a modularized approach to pricing; and, second, a strong investment in cultivating expertise in best-of-breed third-party RPA tools, which helps broaden the appeal of its capabilities. Domain expertise informed by deep client relationships and BPM business: Infosys leverages its deep and often long-term relationships with clients as well as process knowledge gained from its business process management business to inform its approach to client and industry-specific digital transformation. Clients comment that knowledge of their business and processes makes Infosys effective at identifying automation opportunities. Change management skills: Infosys, perhaps because of its use of RPA within its BPM business, has developed a structured approach to change management that it bakes into its engagements. While no service providers are truly exceptional at automation-related change management today, Infosys' customers gave the company above-average marks for their efforts here. Internal IP: In addition to its AssistEdge tool, it has developed various accelerators and adaptors such as its Process Automation Opportunity Evaluation Framework and applications monitoring accelerator to help improve time to results. Focus on Intelligent Automation to enable industrialization: While Infosys has a clear focus on RPA and related services, often as a starting point for client automation journeys, it is clear that scale and enhanced business results are tied to transforming business processes with a broad range of intelligent automation capabilities. 	<ul style="list-style-type: none"> Delivering value to new clients: Existing clients value Infosys' knowledge of their business and processes, which lends itself to automation initiatives. New clients have commented that they expected greater depth of experience with creating RPA/Automation programs. Logistics and resource availability: Some clients cited issues with how quickly Infosys can ramp up automation teams. Others cited restrictions on how late offshore team members can work as limiting the amount of daily overlap for collaboration with client teams in other geographies. Greater focus on business outcomes rather than technology: Infosys has all the skills to implement and scale RPA or IA solutions. It now needs to match its technical expertise with illustrating business outcomes—moving beyond the what and how to why. 							
Ability to execute										
Depth and breadth of RPA offerings	#8									
Scale	#9									
Delivery of value	#16									
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RPA strategy and roadmap	#13									
Focus on business outcomes and process transformation	#11									
Technology innovation	#7									
Voice of the customer	#21									

Wipro: A global service provider leveraging RPA to help enterprises optimize and transform operations



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#11	<ul style="list-style-type: none"> Early mover on automation: Wipro has been assisting clients with process re-engineering and automation for a number of years and added RPA into its automation toolkit in late 2014. Its RPA capabilities run the gamut from consult to implement to ongoing management and sit within its Digital Operations & Platforms unit. Clients comment that the firm's growing use of RPA complements and extends its capabilities around automation such as BPM as well as its ability to deliver specific outcomes. Service focus on RPA delivery: Wipro delivers RPA in two primary ways: (1) part of managed services engagements focused on optimizing functions or business processes such as order management, or, (2) as a joint Center of Excellence (CoE) engagement. The intent is to support clients beyond implementation to ensure success. Clients indicate that the firm plays a critical role in ongoing RPA operations. Strong business process framework and IP: Wipro's Enterprise Operations Transformation (EOT) framework guides its approach to client engagements, with automation as one of the key pillars to driving change. Its Base))) business process management platform and underlying modules help enable process assessment automation (Harmony module), manage (Core module), and govern (Prism module) outsourced processes inclusive of automation. Intelligent automation through HOLMES: Additional key IP is its AI platform HOLMES, which was one of the first broad IA frameworks available in the market place. Wipro leverages elements of HOLMES plus RPA to enable various straight-through processing workflows such as zero-touch income processing in securities operations. Process and domain expertise: Wipro leverages its deep knowledge of clients' business processes and industries to help deliver process transformation. For RPA, its primary depth is in industry-specific processes for BFS and manufacturing as well as horizontal F&A and procurement functions. 	<ul style="list-style-type: none"> Broaden IA definition to include RPA: Wipro's HOLMES platform was ahead of its time as a broad IA framework. Despite this, the firm continues to manage AI and analytics somewhat separately from operations-focused RPA initiatives. As proffered by the HFS Triple A Trifecta, these elements have more impact together. Leverage Topcoder for RPA: We are awash in cool use cases around AI from Wipro's crowdsourcing subsidiary Topcoder. However, given the continued dearth of experienced RPA skills, there is surely a role for Topcoder to play here, particularly around complex use cases and enterprise-wide scalability. Promote RPA process libraries: Wipro is creating a wealth of domain and industry-specific accelerators and frameworks but tends to promote HOLMES bots rather than RPA. 		
Ability to execute					
Depth and breadth of RPA offerings	#18				
Scale	#14				
Delivery of value	#13				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#11	<p>Acquisitions include:</p> <ul style="list-style-type: none"> N/A <p>Partnerships include:</p> <ul style="list-style-type: none"> Automation Anywhere: platinum business partner Blue Prism UiPath: regional business partner WorkFusion: partner NICE Redwood Intellibot Kryon 	<p>105 enterprise RPA clients including:</p> <ul style="list-style-type: none"> Bancolumbia Allied Irish Bank US-based clothing manufacturer European network equipment manufacturer UK-based communication infrastructure provider Australian telecom operator Swedish-Swiss technology company US-based insurance company Luxembourg-based steel manufacturing company Swiss bank One of the world's largest commercial banking organizations Australian power corporation British water utilities company American retail giant American paper and pulp manufacturer 	<p>Headcount: 920</p> <p>RPA delivery is spread across the globe as follows:</p> <ul style="list-style-type: none"> India: 80% (Chennai, Pune, Bengaluru, Delhi NCR) US: 3% (Florida, Texas, New Jersey) Europe: 5% (Sweden, Austria, Poland) Australia: 4% (Sydney, Melbourne) APAC: 2% (Kuala Lumpur) LATAM: 6% (Mexico, Columbia, Peru, El Salvador) 	<ul style="list-style-type: none"> Base))): A hosted business process management platform where three of its four core components support automation: <ul style="list-style-type: none"> BASE Harmony: Knowledge capture, project management, and process transformation module BASE CORE: Operations management platform BASE Prism: Governance and analytics Next Generation Customer Experience (NGCE): Customer experience enhancement HOLMES: AI and cognitive capability platform Process Manager: Light-weight operations and actions tracker. Insights Dashboard: Cross Product/platform data visualization solution.
Focus on business outcomes and process transformation	#8				
Technology innovation	#10				
Voice of the customer	#20				

WNS: A global BPO firm using RPA to transform industry-specific business processes and domain functions

Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#12	<ul style="list-style-type: none"> Industry-specific BPO credentials and process depth: Founded in 1996, WNS's BPO heritage ensures it has a deep and nuanced understanding of its clients' processes and the requisite domain knowledge to help them along their automation journeys. While the firm works across industries, it has notable depth of experience in the travel and insurance sectors, where it is helping to reinvent and automate processes such as crew scheduling for airlines, guest relations for hotels, or claims adjudication for P&C insurers. WNS' clients consistently endorse its role as a trusted partner helping them to navigate and modernize business operations. BPO approach helps derisk automation: Various clients commented that WNS has helped them embrace automation through its BPO approach due to its knowledge of processes and where automation will yield returns as well as peace of mind that there is knowledgeable human oversight. This has helped traditional enterprises gun shy of implementing and managing RPA reap automation benefits. Talent training: While WNS has invested in cultivating trained RPA resources, it also realized the need to educate its broader operations workforce. It launched its BYOB (bring your own bot) program in 2017 to promote knowledge and understanding of the role and benefits of RPA, enable use case identification, and light bot builds across various third-party RPA toolsets. Clients make note of strong staff development and there seems to be less of a gap between RPA IT delivery and use in processes than with some other BPO peers. TRAC methodology: WNS's "technology powered by robotics, analytics, and cloud" (TRAC) methodology keeps the company focused on embedding emerging cognitive technologies into RPA offerings to augment and supplement its clients' automation deployments. This is in line with its adage that RPA shouldn't be thought of as a separate technology, but a tool in a broader automation toolbox to be adjusted to clients' needs, and helps focus their delivery in process and domain areas. 	<ul style="list-style-type: none"> Stay true to BPO value: Based on client demand, WNS has started to offer RPA implementation services where clients self-manage. However, implementation without corollary process management reduces the value WNS can deliver. Clients should leverage WNS for their process and domain knowledge, not their SI skills. Broaden intelligent automation capabilities: While WNS has solid analytics capabilities, clients would like to see more depth of capability around broader IA such as cognitive assistants, machine learning, and other AI building blocks. Expand industry solutions: WNS already has a strong depth of industry solutions for insurance and travel, and in the future, it could leverage its experience to develop offerings for a wider range of industries it serves. Identifying new revenue opportunities: Some clients suggested that WNS could better help them identify new revenue opportunities through system enhancement. This is an area in which WNS could put its deep process knowledge and domain expertise to get beyond bottom-line impact. 							
Ability to execute										
Depth and breadth of RPA offerings	#20									
Scale	#22									
Delivery of value	#6									
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RPA strategy and roadmap	#25									
Focus on business outcomes and process transformation	#24									
Technology innovation	#27									
Voice of the customer	#1									

NTT DATA: A global services firm using strong RPA IP to optimize processes and deliver committed outcomes



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#13	<ul style="list-style-type: none"> • Capabilities across the RPA service value chain emphasizing managed services: NTT DATA, a conglomeration of NTT DATA Services (merger of NTT Data Inc. and Dell Services), everis, and NTT DATA Japan, offers RPA services from consulting and implementation to management and optimization services. Its BPO capabilities coupled with its own RPA toolkit have helped the firm develop strong process capabilities and an RPAaaS offering. While many firms are still contemplating how to price and run an RPAaaS offering, NTT DATA has had its version up and running for two years with uptake from clients that want to pay for outcomes, not technology. • Strong intellectual property baked into engagements: NTT DATA launched its own RPA product in Japan, Office Robot (known as WinActor in Japan), in 2014. Separately, Dell Services launched its AFTE (Automated Full Time Equivalent) toolset in 2015. With NTT DATA's acquisition of Dell Services in 2016, AFTE was integrated and combined with its proprietary AI-based analytics engine. AFTE and its multivendor bot management command center, various frameworks and accelerators, and a firm-wide commitment to ongoing R&D investment have helped drive RPA into the fabric of NTT DATA's approach to service delivery. The firm does not license its AFTE RPA toolset—rather, it is baked into engagements. • Depth of experience in healthcare and insurances sectors: While NTT DATA works across sectors, it has a strong depth of expertise working with healthcare payers and providers and insurers for RPA automation capabilities such as claims processing and adjudication, revenue cycle management, and RPA+AI for denial prediction and prevention. • Outcome focus: NTT DATA is moving to outcome-based pricing for some of its RPAaaS and managed services engagements that include its AFTE RPA tool. Pricing is built around delivering an agreed output such as the number and speed of physicians onboarded. Clients gave NTT DATA high marks for their ability to deliver outcomes. The bulk of its work with third-party RPA tools remains T&M focused. 	<ul style="list-style-type: none"> • Balanced approach to third-party RPA tools versus internal AFTE tool: NTT DATA positions itself as vendor agnostic as it pertains to RPA, with implementation capabilities around the leading third-party tools as well as its AFTE toolset. NTT DATA should continue to refine its focus on outcomes in order to deliver solutions based on benefit rather than brand. • Consolidate RPA competencies: Clients commented that they would like to see better integration and expansion of its RPA and AI capabilities—efficiently bringing together pockets of excellence from various acquisitions. • Enhance thought leadership: NTT DATA's focus on RPA is not well known. The firm should spotlight its tools and outcome-based approach to digital labor. 		
Ability to execute					
Depth and breadth of RPA offerings	#15				
Scale	#12				
Delivery of value	#23				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#16	Acquisitions include: <ul style="list-style-type: none"> • Dell Services (2016) Partnerships include: <ul style="list-style-type: none"> • Automation Anywhere: business partner • UiPath • Blue Prism and TrustPortal • Pega • Softheon • MACCESS 	1,000+ enterprise RPA clients, including: <ul style="list-style-type: none"> • US multi-line insurance company • Major US provider of annuities and life insurance • Leading global provider of insurance, annuities, and employee benefit programs • US provider of managed health care plans • Provider of comprehensive business solution to physician practices • Largest not-for-profit Medi-Cal and Medicare health plan provider • Large global security services headquartered in Spain • Large global insurance company headquartered in the UK 	Headcount: ~650 Locations: <ul style="list-style-type: none"> • US: (Texas) • Asia: Japan, India (Gurugram, Chennai, Coimbatore) • Europe: (Spain, Portugal, UK, The Netherlands, Belgium, Italy, Germany) • LATAM: (Brazil, Mexico, Colombia, Argentina, Chile, Peru) • Africa: (Morocco) 	<ul style="list-style-type: none"> • The Automation FTE (AFTE) tool kit: An RPA solution comprising more than 50 vertical-specific and vertical-agnostic tools to automate repetitive, high-volume and rules-based tasks, reducing or eliminating human effort. • BOT Command Center: Command Center's Virtual Resource Monitoring System (VRMS) capability helps monitor and report on BOTs with a common dashboard. Covers its AFTE tool and third-party tools. • Intelligent Automation Cloud Platform: Enterprise cloud platform to deliver intelligent automation services to clients. • Efficiency Suite (ES): The ES is an enterprise solution for managing BPO services, improves the traceability of activities and the automation of tasks, enabling BPOs to maximize the efficiency and profitability of their operations. The ES integrates with third-party RPA and also contains an own IP automation module. • Office Robot (WinActor in Japan): A desktop-based tool to automate repetitive input work, reduce work time, and reduce input errors.
Focus on business outcomes and process transformation	#15				
Technology innovation	#20				
Voice of the customer	#6				

Virtual Operations: RPA services pioneer enabling scaled automation with large clients and partners pivoting towards enabling technology



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#14	<ul style="list-style-type: none"> • The benefit of experience: Virtual Operations (VOPs) was one of the first RPA services pure play firms, recognizing the potential of RPA early on and taking a lead role in proselytizing automation to the marketplace. Key to its experience-based approach is the view that RPA needs to be implemented and managed end-to-end in order to scale and deliver benefits—and this is best done by enterprises themselves. VOPs thus focuses on client enablement with its joint agility model and range of enabling tools, working with clients then transitioning out as agreed. • Enabling technology: The company has developed various enabling technologies, frameworks, and methods to help its clients achieve success with automation. While it previously licensed its VOLT methodology, it has recently productized additional tools and resources, making them accessible to clients through its VIP portal. This puts the power of its internal IP in the hands of its clients. • Strategy, support, and training: VOPs has capabilities across the RPA Services value chain, with notable skills in automation strategy and some of the most experienced RPA practitioners available globally (half the team has more than four years experience). It has developed offerings around ongoing support such as its VOICE development support offering for in-house RPA resources and training with its Academy capabilities to drive knowledge into its clients. Clients compliment VOPs on its ability to identify and broadly address the root causes of manual work in order to drive effective automation solutions beyond technology implementation or CoE development. • Behind the scenes: After losing some of its co-founders to Cognizant in 2014, VOPs made a conscious decision to complement its enterprise focus with ongoing white label engagements with global services firms. While this has made it sometimes less visible, it has helped the company continue to grow. • Traction in ERP ecosystems: VOPs' largest engagement focus areas are supply chain and F&A. It has targeted the data flow from ERP systems, often enabled by its partner Celaton, to identify automation opportunities that are often cross-silo or cross-functional. 	<ul style="list-style-type: none"> • Visibility: Even if VOPs continues to engage with many of its end clients through its partners, there is a need for it to promote its brand as well as to continue contributing to the education of the marketplace. This has been decidedly lacking in recent years. Many of its technology partners, flush with funding and unicorn status, can potentially help. • Process and domain expertise: VOPs is generally open that process expertise is not a major part of what it brings to the table—its clients are the experts on their business. However, this can work against them as many service providers have near institutional relationships with their clients with deep knowledge of their businesses. Given VOPs substantial experience baseline, particularly in areas such as supply chain, F&A, and MDM, they can better position process expertise. • Scale of resources: While clients are pleased with the commitment, experience, and service excellence of the provider's RPA talent, there are concerns that acquiring an ever-larger number of big clients could lead to resource shortages or overload. 							
Ability to execute										
Depth and breadth of RPA offerings	#11									
Scale	#23									
Delivery of value	#5									
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RPA strategy and roadmap	#19									
Focus on business outcomes and process transformation	#7									
Technology innovation	#15									
Voice of the customer	#12									

LTI: A global service provider leveraging RPA and its Mosaic platform to deliver business outcomes



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#15	<ul style="list-style-type: none"> • Clarity of vision and execution post IPO: The IPO of L&T Infotech in 2016 ended an era of change and lack of strategic clarity. Now, two years on and rebranded as LTI, the firm has refined its brand and strategic direction. This allows for more certainty in decision making, particularly regarding innovation topics such as RPA. Clients are pleased with the firm's focus on delivering business outcomes and creative commercial models. • Transformation roadmap based on scaling RPA and delivering benefits beyond cost reduction: LTI won its first RPA engagement four years ago with a clear transformation roadmap and underlying self-funding automation strategy. It has continued to invest in this approach by offering clear business benefits, milestones, flexible commercial terms, and ongoing investment in internal IP to accelerate speed to results. • Platform approach and strong internal IP: LTI, with its strong heritage in applications development, management, and engineering, has developed a range of internal tools, frameworks, and accelerators such as its BOT Governance Dashboard and various industry-specific process templates. These solution components have been designed to snap into its Mosaic platform, launched in 2017, which also enables service orchestration with cognitive and analytics elements to build solutions broader than RPA. • Reskilling resources in RPA and IA disciplines: LTI states it has trained 70% of its RPA and broader IA resources through internal training programs, via its MosaicAcademy. All resources go through a range of internal certifications and practicum complemented by certifications from third party RPA providers. This approach enables LTI to develop talent with high-demand skills as well as create enhanced career paths for its staff. 	<ul style="list-style-type: none"> • Increased penetration within its active client base: LTI has fewer RPA clients than many of its industry peers. Given LTI's deep relationships with an estimated 300+ active clients, HFS would expect to see its penetration with RPA and broader IA increase in the coming year. • Support the "why" not just the "how": While LTI's clients applaud the quality of its engineering resources, the firm needs to ensure it is bringing broader business value beyond skills for hire. • Formalize and expand relationships with third-party RPA tool providers: As an agnostic provider, LTI may want to formalize its relationships with Blue Prism to ensure optimal support and co-development opportunities. Development of expertise with tools beyond the usual suspects, such as the work it is doing with WorkFusion, will additionally help round out its portfolio. 							
Ability to execute										
Depth and breadth of RPA offerings	#16									
Scale	#20									
Delivery of value	#14									
Innovation capability		<table border="1"> <thead> <tr> <th>Relevant acquisitions and partnerships</th> <th>Key clients</th> <th>Operations</th> <th>Internal IP and technologies</th> </tr> </thead> <tbody> <tr> <td> Acquisitions include: <ul style="list-style-type: none"> • 2016: AugmentIQ Partnerships include: <ul style="list-style-type: none"> • Automation Anywhere: business partner • Blue Prism • WorkFusion: strategic partner • UiPath • Pega (OpenSpan) • ABBY • Datacap (IBM) </td> <td> 32+ enterprise RPA clients, including: <ul style="list-style-type: none"> • Leading South African bank • Fortune 100 Bank • UK-based leading global bank • Leading Nordic bank • US-based insurance major • Leading German reinsurer • Global leader in insurance broking and risk management • Fortune 100 multinational consumer goods corporation • Oil and gas major • Midstream petroleum services major • Multinational energy corporation </td> <td> Headcount: 410+ Locations: <ul style="list-style-type: none"> • North America: 15% (USA, Canada) • EMEA: 10% (Denmark, Finland, Poland, South Africa) • India: 74% (Chennai, Bangalore, Mumbai, Pune) • Other APAC: 1% (Singapore) </td> <td> <ul style="list-style-type: none"> • Mosaic Platform: Converged platform that offers data engineering, advanced analytics, knowledge-led automation, IoT connectivity, and improved solution experience. Some of the solutions that leverage the base platform are: <ul style="list-style-type: none"> • Automation Discovery: Discover automation opportunities from history of IT Incidents • IT Operations Center: Automate manual intensive tasks and requests using ML • BOT Governance Dashboard: Continuously measures and reports automation benefits delivered • BOT Business Insights: Dashboards that derive information from the BOT run analytics and System Of Records to get process insights. • ARCoT: Tool evaluation framework • Automatability Index Framework: Framework to identify automation hotspots in processes </td> </tr> </tbody> </table>	Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies	Acquisitions include: <ul style="list-style-type: none"> • 2016: AugmentIQ Partnerships include: <ul style="list-style-type: none"> • Automation Anywhere: business partner • Blue Prism • WorkFusion: strategic partner • UiPath • Pega (OpenSpan) • ABBY • Datacap (IBM) 	32+ enterprise RPA clients, including: <ul style="list-style-type: none"> • Leading South African bank • Fortune 100 Bank • UK-based leading global bank • Leading Nordic bank • US-based insurance major • Leading German reinsurer • Global leader in insurance broking and risk management • Fortune 100 multinational consumer goods corporation • Oil and gas major • Midstream petroleum services major • Multinational energy corporation 	Headcount: 410+ Locations: <ul style="list-style-type: none"> • North America: 15% (USA, Canada) • EMEA: 10% (Denmark, Finland, Poland, South Africa) • India: 74% (Chennai, Bangalore, Mumbai, Pune) • Other APAC: 1% (Singapore) 	<ul style="list-style-type: none"> • Mosaic Platform: Converged platform that offers data engineering, advanced analytics, knowledge-led automation, IoT connectivity, and improved solution experience. Some of the solutions that leverage the base platform are: <ul style="list-style-type: none"> • Automation Discovery: Discover automation opportunities from history of IT Incidents • IT Operations Center: Automate manual intensive tasks and requests using ML • BOT Governance Dashboard: Continuously measures and reports automation benefits delivered • BOT Business Insights: Dashboards that derive information from the BOT run analytics and System Of Records to get process insights. • ARCoT: Tool evaluation framework • Automatability Index Framework: Framework to identify automation hotspots in processes
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RPA strategy and roadmap	#18									
Focus on business outcomes and process transformation	#12									
Technology innovation	#17									
Voice of the customer	#9									

Genpact: Global professional services firm leveraging domain and industry knowledge to drive end-to-end automation



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#16	<ul style="list-style-type: none"> • Dedicated RPA practice, with sector-specific leaders driving domain-based automation: Genpact was an early adopter of RPA and has continued to cultivate RPA focused expertise, value-added IP, and RPA extension with a strong focus on domain-based solutions with end-to-end process improvement and reinvention. The firm has a clear competency in RPA, which while complemented by broader IA, has not been subsumed. • Development of value-added IP and assets: While the firm has developed strong capabilities with the major third-party RPA software vendors, it has also developed various assets and accelerators to do things such as enable process identification, identify process improvement needs before automation, accelerate development work, and provide managed RPA governance. • Notable sector depth in retail, CPG, and manufacturing: While Genpact has solid depth in banking and insurance, the two sectors with the most RPA experience, it is helping retail, CPG, and manufacturing clients make progress with automation. Engagements focus on F&A and procurement and the intersection with supply chain operations so critical to these sectors. • RPA extension, intelligent automation focus, and service orchestration: Genpact has been actively extending the capabilities of RPA for a couple of years, adding tools such as machine learning, natural language understanding, and virtual agents to bring greater intelligence to workflows. Its Genpact Cora platform enables the integration, orchestration, and management these solutions. 	<ul style="list-style-type: none"> • More specific tool knowledge: Genpact's biggest depth of experience with third-party RPA software is with Automation Anywhere. Clients have noted the firm could use more resources skilled in Blue Prism and that understand best practices for this solution. Its recent silver certification with Blue Prism should help. • RPA engagements heavily weighted to North America: On average, for all service providers in our study, there is much closer parity between North America and Europe. Given Genpact's global footprint, this is a potential missed opportunity, particularly given the advanced nature of many RPA engagements in Europe. • Spotlight the true domain expertise: F&A is still the leading process area for RPA implementations, but industry-specific engagements are on the rise as enterprises seek to impact their core business operations. Clients are hungry to understand the industry-specific impact of RPA. Genpact needs to better spotlight its industry-specific RPA and RPA extension use cases beyond F&A or other horizontal use cases that just happen to be in manufacturing. 							
Ability to execute										
Depth and breadth of RPA offerings	#7									
Scale	#11									
Delivery of value	#17									
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RPA strategy and roadmap	#14									
Focus on business outcomes and process transformation	#14									
Technology innovation	#14									
Voice of the customer	#22									

PwC: Global professional services firm leveraging advisory strength to enable client automation journeys



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#17	<ul style="list-style-type: none"> • Leveraging its role as a trusted partner: PwC was admittedly late to the RPA market, but has been working overtime the past few years to present a compelling capability to the market. It has been effectively leveraging its existing client relationships as a channel for automation and winning competitive engagements with a no-hype approach to advisory laying bare the potential for downstream pitfalls when engagements lack change management and ample governance. It has been most effective with clients in financial services (FS), technology, media, and telecommunications (TMT). • Deep domain expertise: PwC has developed intimate knowledge of its clients' businesses with deep domain expertise in key industries as well as within functional domains such as tax, audit, cyber-security, and change management. This intimate client understanding enables PwC to push automation capabilities at the domain level that are still somewhat nascent opportunities such as cybersecurity and risk and assurance. • Broad RPA toolkit: While PwC has cultivated formal partnerships with the big three of RPA software, it has also worked across the ecosystem with providers such as NICE and Pega, which have a broader platform play, as well as specialty firms such as Kofax, which focuses on smart document capture. PwC is in the top quadrant of our study for broad tools expertise. 	<ul style="list-style-type: none"> • A more consistent firmwide approach to intelligent automation: PwC has distinct pockets of RPA and broader IA excellence, such as in BFS and TMT industries and certain domain areas such as cyber security. However, in areas where the demand for RPA is not as palpable, automation may not be proactively recommended or consistently included in solutioning. • Continued integration between Triple-A Trifecta elements: While PwC has strong capabilities in smart analytics, various AI building blocks such as machine learning, and RPA, these capabilities are developed and run as separate competencies. Increased focus on driving cognition and enhanced decisioning into automated workflows with RPA will help enable end-to-end automation in line with HFS' Triple-A Trifecta model. • Marketing and thought leadership: PwC has been quieter about RPA and IA thought leadership than the other members of the Big Four. PwC could increase its mindshare in social media, thought leadership content, participation in market assessment studies, and influencer relations. 		
Ability to execute					
Depth and breadth of RPA offerings	#17				
Scale	#8				
Delivery of value	#18				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#24	<p>Acquisitions include:</p> <ul style="list-style-type: none"> • None that are RPA-related <p>Partnerships include:</p> <ul style="list-style-type: none"> • Automation Anywhere: platinum delivery provider • Blue Prism: certified delivery provider • UiPath: global business partner • Joint business relationships with Kofax, NICE, Pega, WorkFusion, Kryon, Amazon, Appian, DXC 	<p>180 enterprise RPA clients including:</p> <ul style="list-style-type: none"> • Major global developer, manufacturer, and marketer of medical devices • Major global asset manager • Large Canadian financial institution • Major global insurance company • International investment bank • Social networking company • Global reinsurer • Global transportation and logistics company • Major pharmaceutical company • Global electronics distribution company 	<p>Headcount: 2,700 worldwide</p> <p>Locations:</p> <ul style="list-style-type: none"> • Americas: 60% • EMEA: 25% • APAC: 15% 	<ul style="list-style-type: none"> • Process Assessment and Business Case Accelerator • Auto Process Discovery tool • Enterprise IA deployment frameworks • Automation (incl. CoE) Operating Model Framework • Risk and Controls Integration Framework • Total Cost of Ownership Model Accelerator • IA deployment methodology • Train the Trainer knowledge share program and role-based training curriculum • Delivery tracking templates • Requirements and design templates • Reusable objects libraries
Focus on business outcomes and process transformation	#6				
Technology innovation	#8				
Voice of the customer	#24				



Sutherland: Global BPO player and RPA pioneer focused on transforming business processes



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#18	<ul style="list-style-type: none"> An RPA pioneer with deep knowledge and experience: Sutherland originally embraced RPA in 2013 with a partnership with Blue Prism focused on optimizing F&A processes. It has expanded its use of RPA across its business, driving it into industry and domain areas such as tech support, mortgage, and healthcare and building deep experience and IP including its own RPA toolset (SmartRPA) to support its clients in transforming business processes. Clients consistently commend their combination of technical expertise and process knowledge. Automating the right use cases: Sutherland has used its years of RPA and automation knowledge to develop approaches that help clients target the right areas for automation. These include its Robotizability approach for picking appropriate use case(s) and its RAPID framework for operationalizing automation. Outcome focus: Sutherland has successfully pivoted many of its RPA engagements to be measured by the achievement of outcomes such as DSO reduction, lowering client churn, or lowering the cost of claims. While these outcomes have become the new KPIs for engagements, there is still a more challenging shift to make to from traditional service billing models like FTEs to payment for outcomes achieved. Governance of hybrid workforce engagements: As a BPO player, Sutherland has long understood the importance of managing and optimizing its workforce. As it increasingly embraces RPA and thus manages a combined human and digital workforce, it has developed capabilities and tools to help govern and deliver such as its ROME (robotic operations management engagement) platform and its SmartInteract process management software that integrates tasks performed humans and machines. This helps support end-to-end management which enables scalability. 	<ul style="list-style-type: none"> Marketing and thought leadership around RPA: Despite its early mover status, Sutherland was historically quiet about its RPA use, with it often occurring behind the scenes. While it has become more overt and collaborative with its clients, it can continue to invest in establishing itself as a thought leader. Balanced RPA tool agnosticism: While Sutherland has capabilities with the big three RPA tools, especially UiPath, its greatest depth is with its internal tool, SmartRPA. While Sutherland defers to clients on tool choice, its internal tool generally wins in greenfield sites. It thus needs to be clear with customers about the nature of its vendor agnosticism. Delivery speed: Some clients expressed frustration with the time required to deliver RPA benefits. While transformation takes time, Sutherland can work to help its clients better understand time to benefit particularly for its more complex engagements. 		
Ability to execute					
Depth and breadth of RPA offerings	#14				
Scale	#18				
Delivery of value	#12				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#12	Acquisitions include: <ul style="list-style-type: none"> Nuevora Analytics Partnerships include: <ul style="list-style-type: none"> UiPath Automation Anywhere Blue Prism WorkFusion ABBYY Google Microsoft Cloud Microsoft cognitive services 	Enterprise RPA clients include: <ul style="list-style-type: none"> Guardian Qatar Airways Argo Insurance, Argo Financial Services Motiva Enterprises Oman Air International insurance carrier Multinational PC and technology manufacturer US-based mortgage lender Automotive parts distribution company Health insurance and service company Custom computer programming services Health systems agency 	Headcount: 250 Locations: <ul style="list-style-type: none"> USA: 20% (Dallas, Rochester, New Jersey) Canada: 5% (Sault Ste Marie, ON) UK: 5% (London) India: 55% (Chennai, Hyderabad, Bangalore, Mumbai) Philippines: 10% (Manila, Makati) Middle East: 5% (Dubai, UAE) 	<ul style="list-style-type: none"> SmartRPA: Multi-faceted RPA platform to design and deploy robots SmartSpec: Cloud-based module to capture business and functional requirements for designing and development of robots SmartDesigner: Robot development environment SmartManager: Project management dashboard SmartDeployer: Testing engine for deployment-ready code SmartRunner: Lightweight application that monitors and logs runtime health of systems SmartInteract: Create bulk data input/output and responsive webform for user interaction with robots SmartMonitor: Monitor and control your robots Credential Manager: Vault that provides storage and management of robot credentials securely SmartFly: Monitor and control robots and exceptions using any ISO or Android device on the fly
Focus on business outcomes and process transformation	#17				
Technology innovation	#22				
Voice of the customer	#11				

Syntel: A pioneer of an integrated approach to intelligent automation with its SyntBots platform, now part of Atos*

Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#19	<ul style="list-style-type: none"> • A pioneer in integrated intelligent automation: Syntel, acquired by Atos in July 2018, launched its SyntBots IA platform in 2015 with a vision to drive efficiency into IT and business operations through automation. It began dabbling with automation as early as 2011 through BPM, macros, and the early days of RPA. It realized early on that RPA is powerful alone and even more so when coupled with analytics, rules engines, and eventually AI, thus built its own platform to enable this mix. It delivers IA through a service-only approach with this toolset delivered as part of managed services or Automation CoE engagements. • Strong internal IP applied to IT and business operations: Syntel, as an IT services player, originally applied its IA capabilities to drive efficiencies in IT processes such as application management and product engineering. While continuing this focus, it has been actively adding in business process-focused automation capabilities in industry domains like policy reconciliation for insurance. Its library of reusable domain elements now exceeds 800 and its Virtual Workforce Manager supports bot management and governance. • Large RPA resource pool enabled by internal training: Syntel has trained nearly half of its total workforce on its SyntBots platform, ensuring both strong depth of skills as well as a culture of automation as a stand element of solutions. • Outcome focus: Syntel's focus on driving operating efficiencies via automation enables it to ink deals focused on business outcomes with up-front commitments for savings, productivity, and quality metrics. 	<ul style="list-style-type: none"> • Sustaining momentum post-acquisition: HFS has witnessed a loss of momentum from former RPA/IA services leaders post-acquisition (e.g., HP, Dell Services). While there is IP overlap for broader IA, Atos' RPA focus is squarely on third-party tools. Thus, Syntel may be able to leverage this white space to help round out Atos' RPA capabilities. • Geographic expansion: Almost three-quarters of Syntel's RPA clients are based in North America. Its integration into Atos will help diversify its geographic footprint. • Best of breed approach: While Syntel is deeply trusted and well embedded with core clients, it has sometimes struggled to gain traction with its internal IP approach in a sea of third-party RPA tool adoption. Its integration with Atos may help balance this challenge, providing options to clients while continuing to stay focused on the provision of outcomes. 		
Ability to execute					
Depth and breadth of RPA offerings	#12				
Scale	#13				
Delivery of value	#20				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#6	Acquisitions include: <ul style="list-style-type: none"> • N/A Partnerships include: <ul style="list-style-type: none"> • Google • Microsoft • AWS 	41+ enterprise RPA clients, including: <ul style="list-style-type: none"> • Leading European insurer • Leading commercial insurer • Leading financial institution • Leading global financial services firm • Leading global advisory, broking company • Top three rating agency • Top five midwest healthcare payer • Swiss multinational pharmaceutical company 	Headcount: 4,000+ Locations: <ul style="list-style-type: none"> • North America: 15% (Phoenix, Cary) • UK: 10% (London, Edinburgh) • EMEA: 3% (Zurich) • Philippines: 2% (Manila) • India: 70% (Mumbai, Chennai, Pune) 	<ul style="list-style-type: none"> • SyntBots: Intelligent automation platform capable of providing service across business process optimization, legacy modernization, product engineering, application operations and infrastructure operations. This platform includes RPA and cognitive capabilities. It has a reusable library of 800+ domain led knowledge stores (SOPs). Key modules include: <ul style="list-style-type: none"> Virtual Workforce Manager: Balances workload across bot machines dynamically, track bot executions. Process recorder and designer: Creates as-is process flows and makes manual processes available for customization. Rule engine: Encapsulates all business rules. Insights: Built-in capability to generate interactive drill-down dashboards. Artificial Intelligence work-bench: AI platform. OCR module: Digitizes and automates processes that require inputs from scanned documents. Self-service portal: Ability to integrate data spread across multiple applications.
Focus on business outcomes and process transformation	#19				
Technology innovation	#25				
Voice of the customer	#17				

* Profile represents Syntel capabilities pre-acquisition

Tech Mahindra: A global SI balancing internal RPA IP plus best of breed external tools to improve business efficiency



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#20	<ul style="list-style-type: none"> • A broad approach to automation: Tech Mahindra launched its AQT (Automation, Quality, Time) platform in late 2015 to centralize resources and technologies focused on driving business efficiency through automation. RPA is an element of AQT, whereby TechM has built its own front-office-focused RPA solution (Uno-R) as well as partnering with third-party RPA software companies. The AQT approach supports the integration of RPA with AI building blocks and analytics. • Equitable approach to RPA tool selection: TechM built its Uno-R RPA solution in part due to the perceived lack of front-office capabilities from existing third-party RPA providers. It regularly recommends and supports third-party solutions such as UiPath, where it has its greatest depth of experience beyond Uno, for back office-focused engagements. It leverages a multi-faceted process assessment and scoring approach to identify and select the most suitable RPA tool and process focus areas. • Training, reskilling, and automation thinking: As part of AQT, the company launched extensive ongoing technical training on internal and external tools. This is intended to support reskilling of existing resources as well as training for new hires covering 21 tools and four scripts. The curriculum is ongoing and also extends to broad training for operations resources. • Implementation focus on horizontal processes: While TechM has capabilities across the RPA services value chain, its greatest depth of experience is in RPA design and implementation in horizontal process areas such as finance and accounting, supply chain, and customer services including IT service desk. While the majority of its work is done with telecommunications and BFS clients, most of these projects are still horizontal in nature. 	<ul style="list-style-type: none"> • Industry-specific solutions: While TechM is getting decent traction with its horizontal process focus for RPA, particularly around service desk where it melds its TACTiX machine learning tool with RPA, it has a strong opportunity to leverage its deep experience with the telecom sector to offer differentiated industry-specific solutions. • Broader client development: TechM's client penetration is lagging behind its TWITCH Indian heritage competitors. As the vast majority of its engagements are sole sourced with existing clients, it should actively target the balance of its existing client base with a proactive automation agenda while helping to scale existing clients. • Availability of RPA-trained resources: Some clients groused about occasional shortages of RPA staff skilled in third-party software. While TechM has 500+ resources trained in UiPath, it is less robust for the rest of the Big Three and beyond. 		
Ability to execute					
Depth and breadth of RPA offerings	#24				
Scale	#17				
Delivery of value	#22				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#15	<p>Acquisitions include:</p> <ul style="list-style-type: none"> • N/A <p>Partnerships include:</p> <ul style="list-style-type: none"> • Automation Anywhere: business partner • UiPath: regional business partner • Blue Prism • Pega Robotics (OpenSpan) • WorkFusion 	<p>Enterprise RPA clients include:</p> <ul style="list-style-type: none"> • Mexican mobile telephone operator • Largest wireless telecommunications provider in the United States • One of the largest financial institutions in South Africa • Telecommunications company with operations in 180 countries • Fortune 500 American multinational conglomerate • UK's leading value for money consumer and B2B telecoms provider • Largest American manufacturer of specialty chemicals • Third-largest wireless carrier in the United States • One of the world's largest American multinational energy corporations • Largest Nordic and Baltic fixed-voice, broadband, and mobile operator by revenue and customer base • Third-largest Canadian multinational bank by deposits and market capitalization 	<p>Headcount: 820</p> <p>Locations:</p> <ul style="list-style-type: none"> • North America: 10% (USA) • LATAM: 4% (Mexico) • UK: 4% (Milton Keynes) • EMEA: 8% (Saudi Arabia, UAE, South Africa, Finland) • India: 68% (Pune, Hyderabad, Chennai and Bangalore) • Philippines: 4% (Manila, Cebu) • APAC: 6% (Australia, Singapore, New Zealand) 	<ul style="list-style-type: none"> • UNO-R: In-house RPA platform focused on front office process and includes a unified desktop feature. • UNO-P: RPA solutions for back-office operations powered by partners such as UiPath, AA, Blue Prism, Pega and WorkFusion. • TACTiX: In-house AI-based ticket categorization and ticket assignment platform. • Process assessment approach: Identify RPA automation potential by understanding customer processes and tech ecosystem. • Business Case Modeler: Home grown solution to provide visibility on potential business benefits of automation and works as a decision support system for customers. • AIOps platform for IT Operations automation
Focus on business outcomes and process transformation	#18				
Technology innovation	#13				
Voice of the customer	#10				

Mindfields: An intelligent automation pure play provider offering fixed price solutions emphasizing development of in-house client capabilities

Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#21	<ul style="list-style-type: none"> Focus on democratizing RPA and automation: Mindfields wants to make automation accessible and understandable to all enterprises. To enable this, it has focused on offering simple packaged solutions at a fixed price, such as its CoE.exe offering, which helps enterprises stand up their own automation center of excellence. Its approach continues to gain traction in the market with companies of all sizes and high levels of client satisfaction. Enabling clients to manage their own automation environments: While they have started to dabble in managed RPA services, the bulk of Mindfield's focus is on educating and training clients about how to build and run effective automation engagements. Its advisory and implementation services emphasize "fail fast and adapt," automation of the right processes, and effective governance. Geographic expansion: Mindfields is an Australian company headquartered in Sydney. While 80%+ of its revenue is derived from in-region clients, it has been expanding its footprint to the Middle East, Europe, and the US. It is in the process of establishing US operations in Atlanta and New York. Speed and flexibility: While Mindfields tends to focus on specific processes, as opposed to broad end-to-end transformation, its clients laud the company for speed to results and flexibility. Productizing RPA and intelligent automation: Mindfields is pushing the concept of reusable elements and accelerators by productizing proven uses cases. These "products" are often application and process-specific such as employee onboarding in Success Factors. The effect, while very process-specific, helps organizations understand the art of the possible with automation. 	<ul style="list-style-type: none"> Spotlighting scaled RPA and IA use cases: While Mindfield's model is preceded on enabling clients, most of its use cases are process-specific and focused at the start of the RPA journey. Mindfields should consider showcasing how RPA scales and becomes industrialized. Managed growth: While Mindfields has a unique go-to-market approach, it is still a small firm. As it expands, it needs to make wise choices that complement its "democratized" approach to automation where they can still drive value without compromising nimbleness or becoming a people-based BPO. Continued productization and automation of services will help support this. Blue Prism: Mindfields primarily uses AA and UiPath; Blue Prism is an intentional omission due to perceptions of implementation complexity and cost of trained resources. However, given Blue Prism's continued adoption, Mindfields may want to reevaluate. 							
Ability to execute										
Depth and breadth of RPA offerings	#23									
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RPA strategy and roadmap	#17									
Focus on business outcomes and process transformation	#26									
Technology innovation	#23									
Voice of the customer	#2									

Roboyo: A regional pure play firm focused on execution excellence and enabling clients to effectively harness the power of RPA



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#22	<ul style="list-style-type: none"> • Helping clients execute on the promise of RPA: Roboyo, launched in late 2015, is a pure play intelligent automation provider based in Germany dedicated to helping clients use RPA and broader IA effectively. It offers capabilities across the RPA Services value chain, with emphasis on engineering and implementation, operations, and training. It has focused on UiPath since inception, and it has been cultivating its Blue Prism skills since 2017. • Training expertise: Roboyo has cultivated a strong training expertise, notably as one of UiPath's first certified training partners. It currently offers onsite and virtual training in seven languages to help address the massive demand of a resource-starved market. This capability helps Roboyo fulfill one of its key tenets, enabling its clients to develop their own RPA expertise and take more ownership of their digital projects. • Nerd power prevails: Roboyo's customers continually laud them for their depth and breadth of offerings, trained staff with domain and technical expertise, and ability to identify use cases that work for their respective enterprises. • Development of RPA-as-a-Service: Beyond implementation and training, Roboyo is working to realize its vision of RPA available on the cloud as a flexible on-demand, consumption, or outcome-based model. It piloted this concept with St. Galler Kantonalbank in early 2018 for a focused project tied to transfer of securities positions tied to an M&A transaction. HFS is keen to see this model refined and formalized. 	<ul style="list-style-type: none"> • Consulting versus execution: There are a lot of blurred lines in RPA between advisory, implementation, and outsourcing. Roboyo offers consulting services and has a consulting heritage at its leadership level but tends to prioritize execution. Its clients, while very happy with its execution capabilities such as implementation and training, would like to see greater depth in change management, governance, and process consulting capabilities. As its client needs change as RPA scales, Roboyo needs to remain strong in its role as execution partner while continuing to refine any capabilities that impact the effectiveness of ongoing operations. • Investment in ongoing R&D: Roboyo has developed a useful internal IP, such as frameworks and accelerators to help foster and scale RPA. As it pushes towards broader use of intelligent automation, it needs to complement this by investing in the enablement of broader solutions that include elements of AI and analytics to improve functionality and manageability. Initiatives such as its Intelligent Automation Platform and its RPA as a Service are leaning in the right direction, but need to be proven. • Measured geographic expansion: Approximately 95% of Roboyo's business is in Europe. As it flexes its growth muscles, it has established a nearshore center in Spain and opened operations in the US in Atlanta. As it grows, HFS cautions Roboyo to stay focused on that which differentiates it—its strong execution message. It can use technology, IP, and well placed investments in human capital to expand geographic reach and better enable global clients. 		
Ability to execute					
Depth and breadth of RPA offerings	#22				
Scale	#25				
Delivery of value	#10				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#21	Acquisitions include: <ul style="list-style-type: none"> • N/A 	75 enterprise RPA clients including: <ul style="list-style-type: none"> • One of the largest car manufacturers in the world • One of the largest automotive suppliers in the world • Global retailer with 50,000 employees • One of the largest HR services firms in the world • A leading construction company • One of the largest telecommunications companies globally • Large asset manager with \$250B in assets under management • One of the largest banking groups in Europe • A European transmission systems operator 	Headcount: 70 Locations: <ul style="list-style-type: none"> • Europe: 95% (Nuremberg, Hamburg, Barcelona) • North America: 5% (New York, Atlanta) 	<ul style="list-style-type: none"> • Custom RPA Activities: Custom developed RPA activities, for example, more app integrations, advanced OCR extraction, and statistical text analysis. • Customizable WebDock: Human-machine interface that allows a user to send data to a robot via a user-friendly form. • Automated RPA Quality Assessment Tool • Delivery Methodology: Includes Quality Gates (Pre-Development Checklist, Internal KickOff, Code Review)
Focus on business outcomes and process transformation	#28	Partnerships include: <ul style="list-style-type: none"> • UiPath: partner and training partner • Blue Prism: RPA and custom development • Kryon: external RPA partner • ABBYY: OCR partner • Enate: robotic service orchestration partner 			
Technology innovation	#24				
Voice of the customer	#7				

HCL: Global service provider focused on the service orchestration of intelligent automation to deliver business outcomes



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#23	<ul style="list-style-type: none"> Broad focus across the intelligent automation continuum: HCL's intelligent automation and AI capabilities are among the broadest in the industry, ranging from RPA to autonomics to test automation. RPA is run from its business process services organization and complements its cognitive and AI capabilities powered by its DRYiCE platform. These capabilities work closely together to drive the orchestration of various technology levers and process expertise to solve client problems. Service delivery and commercial models: Delivery excellence referenced by clients with its willingness to go "beyond the contract." This is coupled with HCL's focus on alternative pricing models targeting outcomes, moving beyond T&M. These approaches have enabled HCL to cultivate the majority of its RPA clients from its existing client base. Strong IP and asset development: HCL continues to add modules to its DRYiCE automation and orchestration platform and scale the associated practice. A recent new co-innovation with MIT is its EXACTO tool, an AI-based information extraction tool designed for reading and classifying handwritten and typed image-based documents. It is being used in tandem with RPA to enable straight processing for workflows requiring input documents. Financial services focus: Nearly half of HCL's RPA-focused engagements are with banking and financial services clients focused on optimizing processes such as regulatory reporting, client onboarding, and KYC as well as horizontal processes such as F&A. 	<ul style="list-style-type: none"> Move beyond tool and technology mindset: While HCL has an enviable set of technology capabilities, HFS recommends to drive stakeholder discussions more around business problems and outcomes. Understanding how to execute is great, but ensure there is always clarity on why. Lack of a unified RPA and IA mission: Much of HCL's marketing and messaging around RPA and broader IA is murky. There needs to be greater clarity on objectives, as well as succinct articulation of what DRYiCE includes and the value it can deliver. Depth of talent with third-party RPA tools: While HCL has a good depth of experience with Automation Anywhere and Blue Prism, and to a slightly lesser extent with UiPath and WorkFusion, its clients highlight the need for continued proactive investment in training as market demand continues to outstrip supply. 							
Ability to execute										
Depth and breadth of RPA offerings	#29									
Scale	#16									
Delivery of value	#26									
Innovation capability		<table border="1"> <thead> <tr> <th>Relevant acquisitions and partnerships</th> <th>Key clients</th> <th>Operations</th> <th>Internal IP and technologies</th> </tr> </thead> <tbody> <tr> <td> Acquisitions include: <ul style="list-style-type: none"> Alpha Insights (2017): a strategic partnership and purchase of select assets. The company focuses on business flow monitoring and operational intelligence with the primary focus on the financial services sector Partnerships include: <ul style="list-style-type: none"> Automation Anywhere Blue Prism UiPath WorkFusion MIT Kofax NICE </td> <td> 50+ enterprise RPA clients, including: <ul style="list-style-type: none"> Great Britain-based soft drink producer UK-based leading property management group Leading Europe-based multinational bank UK-based leading insurance company APAC-based pharmaceutical integrator One of the Big Four Irish banks American worldwide management consulting firm Malaysian oil and gas company Finnish based paper manufacturers American office supply retailing company An investment banking firm in Atlanta, Georgia A leading Swedish automobile company A leading consulting and services firm in Massachusetts A retail banking giant in NY Enterprise and cloud data management company in California A German investment bank and financial services company </td> <td> Headcount: 700+ Locations: <ul style="list-style-type: none"> North America: 15% (Cary, Frisco, Jackson, Troy, Jersey City) UK: 25% (London, Egham) EMEA: 9% (Finland, Switzerland, Gothenburg, Krakow, Oslo) India: 44% (Chennai, Noida, Bangalore, Pune, Hyderabad) Other APAC: 7% (Sydney, Melbourne, Singapore, Malaysia) </td> <td> <ul style="list-style-type: none"> 3-Lever BPM: Creates comprehensive to-be business process maps. EXACTO: Domain-centric machine learning solution. iBPS: Provides a process platform for business stakeholders to drive enterprise-wide digital transformation. Cognitive Orchestrated Process Autonomics: COGNITIVE interface leveraging IBM Watson, Amazon Alexa, and other standard tools to provide a powerful HMI transformation framework. DRYiCE: Automation and orchestration platform. </td> </tr> </tbody> </table>	Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies	Acquisitions include: <ul style="list-style-type: none"> Alpha Insights (2017): a strategic partnership and purchase of select assets. The company focuses on business flow monitoring and operational intelligence with the primary focus on the financial services sector Partnerships include: <ul style="list-style-type: none"> Automation Anywhere Blue Prism UiPath WorkFusion MIT Kofax NICE 	50+ enterprise RPA clients, including: <ul style="list-style-type: none"> Great Britain-based soft drink producer UK-based leading property management group Leading Europe-based multinational bank UK-based leading insurance company APAC-based pharmaceutical integrator One of the Big Four Irish banks American worldwide management consulting firm Malaysian oil and gas company Finnish based paper manufacturers American office supply retailing company An investment banking firm in Atlanta, Georgia A leading Swedish automobile company A leading consulting and services firm in Massachusetts A retail banking giant in NY Enterprise and cloud data management company in California A German investment bank and financial services company 	Headcount: 700+ Locations: <ul style="list-style-type: none"> North America: 15% (Cary, Frisco, Jackson, Troy, Jersey City) UK: 25% (London, Egham) EMEA: 9% (Finland, Switzerland, Gothenburg, Krakow, Oslo) India: 44% (Chennai, Noida, Bangalore, Pune, Hyderabad) Other APAC: 7% (Sydney, Melbourne, Singapore, Malaysia) 	<ul style="list-style-type: none"> 3-Lever BPM: Creates comprehensive to-be business process maps. EXACTO: Domain-centric machine learning solution. iBPS: Provides a process platform for business stakeholders to drive enterprise-wide digital transformation. Cognitive Orchestrated Process Autonomics: COGNITIVE interface leveraging IBM Watson, Amazon Alexa, and other standard tools to provide a powerful HMI transformation framework. DRYiCE: Automation and orchestration platform.
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RPA strategy and roadmap	#22									
Focus on business outcomes and process transformation	#27									
Technology innovation	#18									
Voice of the customer	#4									

DXC Technology: Global service provider emerging post-merger with a strong focus on automation as a service



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#24	<ul style="list-style-type: none"> • Playing from its post-merger strengths to offer a differentiated approach to RPA: The timing of DXC's CSC/HPE merger disrupted the momentum of HPE's then-emerging RPA leadership. The new company, recognizing it was late to market, developed a cloud-based on-demand RPA offering that leverages DXC's cloud experience, existing RPA skills, and analytics—its Agile Process Automation (APA) platform. • Internal use of RPA to help rationalize merger: DXC leveraged process discovery and mapping capabilities to rationalize duplicate systems and then implemented RPA for various business processes such as procurement, accounts payable, and HR functions. This internal activity informs its approach with clients. • Xchanging acquisition: The 2017 acquisition of Xchanging further expanded its RPA capabilities. Xchanging was Blue Prism's first service partner to achieve its Enterprise Capability Certification status. • Depth of tools experience beyond the big three: While DXC has depth of experience with UiPath and Blue Prism, it has also cultivated expert-level experience with Kryon and Softomotive, which provides options to clients leveraging its Automation Factory approach. • Less reliance on competitive bids: The majority of DXC's RPA contract wins are sole-sourced, which suggests a strong focus on optimizing existing client relationships. Former clients of either of the merged entities have an opportunity to explore the integrated capabilities of the company. • Consumption-based pricing model: DXC has developed a robot-per-day rate, with a required minimum, that includes all software licensing and service costs. It is based on UiPath and Blue Prism, DXC holds the licenses, and it can scale up or down based on requirements. 	<ul style="list-style-type: none"> • Needs a marketing push emphasizing RPA business outcomes: The DXC brand is barely a year old. Its new brand and its Agile Process Automation platform approach are not well known in the market and could use focused marketing efforts spotlighting its results. • Downplaying its RPA factory model: DXC has corralled its RPA implementation expertise from HPE and Xchanging in its factory model approach. It is going to market with its APA-based approach to drive differentiation but is relying on its implementation capabilities for both credibility and revenue while it scales APA. Implementation skills are still in high demand in a talent-starved market, thus should be better highlighted. • Use of partners: DXC leverages partners such as PwC for RPA advisory services and Mphasis for BFSI-focused automation capabilities. This can add complexity to client engagements. 		
Ability to execute					
Depth and breadth of RPA offerings	#21				
Scale	#15				
Delivery of value	#24				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#28	Acquisitions include: <ul style="list-style-type: none"> • Xchanging 	825 RPA clients, the majority of which consume RPA as part of service delivery including: <ul style="list-style-type: none"> • Bank of Queensland • TAL Insurance • Large insurer in North America • Global CPG company • Global healthcare supplier 	Headcount: 919 Locations: <ul style="list-style-type: none"> • North America: 10% (California, Texas, New York) • EMEA: 20% (France, Poland, Slovakia) • India: 30% (Bangalore, Gurgaon) • Vietnam: 5% • China: 20% (Shanghai) • ANZ: 10% (Melbourne) 	<ul style="list-style-type: none"> • Agile Process Automation: A data discovery-led approach to improving business processes with cloud-based robotics and flexible solutions that scale hybrid digital workforces to meet fluctuating business demands. • Robotic Workforce Management Portal: A technology to help manage an integrated suite of automation services created to optimize applications management in the cloud with reduced human intervention, creating key benefits such as capacity increase, quality improvement, and acceleration of service delivery to the end customer.
Focus on business outcomes and process transformation	#23	Partnerships include: <ul style="list-style-type: none"> • UiPath: partner • Blue Prism: silver partner • Kryon • WorkFusion • Softomotive • Automation Anywhere: business partner • PwC • Mphasis 			
Technology innovation	#19				
Voice of the customer	#23				

Mphasis: A mid-tier service provider with deep BFSI domain expertise leveraging automation to drive digital transformation



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#25	<ul style="list-style-type: none"> Deep BFSI domain expertise: Mphasis specializes in driving digital transformation for BFSI firms with focused depth in brokerage and wealth, payments, compliance, lending, and P&C insurance. The vast majority of its RPA and IA engagements are sole-sourced; the firm is bringing the latest automation capabilities to support its roster of BFSI clients and trading on its reputation as a domain specialist. Application services expertise extending to RPA: Mphasis has an established track record of helping BFSI enterprises modernize and transform using automation—from scripts to BPM and now RPA and intelligent automation. Its RPA practice sits within its Enterprise Packaged Software business, alongside BPM, Lean, and Cognitive, working to use best-of-breed technologies and internal IP to help solve client business challenges and enable new services. Investment in RPA extension, analytics, and cognitive workflows: Mphasis has invested an estimated \$30M in developing internal IP such as its Graf family of data-driven analytics tools to help with opportunity identification and its DeepInsights data processing and analytics engine to create end-to-end workflows that are enabled by data, powered by RPA, and made intelligent with cognitive capabilities. Supporting digital transformation through iterative gains: Mphasis' Front2Back transformation strategy helps clients transition from analog to digital through a stepped approach that initially prioritizes quick results and rapid payback, which is then leveraged to fund and support further investment. 	<ul style="list-style-type: none"> Continued investment in RPA training: Mphasis can continue to improve its footprint with RPA-trained resources. It currently has about 200 trained resources, with good depth in Blue Prism and UiPath. It can further develop its Automation Anywhere expertise. Increase footprint with RPA deployments: Compared to its peers in this study, Mphasis has a relatively small client base of 15 for RPA. While its domain focus narrows its aperture somewhat, there is still room for expansion, especially within existing clients. Governance and communication: clients commented that governance expertise beyond IT, such as communications and stakeholder engagement, could be improved. 							
Ability to execute										
Depth and breadth of RPA offerings	#26									
Scale	#24									
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RPA strategy and roadmap	#20									
Focus on business outcomes and process transformation	#22									
Technology innovation	#16									
Voice of the customer	#19									

EXL: Global BPO player driving domain-specific automation enhanced with analytics to deliver business outcomes



Dimension	Rank	Strengths	Development opportunities							
HFS Top 10 position	#26	<ul style="list-style-type: none"> • Leveraging its analytics and domain expertise to offer differentiated RPA services: While EXL was a late mover on RPA and broader intelligent automation, it continues to scale its RPA capabilities with embedded analytics and packaged bot solutions with domain expertise such as first notice of loss and KYC. Its EXLerator framework brings together domain, data, and the appropriate tools to deliver business outcomes. • Strong focus on sole-sourced contracts: EXL is bringing its RPA capabilities to its existing clients and offering process optimization and business outcomes. This is often a cannibalization play where it dilutes labor arbitrage revenue for broader, more valuable work with clients. • Development of domain-specific tools: EXL has invested in building various toolsets to accelerate and improve RPA effectiveness—functional bots, packaged domain bots, and solution accelerators. Domain-specific tools encompass both industry-specific tools such as for insurance and banking as well as horizontal processes such as order entry. These bolt-on solutions are helping to extend RPA use cases in large enterprises where they have often already deployed RPA. • Process knowledge: Various clients complimented EXL on their process knowledge and their ability to leverage this knowledge to tailor and optimize RPA engagements. • Modular approach to RPA offerings: EXL recognizes that its clients are in different stages of RPA adoption and broader digital transformation. Thus it designed its RPA and advanced automation offerings to meet their clients where they are—outsourcing extension, digital consulting focused on roadmaps and blueprinting, and the packaged domain solutions as accelerators. The focus on outsourcing extension generally includes cannibalization of people-based revenue. 	<ul style="list-style-type: none"> • RPA skills with third-party partners: While EXL has cultivated a good depth of experience with Automation Anywhere and is expanding its capabilities with Blue Prism and UiPath, it has limited expertise with other providers other than WorkFusion and Antworks. • North American focus: The vast majority of its RPA engagements are within North America. Europe, which HFS generally perceives as being more advanced in its RPA adoption and use cases, is a logical expansion focus. • Scaling RPA talent to match process knowledge: While EXL has scaled its RPA capabilities over the past couple of years, the majority of its ~350 automation practitioners are thin on experience. EXL needs to continue its investment in talent, coupling RPA skills development with process knowledge. To this point, clients cited issues with and code quality (junior staff) and lack of RPA knowledge with processes experts. 							
Ability to execute										
Depth and breadth of RPA offerings	#19									
Scale	#27									
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RPA strategy and roadmap	#26									
Focus on business outcomes and process transformation	#20									
Technology innovation	#21									
Voice of the customer	#25									

Atos: IT-focused service provider scaling its use of RPA to enable industrialized automation



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#27	<ul style="list-style-type: none"> • Syntel acquisition: Atos' recently announced (July 2018) acquisition of Syntel (see separate profile) will dramatically increase its RPA assets and experience base. Until the entities are integrated, this profile represents the HFS perspective on Atos without Syntel. • Scaling RPA to complement its broad automation toolkit focused on industrialization: Atos has amped up its use and provision of RPA over the last 18 months, increasingly leveraging it as a component of broader intelligent automation solutions and IT offerings (applications management and BPM). This increase has helped round out its portfolio and extend its automation capabilities. Given the firm's focus on bringing the value of automation to its existing client base, this addition of enhanced RPA capabilities plugs a major gap. • Options across the value chain: Atos-hosted RPAaaS is now extended to include consulting and implementation capabilities for UiPath, Blue Prism, and Automation Anywhere. It has also had success with managed RPA leveraging its cloud-based offering plus services. • Internal use of RPA and company-wide training: Atos started its RPA journey internally with focus on processes within finance, HR, sales, and procurement using UiPath. All staff receive automation training, which helps sales effectiveness and internal use case identification. Atos' internal use of RPA and training inform its market approach to RPA. • Living use cases repository: Stringent process for documenting processes and knowledge capture—nothing goes live without being recorded in the use case knowledge repository and improved or updated at each review stage. There are more than 200 cases documented which is critical for re-use and speed to solution. 	<ul style="list-style-type: none"> • Recent growth of RPA expertise, but later than peers: Atos jumped on the intelligent automation train relatively early with its focus on cognitive agents and its intelligent automation platform. RPA was represented via Atos' RPAaaS platform, but the hosted solution was ahead of its time and has limited traction. As such, there was limited growth in its RPA capabilities until about two years ago. Since then, Atos has scaled its resources by 300% and is actively injecting RPA into engagements. Atos needs to continue this trajectory to achieve experience parity with peers. • Depth of experience with third-party RPA tools: While the firm has cultivated significant expertise with its UiPath-based RPAaaS platform, it has emerging experience (defined as <10 engagements) with other leading third-party RPA software tools. • Demonstrating the proof points: As Atos scales its use of RPA, especially within broader intelligent automation scenarios where RPA functionality is complemented by cognitive tools, it is critical for it to showcase the supporting role RPA plays in enabling digital transformation and driving business outcomes. 		
Ability to execute					
Depth and breadth of RPA offerings	#25				
Scale	#21				
Delivery of value	#19				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#27	Acquisitions include: <ul style="list-style-type: none"> • Syntel (July 2018) 	Enterprise RPA clients include: <ul style="list-style-type: none"> • A German automotive company • A French automotive company • An energy company • A Finnish multinational communication and information technology company • A British broadcaster • A French multinational pharmaceutical company • Xerox • Siemens • A UK life insurance company • A German multinational pharmaceutical and life sciences company 	Headcount: 400+ with experience across UiPath, Automation Anywhere, and Blue Prism Locations: Delivery via Atos locations based in 73 countries. Major delivery locations for RPA are: <ul style="list-style-type: none"> • India • Morocco • Poland • United Kingdom 	<ul style="list-style-type: none"> • Atos Hybrid RPAaaS Cloud Platform: Offers clients a scalable RPA platform based on the latest back-office server and orchestrator technology from UiPath. The platform is managed and operated by Atos Automation and Robotics Factory 7x24 in Atos Cloud Infrastructure. Clients can hire small (e.g., single to large-scale) robot configuration as needed to right-size RPA technology investments to the best business outcome and strategy. Pilot RPA solutions can immediately switch into large-scale operation. • Atos Intelligent Automation Platform (AIAP): A platform built to implement various solutions providing intelligent automation capabilities in areas such as service management, preventive maintenance, and other areas of operations management across RPA, autonomic, and cognitive technologies.
Focus on business outcomes and process transformation	#25	Partnerships include: <ul style="list-style-type: none"> • UiPath • Automation Anywhere • Blue Prism • Thoughtonomy • Pega 			
Technology innovation	#26				
Voice of the customer	#29				

Hexaware: A disruptive mid-tier IT services company leading with automation to re-engineer business processes and impact CX



Dimension	Rank	Strengths	Development opportunities								
HFS Top 10 position	#28	<ul style="list-style-type: none"> • Executing on its “Automate everything, Cloudify Everything, Transform Customer Experience” strategy: Hexaware reinvented itself a few years ago with new leadership, a new logo, and a new strategy focused on automation, cloudification, and customer experience (CX). While late to market with RPA, it has rapidly scaled over the past three or more years with its focus on actively cannibalizing FTE-based deals—often using champion/challenger to win process modernization deals from competitors. • Managed digital services approach: The company is gaining traction with engagements that leverage RPA and RPA extension as a standalone managed services engagement or as a key component of broader process transformation outsourcing deals focused on F&A, customer service, and industry-specific such as insurance and banking processes. • Internal IP for RPA governance: In order to effectively govern and manage its RPA managed services engagements, particularly in multivendor RPA environments, the firm developed its Digital Operations Command Center (DOCC). DOCC enables real-time monitoring of all stages of the process and task execution across humans and bots. • Focus on non-linear growth: Hexaware is committed to growing without adding headcount—with a stated objective of achieving a 50/50 ratio of human-to-digital workforce. This requires the company to actively cannibalize BPS headcount, lead deals with automation, and add automation to internal functions. They have broken down the silos between their BPS and IT business, with the same CTO driving automation for both. 	<ul style="list-style-type: none"> • Scaling RPA talent and experience: While Hexaware is winning and delivering business that either focuses on or includes RPA, it still has a notably smaller base of skilled RPA talent than many of its top competitors and a smaller number of clients and engagements. While the firm is actively addressing this challenge, the caveat for prospective clients is to ensure Hexaware can bring the necessary subject matter expertise and deliver on its committed objectives. • Spotlighting true industry solutions, not horizontal solutions in industry: Hexaware states that its top area for process automation is on industry-specific processes. However, it needs to better spotlight this in its case studies and client examples. Industry-specific use cases are of critical importance because they represent the adoption of RPA for higher value (and therefore higher risk) functions with deeper potential benefits. Some positive examples stand out, like the Digital Verification as a Service offering it developed for a background check provider. • Help the industry understand your role as a disruptor: Disruptors do things differently and drive change. Invest time and marketing focus in articulating and demonstrating how and why you are a disruptor. 								
Ability to execute											
Depth and breadth of RPA offerings	#27										
Scale	#28										
Delivery of value	#27										
Innovation capability											
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Focus on business outcomes and process transformation	#21										
Technology innovation	#28										
Voice of the customer	#27										

Conduent: Global BPO provider bringing internal automation expertise to clients



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#29	<ul style="list-style-type: none"> • Depth of automation and process experience from internal tools and operations: Conduent was an early mover in Robotic Desktop Automation (RDA), developing proprietary tools for attended bot use cases as early as 2008. However as its tools and skills were part of BPO service delivery, they were not promoted externally and thus went largely unnoticed. As RPA continues to gain traction in the market, Conduent is now highlighting its existing automation capabilities and its Conduent Automation Suite (CAS). • Executing on a clear strategy: Conduent spun out of Xerox as an independent entity in January 2017. Since then, it has made substantial investment in refining its operating model, including technology rationalization including a refinement of its automation assets. It is delivering on its One Conduent vision as a provider of digital interactions enabled by technology platforms such as automation. • Strength in change management and governance: The company has a hardened approach to governance and change management through its internal Automation CoE, which it established more than five years ago. • Services-led approach: Conduent delivers automation as part of managed services engagements. Clients get the benefit of automation as part of their solution, with no licensing or maintenance costs to consider. 	<ul style="list-style-type: none"> • Late to market: Conduent was truly an early mover with RDA, but kept its capabilities shrouded behind BPO operations. It is now somewhat late to market as many clients have already invested in RPA with other providers. • Emerging experience with third-party RPA tools: As RPA adoption continues, many clients have already made investments in third-party RPA tools. While third-party tools can purportedly plug into its CAS platform, Conduent’s experience with tools such as Automation Anywhere and UiPath is rated as emerging (<10 engagements). • Dearth of RPA talent: Conduent does not focus on RPA consulting or third-party RPA software implementation, thus has no need for 1000s of RPA resources; comparable BPO peers have two to three times more RPA talent. • Need for more thought leadership: Now that clients are aware of its automation capabilities, they are actively asking for more thought leadership from Conduent—particularly around optimization and improvement in business processes run by Conduent. 		
Ability to execute					
Depth and breadth of RPA offerings	#28				
Scale	#29				
Delivery of value	#29				
Innovation capability		Relevant acquisitions and partnerships	Key clients	Operations	Internal IP and technologies
RPA strategy and roadmap	#29	Acquisitions include: <ul style="list-style-type: none"> • N/A Partnerships include: <ul style="list-style-type: none"> • N/A—Conduent leverages its internal suite of automation tools 	Enterprise RPA clients include: <ul style="list-style-type: none"> • Leading European cable operator • West coast state Medicaid • Aerospace manufacturing company • US-based holding company • Multi-lender student loan processing clients • East coast state Medicaid application processing • Large US-based dental insurance provider • Large US-based logistics company 	Headcount: 125 Locations: <ul style="list-style-type: none"> • North America: 30% • India: 70% 	<ul style="list-style-type: none"> • Conduent Automation Suite (CAS): Software that performs tasks in an efficient, repeatable way that mimics human actions, doing work based on pre-set rules that cover both simple routines and complex processes. RPA interacts with existing systems and applications and integrates into existing business processes and workflows with little development effort. • Conduent Automated Intelligence: RPA configuration and runtime.
Focus on business outcomes and process transformation	#29				
Technology innovation	#29				
Voice of the customer	#28				

About the authors



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Elena Christopher drives the industry-specific research agenda for HFS, digging into the major trends impacting each in-scope industry and the implications for business process and IT services. Elena's industry coverage areas are High-Tech, Banking and Financial Services and Telecommunications.

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