The Services Research Company™

A Buyers' Guide to Accenture

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Why Accenture

Accenture: Quick Facts, 1

Accenture is a global professional services organization headquartered in Dublin, Ireland, that provides strategy, consulting, SaaS, ITO, and BPO.

Accenture began as Arthur Anderson's consulting division, Anderson Consulting. In 2000, Anderson Consulting split from Arthur Anderson following a dispute and in 2001 rebranded as Accenture. Accenture went public on July 19, 2001.

Accenture has proven itself to be a strategic and consulting powerhouse in the service market. The service provider has developed a highly innovative industry-specific offerings portfolio that combines technology and services.

Accenture's consulting and software integration (SI) remain its standout services. The service provider is widely considered one of the deepest and broadest partners with a number of software vendors, including Salesforce and Workday.

The service provider has developed a market-wide reputation for delivering contracts on time and on budget and is aggressively results driven in its service approach.

Accenture is much more strategic, as opposed to opportunistic, in the way it approaches contracts and has at times turned down contracts if it does not see a way to partner strategically with a client.

The service provider has a reputation for acquiring high-end talent and has implemented numerous initiatives to attract and retain said talent. The company's Rise and Shine program in Workday is an example of these initiatives.

Accenture consists of five separate business units:

- Accenture Strategy
- Accenture Consulting
- Accenture Digital
- Accenture Technology
- Accenture Operations

Accenture: Quick Facts, 2

Other Quick Facts about Accenture are:

- Total number of employees: 394,083,295,381 are part of its Global Delivery Network as of December 2016
- Geographic Presence (Estimated)
  - Onshore (North America (16%), UK and Western Europe (10%) – 25%)
  - India (Gurgaon, Mumbai, Hyderabad, Kolkata, Chennai, and Bangalore) – 44%
  - Philippines (Manila, Cebu) – 14%
  - China (Dalian, Shanghai, Chengdu) – 3%
  - Other APAC (Australia, Singapore, and Japan) – 4%
  - Nearshore (Latin America, Eastern Europe) – 10%

Clients*

* Representative list of publicly referenceable clients included in HfS Blueprints

Horizontal Offerings

- Procure to Pay
- Order to Cash
- Record to Report
- Financial Planning and Analysis

F&A

- Planning Services
- Source to Pay Services
- Fulfillment Services
- Services Management

Supply Chain Management

- Strategic Sourcing
- Contract Management
- Supplier Management
- Technology Management
- Transactional Procurement

Procurement

- Recruitment (RPO)
- Learning Services
- Benefits Administration
- Payroll
- Workforce Development Services

HRO

- AI
- Analytics
- Mobility Services
- Cloud Services

Digital

- Infrastructure Services
- Blockchain
- IoT
- SaaS
- Cyber Security
- Application Services

IT Services

Industry Offerings

- Accelerated R&D Services
- Intelligent Commercial Solutions
- Enterprise Technology
- Intelligent Patient Solutions
- Supply Chain Services

Life Sciences

- Core Banking
- Credit Services
- Payment Services
- Trading
- Asset Management
- Wealth Management
- Post-trade Processing

Banking and Capital Markets

- Advertising Services
- Customer Interaction Services
- Video Services
- Network Services
- Sales and Channel Support
- Product Lifecycle Services

Telecoms and Media

- Clinical Management
- Population Health
- Virtual Health
- Care Value
- Clinical Analysis
- Electronic Health Information Management

Healthcare

- Digital Consumer Engagement
- Enterprise Services
- Route to Market
- R&D Transformation
- Digital Store Services

CPG and Retail

- P&C Claims Administration
- Product Policy and Underwriting
- Distribution and Marketing
- Finance, Risk, and Regulatory
- Technology Advisory

Insurance

- Administration
- Border Services
- Defense Services
- Postal Services
- Revenue Services
- Public Safety Services
- Social Services

Public Sector

- Smart Grid Services
- Asset and operations Services
- Energy consumer Services

Utilities

Strategy, Strengths, and Weaknesses

Strategy

- Accenture has made a concerted push toward developing its digital capabilities. The service provider launched its Accenture Digital business unit in 2014.
- The service provider is largely looking to enter into contracts only where it has a strategic partnership with the client. The Accenture business unit Accenture Strategy, launched in 2015, is testament to this goal.
- Accenture is likely to continue its enterprise-wide aggressive acquisitions strategy through CY 2017 as it looks to continue to transform its offerings portfolio.
- Accenture will continue with its Cloud First strategy. This has been proven through its aggressive acquisition focus in this area, including DayNine, Tquila, NASCHO Consulting, and Cloud Sherpas.

Strengths

- Scope of service delivery. Extremely comprehensive consultancy practice through to managed service delivery.
- Extensive digital practice, meaning Accenture is able to cross-sell and augment digital levers across its BPO portfolio.
- Well-established SaaS practice. Accenture has acquired numerous companies to grow this practice.
- Core focus on the ideals of the As-a-Service Economy. Accenture is well positioned to deliver value across all eight ideals of the As-a-Service Economy.
- Comprehensive global delivery structure. Accenture has an extremely large and diverse delivery network.
- Analytics capability. Accenture has created an industrialized analytics model.
- Ability to engage clients at the strategic level. By leveraging its consultancy practice, Accenture has become a close strategic partner with many of its clients.
- Capabilities in intelligent automation, recognized as a leader in HfS's 2016 Intelligent Automation Blueprint

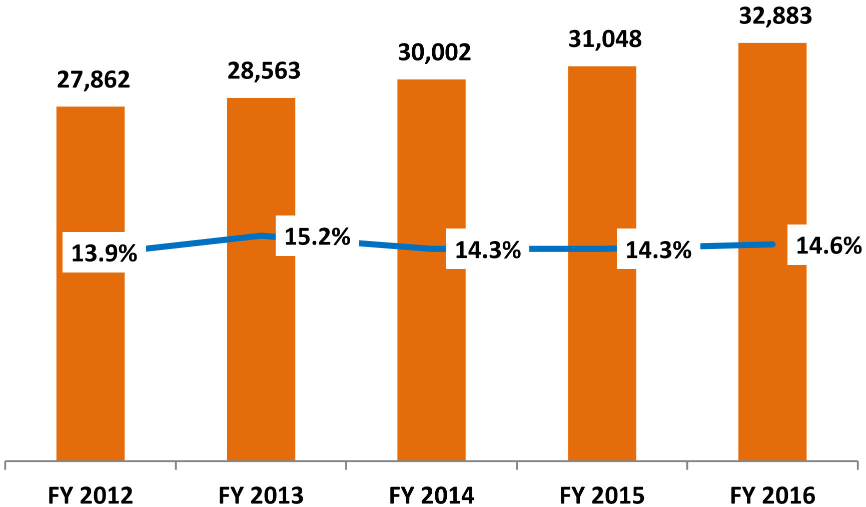
Weaknesses

- Accenture's size and scale can deter smaller organizations from working with it.
- Perceived arrogance in the market. Accenture's refusal to participate in RFIs has given it a perceived arrogance in the market.
- Perception as a high-cost service provider although in reality Accenture has, on multiple occasions, undercut Indian peers in RFPs to win.
- Aggressive results culture can alienate clients and has historically deterred repeat business.

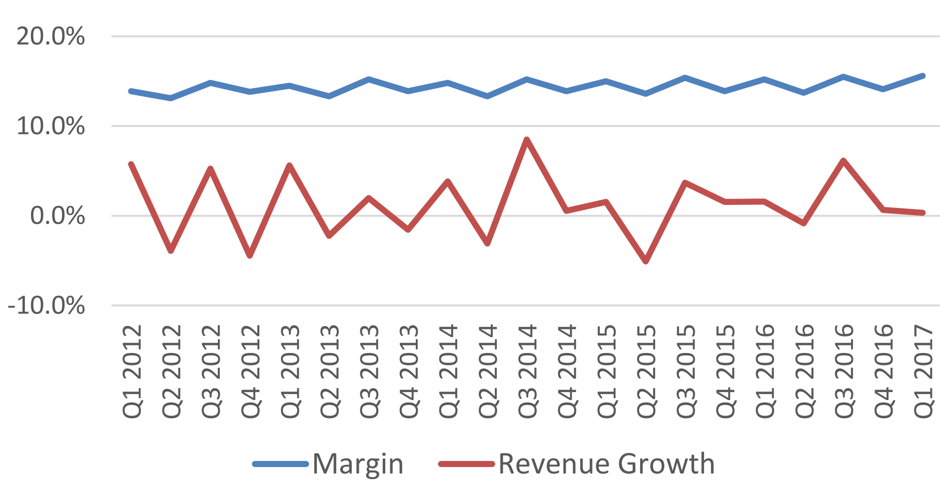
Financials

Accenture Financial Performance

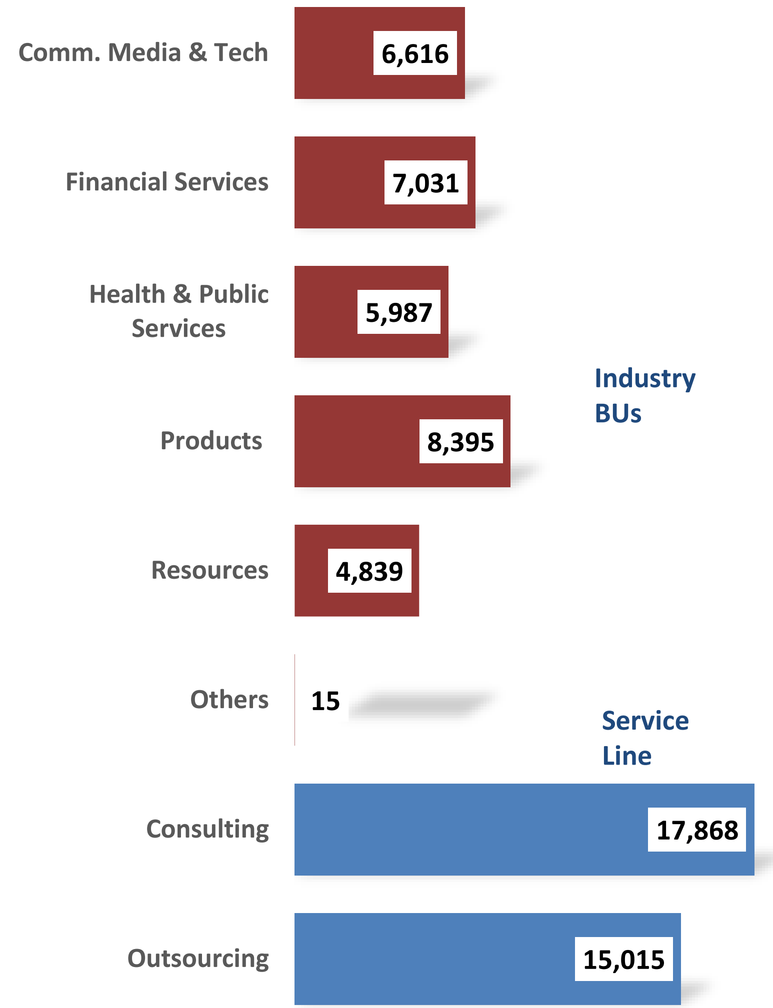
Net Revenue ($M) / Operating Margin % by Financial Year



Growth vs. Operating Margin by Financial Quarters



Net Revenue Breakdowns FY2016 ($M)



Accenture FY ending August 31, 2016 (12 months)

Delivery Location Compendium, 1

Capabilities	Headcount	Onshore - US and Canada	Nearshore - Latin America	Onshore - UK and Western Europe	Nearshore- Continental Europe	India	Philippines	Other APAC	MEA
Digital Marketing Operations 2016	8,300	2%	7.5% Argentina-Buenos Aires, Costa Rica-San Jose	1% London	13.5% (Poland-Warsaw, Ireland-Dublin, Spain-Malaga, Madrid, Italy-Milan)	67% (Bangalore, Chennai, Mumbai, Delhi, Hyderabad)			
Procurement As-a-Service, 2016	13,600	18% King of Prussia, PA, Pittsburgh, PA; San Antonio, TX	3%		26%	53%			
Healthcare, 2016	20,000	4%			1% Spain	25%	70%		
Energy Operation, 2016	3,000	4% Houston, US, Calgary, Canada	Colombia, Chile, Argentina, Brazil, Mexico	Europe (Stavanger, Paris, Aberdeen, Lisbon, Madrid, Rome, Amsterdam, Munich, Copenhagen)				Asia Pacific (Australia, Indonesia, Malaysia, Philippines, China, Japan)	`
Mortgage Services, 2016	3500	6% Charlotte, Dallas, New York, San Antonio, Sacramento	Sao Paulo			Bangalore, Chennai, Mumbai	Manila		

Delivery Location Compendium, 2

Capabilities	Headcount	Onshore - US and Canada	Nearshore - Latin America	Onshore - UK and Western Europe	Nearshore- Continental Europe	India	Philippines	Other APAC	MEA
Finance and Accounting As-a-Service Business Process Outsourcing, 2016	24,600	5% US, Canada	5% (Argentina, Brazil, Costa Rica)	UK & Ireland	Continental Europe (Spain, France, Poland)	65%	10%	5% Mauritius, Sri Lanka, Bangladesh	South Africa
Telecom BPO, 2016	5000	6%	Argentina, Brazil		Czech Republic, Poland, Slovakia	India	Philippines	Australia,	
ServiceNow Services, 2016	750	42%		13%		17%	10%	15%	3%
SuccessFactors Services, 2016	1200+	US and Canada	Argentina, Brazil, Mexico	UK, Denmark, Switzerland, Germany	Czech Republic, Spain, Poland	India	Philippines	Australia, NZ, Japan, China, South Korea, Singapore, Malaysia, Thailand	South Africa
Salesforce Services, 2016	3700	US and Canada		UK, Ireland, Gallia, the Nordic			Manila		Australia and New Zealand

Tools/Methodology Compendium, 1

Capabilities	Tools/Methods	Common Tools
Utility Operations, 2017	• Retail Platform for Utilities • Smart Grid Advanced Analytics • Smart Water Monitoring • Connected Home Platform • Intelligent Automation Platform (IAP); Global Productivity Hub, Automation Identification Diagnostic Tool (AIDT), Artificial Intelligence, RPA • High Performance Utility Model (HPUM), best-practice operating model frame • Accenture Digital Assistant • Energy Consumer Mobile App • CIS and MDM implementation accelerators • Electronic Work Package	• NA
Managed Security Services, 2017	• Cyber intelligence platform (jointly developed with Intel and Cloudera) • Cyber defense platform • Velocity identity platform	
Design Thinking, 2017	• Fjord's Service Design methods • Accenture Innovation Architecture supported by Accenture Research, Ventures, Labs, Studios, Innovation, and Delivery Centers • New Consulting Methods	
Salesforce Services, 2017	• 11 Fullforce Master Certifications: Comms and Media, Financial Services, Healthcare and Life Sciences, Public Sector, Auto and Manufacturing, Consumer Products and Retail, Sales Cloud, Service Cloud, App Cloud, Community Cloud, and Analytics Cloud • 15 Fullforce Industry Solutions: Newest ones include Accenture Multimedia Ad Sales Solution, Accenture Retail Clienteling Solution, Accenture Intelligent Payer Platform, Accenture Health Experience Platform, and Accenture Customer Experience Solution for Utilities • Accenture Automated Framework for Testing (AAFT) for Salesforce • Accenture System Diagnostics for Salesforce: for visibility of current customizations • Automation Blueprint for Salesforce • Accenture Requirements Analyzer • Dev Ops Platform for Salesforce	

Tools/Methodology Compendium, 2

Capabilities	Tools/Methods	Common Tools
Internet of Things (IoT) Services, 2016	• Connected Transport: Connected Vehicle, Fleet, Transit Systems, Insurance, Freight. • Connected Spaces: Connected Home, Connected Buildings, Connected Cities • Connected Operations: Connected Asset Management, Connected Worker, Connected Manufacturing, Connected Agriculture • Connected Health: Remote Patient Monitoring, Wellness and Prevention, Connected Pharma, Intelligent Health Enterprise • Connected Commerce: IoT Payment and Data Security, Blockchain and Cryptocurrency, Connected Contextual Commerce • IoT platform: Connected Platforms as a Service (CPaaS) integrated with Accenture Insights Platform, a cloud analytics solution, and the Accenture IoT Device • Platform (AIDP) an ARM-based Rapid Prototyping device development platform	
Workday Services, 2016	• Legal and Regulatory Accelerator: facilitates localization • Accenture Client Enablement (ACE): integration tool for requirements, decisions, actions, risks and issues, status and reporting • Rapid Configuration Suite: pre-built templates, tools and accelerators. • Accenture Integration Suite: supporting documents and field-tested components • Accenture Systems Diagnostic: standardizes and optimizes objects, processes and configurations • Change management toolkit: best practices • Accenture Implementation Guide for Workday • Payroll Reconciliation Accelerator • Mobilization Toolkit • Business Process Design Accelerator • Conversion Suite: data migration tools • Accenture Release Management Services Suite for Workday: release updates	• NA
SuccessFactors Services, 2016	• Accenture High-Velocity Talent and HR: pre-configured solutions for fast implementation • Packaged Cloud Methodology for SuccessFactors: Accenture Delivery Suite (ADS) delivery methodology for SuccessFactors • Accenture SuccessFactors' Data Conversion Toolkit • Accenture SuccessFactors' Test Automation Toolkit • Accenture Human Capital Operating Model • Accenture's HR 360 Diagnostic: tool to capture business objectives and challenges • Accenture HR Audit and Compliance As-a-Service: SuccessFactors' extension on the SAP HANA platform. Accenture Clone and Test for Cloud: SAP HANA cloud extension for Employee Central • Accenture Quick Document Builder for SuccessFactors: automates correspondence sent to employees and managers	

Tools/Methodology Compendium, 3

Capabilities	Tools/Methods	Common Tools
Procurement As-a-Service, 2016	• Workflow Platform: Used internally by Accenture, includes Radix, multi-client, cloud-based platform, automates and integrates projects, activities, and information throughout the Source to Pay process. • Radix Mobile: Radix data and insights and the ability to initiate and approve projects, is available via a mobile app • Accenture Insights: Category and process-specific business and market intelligence • Procurement Performance Management Suite: provides clients with visibility into program spend, savings, compliance, and performance and the ability to engage with projects, includes SpendTrends, Spend Analytics, Project Initiation and Management, Pipeline Savings Insights, Buyer Portal, PTP/ Compliance Analytics, and AP Tool Suite	
Finance and Accounting As-a-Service Business Process Outsourcing, 2016	• Accenture Operations Navigator 2.0: analytics dashboard • Radix™: workflow platform • Accenture SolutionLIVE Marketplace: manages and allocates work • Accenture Cognitive Engine (ACE) • Intelligent Text Analyzer Platform (ITAP): reviews structured and unstructured data from multiple sources • Digital Workforce Platform: supports invoicing, cash apps, period close, master data, analytics, budget, and forecasting • Accenture Global Productivity Hub: tracks and measures agent performance, including shrinkage • F&A Vendor Helpdesk: artificial intelligence service desk *Accenture Unified Desktop:* automates transaction processing including vendor portal downloads, posting invoice data through Optical Character Recognition (OCR) to ERP	• Accenture Insights
Digital Marketing Operations, 2016	• Estimation Tool • Daikiri • Jira • Hero Framework • Accenture Digital Diagnostics (ADD) • Precision Marketing • Customer Profiler • Accenture Clustering Engine • Asset Utilization • Email Marketer • Campaign Manager • Social Wall • Accenture Marketing Analytics Platform (AMAP) • Accenture Customer Insight (ACI) • Accenture Digital Optimization (ADO) • Accenture Insights Platform (AIP) • Accenture Customer Analytics Record (ACAR)	

Blueprint Performance

Accenture Profiles from HfS Blueprints (2014–2017)

This report contains Service Provider profiles of Accenture from 45 HfS Blueprints covering business Salesforce, Workday services, IoT, Intelligent Automation, SAP Services, Energy Operations, Procurement Services, SuccessFactor services and much more.

Accenture was seen by our HfS Analyst team as:

- *Salesforce's largest partner, focused on digital transformations, with market-leading Salesforce services capabilities (Salesforce Services 2017 – Khalda De Souza)*
- *A complete vision for digital marketing operations bolstered by smart acquisitions and complemented by automation (Digital Marketing Operations 2016 – Melissa O'Brien)*
- *Visionary and leading edge provider of procurement As-a-Service offerings with great breadth and depth (Procurement As-a-Service 2016 – Derk Erbe)*
- *A global service provider with strong consulting, industry and PLM software expertise (Product Lifecycle Management (PLM) Services 2016 – Pareekh Jain and Tanmoy Mondal)*
- *Business strategy through to execution continuity with strong IoT expertise as an ingredient of a broader digital platform (Internet of Things services 2016 – Oliver Marks)*
- *Global system integrator pushing the envelope on innovation through embedding analytics in automation and expanding vertical solutions (Intelligent Automation 2016 – Tom Reuner)*

Blueprint Index, 1

Blueprint Index, 2

Blueprint Index, 3

Accenture
Winner's Circle

High growth practice with deep industry expertise in delivering As-a-Service and digital-led services across the utility value chain

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Blueprint Leading Highlights

- Actual delivery of services
- Flexibility in delivering end-to-end and point solutions
- Vision for utility market evolution and services
- Depth of industry-specific capabilities
- Use of partnerships, alliances, and joint ventures

Value Chain Services Maturity

- Upstream
- Midstream
- Downstream
- Cross Value Chain BPO and Engineering
- Cross Value Chain ITO

Strengths

- **Enabling Outcomes and New Business Models**: Accenture is partnering with clients to jointly pursue outcomes; as an example, it is actively helping clients to reduce cost to serve and explore new revenue model opportunities (e.g., PEV, solar leasing, monetizing data). The value proposition is enabled by Accenture strategy, digital, consulting, operations, and technology.
- **Strong Focus on Platforms and As-a-Service:** Accenture brings together expertise, capability, intellectual property, and technology in industry platforms such as retail platform for utilities, smart grid advanced analytics, and connected home platform.
- **Co-Development of Industry-Specific Solutions with Alliance Partners**: As an example, Accenture and Salesforce developed the Accenture Customer Experience Solution for Utilities, based on Salesforce's Customer Success Platform.
- **Consultative Approach Gives Clients Confidence and Innovation:** Accenture's strong consulting-led approach brings a high level of industry expertise and understanding of client's challenges.
- **Continued Investment in Utility Industry Capabilities***:* Recent acquisitions like New Energy Group, Realworld OO Systems, Structure Group, and Cimation have brought substantial industry expertise in areas like GIS and IT-OT integration, industrial IoT, process automation, asset analytics, and cyber security. Accenture also has a strong partner and alliance ecosystem, with partners across the value chain.
- **Events and Research Programs to Help Shape the Industry**: Accenture invests in the Digitally Enabled Grid Research Program and the New Energy Consumer Research Program as well as events and forums like IUEC, Accenture Utilities Global Council, and the Accenture Smart Grid Leadership Network.

Challenges

- **Engineering Services:** IT-OT integration and smart grids are big imperatives in the industry. For the last few years these have been, and remain, key areas of investment for Accenture in its smart grid business in terms of capabilities, acquisitions and partnerships. The challenge for Accenture is to highlight these capabilities and service offerings in the market, traditionally not viewed as its bread and butter.
- **Articulating Opportunities Beyond the Fortune Global 2000:** Accenture's depth and breadth in utilities can be a good match to smaller utilities with large, strategic transformational challenges and ambitions. However, Accenture should further articulate and communicate its commitment to As-a-Service, outcome-based, and scalable utility operations services, and its willingness to co-invest and co-innovate with clients to tap this market potential. Market feedback HfS receives indicates the view of Accenture as a big, expensive service provider catering only to the largest utilities persists in the market.
- **Ensuring Innovation Across All Clients and Projects**: Clients have noted in fixed fee engagements that there is room to bring more innovation, when compared to other projects. As Accenture commits to new As-a-Service outcomes, the imperative is to bring the innovative mindset to all clients and projects.

Relevant Acquisitions and Partnerships

Acquisitions: Davies Consulting (2017), New Energy Group (2016), Realworld OO Systems (2016), OPS Rules (2016), MOBGEN (2016), Cloud Sherpas (2015), Gaspo (2015), Cimation (2015), FusionX (2015), Structure (2015)

Joint Venture: OMNETRIC Group with Siemens; Avanade with Microsoft

Partnerships:
Power Generation: ABB, DataGlance, GE Meridium, Intergraph, Microsoft, Oracle, OSIsoft, SAP
Market Operations/Trading: Allegro, Openlink, Sungard
Transmission and Distribution: ABB, Siemens eMeter, Esri, GE, Itron, IBM Maximo, Oracle, SAP, Schneider Electric, Siemens
Retail and Customer Operations: Ferranti, Microsoft, Oracle, Opower, Salesforce, SAP, Tendril
Enterprise and Management Functions: Microsoft, Oracle, SAP, Service Now, BluePrism, Automation Anywhere

Key Clients

Over 200 clients globally including:

- Sixteen of the 20 utilities in the Fortune Global 500
- Electricity, gas, and water utilities

Global Operations

Headcount: 15000 utility professionals serving clients in over 45 countries

Locations:
Accenture concentrates service delivery in 32 of 50 delivery locations, where they provide utility-specific services

Proprietary Technologies / Platforms

- *Retail Platform for Utilities*
- *Smart Grid Advanced Analytics*
- *Smart Water Monitoring*
- *Connected Home Platform*
- *Intelligent Automation Platform (IAP); Global Productivity Hub, Automation Identification Diagnostic Tool (AIDT), Artificial Intelligence, RPA*
- *High Performance Utility Model (HPUM), best practice operating model frame*
- *Accenture Digital Assistant*
- *Energy Consumer Mobile App*
- *CIS and MDM implementation accelerators*
- *Electronic Work Package*

HfS BLUEPRINT REPORTS

Accenture

Business-led offerings that will appeal to CISOs and other senior executives

As-a-Service Winner's Circle

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Blueprint Leading Highlights

- Depth and quality of services
- Client references
- Vision for security
- Industry expertise
- Predictive analytics and remediation
- Talent strategy
- Differentiated thought leadership

Alignment with OneOffice

- OneOffice
- Shared Responsibility
- Digital Trust

Strengths

- **Industry focus:** Accenture has specifically invested over the past year in expanding its security delivery beyond industry-specific regulatory requirements to putting security in the context of business trends that affect clients' businesses.
- **Cyber Fusion Centers:** The firm has combined its security innovation labs and Liquid Studios capabilities for proof of concepts to move clients faster into operationalized security.
- **Global capabilities:** Accenture has strong delivery capabilities with security-specific delivery centers in all major geographic regions.
- **Depth in all major security areas:** The provider has services in all of the areas HfS included in the Managed Services category except for physical security, which it plans to add in the next 12–18 months.
- **Data ethics:** Accenture is building thought leadership around data ethics, the concept of ensuring the data and algorithms used in security used for ethical and legal purposes.
- **Client relationships:** Accenture's strong account management capabilities are evident in the number of references, the seniority of its references (all CISOs), and the speed with which those references made time to speak on Accenture's behalf.

Challenges

- **Potential for technical side to get dismissed:** With Accenture's focus on the business side (which HfS agrees with as a strategy), it's possible that mid-level security staff will consider the offering too high level. Accenture will need to make sure the depth of its offering is communicated to all levels of the organization.
- **Talent acquisition:** Accenture acknowledges that it is reviewing its training program in order to to be more flexible in the types of people brought in and the kind of mentoring needed for non-traditional security talent.

Relevant Acquisitions / Partnerships

Acquisitions since 2013:

- Arismore
- Defense Point
- RedCore
- Maglan
- Cimation
- Fusion X
- U.S. federal government services business of Endgame Inc. * (02/08/2017) pending
- iDefense * (02/09/2017) pending

Partnerships:

- Managed Cyber Defense: Qualys, Recorded Future, Palo Alto, Splunk, Tanium, End Game, Microsoft, Cisco, IBM, HPE, Skyhigh Networks, Alert Logic, CipherCloud, Symantec, Zscaler, Cybereason, Phantom
- Managed Digital Identity: ForgeRock, Oracle, Okta, SailPoint, RSA, CyberArk
- Managed Compliance: RSA Archer, RSM
- Managed Application Security: Microsoft, Oracle, SAP, HPE, IBM

Client Profile

More than 100 MSS clients, including:

- Global 1000 firms

Clients in industries such as

- Oil & Gas
- Utilities
- Mining
- Health & Public Services
- Financial Services
- Media & Communications
- Retail
- Automotive

Service Delivery Operations

Total MSS Employees: ~5000
Delivery Personnel in SOCs: ~1500

Delivery from 12 Cyber Fusion Centers (SOCs) in:

- Cincinnati
- San Antonio
- Sterling
- Buenos Aires
- Prague
- Tokyo
- Bangalore (supported by other Security Centers in New Delhi, Pune and Kolkata)
- Manila
- Tel Aviv

Accenture also has Cyber Labs in Washington, D.C., and Tel Aviv, Israel.

Proprietary Technologies

- Cyber intelligence platform (jointly developed with Intel and Cloudera)
- Cyber defense platform
- Velocity identity platform

Accenture

As-a-Service Winner

Incorporating more of a flexible, iterative and user-centered approach to its strong "doing," outcomes-oriented culture

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Blueprint Leading Highlights

- Design Thinking Leadership and Commitment
- Understanding Client Business and Context for Innovation
- Actual Solutions Derived Using Design Thinking
- Formal Methods and Tools
- Vision for Design Thinking in the As-a-Service Economy
- Use of Partnerships & Acquisitions

Use of Design Thinking in:

- Internal Operations
- Client – Digital Transformation
- Client – Business Operations

Strengths

- **Design Thinking, Design Doing, Design Culture:** Accenture has a culture of doing, so with Design Thinking, it is adding in the element of observing and understanding the end-user. With the acquisition of Fjord, Accenture brought in a a global capability, methodology, and studios that it can use for design projects that change the way it works internally (such as revamping its global performance management program and client offerings) and with clients (examples in every industry). Clients appreciate that Accenture can take into consideration what they know about their business when they design and manage complexity. The goal is "to disrupt and reinvent everything we do and help our clients do the same," in the framework of measurable results.
- **Thoughtful Talent Development:** Accenture wants its whole workforce to at least understand the principles of Design Thinking – collaboration, human-centered, iterative. Training ranges from self study on what is Design Thinking to tools to use and workshops for experiential learning. A current initiative puts people with Design Thinking skills in positions to work with teams and mentor. Accenture is also helping clients build capability.
- **Innovation Framework:** The Accenture Innovation Architecture supports a journey that includes, as warranted, research, prototyping, development, and implementation of services and operations support. It's also a good way to give clients comfort that innovation is tied to outcomes—through a project or on-going service. A Fjord Rumble workshop will help a team frame a problem and start down a path together.
- **Cultural Shift:** Accenture's rich history of consulting and operations work is focused on defining and delivering business outcomes. Design Thinking is helping to shift services and solutions to user-centric versus "best practices."

Challenges

- **The "Doing" Mentality:** Accenture has a strong culture of outcomes-based work and driving to results. It can come across as "directive" and "doing to" rather than "empathetic" and "doing with." We understand how Accenture and clients want to measure results qualitatively for every undertaking, but we challenge both to incorporate more of the empathy that is characteristic of Design Thinking.
- **Early Days for Design Thinking in Business Operations:** Accenture Operations has a large portfolio of clients that are used to traditional, industrialized service delivery through BPO and a solid hierarchy in place. There are some early examples of "results," but it lacks the storytelling and direct client references to create a "feeling" of success. Accenture needs to be more bold about sharing its stories of how empathy, end-user experience, and journey maps, for example, are part of how they work.
- **Keeping Talent Engaged:** Service design is a massively growing industry, and Accenture and other service providers will have the challenge of keeping people engaged and on-board. As other service providers figure out the value of Design Thinking with their clients, Accenture (and other leaders) will have a target on its back for capable professionals. Accenture will need a flexible and fast acquisition and on-boarding plan.

Acquisitions and Partnerships

Acquisitions include: 2nd Road (2016), Chaotic Moon (2016), Karmarama (2016), Fjord (2013)

Partnerships include: Massachusetts Institute of Technology (MIT), Duke University, Indian Institute of Technology, Purdue University, Stanford University, University of California, Berkeley

Representative Clients

- Large European Bank
- Global Pharmaceutical Company
- Global Insurance Company
- North American Healthcare Payer
- North American Healthcare Provider
- Global Energy Firm
- Spanish Banking Group

Service Delivery Operations

- 100,000+ trained on Design Thinking (Design Thinking Academy, Design Thinking Online)
- Delivery center training in India & Philippines
- Fjord Evolution, an internal design-learning

Innovation / Design Centers:

- Fjord Rumble™ - Design Thinking Workshops
- 50+ studio & delivery center locations

Frameworks / Tools

- Fjord's Service Design methods
- Accenture Innovation Architecture supported by Accenture Research, Ventures, Labs, Studios, Innovation and Delivery Centers
- New Consulting Methods

Winner's Circle

Salesforce's largest partner, focused on digital transformations, with market-leading Salesforce services capabilities

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PLAN

IMPLEMENT

MANAGE

OPERATE

OPTIMIZE

Blueprint Leading Highlights

- Quality of Account Management Team
- Scale of Capabilities
- Flexibility
- Experience Delivering Industry-Specific Solutions
- Partnership Strategy
- Vision for Salesforce Effectiveness
- Investment in Tools

Strengths

- **Clear Leader in Scale:** Accenture has the largest Salesforce services practice and more than double the number of Salesforce certified consultants than any other partner in the ecosystem. This impressive bench strength is supported by a global onshore and offshore global delivery capability. Clients highlight that Accenture is able to provide the right resources whenever and wherever they require them.
- **Depth and Breadth of Services**: Accenture has deep capabilities and vision in all Salesforce services areas, including consulting, implementation, ongoing support services, and BPO. It has particular experience and strength in large-scale digital transformation projects. Accenture also works closely with Salesforce to develop services to support the new technologies, including Einstein, Wave Analytics, and IoT.
- **Investment in Differentiating Capabilities:** Accenture has 18 certified technical architects, which is at least three times more than any other Salesforce services partner. It has also achieved the largest number of Fullforce Master and Fullforce industry certifications, at 11 and 15, respectively. Moreover, Accenture continues to invest in developing and strengthening its tools that align to client business needs. This is underpinned by a strong partnership and acquisition strategy in the past two years, including its equity investment with Salesforce in the industry solution provider Vlocity and its acquisition of cloud specialist Cloud Sherpas in 2015.
- **Commitment to Assisting Clients to be Self-Sufficient:** As well as delivering cloud roadmaps to help clients understand their Salesforce journey, Accenture provides support and assistance to clients that want to be self-sufficient post-deployment. This includes recommending new roles within the business and IT functions at client enterprises.

Challenges

- **Perceived Loss of Close Relationship by Cloud Sherpas Clients:** Some Cloud Sherpas clients may be concerned that the specialist's acquisition by Accenture may change the nature of the relationship. This includes a perceived loss of a close account management relationship and a more aggressive approach by Accenture to up-sell additional services into the account. Prospective clients need to be clear about the services they require and what they can deliver with in-house teams. Accenture should address these worries and highlight its targeted program and commitment to ensuring all clients have a successful Salesforce experience.

Relevant Acquisitions/Partnerships

Acquisitions include:

- New Energy Group (2016)
- CRMWaypoint (2016)
- Cloud Sherpas (2015)
- Tquila (2015)
- ClientHouse GMBH (2014)
- Joint equity with Salesforce in Vlocity

Partnerships include:

- Anaplan, Apttus, Box, CipherCloud, Callidus Cloud, ClickSoftware, Cloud Sense, Informatica, Kinaxis, Kronos, ServiceNow, PROS, Vlocity, Zuora

Key Clients

Accenture works with clients across industry sectors. More than 75% of Salesforce services work won in the last fiscal year was with repeat clients.

Industry Coverage: in order of Salesforce services revenues:

- Products
- Communications, Media, and Technology
- Financial Services
- Resources
- Health and Public Services

Publicly disclosed clients include:

- Coca-Cola, Schneider Electric, RCS Media Group, SunTrust, Shire, TDC, Flagstar Bank, ENEL, Pearson

Operations

- Partner Level: Global Strategic
- Fullforce Master Certifications: 11
- Fullforce Industry Solutions: 15
- Salesforce Certified Consultants: 3,700
- Average Number of Certifications per Employee: 2.3
- Certified Technical Architects: 18
- Total Number in Practice: 9,500
- Number of Projects Completed: 1,400
- Customer Satisfaction Score: 9.3/10

Key delivery locations for Salesforce practice:

- NA: US, Canada
- Latin America
- Europe: UK, Ireland, Gallia, the Nordic countries
- APAC: The Philippines
- Australia and New Zealand

Technology Tools and Platforms

- *11 Fullforce Master Certifications:* Comms and Media, Financial Services, Healthcare and Life Sciences, Public Sector, Auto and Manufacturing, Consumer Products and Retail, Sales Cloud, Service Cloud, App Cloud, Community Cloud and Analytics Cloud
- *15 Fullforce Industry Solutions:* Newest ones include Accenture Multimedia Ad Sales Solution, Accenture Retail Clienteling Solution, Accenture Intelligent Payer Platform, Accenture Health Experience Platform, Accenture Customer Experience Solution for Utilities
- *Accenture Automated Framework for Testing (AAFT) for Salesforce*
- *Accenture System Diagnostics for Salesforce:* for visibility of current customizations
- *Automation Blueprint for Salesforce*
- *Accenture Requirements Analyzer*
- *Dev Ops Platform for Salesforce*

Winner's Circle

A complete vision for digital marketing operations bolstered by smart acquisitions and complemented by automation

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Blueprint Leading Highlights	Strengths	Challenges
• Ability to Attract and Retain Talent • Progress on Embedding Automation • Talent Strategy • Vision for Digital Marketing Operations Evolution	• **Industry diversification and business outcome focus:** Accenture has digital marketing operations clients and solid case studies spanning many industries, whereas many competitors take an industry focused approach. The service provider's ability to replicate services across industry verticals and drive business outcomes is a testament to its talent and processes. • **Talent strategy**: Much of Accenture's onshore staff are ex-agency talent, bringing an expertise and understanding of the traditional agency world with an eye toward the future. The onshore/offshore balance within digital marketing operations is a smart approach to talent, and clients noted that Accenture flexes well in response to demand. • **Approach to automation:** Accenture maintains a focused approach on the end-to-end process, embedding automation and analytics to deliver business insights and outcomes. Tools like Daikiri, which automates content testing processes, and Jira, which automates marketing workflow, create efficiencies for Accenture clients. • **Provocative acquisitions:** Accenture's acquisitions over the last few years are illustrative of the service provider's forward thinking vision for the evolution of this market. These acquisitions span across various core pieces of digital transformation, such as aVVenta for content, Cimation for IoT consulting and Chaotic Moon for digital technology design and prototyping. These acquisitions complement marketing operations and customer experience services, helping to double the service provider's digital marketing operations business over the last two years.	• **Cultural integration of acquisitions**: Accenture has made some bold moves in terms of acquisitions and is working to ensure that the skills they have acquired are not diluted. Going forward, Accenture should continue to work to ensure that the acquired organizations are integrated culturally and that they can draw out the full value and benefit from these acquisitions. • **Improving customer relationships:** Feedback from clients on account management is mixed, where some are very pleased and others seeking more attention and thought leadership from the relationship. Given the growth of this business for Accenture in the past two years, this could be attributed to the pace of change, with a greater focus on vision and innovation which could have resulted in Accenture taking for granted some of the basics.

Value Chain Services Coverage:

- **Marketing Content Development & Management**
- **Campaign Management**
- **Analytics and Reporting**

Relevant Acquisitions and Partnerships	Key Clients	Global Operations Centers	Proprietary Technologies
Acquisitions: • IMJ Corporation, 2016 • dgroup, 2016 • MOBGEN, 2016 • Technological, 2016 • Cimation, 2015 • Brightstep, 2015 • PacificLink Group, 2015 • Chaotic Moon, 2015 • AD.Dialeto, 2015 • Boomerang Pharmaceutical Communications, 2015 • CloudSherpas, 2015 Key partnerships: • Adobe • Google AdWords • Salesforce	Total digital marketing operations clients: 100+ Key clients include: • Global consumer products and goods • BMW • UBS • U.S. Pharma company • South African division of a global telco • Major U.S. retailer • Leading U.S. telco • Global financial services company • Leading U.S. B2B high tech reseller • U.S. based grocery retailer • European arm of a global auto manufacturer	Headcount: 8,300 Delivery Centers: 10+ • LATAM: 7.5% (Argentina-Buenos Aires, Costa Rica-San Jose) • U.K.: 1% (London) • EMEA: 13.5% (Poland-Warsaw, Ireland-Dublin, Spain-Malaga, Madrid, Italy-Milan) • India: 67% (Bangalore, Chennai, Mumbai, Delhi, Hyderabad) • Philippines: 8% (Philippines-Manila) • Other APAC: 1% (China-Dalian, Shanghai) • North America: 2% (U.S.A.)	• Estimation Tool • Daikiri • Jira • Hero Framework • Accenture Digital Diagnostics (ADD) • Precision Marketing • Customer Profiler • Accenture Clustering Engine • Asset Utilization • Email Marketer • Campaign Manager • Social Wall • Accenture Marketing Analytics Platform (AMAP) • Accenture Customer Insight (ACI) • Accenture Digital Optimization (ADO) • Accenture Insights Platform (AIP) • Accenture Customer Analytics Record (ACAR)

Winner's Circle

Visionary and leading edge provider of procurement As-a-Service offerings with great breadth and depth

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Blueprint Leading Highlights	Strengths	Challenges
• Actual Delivery Of Services • Geographic Footprint and Scale • Vision For The Evolution of Procurement As-a-Service • Models for Co-innovation and Collaboration • Strategy for Intelligent Automation • Ability to Leverage External Value Drivers • Quality of Account Management	• **The End-to-End Process:** Accenture leads the market in the breadth, depth and sophistication of its strategic sourcing and category management capabilities with innovative specializations in fields such as energy sourcing, media and advertising, and logistics. Accenture's combination of deep expertise, platform, intelligence & analytics, and automation all combine to drive outcomes (for SCM but also PTP) fused across the end-to-end process. Accenture has also brought on ex CMOs, CPOs and domain experts to lead categories in their global delivery network. • **As-a-Service Capabilities**: Accenture is advocating an As-a-Service approach to Procurement Outsourcing that allows clients to select the skills and technology needed to more effectively integrate into their retaining procurement functions than has traditionally been the case. • **Excellent Account Management:** Clients are quick to highlight their delight with their account management leads who make it easier to do business with what can at times seem like a giant firm. They consistently cite unbelievable commitment to deliver. • **Modularize the Service Offering:** Accenture has recognized that their end-to-end offering was too complex to a segment of the buyers. Recognizing the need for more flexibility and simpler ways to contract for the procurement services, Accenture made the necessary changes to offer modules of their services now. • **Innovation in Delivery and Commercial Model:** Accenture has moved all of its contracts to Fixed fee constructs with a performance based fixed fee element and delivery on the Radix business platform it provides. • **Balanced Client Portfolio:** Accenture has a balanced portfolio ranging from medium to large enterprises across most major industries.	• **Maintaining the Community:** Several clients mentioned they would value Accenture opening up their client base to them, organize training and education, provide access to communities and further create peer-to-peer forums with guidance on the future of procurement. Accenture has already taken steps to do this through SpendTrends, opening up a private network where clients can get in and engage. They are also pursuing broader client round tables. • **Reputation as Consultants:** Clients tell us about struggling to position Accenture as partners to the internal organization due to their consultancy reputation. Accenture has built a solution model designed to supplement in-house Procurement teams and should continue to broaden experience with that client niche, which clients also appreciate. • **Integrate Global Teams and Learnings:** Clients working with Accenture across different geographies mention a desire to see more integration of geographic teams and the learnings from the transition and delivery in different countries within the same client organization. This would enable quicker implementation, reduce time to value and lessen the burden on the client organization.

Value Chain Services Maturity

- Strategic Sourcing
- Contract Management
- Supplier Management
- Technology Management
- Transactional Procurement

Acquisitions and Partnerships	Key Clients	Global Operations	Proprietary Technologies
Acquisitions • 2015: EnergyQuote JHA: energy management resources, capabilities, expertise, and technology • 2014: Procurian: category expertise and analytics, proprietary technology, added resources and delivery centers **Partnerships** • Automation Anywhere • SAP/Ariba • Coupa • Seal • ServiceNow • Innovation Partnerships with academic institutions such as MIT and Duke University	~ 400 procurement outsourcing clients including: • Large, global bank • Leading multinational technology company • Multinational oilfield services provider • Global insurance provider • Multinational biopharmaceutical company • Multinational food and beverage company • Large, global chemical company • Global logistics and mining company • Multinational consumer goods company • Global education publisher	• Headcount: 13,600+ • Locations (geographic spread of workforce) • North America - 18% • LATAM - 3% • EMEA - 26% • APAC - 53%	• **Workflow Platform** – Used internally by Accenture, it includes: - **Radix** – Multi-client, cloud-based platform, automates and integrates projects, activities, and information throughout the Source-to-Pay process. - **Radix Mobile** – Radix data and insights and the ability to initiate and approve projects, is available via a mobile app. - **Accenture Insights** – Category and process-specific business and market intelligence • **Procurement Performance Management Suite:** Provides clients with visibility into program spend, savings, compliance, and performance and the ability to engage with projects. Includes: **SpendTrends, Spend Analytics, Project Initiation & Management, Pipeline Savings Insights, Buyer Portal, PTP / Compliance Analytics, AP Tool Suite**

Winner's Circle

A global service provider with strong consulting, industry and PLM software expertise

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Blueprint Leading Highlights

- Client Quality – Number of Top 100 Manufacturers as Client
- Delivery – Capability Across All Services In PLM Value Chain
- Acquisition Strategy
- Thought Leadership
- Client Communities

Plan/ Consult

Implement

Manage

Optimize/ Transform

Dassault Systemes PLM

Siemens PLM

Autodesk PLM

PTC PLM

Oracle PLM

SAP PLM

Key Acquisitions

- Chaotic Moon (2015)
- evopro Group (2014)
- PRION Group (2013)
- PCO Innovation (2013)
- Fjord (2013)

Strengths

- **Strong Delivery Capability Across All Services, Verticals, And PLM Software:** Accenture has one of the most balanced portfolios of vertical expertise and PLM software capability. Accenture works with one or more of the top four companies by revenue in each of the verticals and has used its experience to develop templates for repeatable industry offerings. The service provider has strong delivery capability across the PLM value chain. Most of Accenture's PLM workforce has expertise and deep knowledge in consulting, architecture, future roadmap, transformation, etc., which is helpful for strategic client engagements.
- **Capability Augmentation Via Acquisitions:** A couple of PLM service providers (PRION and PCO Innovation) were acquired by Accenture in the last four years. Also, Accenture's other acquisition in the digital, engineering and consulting space (Fjord, Chaotic Moon, evopro Group) are relevant in the PLM space too. These acquisitions augment its PLM capabilities across services, verticals and PLM software.
- **Strong Initiative In Creating PLM Client Communities**: Twice a year, Accenture hosts PLM Forum providing an informal setting for R&D and engineering executives to share best practices, lessons learned and emerging trends.
- **Quality Of Clients:** Accenture has one the highest number of clients in the top 100 manufacturer lists, which demonstrates its client quality.
- **Thought Leadership:** Accenture has demonstrated strong thought leadership in the PLM space by publishing one of the highest numbers of PLM-related articles in the last 12 months.

Challenges

- **Small And Medium Size Clients:** The strategy of Accenture is to work with the G1000. While the quality of clients is Accenture's strength, there is an opportunity for Accenture to engage small and medium size clients with the right PLM value proposition.
- **Engineering Expertise:** Though Accenture is making investments in engineering, its engineering services practice is not as big as some of its peers and it can be a constraint in the core engineering process design for PLM implementation. Reference clients have pointed that Accenture has some scope for improvement in few niche technical areas.
- **Organizational Complexity Perception:** The PLM business in Accenture is embedded in different service lines such as Strategy, Consulting, Digital, Technology, and Operations, which is a different approach than some of its competitors. This structure can be challenging to new PLM clients that are used to dealing with simpler structures of some of the other service providers. Accenture is addressing this by creating a Product Lifecycle Service (PLS) functional practice which cuts across five service lines described above.

Key Clients

Top 100 Manufacturers as Clients: 35

Clients: 170+ PLM Services clients including:

- German Automobile Manufacturer
- Japanese Automobile Company
- US Aerospace Company
- Dutch Electronic Manufacturer
- US Internet Company
- US Industrial Equipment Manufacturer

Global Operations Centers

PLM Services Headcount (In-Scope): 4,000 -4,500 estimated by HfS

Locations: 10+ major PLM delivery center locations including:

- North America: Canada, US
- Europe: Hungary, Romania, Turkey
- Asia Pacific: India, Philippines
- ROW: Mauritius

Proprietary Tools / Platforms/ Accelerators/ IP

- *Product Development Diagnostic Toolkit*: End-to-end PLM and product development process mapping
- *Enterprise Product Information and Content (EPIC):* Intelligent portal that connects to all major PLM solution providers
- *PLM Development Accelerators*: In-house tools for developing major PLM technologies
- *myPLM Learning Platform:* Functional and technical training used both externally and internally

Accenture – Internet of Things Services 2016

Winner's Circle

Business strategy through to execution continuity with strong IoT expertise as an ingredient of a broader digital platform

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Blueprint Leading Highlights

- Broad Digital Strategic Strengths
- Strong Vision for the IoT
- Flexible Pricing Models
- Creation of Proprietary Frameworks
- Industry Expertise

IoT Services Offering Maturity:

- IoT Consulting
- IoT Enablement
- IoT Connectivity
- IoT Integration
- IoT Management

Strengths

- **IoT Is in the Mobility Group Within Digital Practice:** Accenture's Mobility Strategy and Consulting group heads up innovation and drives action plans with clients for the IoT, pulling in the various Accenture platform technologies and partnerships as needed. Momentum is under way with 1,200+ IoT engagements in 2015 and 2016.
- **Internal Platforms, Tight Partner Relationships:** There is a focus on developing additional proprietary digital software and APIs this fiscal year for the IoT in order to build out foundations for Accenture and its clients.
- **Very Strong in Large-Scale Complex Industrial and Manufacturing IoT, and Connected Smart Buildings:** With 30 As-a-Service IoT apps, Accenture is investing ahead of the curve for all sizes of projects from buildings to the "things" connected to them.
- **Strong Portfolio of IoT Work:** Accenture is mature and experienced across many industry verticals in IoT, implementing the backend data flows and interoperability needed to disseminate intelligence.
- **Accenture IoT Ignite:** This methodology drives business value prototyping, PoCs, and project planning ties with the larger services organization to scale projects.
- **Significant Ready-to-Deploy Technologies:** Accenture's accelerators allow agility and speed to market for IoT projects, backed by dedicated staffing and processes.

Challenges

- **As-a-Service Positioning**: Accenture continues to actively build its IoT offerings around an As-a-Service model. This approach, along with complex partnering relationships, may not be a good fit for some client needs and cultures rooted in less flexible workflows and technology relationships, and Accenture will need to help bridge these companies from today to tomorrow.
- **IoT Embedded in Mobility Practice:** This makes sense from an Industry 4.0 perspective, but some competitors have a more direct lineage to digital strategy, a better fit for certain types of IoT goals.
- **Strong Partnership Model:** Accenture may run into challenges as the market matures and existing business models are disrupted between larger tech players, causing stress to client platforms as former allies become adversaries.
- **Messaging:** IoT is buried in generic Accenture digital marketing positioning, and it can be hard to identify specific Accenture IoT attributes, unique selling, and value propositions.

Service Delivery Operations

- Innovation
- Execution
- Industrial
- Entrepreneurial

Headcount: About 5000 in IoT and Mobile, about 36000 in Accenture Digital

Delivery Network: 30% US, Europe, Asia; 55% India; 10% Philippines; 5% Eastern Europe

Client Profile

Go-to-Market Approach:

Accenture's IoT practice formed in December 2014 as part of Accenture Mobility, which is part of Accenture Digital.

Accenture IoT practice organized across five business towers: Connected Transport, Connected Spaces, Connected Operations, Connected Health, and Connected Commerce. These towers have 30+ client offers.

Target Industries:
Global 2000 companies in 19 industries. The Accenture IoT core target industries include: Utilities, Energy, Industrial Equipment, Chemicals, Travel, and Transportation.

Acquisitions / Partnerships

Acquisitions: Mobgen (2016)
- OPS Rules (2016)
- Cimation (2015)
- Gapso (2015)

Relevant Strategic Investments
- Ripple Labs (2016)
- VenueNext (2015)
- ChaoticMoon (2014)
- Apigee (2013)

Partnerships:
- Amazon Web Services
- Apigee
- Cisco
- GE
- Intel
- Microsoft

Proprietary Technologies / Platforms

Connected Transport: Connected Vehicle, Fleet, Transit Systems, Insurance, Freight.
Connected Spaces: Connected Home, Connected Buildings, Connected Cities
Connected Operations: Connected Asset Management, Connected Worker, Connected Manufacturing, Connected Agriculture
Connected Health: Remote Patient Monitoring, Wellness and Prevention, Connected Pharma, Intelligent Health Enterprise
Connected Commerce: IoT Payment and Data Security, Blockchain and Cryptocurrency, Connected Contextual Commerce.
IoT platform: **Connected Platforms as a Service** (CPaaS) integrated with **Accenture Insights Platform**, a cloud analytics solution, and the **Accenture IoT Device Platform** (AIDP) an ARM-based Rapid Prototyping device development platform.

HfS BLUEPRINT REPORTS

Winner's Circle

Global system integrator pushing the envelope on innovation through embedding analytics in automation and expanding vertical solutions

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Blueprint Leading Highlights

- Vision for and investments in the evolution of IA
- Approach to apply IA across organizational boundaries
- Integration of process and organizational consulting
- Actual delivery of services
- Flexibility to provide end-to-end and point solutions

PLAN

IMPLEMENT

MANAGE

OPERATE

OPTIMIZE

Strengths

- **Holistic automation strategy:** Accenture stands out through investments in a holistic automation strategy. The reference point is the Accenture Intelligent Automation Platform integrates Business Workflow Management, Delivery Management, Intelligent Automation, and Analytics and Insights, with a neutral ERP interface at the core. This is further enhanced by the Accenture AI Engine that provides an architecture abstraction layer for interacting with various Autonomics services, such as natural language processing (NLP) and machine learning.
- **Analytics is strategically embedded in IA:** Accenture Digital has more than 13,000 professionals dedicated to integrated analytics, essential for converting the data driven by Intelligent Automation into actionable insights and business outcomes; Accenture Labs further harnesses and integrates artificial intelligence, machine learning, and predictive analytics into delivery.
- **Integrated vertical offerings:** Accenture is driving IA end-to-end and point solutions into industry offerings. Examples include Claims Adjudication Advisor and Lease Abstraction Advisor that combine a virtual agent with broad cognitive capabilities.
- **Strong collaboration with ecosystem partners:** Accenture is leading the industry by building out dedicated IA practices. IBM Watson and IPsoft Amelia are examples that are being ramped up aggressively. The strategic lever in the ecosystem is the AI Engine that allows a plug-and-play integration of disparate IA assets.

Challenges

- **Proprietary IP:** Accenture doesn't have its own proprietary "Cognitive Automation Platform," such as ignio, Mana, HOLMES, or Watson. Although Accenture's technology-agnostic approach is largely seen as one of its unique strengths, clients that prefer the integrated platform approach may prefer to work with other service providers. Accenture may want to review whether it needs to develop its own Cognitive Automation platform in the future if not having one becomes a disadvantage.
- **Change and stakeholder management:** Some RPA clients would like to see more proactive support for engaging with stakeholders on change management, especially in the context of managing IT implications. The project teams did not cover those implications or have the appropriate skill sets to do so.

Relevant Acquisitions/Partnerships

Partnerships include:

- IBM Watson practice
- Nervana
- IPsoft, including Amelia Practice
- Saffron
- AutomationAnywhere
- Blue Prism
- Fusion
- Next IT

Key Clients

Accenture works with clients across industry sectors:

- WH Smith
- UK Department for Work and Pensions
- Italian government agency
- Oil and gas company
- Global law firm
- Large pulp and paper manufacturer
- Large casino company
- European telecommunications company
- Global technology company
- Global financial service company

Operations

Geographic footprint and scale of the Intelligent Automation practice

Accenture has established a cross-company Artificial Intelligence Governance Committee, as well as a Growth and Strategy Working Group, comprised of senior leaders from each of Accenture's five businesses.

The Artificial Intelligence Lab in Dublin promotes partnerships with start-ups, accelerators, and universities around the world.

The Accenture Analytics Data Science Center of Excellence (CoE) is comprised of nearly 100 highly specialized individuals possessing a unique skillset of deep domain expertise in advanced analytics and machine learning.

Technology Tools and Platforms

- **Accenture Intelligent Automation Platform** integrates four essential parts—Business Workflow Management, Delivery Management, Intelligent Automation, and Analytics and Insights, with a neutral ERP interface at the core, allowing seamless communication with external data sources and client systems.
- **Accenture AI Engine** provides an architecture abstraction layer for interacting with various Autonomics services, such as NLP and machine learning.
- **myWizard** augments human technologists with virtual agents powered by AI, armed with analytics capabilities and plugged directly into Accenture's other automation assets.
- **Accenture App Exchange:** This internal crowdsourcing platform houses more than 1,000 automation solutions.
- **CORD** methodology has been adopted to ensure a disciplined approach to rapid identification, deployment, and scaling of automation solutions.

Winner's Circle

Focused on delivering Transformative Business Outcomes from its Cloud First Applications Team

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PLAN
IMPLEMENT
MANAGE
OPERATE
OPTIMIZE

Blueprint Leading Highlights

- Quality of Account Management Team
- Engage Clients and Develop Communities
- Incorporate Feedback
- Geographical Scale
- Tools Development

Strengths

- **Breadth and Depth of Capabilities:** Accenture provides the full range of services to support Workday HCM and FM applications, supported by a Global Delivery Network. Its North America delivery centers act as Centers of Excellence for the various Workday modules. For example, its new Chicago Workday Hub is a Center of Excellence for Absence, Benefits and Time Tracking. Accenture intends to add Compensation, Recruiting, and Talent skills to this center by year end. Accenture has made strategic acquisitions and partnerships to strengthen cloud capabilities and/or enhance Workday offerings. Accenture has created a dedicated Cloud First group that has the freedom and flexibility to identify investment requirements to align with clients' specific needs in SaaS services. Implementation and management services teams work together to share knowledge and enhance client experience.
- **As-a-Service Strength:** Accenture is evolving its Workday services offerings to deliver in an As-a -Service model, with plans to cover all the ideals in the HfS As-a-Service model. This includes a keen focus on client business outcomes, and the inclusion of intelligent automation, analytics and actionable insights, and security and digital services. This include tools which are underpinned by service and pricing flexibility, for example clients can defer implementation costs to the run phase of the engagement.
- **Talent**: Accenture's talent development strategy supports team members to achieve functional, technical, domain and consultative expertise as well as the ability to bring thought leadership to the market and clients. Such retention programs are clear differentiators.
- **Client Feedback**: Clients commend Accenture's skills in change management and ability to deliver on time and on budget. One client also said that the quality and approach of the functional team was "tremendous."

Challenges

- **Expand Industry-Led European Business:** Accenture has opportunities to expand its industry-led Workday services practice outside of North America. The North America Workday service practice is aligned by industry, with a single point of contact in each of the Operating Groups identifying leads. There are also leads in the UK, the Netherlands, Germany and France, where Accenture is seeing good growth. Accenture is identifying opportunities to develop industry related tools and technologies, which could stand it apart as the market becomes more competitive, especially in Europe.
- **Mixed Feedback About Innovation**: One client highlighted that Accenture was not visionary, while others indicated this as a strength. Accenture invests heavily in innovation so clients should be clear about expectations upfront to avoid disappointment.

Relevant Acquisitions/Partnerships

Acquisitions include:
- Cloud Sherpas (2015)
- FusionX+B7:F8 (2015)
- i4C Analytics (2014)

Partnerships include:
- ADP
- OneSource Virtual
- ServiceNow

Key Clients

Accenture works with small and large enterprises spanning geographies and industry sectors. This spans enterprises with 3,000 to 120,000 employees with average size of 30,000 employees.
Geographic Coverage: North America, Europe, Latin America, Asia Pacific

Industry Coverage: Accenture works across industry but has dedicated Workday service practices in the Communications, Media and Technology, Products and Higher Education

Some publicly disclosed clients include:
- Cushman & Wakefield
- Huntsman
- Prudential Corp Asia
- Telefonica Digital

Operations

- Partner Since: 2008
- Number of Employees in Workday Services Practice: 800
- Number of Certified Workday Consultants: 600
- Average Number of Certifications Per Consultant: 2
- Total Number of Clients: 85
- Total Number of Projects/ Ongoing Engagements: 135

Key delivery locations for Workday practice:
- North America: All major cities, including Atlanta, Chicago, NYC Toronto
- Europe: All major countries, including France, the Netherlands, the UK
- Romania: Bucharest
- Asia: Bangalore (India); Manila, Taguig (Philippines)
- Australia: Sydney

Technology Tools and Platforms

- *Legal and Regulatory Accelerator*: to facilitate localisation
- *Accenture Client Enablement (ACE)*: integration tool for requirements, decisions, actions, risks and issues, status and reporting
- *Rapid Configuration Suite:* pre-built templates, tools and accelerators.
- *Accenture Integration Suite:* supporting documents and field-tested components
- *Accenture Systems Diagnostic:* Standardizes and optimizes objects, processes and configurations
- *Change management toolkit:* best practices
- *Accenture Implementation Guide for Workday*
- *Payroll Reconciliation Accelerator*
- *Mobilization Toolkit*
- *Business Process Design Accelerator*
- *Conversion Suite: data migration tools*
- *Accenture Release Management Services Suite for Workday:* release updates

HfS BLUEPRINT REPORTS

Winner's Circle

Sophisticated and innovative thought leader with a wealth of knowledge and experience looking to "change the game" in healthcare operations

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Blueprint Leading Highlights

- Vision for PHCM and Services
- Quality of Account Management
- Use of Intelligent Automation
- Use of Analytics to Drive Insights
- Investments in Future Talent and Technology
- Use of Partnerships and Acquisitions

Value Chain Coverage:

- Population Data Mgmt / Analytics
- Consumer Engagement
- Utilization Management
- Care Coordination
- Performance Mgmt & Operational Analytics

Strengths

- **Wealth of Knowledge, Discipline, and Resources:** Accenture's health practice stands out in terms of talent—knowledge and experience in healthcare practices, policies, current and up and coming technologies, and partnerships. Clients appreciate how they can work through ideas and issues and Accenture will bring in its own and partner talent to participate. Accenture also develops a thorough understanding of its clients' organization, network, and culture.
- **Increasingly Complex Clinical Processing:** Accenture works with clients to determine where the services in the clinical health management space are not differentiated and can be reliably sourced. Accenture has built out specialty support for complex clinical processing, such as gene therapy and spinal fusions.
- **Business Outcome Oriented Analytics:** Building momentum on the analytics capability we saw in the first PHMC blueprint, Accenture offers as-a-service analytics to target specific results such as risk score accuracy and utilization management. For example, it has a system to monitor and identify at the procedure level and by team, or state, and figure out the high volume cases, which codes and the impact of nurse review and escalation. Operational analysis also identifies opportunities to help clients refine their utilization review approach and workflow.
- **Automation in Utilization Management:** A library of automation tools range from simple macros and workload distribution to experimenting with artificial intelligence in prior authorization.
- **Design Thinking and Innovation:** Accenture is increasingly tapping into design thinking to bring "out of the box" approaches to healthcare clients. They shared examples, such as for chronic condition management services that center on patient expectations to define the roles of healthcare providers and payers in education, communication, and payment.

Challenges

- **Flexibility:** Accenture is a high end sophisticated business, well positioned to help organizations to rethink or launch new business and operating models. However, as a project or initiative takes shape, HfS hears from clients who would like Accenture to be more flexible and open about changing as well, especially when it comes to terms and contracts so that a scope of services and contract defined at the outset of an engagement does not limit the future possibilities.
- **Improve Business Process Services Visibility**: Accenture could better highlight the depth of healthcare capability, scale, experience, and innovation in BPO. Since the last blueprint, Accenture has converted a couple of short term engagements into longer-term ones, so we do see momentum here. However, the Accenture Operations capability is not as apparent as strategy, consulting, and technology.
- **Hierarchical Nature:** Accenture's mode of operating is still fairly hierarchical when it comes to discussions and initiatives. HfS heard from clients that Accenture has a reputation for hiring bright people at all levels, and they would like to benefit more directly from this depth; for example, give the bright young generation a voice, not just a seat, at the table.

Acquisitions / Partnerships

Acquisitions include:

- Radiant (2014) for health management capability
- Fjord (2013) including design thinking capability

Partnerships:

- Care Management, EHR & CRM Platforms: Pega, Salesforce, Evariant, Epic Systems, Cerner, ECS Medical Record Retrieval
- Population Health: Harold P Freeman Patient Navigation Institute
- Academic: Duke University, Princeton, MIT, Jefferson School of Population Health
- Automation: Automation Anywhere, Blue Prism, IPSoft
- Industry Organizations: AHIP, CAQH, CHIME, Population Health Alliances, HIMSS
- Interoperability Platforms: Intersystems, Centri Health, Orion

Client Profile

- **Population Health and Care Management Business Process Outsourcing Clients: <10**
- **Target Clients:** Annual revenue exceeds $2 billion and their derivative organizations (e.g., ACOs), including providers, payers, pharmacy benefit managers, retail health providers, post acute care providers, healthcare technology providers
- 63 population health clients worldwide from consulting to BPO

Service Delivery Operations

- Population Health and Care Management offerings started with consulting in 1995; application outsourcing, 2001; BPO in 2011
- Accreditation: URAC, through Radiant, for Health Utilization Management – 4 sites in Philippines; 27 state Utilization Review licenses; 41 state TPA licenses
- Healthcare Headcount: 20,000; 1,400 in global health management
- Specialties: Doctors, Nurses, Pharmacists, Physiotherapists, Dentists, Certified Medical Coders
- Center locations: Philippines (70%), India (25%), USA (4%), Spain (1%)

Proprietary Technologies

- *Accenture Insights Platform*, including Intelligent Patient Platform (for patient outreach; aligned with salesforce.com) and Health Analytics for Payer Optimization (supports risk score accuracy)
- *Accenture Clinical Review Analytics Accenture Digital Workforce*: for performance management, using RPA
- *Accenture Public Health Platform*
- *Accenture Operations Navigator*

HfS BLUEPRINT REPORTS

Winner's Circle

Broad capabilities across the Value Chain and deep industry expertise making big investments in As-a-Service innovation and digital

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Blueprint Leading Highlights

- Actual Delivery Of Services
- Flexibility in Delivering End to End and Point Solutions
- Vision For Oil & Gas Market Evolution and Services
- Depth of Industry Specific Capabilities
- Experience delivering to Super Majors and NOC's
- Strategy for Intelligent Automation

Value Chain Services Maturity

- Upstream
- Midstream
- Downstream
- Cross Value Chain BPO and Engineering
- Cross Value Chain ITO

Strengths

- **Investments In Energy Operations Services and Talent:** Accenture Operations has made significant investment in innovation in Energy Operations services and Industry Talent. Clients we spoke with are impressed by the deep talent Accenture brings to engagements.
- **Extensive Use of Intelligent Automation in Energy Operations BPO Service Delivery:** Accenture Operations is investing in technology and automation to drive the As-a-Service evolution, adding descriptive, predictive and prescriptive analytics to the business processes.
- **Significant progress in The Move to As-a-Service:** Accenture has set up Digital centers to help Oil & Gas clients envision future opportunities in digital operations that improve operational efficiency and agility. Accenture is actively offering and delivering As-a-Service contracting models with the prevalence of new digital services, promoting outcome-based models and As-a-Service structures in new deals.
- **Integration of Consulting, BPO and Technology in Oil & Gas:** Services across the value chain are delivered by the different groups within Accenture. The Energy Industry Group offers Assets and Operations Services connecting workers, assets, operations. Capital Project Services, with Strategy, Consulting, Digital, Technology and Operations groups providing industry specific services from their area of expertise.
- **Investment in Industry Specific Capabilities***:* Acquisitions like Schlumberger Business Consulting and Cimation have brought in substantial industry expertise in areas like strategy consulting, Industrial Internet of Things, process automation, asset analytics and cyber security.

Challenges

- **Vision to Action to Sustain Change in Clients:** Accenture has a comprehensive vision for the Oil & Gas industry. The challenge is to help traditionally conservative companies to seize the opportunities for increased agility, greater efficiencies in operations and new competitive advantages stemming from digital technologies such as IoT and analytics. Further investment in industry engagement, like summits and online forums, could help spread best practices and thought leadership across clients.
- **Providing Services to Smaller Oil & Gas Companies:** As sourcing becomes more strategic for many O&G companies, the market opportunity for service providers grows. With the current focus on the top half of the Global 2000, the challenge for Accenture is to bring their innovative and high end services approach to smaller companies. HfS expects to see the smaller scale delivery of services particularly fueled by As-a-Service models, Intelligent Automation and multi-client digital platforms

Relevant Acquisitions / Partnerships

Acquisitions:
Schlumberger Business Consulting (2015), Gaspo (2015), Cimation(2015), Structure (2015), Hytracc (2014)
Partnerships:
Technology: SAP, Oracle, Microsoft, HP, AWS, Cisco
Platforms: Salesforce.com, Workday, ServiceNow, SAP Ariba, NetSuite, SuccessFactors
Automation and RPA: IPSoft, Automation Anywhere, BluePrism
O&G specific: GE for Intelligent Pipeline Solutions, SAP for Upstream Production Operations
Academic: Duke, MIT

Key Clients

200+ Clients globally including:

- All six integrated super majors
- National Oil companies
- Oil Field Services companies
- Exploration & Production companies
- Independent oil companies

Global Operations

Locations: 14500+ Energy FTEs (~3000 in BPO) across 50 countries globally:

- US and Canada (Houston, Calgary)
- India (Bangalore, Hyderabad)
- Europe (Stavanger, Paris, Aberdeen, Lisbon, Madrid, Rome, Amsterdam, Munich, Copenhagen)
- Asia Pacific (Australia, Indonesia, Malaysia, Philippines, China, Japan,
- Latam (Colombia, Chile, Argentina, Brazil, Mexico)

Accenture operates 31 Energy Hubs and a Oil & Gas Shared Services Center of Excellence in Bangalore, a IoT Center of Excellence for Resources in Singapore, a Plant Optimization Center in Brazil and the Accenture Digital Energy Showcase in France

Proprietary Technologies / Platforms

- *Accenture Enterprise Services for Energy*
- *Accenture Digital Assistant*
- *Accenture Knowledge Navigator*: Content repository for policies, procedures, training materials
- *Accenture Operations Navigator*: "one-stop" portal for operational performance and business process data visibility
- *Accenture BPO App Exchange*: one stop access to all automation solutions
- *Intelligent and Automated Workflow tool*
- *Accenture Cognitive Engine*
- *Accenture Digital Workforce Platform*
- *Accenture Insights Platform*

HfS BLUEPRINT REPORTS

Winner's Circle

Mortgage As-a-Service visionary driving operationally excellent engagements by leveraging leading industry assets

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Blueprint Leading Highlights

- Actual Delivery Of Services
- Experience Delivering To Top 50 Lenders
- Quality of Account Management Team
- Vision for Mortgage As-s-Service Market Evolution
- Roadmap for MOS (Internal and 3rd Party) Usage
- Integration of Customer Feedback and Collaborative Models of Engagement

Offering Maturity

Origination: 75%

Servicing: ≃20%

Default: 5%

Strengths

- **Creating Industry Dialogue And Vision For Mortgage As-a-Service:** Accenture Operations is exploring ways to move offerings towards As-a-Service. Accenture Credit Services (ACS) is undertaking research to understand the current state of mortgage operations, and clients' perceptions of and outlook on Mortgage As-a-Service, with a particular focus on how its point solutions could be leveraged in an As-a-Service delivery model. HfS sees this as a strong indicator of Accenture progressing since the last Blueprint on their vision – it is taking the lead to help clients write off legacy technology and processes by first defining and articulating a vision for the market specifically, and understand its readiness and barriers to As-a-Service.
- **Offering Diversity And Operational Excellence In Mortgage Operations:** Accenture Credit Services is maintaining its best-in-class reputation among mortgage clients, particularly in origination and servicing processes. Its sizeable business in commercial mortgage is still unique with few competitors able to touch the complex nature of work involved. Clients give examples of how Accenture has been instrumental in redesigning their credit and operational processes, using automation as a key lever.
- **Relationship Building To Deliver Value Beyond Cost:** Following from the 2014 Blueprint, Accenture is continuing its focus on creating strong account relationships even before the lenders become clients. Multiple clients commended the service provider's ability to customize deliverables and articulate clear governance structures with considerable leadership involvement and engagement, stating that it is "an easy company to do business with."

Challenges

- **Shaping Market Dialogue On Software Vs. Platform Based Services:** As a market leader, Accenture will need to focus on communicating to the market how it intends to balance having a technology agnostic approach at ACS, and acquiring companies with platforms. Clients HfS spoke to had some expectations around greater integration of its platform and services, towards driving results. Accenture, like other service providers in this industry, will need to balance these client expectations for platform based services, creating more transparency around the ways in which business outcomes are delivered through different operating models.
- **Expanding From Point Solutions To Get To As-a-Service:** Accenture has what appears to be the best of a variety of point solutions. A lot of its scale comes from large clients that have engaged with the service provider on these point solutions, making it a challenge and an opportunity for it to turn them into As-a-Service clients in the future, leveraging its technology platform and operations support to deliver outcomes. While this is an industry challenge in general, HfS expects Accenture as a market leader to lead the change.

Relevant Acquisitions / Partnerships

Acquisitions:

- 2013, Mortgage Cadence which bolstered LOS capabilities
- 2013, Vivere Brasil, a majority stake acquisition which brings Accenture Credit Services into Brazil.
- 2011, Zenta which brought Accenture into the Mortgage Services market

Key Clients

90 major Mortgage Operations clients, including:

- Top five U.S. financial institution
- Top 10 U.S. mortgage banker
- Top five mortgage servicer
- Top 30 U.S. financial institution
- Top five commercial bank

Global Operations

Headcount/Locations: More than 375,000 employees worldwide with 3,500 focused on Mortgage across 10 locations:

- North America: Charlotte, Dallas, New York, San Antonio, Sacramento
- Latin America: Sao Paulo
- India: Bangalore, Chennai, Mumbai
- The Philippines: Manila

Proprietary Technologies / Platforms

- *Accenture Credit Services Proprietary Technology Platform:* Leveraging Mortgage Cadence as a proprietary LOS system for pipeline management in loan lifecycle, including straight-through processing and quality checkpoints
- *PAR (Prioritization, Allocation, Routing):* An algorithm that systematically routes and reassigns loans based on loan criteria, turn-time requirements and licensing
- *BPO Navigator* for analytics and performance management
- *First Pass Yield System (FPY)* for continuous improvements
- *Pipeline Allocation Management (PAM)* for optimizing workload allocation
- *Vivere (Brazil):* A consumer mortgage and construction-lending contract processing platform (origination and administration)

HfS BLUEPRINT REPORTS

Winner's Circle

Offers the broadest global reach and deepest vertical capabilities in ServiceNow services, while supporting the Cloud First strategy

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High performance. Delivered.

PLAN
IMPLEMENT
MANAGE
OPERATE
OPTIMIZE

Blueprint Leading Highlights

- Actual Delivery of Services
- Geographical Footprint and Scale
- Experience in Delivering Industry Specific Solutions
- Application and Platform Strategy
- Integration of Consulting and Technology Capabilities

Strengths

- **Cloud Sherpa acquisition provides scale and depth:** Clients cite Accenture's strength as a true business partner and its "excellent" account management capabilities. In a nascent market Accenture stands out through domain expertise. Clients appreciate the quality of the technical and business understanding, and availability in many geographies. Thus far, the acquisition has had a positive impact on expanding Accenture footprint in evolving cloud eco-systems such as Workday and ServiceNow.
- **Execution excellence**: Largest ServiceNow practice in the industry. Clients like the broad set of capabilities that get enhanced by Accenture's strength in consulting.
- **Deep vertical capabilities**: Leveraging its vertical go-to-market, Accenture has frameworks and broad assets in Retail, Financial Services, Higher Education, Media, Telecommunications and High Tech. Strong traction in US Federal business.
- **High customer satisfaction levels:** High CSAT scores underlines strong actual delivery of services. Clients cite Accenture's position as 'trusted advisors' that recommend common best practices as well as strong collaboration with clear visibility of the various project streams.
- **Driving standardization on ServiceNow through Business Units:** The internal standardization of the broader notion of service delivery on ServiceNow will drive deeper domain expertise and allow for more scale of talent.. This will help to balance the scarcity of talent leading to delivery personnel being trained on projects. At the same time will help to take clients credibly on the journey toward ESM.

Challenges

- **Vision of the ServiceNow journey:** A more succinct articulation of the transformation journey aligned with the broader notion of the As-a-Service Economy. The includes calling out specific ServiceNow capabilities
- **Proactive guidance on innovation**: Some clients would encourage a stronger guidance on innovation and how to overcome legacy. However, when these issues are being brought onto the table, a swift response tends to happen
- **Leverage of broader automation capabilities**: HfS would like to see a more proactive leverage of Accenture's Intelligent Automation capabilities as part of discussions of ServiceNow projects given its thought-leadership in this space
- **Dilution of Cloud Sherpas culture**: Maintaining some of the agility that a start-up brings; in particular in acting as a change agent for clients

Strategic Positioning

Partner status: Master Solutions Partner (Global Strategic Partner, Gold Partner – Sales, Gold Partner – Services, Authorized Training Partner, Technology Partner)
Acquisitions include:
- Cloud Sherpas (2016)

Strategic Positioning:
- Cloud Sherpa acquisition enhances the Cloud First strategy
- Leverage of Accenture's vertical capabilities and go-to-market; broad set of ServiceNow specific frameworks and accelerators
- Driving ServiceNow into ESM functions
- Negotiated Managed Service Provider agreement to replace Remedy with ServiceNow for outsourcing business and internal use will drive deeper domain expertise

Key Clients

Accenture works with clients across industry sectors:

- A leading global resources company
- U.S. Government Sponsored Financial Consulting Firm
- Direct-broadcast Satellite Service Provider
- Global P&C Insurance Company
- Canadian Integrated Energy Company
- Fortune 100 Managed Health Care Company
- Leading Global Publishing Company
- Multinational Telco & Internet Service Provider
- U.S. Worldwide Clothing & Accessories Retailer
- A Leading Independent Energy Company
- A Leading Global Resources Company
- Global Mining And Resources Company

Operations

CSAT (as reported by ServiceNow customers): 8.7

Geographic footprint and scale of the ServiceNow practice
- North America: 315
- EMEA: 95
- APAC: 130
- GDN: 210

Established practice leadership and delivery teams in US, Australia, Singapore, Japan, UK, Ireland, Germany, France, Italy, Nordics, Netherlands, Brazil and Mexico.

Delivery centers in US, Philippines, India and Bratislava.

Technology Tools and Platforms

- **ServiceNow Business Case Assessment**
- **Rapid ITSM**
- **Platform Development**
- **ServiceNow as a Managed Service**
- **Enterprise Service Management Offerings**
- Application-aligned "EXCELerator" best practice solution sets
- Industry-aligned best practice frameworks
- ServiceNow Authorized Training Partner

Winner's Circle

Business outcomes–focused global service provider with compelling As-a-Service vision and a full set of offerings in telecom

accenture operations

Blueprint Leading Highlights
• Customer Quality – Number of Top 50 Telcos as Customer • Delivery – All Processes Across Value Chain • Plans for As-a-Service • Innovation - Examples • Business Outcomes Measurement
Network
Fulfillment
Assurance
Billing
Wireless
Wireline/ Broadband
Cable

Strengths

- **Vision of Digital Telco in As-a-Service Economy:** Accenture has developed a compelling vision and roadmap of how telcos can transform to become integrated digital service providers (IDSPs) to compete in the digital economy. The Operations team is working with other Accenture Growth Platforms (Strategy, Digital) in delivering on the IDSP promise. Accenture has been investing in and developing tools and technology for telecom digital operations. It aims to gradually transform telcos' business toward digital operations, where an increasing proportion of the business processes can be delivered as BPaaS. The As-a-Service ideals are integral to its strategy and offerings.
- **Delivery of Services for All Processes:** Accenture has a depth of client experiences and capabilities across all telecom operations sub-processes of network, fulfillment, assurance, and billing. Clients pointed to examples of transformative solutions in all areas and to a deep bench of skilled delivery resources. Customer references have confirmed that they also benefited from automation and analytics capabilities of Accenture in the last couple of years.
- **Analytics and Experience of Delivering Business Outcomes:** Accenture has demonstrated its strong analytics credentials with a large number of case studies. Clients pointed to Accenture's focus on tangible business outcomes such as capex efficiency, process efficiency, cost reduction, customer satisfaction, and compliance in the engagements.
- **Quality Of Customers:** Accenture has one the highest number of clients in the ranks of the top 50 telcos.

Challenges

- **Moving Beyond Tier 1 Telcos:** Accenture's strategy is to work with the G2000. Out of its 30+ telco customers, 23 are among top 50 telcos. While the quality of clients is Accenture's strength, there is an opportunity for Accenture to engage with Tier 2 and Tier 3 telcos with the right value proposition.
- **Getting Best Out of Accenture:** Reference clients have pointed out that Accenture's BPO delivery is sometimes constrained due to IT issues. If IT is not managed by Accenture, the BPO team may have to do temporary work arounds which can impact the delivery of business outcomes. In the opinion of several clients, it will be beneficial for both clients and Accenture if both IT and BPO are managed by Accenture. The Accenture team can be more proactive in conveying the value proposition of single source IT and BPO to stakeholders. This will also help Accenture to accelerate the deployment of intelligent automation into customer engagements as well as accelerate their As-a-Service strategy.

Relevant Acquisitions/Partnerships	Key Clients	Global Operations Centers	Proprietary Technologies / Platforms
Acquisitions: • Acquity Group (2013) • Fjord (2013) • i4C (2014) • FusionX (2015) **Partnerships**: • Alcatel-Lucent/ Nokia, Cisco, Huawei, Oracle, SAP, ServiceNow, Vlocity	**Top 50 Telcos as Clients:** 23 **Clients:** 30+ telecom BPO clients including: • Dutch Telco • Australian Telco • European Telco • US Telco • Brazilian Telco • Danish Telco	**Telecom BPO Headcount (In-Scope):** 5,000 -6,000 estimated by HfS **Locations**: 15+ telecom BPO delivery center locations including: • North America: US • Europe: Czech Republic, Poland, Slovakia, • APAC: Australia, India, Philippines • ROW: Argentina, Brazil	• *Accenture Operations Global Productivity Hub (GPH):* In-house application for productivity monitoring and control • *Accenture Operations App Exchange:* In-house repository for automation • *Accenture Operations App Explorer*: In-house tools for analytics • *Accenture Liquid Workforce*: A crowdsourcing-inspired platform and initiative • *Accenture Intelligent Order Management (IOM):* Tool for order management analytics

HfS BLUEPRINT REPORTS

Winner's Circle

Forward thinking and innovative service provider with a global reach

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Blueprint Leading Highlights

- Use of Intelligent Automation
- Application of Plug & Play Digital Business Services
- Collaborative Engagement
- Writing Off Legacy
- Focus on Business Outcomes

Recruitment (RPO)

Learning Services

Benefits Admin

Payroll

Workforce Dev Serv.

Analytics

Strengths

- **Extensive Use of Intelligent Automation Within MPHRO Service Delivery:** Accenture has implemented extensive use of automation in its MPHRO contracts from compliance through to email response and actioning. Clients have praised the proactive nature of Accenture's automation implementation within MPHRO functions
- **Service Delivery Based on Business Outcomes:** Accenture is aiming to sell MPHRO deals through addressing end business goals.
- **Integrated Service and Technology Delivery:** Accenture has an ecosystem of partner and proprietary HR technologies that it implements into client organizations and are included in Accenture's outcomes and transactional based pricing.
- **Global MPHRO Support Across Value Chain:** Accenture has reached a "critical mass" whereby it can deliver on multi-country and multi-language MPHRO contracts. The service provider has partnered with a major global payroll service provider in its delivery of long-tail country payroll contracts.
- **Key Focus on Employee Engagement:** Accenture has developed its MPHRO services around employee engagement and satisfaction. As this is one of the leading drivers to MPHRO adoption it will help foster growth for Accenture within the MPHRO market.
- **Platform Agnostic:** Accenture has partnered with both SuccessFactors and Workday to deliver implementations, even going so far as launching a Workday CoE in Bucharest.

Challenges

- **Fast Paced Career Culture within Accenture:** The fast paced career trajectory of its staff means the vital members of a delivery team are often moved off of accounts after a relatively short time. Accenture needs to manage client expectations and transitions to make this a smooth experience for both employees an clients.
- **Pricing Flexibility:** Clients have stated that Accenture is average when it comes to negotiating the pricing terms of a contract.
- **Cross Client Engagement:** Accenture has not yet successfully launched specific cross client HRO forums or summits. These forums create the breeding ground for best practice sharing between clients and can also be useful to the service provider in development of service delivery through holistic client feedback.

Relevant Acquisitions / Partnerships

Acquisitions:
- FusionX (2015) to enhance cybersecurity
- Cloud Sherpas (2015) to enhance cloud consulting capability
- i4C Analytics (2014) to enhance analytics capability
- Solium

Partnerships:
- Technology: ServiceNow, Workday, Successfactors, Oracle
- Service: Major Global Payroll Provider

Client Profile

~80 MPHRO clients Including:
- Unilever
- Alcatel Lucent
- Bank of Ireland

Service Delivery Operations

- TOTAL MPHRO Headcount: ~5,500
- MPHRO delivery in 20 centers
- Delivery center locations: North America, Brazil, Argentina, Western Europe, China, Sri Lanka, Japan, the Philippines, and Singapore, India, Czech Republic, Romania and South Africa
- Workday COE in Bucharest
- MPHRO Geographic Support: North America, LATAM, EMEA and Asia Pacific

Proprietary Technologies

- *One Learning Plan (1LP)*
- *HR Chat tool*

HR Apps:
- *Candidate Interview App*
- *Intelligent Recruiter App*
- *Talent Demand Forecaster App*
- *Talent Performance Profiler App*
- *Recruitment Funnel Analyzer App*
- *Talent Supply Analyzer App*
- *Attrition Predictor App*

HfS BLUEPRINT REPORTS

Winner's Circle

Investing to progress its talent, embrace Intelligent Automation and evolve to business outcomes-driven F&A solutions As-a-Service

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Blueprint Leading Highlights

- Talent Development
- Applying Intelligent Automation
- Intelligent and Collaborative Engagement
- Solutions for Accessible & Actionable Data
- Investing in Future Talent and Technology
- Vision for Finance As-a-Service

Value Chain Coverage:

- Procure to Pay
- Order to Cash
- Record to Report
- Finance Transformation
- Analytics

Strengths

- **Evolution to As-a-Service Underway:** 25 years into BPO, Accenture is investing in talent and technology to embrace As-a-Service delivery. HfS hears from clients an appreciation for the firm's depth of consultative F&A process talent, capable delivery staff and technical expertise. It has proven ability to service FP&A queries using mobile and desktop apps is a genuine "As-a-Service" attribute that leverages talent, technology and consumption pricing.
- **Intelligent Automation Focus:** Accenture has targeted specific areas of F&A for RPA, such as ServiceNow in R2R to streamline email requirements, integrate workflow, and data load into client ERP systems; and proprietary Radix for automation and workflow in P2P. A move into AI includes a pilot virtual assistant, IPSoft's Amelia, at the F&A Vendor Help Desk. An App Exchange is a "library" of more than 900 reusable automation and business process solutions. Multiple successful implementations of RPA software tools, such as Automation Anywhere, Fusion and Blue Prism.
- **Training As-a-Service Talent:** "Automation 101" is mandatory training for all BPO delivery professionals to identify processes that can be automated and increase their focus on value-driven tasks. Accenture also rolled out *SolutionLIVE Marketplace* as a unique way to allocate work. Clients appreciate this kind of effort from Accenture that also helps address attrition and increase employee engagement.
- **Integrating Operational and Risk Management Analytics:** Accenture Operations Navigator is evolving from a KPI report tool to a real-time analytics dashboard with up-to-the-minute data and visualization. Accenture uses it to identify bottlenecks and opportunities for automation. We'd like to see it integrate the significant amount of risk and compliance analytics work Accenture does in F&A As-a-Service.

Challenges

- **Prioritizing Where To Invest In its Legacy Client Base:** Accenture has a well-established enterprise client base dating back to the early days of outsourcing. Some of these clients are ready for change, while others are "stuck" in the legacy model, with many still held hostage to legacy ERP systems, making it challenging to take advantage of Accenture's technology capabilities in F&A and delink headcount from cost. Accenture needs to prioritize its client base to nurture those ready for change by investing in pilots and roadmaps, as it has many resources and partnerships to leverage.
- **Shared Problem Finding:** HfS heard, Accenture "could do more to find problems and bring them to our attention," which could be addressed by infusing Design Thinking into the account management, making it a shared effort.
- **Resistance to Mid-Market:** The enterprise market is slow to change, even when it is ready, and HfS sees increased movement in mid-market F&A ($1bn-$3bn clients), which Accenture has not proactively targeted, and is increasingly ripe for As-a-Service. However, investments in firms such as Cloud Sherpas, with mid-market experience, should help evolve the mindset and approach as the enterprise sector becomes increasingly saturated.

Acquisitions / Partnerships

Acquisitions:

- 2015: Cloud Sherpas, FusionX
- 2014: i4C Analytics, PureApps, Hytracc
- 2013: ChangeTrack Research, Procurian

Partnerships:

- Marriott for Accenture Hospitality Services
- ServiceNow for a self service platform
- SAP ARIBA
- IPSoft Amelia, Automation Anywhere, and BluePrism for Intelligent Automation
- Workday Financial Management
- NetSuite for BPaaS
- Duke and MIT Universities for innovation

Client Profile

Targets G2000 companies

180 F&A BPO clients, including: BP, Canon, Microsoft, NCR, TDC

Target Industries:

Financial Services, Healthcare & Life Sciences, Manufacturing, Technology, Telecom, Retail, Consumer Goods, Public Services, Natural Resources, Travel & Transportation, Hospitality, Utilities

Service Delivery Operations

Headcount: 24,600+

Delivery Centers (25):

- North America – 5% (USA, Canada)
- Latin America – 5% (Argentina, Brazil, Costa Rica)
- UK & Ireland
- Continental Europe (Spain, France, Poland)
- India, China, Philippines – 76%
- Others – 7% (including Mauritius, South Africa, Sri Lanka, Bangladesh)

Proprietary Technologies

- *Accenture Operations Navigator 2.0:* analytics dashboard
- *Radix™:* workflow platform
- *Accenture SolutionLIVE Marketplace:* to manage and allocate work
- *Accenture Cognitive Engine (ACE)*
- *Intelligent Text Analyzer Platform (ITAP):* to review structured and unstructured data from multiple sources
- *Digital Workforce Platform:* to support invoicing, cash apps, period close, master data, analytics, budget and forecasting
- *Accenture Global Productivity Hub:* tracks and measures agent performance including shrinkage
- *F&A Vendor Helpdesk:* artificial intelligence service desk
Accenture Unified Desktop: automate transaction processing including vendor portal downloads, posting invoice data through Optical Character Recognition (OCR) to ERP

Winner's Circle

Creating an industrialized analytics model using FinTech innovation

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Blueprint Leading Highlights

- Quality of Account Management
- Geographic Footprint and Scale
- How Service Providers Engage Customers and Develop Communities
- Vision for and Investments in the Evolution of Industry-Specific Analytics Solutions
- Incorporation of Alliances and Partnerships

BFS Analytics Services Offering Maturity:

- Customers & Marketing
- Fraud, Risk, & Compliance
- Portfolio & Credit Risk

Strengths

- **Building Out An Industrialized Model For Banking Analytics:** After significant experience in running consulting and project-based analytics engagements in risk and compliance, Accenture is now working with clients to establish a more ongoing, interactive engagement, including addressing emerging analytics requirements. By engaging with what it calls an industrialized model, Accenture is trying to become an extension of its clients' risk and modeling capabilities. This includes working on projects along with more multifaceted teams for round the clock support through the entire reporting cycle.
- **Leveraging Alliances As A Source Of Innovation:** Accenture has a differentiated role as an industry leader-and enabler for innovation in banking and financial services. Clients particularly value the Accenture FinTech Innovation Lab, Accenture Tech Labs, the Accenture and MIT Alliance in Business Analytics, the Accenture and Stevens Financial Services Analytics Innovation Program, and the company's technology alliances for their access to innovative technology developments in BFS analytics.
- **Industry Thought Leadership And Breadth Of Talent Across Big Data And Analytics Technologies:** Accenture is regarded as leading the industry on the strategic use of big data and analytics technologies for the banking and financial services industry. Its clients feel confident in accessing best practices and innovation through its cross-industry talent, in particular its data visualization, machine learning, and advanced analytics capabilities for fraud and marketing operations.

Challenges

- **Flexibility To Run Different Sizes Of Engagements:** Banks go through various cycles of funding for analytics engagements, which affects overall investments in third-party relationships over time. Clients mentioned that they saw a relative lack of flexibility from Accenture in working with them in "lean" times on small engagements.
- **Affordability Of Hybrid Delivery Models:** Client feedback suggests that Accenture is not as accommodating on commercial arrangements and tends to be more expensive than the competition. Comparatively, some of its competitors are willing to provide discounts or absorb costs for onshore account managers.

Relevant Acquisitions/Partnerships

Acquisitions:

- i4C Analytics (2014), an advanced analytics software platform provider that offers tailored industry and function-specific analytics applications, now fully integrated into the Accenture Insights Platform

Technology Alliances:

- Alteryx, AWS, Apigee, Ayasdi, Cloudera, Datastax, Hortonworks, HP, IBM, Informatica, Intel, Microsoft, Microstrategy, Oracle, Pega, Pivotal, Qlik, Salesforce, SAP, SAS, Tableau, Talend, and Teradata

Academic Alliances:

- MIT
- Stevens Institute of Technology, focused on financial services

Client Profile

- Six of the 10 top global banks
- International banking and financial services company
- Global investment bank
- Multinational financial services company
- European global financial services major
- Large European bank
- British multinational financial services company
- Large American online payment system
- North American mortgage provider
- Major Australian bank
- Large Japanese banking group

Service Delivery Operations

BFS Analytics Services Headcount: NA

Analytics Delivery Center Locations:

- Asia-Pacific, including India – 76%
- North America – 13%
- EMEA – 11%

Proprietary Technologies

- *Accenture Insights Platform:* A cloud-based, As-a-Service platform solution comprised of an integrated suite of leading technologies that hosts a design, build, run environment for the development of industry and function-specific analytics apps
- *Accenture's financial services apps:* Pre-built apps developed or configured for financial services such as Next Best Action, Customer Potential, Customer Profiler, Real Time Credit Decision, Wealth Advisory Toolkit, and Advanced Analytics Credit Scoring

Winner's Circle

Making substantial investments in Supply Chain Management Services to drive analytical solutions and respond to the needs of global clients

accenture operations

Blueprint Leading Highlights

- Actual Delivery Of Services
- Flexibility In Delivering End-to-End and Point Solutions
- Vision For Evolution Of Supply Chain Management As-a-Service
- Solutions For Accessible And Actionable Data
- Integration of Consulting, BPO And Technology

Order Management

Inventory Management

Manufacturing Management

Transportation Management

Aftermarket Services

Master Data Management

Sustainability Services

Strengths

- **Investments in Supply Chain Management Services:** Accenture Operations has stepped up its investment in supply chain management services considerably since the 2014 Blueprint in which Accenture was already the leader. The development of a cross-client analytics application infrastructure is particularly noteworthy as it replicates best practices in tools and insights at scale. Clients we spoke with are impressed by these investments and see the direct business impact of these tools on process operations.
- **Expanding Role In Client Supply Chain Operations:** HfS has seen the offering evolve over the last seven years from a collection of small forecasting contracts with a few large-scale order management deals to one that takes on on comprehensive scope from clients across the SCM value chain. Accenture is expanding its role in clients across processes in a way that HfS has not seen with many of the other competing service providers. This is especially evident in the relationship with a key North American retailer. Accenture is now at the very core of daily operations versus having started in a niche support role years ago.
- **Integration of Consulting, BPO and Technology in SCM:** In the 2014 Blueprint, we highlighted some of the channel and delivery conflict between BPO and Consulting in SCM. Since then, we have seen substantial progress in eliminating conflict and getting synergistic value out of organic investments (e.g., tools) and M&A activity between the groups. This integration is increasingly important in the As-a-Service evolution of SCM, and Accenture seems to be responding as required by the market.

Challenges

- **Cross Client Intelligent Automation:** HfS would like to see the same level of cross-client capability for intelligent automation (RPA, autonomics and cognitive) in supply chain that we have seen emerge in analytics in supply chain since 2014. Accenture Operations has deployed significant numbers of software bots in supply chain contracts, but these bots are generally client specific and at the desktop level. This is in keeping with industry norms, but as Accenture is a leader with vision in this market, HfS expects Accenture to also lead in this area.
- **Integration With IoT Offerings:** If the Internet of Things (IoT) takes off in any form, which has been predicted by many, it will become a critical component of future SCM BPO delivery. HfS would like to hear more from Accenture about how the IoT capabilities inside Accenture Digital will be integrated with Accenture Operations to respond to the needs of the largest global enterprises.

Relevant Acquisitions / Partnerships

Acquisitions:
- Gapso (2015)
- The Javelin Group (2015)
- Elite Logistics (2015)

Partnerships:
- SAP
- Oracle
- Kinaxis
- GT Nexus
- Maximo
- Ariba
- Servigistics
- Llamasoft
- Qlik

Key Clients

55+ major SCM BPO clients, including:

- Digital Media Technology Company
- Global Automobile Manufacturer
- Global Consumer Food Producer
- Global Mobile Phone Manufacturer
- Communications and IT Provider
- North American Retailer
- European Consumer Electronics Company
- Japanese Consumer Electronics Company

Global Operations

Locations: 2,000+ SCM BPO FTEs across ~14 SCM BPO locations with additional support from 35+ other BPO centers globally:

- North America 300+ FTEs
- Europe 500+ FTEs
- APAC 1200+ FTEs

Accenture operates 2 SCM BPO Centers of Excellence where new offerings are developed. They are in Barcelona, Spain, and Mumbai, India.

Proprietary Technologies / Platforms

- *Application Store:* platform for accessing 25+ supply chain analytics related applications
- *Accenture Supply Chain Control Tower:* 3-level framework for integrating supply chain data with process execution capabilities
- *ASCAF:* a supply chain analytics framework
- *i-POT:* Inventory planning and optimization tool
- *Warehouse Productivity Tool:* for warehouse network analysis and optimization
- *Warehouse Reserve Tool:* to help clients provision warranty reserves and identify cost claims reduction opportunities
- *Accenture Operations Navigator:* "one-stop" portal for operational performance and business process data visibility

Winner's Circle

The largest practice in the Blueprint, with a historic relationship with SuccessFactors and comprehensive geographical scale

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Blueprint Leading Highlights

- Quality of Account Management
- Incorporate Customer Feedback
- Geographic Scale
- Deliver Value Beyond Cost
- Vision
- Investment in Proprietary Tools

Plan

Implement

Manage

Operate

Optimize

Strengths

- **Deep Understanding of the Product:** Accenture has worked with SuccessFactors since 2007 and helped to build the Employee Central product in 2011, before the SAP acquisition. Accenture and SuccessFactors jointly implemented the first ten projects of Employee Central. Accenture is also supporting SAP to implement SuccessFactors internally. This experience increases Accenture's credibility as a SuccessFactors service provider with deep technical skills.
- **Strong SuccessFactors Services Capabilities:** Accenture has the largest SuccessFactors practice in the Blueprint, including the number of certified consultants. This is underpinned by a team of more than 8,500 professionals focused on the human capital market. Accenture offers the complete value chain of SuccessFactors services. In its differentiating flexible factory model for application outsourcing services, resources can be shared across engagement teams, leveraging the necessary skills and capacity on demand.
- **Scale**: Accenture has the most comprehensive range of SuccessFactors service delivery centers in the Blueprint, with centers in every region in the world. Clients highlighted geographical scale as a strength for Accenture.
- **Focus on Thought Leadership and Vision:** Accenture identifies innovation in HR, aligning strategies with clients' digital vision and with its own research. Access to skills in Accenture software also brings a key differentiator to Accenture in this market.
- **Delivering Value and Being Responsive:** Accenture's highest reference scores are for incorporating feedback and delivering value beyond cost savings. One reference said that Accenture scored "an absolute 10" out of 10 for delivering value.

Challenges

- **Continued Investment in Tools:** As a leader in this market, Accenture should continue to extend and innovate the HANA cloud platforms, especially for industry sector-focused solutions, which are rare in this market.
- **Strengthen Capabilities in Payroll:** Accenture should develop and strengthen its capabilities in SuccessFactors payroll services. This is a growth area in the market.
- **Growth in APAC and LATAM**: Most of Accenture's SuccessFactors service business comes from the main regions of North America, the UK, and Europe. Given its scale, Accenture has opportunities to strengthen its business in Latin America and APAC in the next few years.
- **Clients Not Always Seeing the Vision:** A few clients highlighted that Accenture did not always bring thought leadership to the engagement. This is surprising, given Accenture's strength in this area. This is partly due to clients contracting for implementation work only having already set the roadmap, including the vision in-house. It also points to a possible opportunity for Accenture delivery teams to identify client demands and capitalize on new revenue possibilities.

Partnerships

Partnerships include:

- Workforce Software
- Kronos
- ADP
- Benefit Focus
- Open Text

Key Clients

Accenture targets large and mid-size enterprises particularly requiring complex HR transformations.

Geographical coverage in order of revenue: North America, the UK, Continental Europe, Middle East and Africa, India, ANZ and other APAC, Latin America

Industry Coverage: Most industries

Some publicly disclosed clients include:

- Alcatel-Lucent, AngloGold Ashanti, Comcast
- Disney and Boston Scientific, Etihad Airways
- NBC Universal, Procter and Gamble, Timken

Operations

- Partner Level: Platinum
- Year of Practice Established: 2009
- Number of SuccessFactors-Certified Consultants: 435
- Number of SuccessFactors Certifications: 591
- Total Number in Practice: 1,200+
- Number of Clients: 150+
- Number of Engagements Completed or Ongoing: 500

Key Delivery Locations for SuccessFactors Practice:

- EALA: UK, Den, Swe, Switz, Ger, Port, Sp, It, Fr, Bel, Pol, Israel, S. Africa, ME, S. America
- North America: United States, Canada, Mexico
- APAC: Aus, NZ, Japan, China, S. Korea, Singapore, Philippines, Malaysia, Thailand, India

Technology Tools and Platforms

- *Accenture High-Velocity Talent and HR:* Pre-configured solutions for fast implementation
- *Packaged Cloud Methodology for SuccessFactors:* Accenture Delivery Suite (ADS) delivery methodology for SuccessFactors
- *Accenture SuccessFactors' Data Conversion Toolkit*
- *Accenture SuccessFactors' Test Automation Toolkit*
- *Accenture Human Capital Operating Model*
- *Accenture's HR 360 Diagnostic:* Tool to capture business objectives and challenges
- *Accenture HR Audit and Compliance As-a-Service:* SuccessFactors' extension on the SAP HANA platform. *Accenture Clone and Test for Cloud:* SAP HANA cloud extension for Employee Central
- *Accenture Quick Document Builder for SuccessFactors:* Automates correspondence sent to employees and managers

Winner's Circle

Strong capability and forward-looking approach that is being realized through investments in acquisitions and talent development

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Value Chain Services Coverage	Clinical	Regulatory	Pharmacovigilance	Customer Care	Commercial Services

Blueprint Leading Highlights

- Delivery Performance
- Embedding Intelligent Automation
- Vision for Pharma Industry and Sourcing
- Investing in Future Talent and Technology
- Use of Partnerships and Acquisitions

Path to As-a-Service

Accenture is working across the industry in a unique way to bring together business and technology to help **Write Off Legacy.** It will take time and effort to operationalize broadly. In the meantime, **Accenture** could apply more of this Design Thinking approach to new and existing clients to best tap into and coordinate the resources it is acquiring and developing.

Strengths

- **Technology and Business Mindset:** Accenture has coordinated an industry coalition to consider how to best embed technology with business for life sciences, as described by a client. The Life Sciences Cloud Coalition drives a proprietary platform, the Accenture Life Sciences Cloud for R&D (ALSC), to aggregate internal and external data sources across clinical, safety, regulatory, and operational functions into a single analytics platform. The coalition currently includes eight leading global biopharmaceutical companies.
- **Extensive Global Network and Capability:** Accenture is recognized by clients for its ability to bring global resources to bear, and balance on-/offshore resources; and its plan is to enhance it further. Expansion includes new delivery centers in Warsaw and Buenos Aires, and additional languages in China (Mandarin) and Prague for Pharmacovigilance.
- **Consistent Operational Excellence:** Clients appreciate the level of attention to root cause analysis and training to address issues and gaps, which are few and far between—minimal escalation.
- **Unique Talent Development Approach:** In an industry with high attrition and demand for specialized skills, Accenture has a partnership with the India Clinical Research Institute (ICRI) that allows preferential access to skilled PV resources. Across the Commercial Services business, it is focused on deploying Therapeutic Area training in key areas such as Diabetes and Oncology. Clients see the benefit in this training, and the career development.

Challenges

- **Bring the Thought Leadership into Action:** Clients can see and appreciate the efforts in the complex R&D space with the coalition and platform development, yet question how it will come to fruition. Accenture needs to continue to work through the balance of addressing everyday issues and opportunities with long-term vision and plans.
- **Refresh Marketing Services with Outcome Focus:** Clients expressed an interest in more near-term "thinking outside the box" for marketing services as the industry changes. Bringing something like the Boomerang BD5 approach that is part of the recent acquisition could inject some fresh energy by partnering the consultative and design thinking–oriented approach with the established delivery capability.
- **Architect and Broker Across Accenture Business:** Accenture works in many industries, and there is (a) convergence between pharma and healthcare and (b) leading-edge use of digital in other industries like banking and retail that pharma could learn leverage. Clients would like to hear more about other industries and client experiences from Accenture.

Relevant Acquisitions/Partnerships

Acquisitions:
- 2015, Boomerang Pharmaceutical Communications
- 2015, Cloud Sherpas
- 2012, Octagon Research Solutions, for regulatory submission services

Partnerships include:
- Life Sciences Cloud Coalition (ALSC)
- Technology Platforms and Tools: Medidata, Medris, Oracle, Veeva, Pegasystems, Adobe
- India Clinical Research Institute

Client Profile

- BPO: Yes
- BPaaS: Yes (Digital Content & Marketing)

Including:
- Accenture Accelerated R&D Services: The Top 10 Pharmaceutical companies (as ranked by annual R&D spend), 90% of the Top 30; 80% of the Top 50
- Accenture Intelligent Commercial Solutions: 8 of the Top 12 Fortune 50 Pharmas

Service Delivery Operations

- Pharma BPO for 19 years
- Pharma Headcount: Accenture Life Sciences: 13,000; Accelerated R&D Services: over 2,700; Commercial Services headcount ~2,000
- Specialties include Biomedical Engineers, Chemists, Dentists, Doctors, Medical Writers, Nurses, Pharmacists, Statisticians
- Pharma Delivery Center Locations: China, Europe, India, Japan, Philippines, UK, US

Proprietary Technologies

- Accenture Operations Navigator: operations performance tool/dashboard
- ACE SDTM conversion engine
- PV Regulatory Compliance Predictor
- PV Volume Predictor
- Patient Safety Interface for adverse events
- Accenture Intelligent Patient Platform (includes Salesforce certified solutions)
- Accenture Marketing Services Platform Accenture Insights Platform
- Accenture Customer Engagement Solution
- Accenture Veeva Accelerator Suite

HfS BLUEPRINT REPORTS

Winner's Circle

A service provider having the right elements for a Design Thinking mindset to drive an As-a-Service environment

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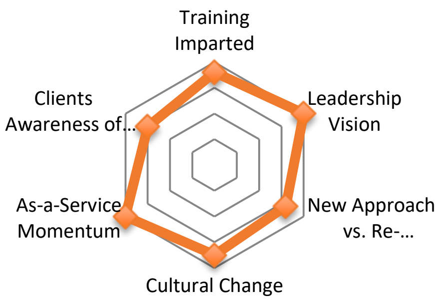
Design Thinking Adoption



HfS POV

Accenture has made major investments innovating its delivery capabilities for the As-a-Service era. The firm is realizing quickly that having a genuine Design Thinking ethos woven into its client engagements is a critical component to challenging legacy mindsets. HfS is most encouraged by the significant reinvestments retraining its own delivery personnel.

Strengths

- **Design Thinking A Natural Fit:** Accenture's business is built on deep relationships and knowledge of the client company and industry, where sponsorship comes from the top. Building intimacy and collaboration through times of growth, disruption and recession help foster Design Thinking effectiveness. Creating measureable business outcomes is only really possible where provider/buyer relationships are forged through years of intimacy and experience with each other.
- **Significant investments in Design Thinking by Accenture Operations:** HfS estimates Accenture's Operations group will reinvest ~5% of its $7 billion revenues into Design Thinking practices around the As-a-Service paradigm in the next 2-3 years. This will be to continue to drive innovation, disrupt and reinvent the business to As a Service, with Design Thinking at the core of value delivery. This will involve targeted hiring of expert designers, ongoing investment in retraining delivery personal in design and data science methods and external innovation alliances, as well as increased focus on establishing true innovation partnerships with design thinking at the core with their clients. There is significant investment in As-a-Service capability, as emphasized by acquisitions of Fjord – part of Accenture Digital and a source of design thinking skills within Accenture - Procurian, Cloud Sherpas and several other firms.
- **Powerful Internal / External Ecosystem**: Accenture depends on its ecosystem for innovating new products and services. Design Thinking adoption includes internal groups such as Accenture Technology Labs and Accenture Digital as well as external partners including MIT, Duke, and Indian Institute of Technology.
- **Clients Appreciate the Problem Solving Capability:** Clients mentioned that Accenture's ability to engage with the client's team and collaborate as partner to ensure project's success is commendable. Although, the problem is typically first defined by the clients/buyer teams.

Challenges

- **More Systematic Use**: Although Accenture focuses heavily on innovation, it is hard to distinguish if Design Thinking is used uniformly. While several clients preach the Accenture approach and style, others are not all fully convinced. Starting with the first phase of the approach, some clients would like Accenture to participate more actively in defining the problem to be addressed.
- **Collaboration, Transparency and Communication**: Client Partners at Accenture know their clients well, as do their delivery teams. With several clients, Accenture needs to create more transparency and momentum around the collaborative aspect of Design Thinking that engages with the clients, the delivery teams, and additional people not typically involved with the clients to "think outside the box" and "challenge the norm" and keep it grounded, per client feedback. There is also room for some engagement teams to be more proactive communicating the firm's value - Accenture could leverage Design Thinking to collaborate more effectively with clients to bring its thought leadership into an action plan for "today."
- **The Emerging "Born in the Cloud" Clients:** Accenture has grown up on the scale-game of enterprises investing colossal sums in ERP and legacy outsourcing. The F500 in 3-5 years will consist of leaner businesses where the cloud and automation are native and As-a-Service is a natural fit. They will not respond to the traditional client partner model. Accenture needs to incubate its plan for the new breed of clients, in addition to the old.

Design Thinking Leadership

- Omar Abbosh, Chief Strategy Officer
- Michael Corcoran, Senior Managing Director – Accenture Operations

Acquisitions and Partnerships

Partnerships:
Massachusetts Institute of Technology (MIT),Duke University, Indian Institute of Technology, Purdue University, Stanford University, University of California, Berkeley

Representative Clients

- Large European Bank
- Global Pharmaceutical Company
- Global insurance Company
- North American Healthcare Payer
- North American Healthcare Provider
- Global Energy Firm

Capabilities/Tools

- More than 10,000 employees are directly accountable for engaging in Design Thinking

HfS BLUEPRINT REPORTS

Winner's Circle

Outcome-focused advanced capability for utilities As-a-Service spanning platforms, automation and analytics

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Blueprint Leading Highlights

EXECUTION
- Experience Delivering Industry Specific Solutions
- Quality of Account Management Team

INNOVATION
- Integration of As-a-Service Capabilities Into Utilities BPO
- Integration of Intelligent Automation Technologies

Path to As-a-Service

Accenture's utilities practice is a great example of where consulting and digital thought leadership is impacting BPO performance, with the way it invests in moving it to As-a-Service delivery by **Writing Off Legacy**.

Strengths

- **Progress on Embedding Analytics and Automation:** Accenture demonstrated several examples of how it is redefining the scope and business outcomes impacted by BPO processes through these levers. In one case, by automating manual processes used to digitize, prioritize and assign work to customer care agents, Accenture increased case management productivity by 30% across billing, credit and collections, and payments while increasing accuracy and reporting reliability.
- **Thought Leadership Influencing Utilities-Specific BPO Engagements:** Accenture has consistently invested in R&D to understand the sea-shifts in the utilities industry, and its vision for the vertical resonates well with clients. In one example, Accenture worked with a client to implement a scalable, cloud-based IVR technology to handle increasing customer care call volumes.
- **A Unique Approach on Writing Off Legacy with a Modular Platform Strategy:** Accenture's platform strategy for utilities enables a full write-off of legacy investments. The technology (e.g. Accenture Retail Platform-as-a-Service for Utilities) is scalable, flexible, secured and modular enough to adapt to different business scenarios to deliver platform-based BPO through an As-a-Service construct.
- **Differentiated Analytics-Driven Offerings:** Accenture's utilities BPO services include solutions for digital-enabled customers, new products and service, smart meter and field force management. Analytics is at the heart of the offering, for example providing enhanced field productivity and control with forecasting analytics, combined with planning, scheduling and mobile capabilities.

Challenges

- **Willingness to Explore Flexible Contract Structures in this Market:** The utilities market needs more flexibility on its journey to As-a-Service. Accenture is particularly challenged in dealing with regulations, and managing the expectations of unionized workforces.
- **Smart Meter Services Strategy and Offering Development:** Accenture's IT, infrastructure and consulting practices have significant capabilities in the advanced metering market. Its key strength lies in delivering customer and smart grid operational transformation with a focus on business benefits. However, some of Accenture's competitors have more experience running smart meter services for utilities clients from a BPO standpoint.

Relevant Acquisitions and Partnerships

Acquisitions:
- 2015: The Structure Group to strengthen capabilities in smart grid operations and energy trading and risk management services

Partnerships:
- 2014: A joint venture with Siemens called OMNETRIC Group to help utilities clients realize the benefits of a digital grid
- Fusion, Blue Prism, Jacada, Automation Anywhere, Verint and IPsoft for Intelligent Automation
- Siemens, ABB, Itron, General Electric, Schneider Electric and OSI for smart grid, grid operations and work and asset management

Key Clients

- BC Hydro
- Enbridge
- Endesa
- Utility operating in Iberia, UK, Latin America, and USA
- Latin American Utility
- Global utility operating in South Europe

Global Operations

- **Utilities BPO operations for 13 years**
- **Headcount:** 3,400 FTEs
- **Locations**: Delivery presence in 27+ locations including:
  - Canada and USA
  - Spain, Portugal, Italy, France and Netherlands (onsite locations)
  - Utilities Offshore centers of Excellence include: Philippines (Manila, Cebu) and India (Bangalore, Delhi, Chennai, Mumbai)
  - Brazil (onsite) and Costa Rica (Digital delivery)

Proprietary Technologies

- Accenture Retail Platform-as-a-Service for Utilities: multichannel, content management, billing, CRM, case management, analytics
- Universal Platform for Enterprise Asset Management: asset and work management, field-force management, asset-planning functions, supply chain and logistics, maintenance processes and operational and asset analytics
- Accenture Enterprise Services Platform for Utilities: industrialization framework for ERP and related business services
- Accenture Smart Metering Platform: smart meters and metering data management supporting Advanced Metering and Grids BPO
- Connected Home Utilities Platform: for New Energy Products and Services and Growth BPO with usage analytics, demand-response capabilities and home automation

Winner's Circle

Salesforce's largest partner, first to market, and now in a leading position to support the Salesforce Customer Success Platform

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PLAN
IMPLEMENT
MANAGE
OPERATE
OPTIMIZE

Blueprint Leading Highlights

- Quality of Account Management Team
- Scale of Capabilities
- Experience Delivering Industry-Specific Solutions
- Partnership Strategy
- Vision for Salesforce Effectiveness
- Investment in Proprietary Tools

Strengths

- **Account Management and In-House Skills:** Clients cite Accenture's strength as a true business partner and its 'excellent' account management capabilities. Accenture has the highest number of certified Salesforce professionals, 2,700. Clients appreciate the quality of the technical and business understanding, and availability in many geographies.
- **Investment in Proprietary Tools and Accelerators**: Accenture has an impressive list of proprietary industry and cross-industry tools and accelerators. Four of its industry solutions: pharmaceuticals, insurance, communications and retail, have achieved Fullforce status.
- **Strong Business Partner Ecosystem:** This includes Accenture's ability to work effectively with other service and software suppliers to meet the customer's overall business objectives such as its digital transformation journey. In addition to organic growth, Accenture invests in partnerships with service and software providers to enhance its Salesforce services capabilities. Most notable is Accenture's recent equity investment with Salesforce in industry solution provider, Vlocity.
- **Disciplined Yet Flexible Approach**: Clients are impressed with Accenture's disciplined methodology, frameworks, processes and overall project management capabilities. However clients also highlight the fact that Accenture listens to their specific needs, starting with the RFP process and throughout the engagement.
- **Acquisitions:** Accenture has made several smart acquisitions in the last 24 months to close gaps in skill availability and to extend the scale of the Salesforce practice.

Challenges

- **Managing Skills Turn-Over:** Consistent with most global service providers, Accenture has to manage skills turn-over and its impact on customer projects. This is particularly true of the offshore skills. Clients rate Accenture highly for its ability to blend onshore and offshore resources, but they are equally frustrated when resources leave the project.
- **Effective Resource Planning:** Clients mention that sometimes Accenture could improve its workforce planning. This is true for resources moving between clients and also between projects on the same client.
- **Ramping Up to Increasing Demand:** Despite Accenture's large numbers of Salesforce certified consultants, it needs to still ensure that it can keep up with the market demand. It has opportunities to offset this by adopting the training culture and methodologies of recently acquired Cloud Sherpas.

Relevant Acquisitions/Partnerships

Acquisitions include:

- Cloud Sherpas (2015) although this profile was completed prior to the closure of this acquisition and therefore does not include Cloud Sherpas data.
- Tquila (2015)
- ClientHouse GMBH (2014)
- Joint equity with Salesforce in Vlocity for industry specific solutions

Partnerships include:

- Apttus, CipherCloud, Callidus Cloud, ClickSoftware, Cloud Sense, Informatica, Kinaxis, Kronos, ServiceNow, PROS, Vlocity, Zuora

Key Clients

Accenture works with clients across industry sectors. Over 75% of Salesforce services work won in the last fiscal year was with repeat clients.

Industry Coverage: in order of Salesforce services revenues:

- Communications, Media and Technology
- Products
- Financial Services
- Resources
- Health and Public Services

Some publicly disclosed clients include:

- DHL
- HP
- Maserati
- Shell
- VSP
- Wells Fargo

Operations

- Partner Level: Global Strategic
- Fullforce Master Certifications: 6
- Fullforce Industry Solutions: 5
- Salesforce Certified Consultants: 2,700
- Certified Technical Architects: 7
- Total number in practice: 6,000+
- Number of projects completed: 850+
- Customer satisfaction score: 9.43/10

Key delivery locations for Salesforce practice:

- USA
- Canada
- Latin America
- Philippines
- Australia/New Zealand
- Nordics
- Gallia
- UK
- Ireland

Technology Tools and Platforms

- *Fullforce Master Certification:* Comms & Media, Financial Services, Healthcare & Life Sciences, Sales Cloud, Service Cloud, and Salesforce1 Platform
- *Fullforce Industry Solutions:* Connected Physician Solution for Healthcare; Effectiveness Platform for Insurance; Connected Patient Platform for Life Sciences; Accenture SaaS Reference Architecture for Communications Service Providers; Retail Personalization Platform
- *Accenture SFDC Partner Relationship Management Quick Start Tool:* cross-industry tool
- *Accenture Quick Start Tool for Salesforce Service Cloud*
- *Accenture Automated Framework for Testing (AAFT) for Salesforce*
- *Accenture System Diagnostics for Salesforce:* for visibility of current customizations

Winner's Circle

A strong performer with an aggressive approach to end-to-end digital services and proactive threat management

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HIGHLIGHTS

Long Term Vision For Security Maturity
Alignment With Digital Trust Framework
Frameworks & Services For Analyzing Security Needs

DIGITAL TRUST ALIGNMENT

VERY HIGH
HIGH
MODERATE - HIGH
MODERATE
LOW - MODERATE
LOW

STRENGTHS

- **Holistic Approach and Capabilities**: Strong capabilities that address the end-to-end digital, cloud, and IoT security requirements, including services and consulting practices that integrate within its Managed Security Services.
- **As-a-Service Focus:** An internal and services structure that aligns with both the 8 Ideals of the As-a-Service Economy and the HfS Digital Trust Model, including a growing emphasis on provider-enterprise business outcome alignment and security as an enabler of customer experience.
- **Strong Focus On Countering Emerging Threats**: Accenture acquired FusionX in 2015, bringing in-house the ability to stage real-world stress testing of client networks – something that will help strengthen their Managed Security Services as well as show increased value to other Accenture clients in non-related areas.
- **Transformational Focus**: A services focus that designs security architectures and business process for emerging threats.
- **Emerging Security Issues:** Strong focus on addressing security issues from new technology trends such as IoT (both commercial and industrial) and sensor data.

CHALLENGES

- **FusionX Integration**: Accenture's acquisition of real-time vulnerability testing firm FusionX demonstrates a forward-looking vision, but we believe the real value will be in related areas that benefit from the insights driven by their threat testing model (this business itself is not rapidly scalable by nature).
- **Software Vendors**: As the provider market shifts towards open competition with more established (perhaps legacy) enterprise software providers, Accenture (given the breadth of their overall digital offering) will face increased competitive pressure as enterprises begin looking at service and technology alternatives.

INFORMATION

MANAGEMENT

- Bill Phelps, Managing Director and Global Lead, Accenture Security Services
- Ryan LaSalle, Managing Director and Global Growth & Strategy Lead, Accenture Security Service

STAFFING

- Est. 1,200 staff in Managed Security Services
- Est. 2,700 staff across Global Security

SOLUTIONS

CORE FOCUS

- Security Architecture, Cyber-Defense, Digital Identity and Managed Security Services

OFFERINGS

- IT Risk & Compliance
- User & Identity Administration
- Application Security Operations
- Threat & Vulnerability Management
- Security Monitoring & Response
- Infrastructure Security Management
- Cloud Security Monitoring & Ops
- Security Analytics & Management

DIGITAL TRUST / AS-A-SERVICE

DIGITAL TRUST ALIGNMENT

- Strong As-a-Service focus and a services strategy that closely aligns with the Digital Trust & Security framework

DIGITAL MATURITY SUPPORT

- Standard offerings capable of assisting clients through Levels 3-4 of the HfS Digital Trust & Security Maturity Model

CLIENTS / DELIVERY

CLIENTS

- Est. 315 clients in 55 countries

DELIVERY CENTERS

- Argentina (Buenos Aires)
- Czech Republic (Prague)
- India (Bangalore, Delhi)
- Philippines (Manila)
- USA (San Antonio)

HfS BLUEPRINT REPORTS

Winner's Circle

A breadth of robust platform-based offerings, IoT expert bench strength and As-a-Service pricing models make Accenture a leading IoT partner

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Blueprint Leading Highlights

- Flexible Pricing Models
- Strength of Vision for IoT
- Creation of Proprietary Frameworks
- Industry Expertise

IoT Services Offering Maturity:

- IoT Consulting
- IoT Enablement
- IoT Connectivity
- IoT Integration
- IoT Management

Strengths

- **Portfolio of Proprietary Use Cases.** Accenture has leveraged its deep enterprise and industrial expertise to build one of the most thorough reference architectures and corresponding platforms allowing clients to quickly embrace experimentation.
- **Committed Partnership Model.** Accenture has made the choice to commit a series of anchor partners in IoT recognizing the strength of going to market with leaders in related areas of technology, with more partners to come.
- **Connected Platforms As-a-Service (CPaaS) Offering.** Accenture has developed a robust platform that quickly enables Service Orchestration, Advanced Analytics, Data Streaming, Storage, Security, Device Management for IoT operations. CPaaS can be customized to use different technology from, for example, Microsoft and/or Intel to meet client needs.
- **Array of Pricing Models.** Offers a full range of pricing from standard custom solution to off the shelf pricing based on relevant industry units (i.e. per connected device, per end-user, per connection to our platform, per transaction, per volume of data processed, etc.). This approach enables a low up front cost and facilitates better cost control.

Challenges

- **IoT Enablement Potentially Hampered By Complex Partnering.** Accenture does not have the same history of providing engineering services at the device level to support IoT enablement as many of the other Winner's Circle service providers. For many clients, this is not an issue, but in industries where clients do not have these capabilities internally, choosing Accenture for IoT solutions may lead ultimately to building more complex partnering models to develop the end solution.
- **As-a-Service Positioning**. Accenture is actively building its IoT offerings around an As-a-Service model. These are still early days for these models and Accenture is working to create market momentum and the platforms behind this effort in IoT.

Business Overview

Self-declared FTEs: ~1,100

Org Structure:
Accenture's IoT practice is run by Craig McNeil within the Accenture Mobility Practice which is part of the Accenture Digital Growth Platform.

Delivery Centers:

- 30% Onshore (US, Europe, and Asia)
- 70% Offshore (India 55%; Philippines 10%; Eastern Europe: 5%)

Go To Market

Accenture's IoT practice is organized into 5 business towers whose focus is to productize "As-a-Service" verticals based on specific use cases. The five towers are: Connected Transport; Connected Spaces; Connected Operations; Connected Health; Connected Commerce.

Target Industries:
Accenture targets the G2000 across: Transport and Industrial Equipment, Health, Public Service, Consumer Goods, Retail, Banking, Insurance, Capital Markets, Media & Entertainment, Electronics & High Tech, Communications, Utilities and Energy

Relevant Acquisitions / Partnerships

Relevant Recent Acquisitions

- Evopro (2014)
- Symbian (2011)

Relevant Strategic Investments

- VenueNext (2015)
- Crittercism (2014)
- Apigee (2013)

Partnerships:

- Intel
- Microsoft
- Apigee
- Amazon Web Services
- GE
- Cisco

Proprietary Technologies / Platforms

- Connected Vehicle, Insurance Telematics, Fleet Management, Connected Ship etc.
- Connected Home offerings for Utilities and Technology companies, Digital Underground Mapping, Smart Buildings solutions etc.
- Connected Asset Management, Connected Workers, Precision Farming, Connected Mines, IIOT Security, Smart Wearables, Digital OEM etc.
- IoT Virtual Health strategies, Health Facility Way-Finding, IoT Virtual Care Platform, IoT Population Health Management, Health Asset Management
- Cryptocurrency & Processing Strategy, Block Chain Asset Management, Tokenization, Paydiant Ecosystem Enablement, Beacons for Commerce etc.

HfS BLUEPRINT REPORTS

Winner's Circle

Long history of providing excellent delivery with smart people, moving into broader industry trends of automation and analytics

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Commercial — Government

Business Operations Maturity: Claims Services | Member Services | Provider Services | Health & Care Mgmt | Admin: F&A, HR

Blueprint Leading Highlights

- Delivery Performance
- Innovation and Vision for Healthcare Payer Operations
- Investing in Future Talent & Technologies
- Use of Partnerships & Acquisitions
- Talent Acquisition & Management
- Quality of Account Management

Path to As-a-Service

Strength and focus on data-driven Ideals with automation, analytics and talent. Exploring platforms and alliances for making technology decisions and investments to get across the line into As-a-Service Economy. Movement is a bit challenged by large, established client base that admits to being reluctant to change IT. Accenture is exploring ways to provide "utilities" that will plug and play to address specific challenges.

Strengths

- **Reinvention to As-a-Service is underway:** Accenture Operations has a long history of FTE-based lift and shift BPO that it recognizes the need to change with automation, analytics, and new operating models. Progress is showing in areas like Analytics-As-a-Service for targeted healthcare issues, and more flexibility in ramping up resources for a client during the recent enrollment period. Also, clients appreciate the Joint Value Targeting Program approach as a way to change from FTE-based to value based contracting and more clearly define and recognize innovation in existing relationships.
- **Proven impactful analytics capability:** Accenture's use of the "HAPO" solution for payment integrity identifies preventable rework and has driven administrative savings of up to 30%. As another example, with the Care Review Analytics Model, associates can analyze claim data and procedure information to predict which clinical review programs will result in higher savings and improve return on investment (ROI) for focusing clinical resources.
- **Consistently attentive, engaged, and developing talent base:** From the account management team through to service delivery, clients appreciate the depth of knowledge and capability at Accenture, and trust them to solution and deliver consistently. A unique example of Accenture's talent development is the "Tech Masters" program, a collection of tools, resources, and communities to help teams learn and use automation. Clients are especially satisfied when engaging with Accenture in new areas, like population health.
- **True visionary:** Clients believe Accenture has a strong perspective on the industry direction, depth in policy and how it can impact the work they do with clients, and a vision for the future of health care.

Challenges

- **Further apply technology to enable business processes:** While Accenture is increasingly applying technology such as the iCA robot for claim within its operations, HfS hears that clients have yet to see the business case to implement in their own environment broadly. The Digital Workforce Platform needs to bring together operational and performance management with increased use of automation and analytics, and could be Accenture's future Intelligent Automation platform. Accenture should continue to proactively share this approach as it comes to life.
- **Combination of speed, operating model, and price point going forward:** Accenture needs to continue on the path to a more nimble approach to deliver effectively with an on- and off-shore balance and use of technology. Clients want Accenture to respond more quickly and with greater urgency to needs they experience today.
- **Fitting and timing the message for the client audience:** Clients would like Accenture to prioritize responding to short term feedback with tactical moves more often, versus an often overriding focus on "strategic innovation" that is not as immediately relevant.

Relevant Acquisitions / Partnerships

- February 2014, Fully acquired Radiant (URAC accreditation and assets) from Anthem.

Partnerships:
- Automation: Automation Anywhere, Blue Prism, Jacada, Fusion
- Workflow Management: Pega, Atlassian
- CRM: Salesforce.com
- Analytics: Duke University

Client Profile

- BPO: Yes
- Platform Based BPO: Yes
- BPaaS: Yes

Including:
- Payers
- Healthcare Provider
- Pharmacy Benefit Management Companies
- Government Agency

Service Delivery Operations

- Healthcare Payer Operations for 14 years
- Healthcare Headcount: 18,000; 13,000 in BPO; 1,200 health licensed practitioners; 1,100 data scientists in healthcare
- Specialties: Doctors, Nurses, Pharmacists, Physiotherapists, Dentists, Certified Medical Coders
- Center Locations: Philippines (60%), India (30%), USA (10%), Europe (<1%)

Proprietary Technologies

- Accenture Public Health Platform (APHP) for Health Insurance Exchange and State Medicaid
- HAPO for claims payment integrity, quality assurance
- Clinical Review Analytics Model
- Accenture Risk Score Accuracy analytics platform
- Performance management: Accenture Digital Workforce platform, iCA for claims processing work distribution/management; Global Productivity Hub, Intelligent Work Allocation, Operations Navigator, Accenture Knowledge Navigator

HfS BLUEPRINT REPORTS

High Performer

Leading with strengths in digital consulting and technology platforms to service insurance BPO

P&C L&A

Blueprint Leading Highlights	Strengths	Challenges
Execution • Geographic footprint and scale • Delivery of claims administration • Delivery of policy serving **Innovation** • Use of emerging technologies • Continuous improvement methodology and capability	• **Strong European insurance client base.** Accenture has one of the largest client bases for insurance across consulting, technology and outsourcing in continental Europe and a growing portfolio for technology in North America. • **Market leading insurance software assets.** Accenture has strong technology assets acquired and developed for P&C and L&A. • **Thought Leadership led by digital consulting.** Accenture is investing in thought leadership and domain knowledge around digitization and mobility in the insurance industry. As an example, its Insurance Experience Hub and customer experience frameworks from Accenture Interactive are enabling it to be at the cusp of digital enablement for the insurance front end. • **Progress on analytics and automation.** Accenture is a market leader for analytics, in areas such as actuarial and fraud but we now see examples of using analytics in BPO operations to improve customer service interactions. RPA is another area where Accenture has made progress since 2013 to enable 360 degree policyholder information aggregation for better servicing and claims adjudication automation to improve interactions, accuracy and response times.	• **Investment and growth in BPO.** Accenture has roughly the same scale and number of clients in the last two years. We do not see core insurance BPO operations as a key focus area for the service provider beyond its existing clientele and investments in technology assets. • **Turning software clients into As-a-Service buyers.** Accenture has a strategic focus to move to As-a-Service in all its offerings and industries for turning software clients into As-a-Service buyers. Accenture needs to push the envelope on integrating its insurance software assets (primarily Duck Creek) and client relationships into broader As-a-Service operations including BPO. This is an emerging operating model where Accenture will need to seize the opportunity to create mindshare with key insurance majors around consumption based models that deliver outcomes. HfS does not see the alignment between Accenture software and Accenture operations in place to yet fully realize this vision.

Relevant Acquisitions and Partnerships	Key Clients	Global Operations Centers	Proprietary Technologies
• 2011: Acquired Duck Creek Technologies, a privately held company that specializes in software solutions for the property and casualty (P&C) insurance industry Partnerships with: • IPSoft for autonomic platform	• RSA • Generali France • Leading European insurance co • Leading European bankinsurance co	• **Headcount:** 4,500 FTEs • **Locations**: Delivery presence primarily in China (Dalian), India (Bangalore, Delhi, Mumbai) and the Philippines (Manila) Some delivery in Europe (Czech Republic, Italy, Mauritius, Portugal, Romania, Spain) and South America (Argentina)	• Accenture Life Insurance Platform – ALIP (Life administration system/platform) • Duck Creek (P&C Policy administration system/platform) • Accenture Claims Component Solution - CCS (P&C Claims administration system/platform) • EPS (Claims vendor management) • MI Dashboard (Analytics) • Accenture Insurance Data Migration Factory

Winner's Circle

An innovative global service provider, focused on business transformation and evolving toward predictive testing

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Blueprint Leading Highlights

Execution

- Customer Satisfaction and Mindshare
- Geographic Footprint and Scale

Innovation

- Concrete Plans to Deliver Value Beyond Cost
- Vision for Competitive Differentiation
- Integration of New Technologies
- Partnership Model

Strengths

- **Balance of strong transformational and industrialization capabilities:** Accenture was recognized by clients for providing strong leadership in testing in support of transforming processes and applications. Crucially these capabilities are underpinned by industrialized assets allowing for efficiency and cost control.
- **Deep vertical capabilities underpin expansive process know-how:** Industry- and technology-aligned solution factories enabling assembly line-like production.
- **Significant R&D in machine learning and cognitive computing:** Accenture's vision is to evolve more predictive and intelligent testing approaches based on analytics and coverage of the emerging digital spectrum.
- **Strength around the SAP ecosystem:** Differentiation comes from the deep partnership with SAP and its investment in intelligent tools.

Challenges

- **Price perceptions:** Aligned with its focus and capabilities around transformation projects, some clients and not non-clients continue to perceived Accenture as being more expensive than its peers. Market recognition of the client benefits to be provided by the Accenture's investment in industrialized assets should that mitigate these this concerns could be beneficial perception.
- **Mid market:** Accenture has not been a significant player in the mid-market of clients for testing services partly because of price perceptions but also primarily because Accenture's targeted market is the Global 2000

Staff & Operations

- Testing professionals: 29,000
- Estimated testing revenues: ~$1,300m
- Global Testing Center of Excellence (TCoE) Network comprised of more than 30 centers located in 17 countries
- Enhance on-site delivery of testing services by augmenting TCoEs with local professionals who have deep testing expertise

Technology

- **Accenture Intelligent Tools for Test Operations**
- **Accenture Test Coverage Analyzer**
- **Accenture Intelligent Tools for Test Analytics**
- **Reusable Industry Test Packs within Accenture Test Repository**
- **Accenture Automation Integrator for Testing**
- **Accenture Testing Accelerator for SAP**

Winner's Circle

Acquiring Procurian has put Accenture at the leading edge of procurement outsourcing delivery with a wide breadth of capabilities

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- Strategic Sourcing
- Transactional Procurement
- Supplier Management
- Contract Management
- Technology Management

Blueprint Leading Highlights

Execution
- Account Management
- Strategic Sourcing
- Transactional Procurement
- Contract Management
- Geographic Footprint and Scale

Innovation
- Integration of As-a-Service Capabilities
- Delivering Value Beyond Cost
- Vision For The Evolution of Procurement Outsourcing
- Integration of Technology

Strengths

- **Successful Procurian Integration.** Accenture has successfully integrated their legacy Procurement Outsourcing, Procurement Consulting, Ariba Services Acquisition and Procurian over the last several years and put key Procurian executives in charge to transform the business.
- **Excellent Account Management.** Clients were quick to highlight their delight with their account management leads (both Accenture and Procurian heritage) who made it easier to do business with what can at times seem like a giant firm.
- **Strategic Sourcing And Category Management.** Accenture leads the market in the breadth, depth and sophistication of its strategic sourcing and category management capabilities with innovative specializations in fields such as energy sourcing. Accenture has also brought on ex CMOs, CPOs and domain experts to lead categories across their global delivery network.
- **Contract Management.** Accenture is being quite innovative in the way that they have aligned legal and contract support resources to procurement outsourcing delivery teams. This approach is helping reduce sourcing cycle times for clients resulting in more rapid compliance to approved sourcing practices thereby reducing rogue spend.
- **As-a-Service Capabilities**. Accenture is advocating an As-a-Service approach to Procurement Outsourcing that allows clients to select the skills and technology needed to more effectively integrate into their retaining procurement functions than has traditionally been the case.

Challenges

- **Transformational Messaging Not For All**. Accenture offers a wide set of Procurement offerings with a strong tilt towards transformational business outcomes. For some current clients and others who have chosen competitors, these transformational messages miss the mark and are perceived as being complicated to contract for and costly to implement. Even today, there are segments of buyers who just want simpler solutions in procurement outsourcing.
- **Retaining Key Sourcing Staff.** Post the Procurian integration, Accenture has seen some departures of sourcing staff who have been selectively poached by other service providers who are looking to build up their capabilities in these areas and we believe that this is even more likely to happen in the near future.
- **Maintaining The Community.** Several clients of a smaller size felt that while they heard about many programs to create communities of clients and share best practices, they weren't able to take advantage of them and felt that perhaps they were really targeted at Accenture's largest clients. We hope that the forthcoming release of "spend trends", a collaborative site with premium content will be a significant development for clients of all sizes who are looking for greater community and collaboration.

Client Industry Verticals

- Communications, Media, and Technology
- Financial Services
- Health and Public Sector
- Products
- Resources
- Public Services

Key Clients

120+ Procurement Outsourcing clients with US$ 95 billion in spend management including:

- Global Automotive Manufacturer
- Global Mining Operator
- Leading White Goods Manufacturer
- Major Cosmetics Retailer
- Global Automotive Parts Supplier
- Leading European Universal Bank
- Wireless Device Manufacturer
- Capital Markets Major
- Global Tire and Rubber Manufacturer

Global Operations Centers

Headcount: 3,300+ professionals

- USA: King of Prussia, PA, Pittsburgh, PA; San Antonio, TX
- Costa Rica: San Jose
- Brazil: Belo Hoizonte; Sao Paulo
- Argentina: Buenos Aires
- UK: London
- Czech: Prague
- Slovakia: Bratislava
- Romania: Bucharest
- India: Bangalore; Chennai; Delhi; Hyderabad
- China: Shanghai; Shenzhen; Dalian
- South Africa: Johannesburg

Technology

Accenture Proprietary Solutions include:
- Radix
- SavingsLink
- The Buying Center Operations Suite (BCOS)
- MySupplier and Buyer Portals
- Accenture Insights – Category-specific benchmarking, analysis, and cost modeling applications
- Accenture Operations Navigator

Key Third Party Solutions include:
- SAP & Oracle
- Tableau
- Ariba

Winner's Circle

Global services leader offering full capabilities across the IT, operations and consulting value chain

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- PLAN
- IMPLEMENT
- MANAGE
- OPERATE
- OPTIMIZE

Blueprint Leading Highlights

- Quality of Account Management
- Tailor to Business/industry
- Flexibility to Deliver End-to-End and Point Solutions
- Integrate Technology
- Pricing Flexibility
- Integrate Technology into Business Process
- Vision

Strengths

- **Proven ability to support both HR and Finance operations on the Workday platform.** Accenture offers organizational change management services and focuses on processes and business impact for customers at each stage of the value. Other services offered include payroll implementation, ongoing support and optimization, Talent and HR BPO, F&A BPO and analytics.
- **Strong account management.** Customers highlighted Accenture's ability to deliver on time and on budget under the guidance of account leads who stayed with the customer.
- **Integrated SaaS and BPO deployments.** Accenture reports more than 10 years experience in SaaS deployments with a breadth of experience to enhance the Workday customer experience. For example, the Accenture Client Enabler (ACE) is a SaaS delivery toolkit that was originally developed for Salesforce.com projects but has been adapted to provide real-time visibility into Workday solution and update delivery. It is one of the few Workday partners that has experience in delivering Workday BPO services.
- **Investment in Workday proprietary tools and accelerators.** Accenture has developed tools, accelerators and methodologies to support fast and effective deployments, and to highlight issues and identify opportunities to improve performance. Accenture has among the highest number of Workday proprietary technologies in the partner ecosystem.

Challenges

- **HR Managed services commitment.** References noted that while Accenture has been strong on strategy and Workday implementation capabilities, it was not as prepared as well to support on-going managed HR services. It had to be brought along or in some cases replaced by another service provider with better global, multi-lingual resources in place to manage on-going support, data management and exception processing around Workday.
- **Staffing model.** References noted that Accentures's primarily US-based implementation team and India-based managed services resources have suffered from inconsistent capabilities and awkward hand-offs. They would like to see a better end-to-end capability around Workday and consistent quality resources worldwide, if not seamless ownership of the entire employee experience.
- **Continuous improvement.** Customers pointed out that Accenture did not have a visible, clear continuous improvement methodology. Accenture has invested in methodologies and tools, such as automation, to improve the SaaS experience for customers, but it seems that customers are not aware of this.

Relevant Acquisitions/Partnerships

- While Accenture has competed a comprehensive assessment of Workday services providers, it has not made any acquisitions in the Workday services market to date. It plans to grow organically and has aggressive employee development and retention plans in place, including hot skills bonuses and restricted stock unit awards.

Key Clients

- Experience with 45 customers on Workday in total, currently working with approximately 30 clients.
- Targets Fortune 1,000 customers of 3,000+ employees, requiring large-scale, international, complex deployments.
- Accenture reports it has clients across its five operating groups (industries), Communications, Media & Technology (CMT) with a focus on high tech firms; Financial Services (FS) with a focus on banking and insurance, Health & Public Services (H&PS) with a focus on Health and Higher Education, Products with a focus on Automotive, Retail and Life Sciences, and Resources.
- Notably Communications, Media & Technology (CMT) , Products and Higher Ed have dedicated Workday practices.
- Clients include: Prudential Corp. Asia, Huntsman and Telefonica Digital

Staff & Operations

- Partner since: 2008
- Number of Workday certified consultants: 550 with a total of 700+ certifications altogether
- Total number in practice: 550+

Accenture has on-shore, off-shore, and hybrid delivery options for customers.

- 5 Workday Delivery Centers in Atlanta, Lisbon, Bangalore, Manila, and Shanghai. Accenture states it will grow its Workday Delivery Centers in all of these locations
- Innovation Centers for Cloud are in San Jose and Bangalore, India.
- Existing Centers of Excellence also support Talent and HR BPO and F&A BPO.
- Workday-specific services resources are located: US: 40%; Europe: 15%; Asia: 45%

Technology Tools and Platforms

- *Accenture Solution Factory for Workday:* builds on Workday's own deployment tools and methodology for HCM and FM.
- *Accenture Advanced Enterprise Solutions for Workday:* Built from SAP experience, these accelerate the development of industry-specific solutions, based on standardized tools and practices.
- *Accenture Reusable Technical Library (ARLT) for Workday:* this accelerates the design and development processes and can optimize projects by up to 30% says Accenture.
- *Accenture Release Analyzer for Workday:* assesses new functionality and produces impact analysis reports for customers.
- *Accenture Client Enabler (ACE):* automation tool used in 90%+ of SaaS projects
- *Accenture Payroll Reconciliation Accelerator* data load validation tool.

Winner's Circle

A global leader in Mobility that brings a robust mix of vision, industry expertise, and technical know-how.

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2014 Mobility Revenue / Growth: HfS Estimate: $2,600M (30%)

Relative Strength Across Stages of Mobility Adoption

Strengths

- Seen as a true thought leader that can develop and deliver on the most robust of long-term business focused road maps and one of four service providers in this year's Winner's Circle.
- Has deep industry expertise that it can bring to bare to explore true business transformation within every mobility engagement.
- Very broad skills across a wide range of mobile platforms means it has nearly every technology covered at least somewhere in the organization.
- Accenture's global footprint – with deep pockets of offshore, nearshore and local talent – means it can put together the most appropriate team for every engagement.
- Robust process and methodology makes it a great choice for those needing considerable help in implementing their mobile strategy.

Challenges

- Viewed by some clients as a bit overbearing at times as their deep experience leads them to come to the table with preconceived solutions.
- Enterprise buyers report there are times Accenture will rely on outside resources to address an RFP and this gives them the impression it has resource constraints..
- Still seen as expensive by enterprise buyers despite its own lower cost development centers located around the globe.
- While Mobility is part of a larger "Digital" practice, Cloud is delivered via a separate "Operations" Growth Platform separating it to some degree from other core elements of transformation though the company can clearly combine the two effectively in delivery.

Client Industry Verticals

Focus on Key Verticals:

- Products
- Resources
- Financial Services
- Telecom & High Tech
- Healthcare & Public Service

HfS Estimate of Revenue Mix:

- 50% B2C
- 50% B2B

Key Clients

In FY14, Accenture Mobility served 49 of the Fortune 100 – 23 of them are ranked #1 in their subindustries.

Enterprise Mobility Clients Include:

- 4 of the top 5 telecoms
- 6 of the top 10 commercial banks
- 7 of the leading health care and P&C insurance providers
- 3 of the top 5 pharmaceutical companies
- 5 of the top 10 petroleum refining companies

Global Operations

Mobility Headcount:

- ~10,000 FTEs

Key Delivery Locations:

- India 55%
- Philippines: 10%
- Eastern Europe 5%: (predominantly Latvia)
- Onshore 30%

Acquisitions:

- Evopro (2014, IoT),
- Acquity (2013, eComm),
- Fjord (2013, design),
- NewsPage (2012, CPG),
- avVenta (2012, Digital marketing)

Technology Offered

Proprietary Platforms & Software:

- Accenture Digital Connected Products Platform, Mobility Managed Services platform, Accenture Mobile Maturity Diagnostic, Accenture Digital Optimization, Accenture Digital Diagnostic, Accenture Web Evaluator, Windows 8 Enterprise Studio (with Avanade and Microsoft)

Key Partnerships:

- SAP, Oracle, Apple, Apogee, Crittercism, and Salesforce

HfS BLUEPRINT REPORTS

Winner's Circle

Engaging thought leader with a full suite of services and community connections.

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Business Process Service Maturity: Consumer / Patient Engagement | Utilization Management | Care Coordination | Performance Mgmt. & Analytics

Blueprint Leading Highlights

- Quality of Account Management
- Innovation and Vision
- Scale + Breadth of Services
- Delivery Performance
- Investing in Future Talent

Strategic Approach

Improve health quality and cost effectiveness for the population by helping patients, providers, and risk bearers coordinate and manage health and wellness across care settings.

Strengths

- **Depth and breadth in scope of services and capability with global credentials.** One of the more experienced service providers in this market, particularly in consulting for population health, and services for care management. Able to lead with strategy and tap into depth in technology and outsourcing. Proof points on embedded analytical capability in delivery.
- **Thought leadership pervasive in broad scope of population health / care management services.** Market recognition in this area - strong credentials and credibility. Won award for population health management program using remote monitoring in Spain from U.S. Population Health Alliance. Rolling out "Joint Value Targeting" with clients to integrate innovation.
- **Community connection.** Through the Accenture Foundation, Accenture has connected with the community, for example funding patient navigation programs with the Harold P. Freeman Patient Navigation Institute.
- **Responsive and engaging.** Clients commended Accenture's commitment to excellence, willingness as an organization to address operational challenges, and ability to tap into the global network, all critical to breaking ground with new concepts for patient-centric services like patient navigation that disrupt the status quo in hospitals and health plans.

Challenges

- **Value proposition with on-going "run" services options.** Accenture was one of the first to market with population health and care management solutions and has completed many projects. However, the service provider has yet to play out the value proposition for on-going services in population health or care management more broadly beyond utilization management. Messaging the end –to-end value proposition is critical here.
- **Healthcare provider capability is not as broad as in payer.** Accenture has breadth and depth across consulting, technology, and outsourcing for health plans and is in the earlier stages of building the same presence in the healthcare provider market segment.
- **Thought leadership slow to convert to longer term business services**. Clients feel it can take a long time to move from what is theoretically possible to what is commercially possible as Accenture takes time to align all the internal organizational units.
- **Active listening to client feedback.** Clients mentioned that while Accenture looks for improvements, brings ideas forward, and drives the program, sometimes it seems as if the team is not consistently employing active listening on feedback.

Relevant Acquisitions / Partnerships

- February 2014, acquired Radiant (URAC accreditation and assets) from Anthem. Radiant operates as a wholly owned subsidiary.
- 2011, launched Radiant with Anthem (as WellPoint).
- June 2005, acquired Capgemini's health practice, including its payer and provider population health management practice.

Client Profile

- **Population Health and Care Management Business Process Services Clients: <10**
- 73 population health clients worldwide in various stages of the continuum, from early consulting engagements to large-scale BPO engagements, including 42 U.S. clients, 21 EALA clients and 10 in Asia Pacific.

Service Delivery Operations

- Population Health and Care Management offerings started with consulting in 1995; application outsourcing, 2001; BPO in 2011.
- Accreditation: URAC, through Radiant, for Health Utilization Management – 4 sites in Philippines; 27 state Utilization Review licenses; 41 state TPA licenses.
- Healthcare Headcount: 18,000; ~13,000 in BPO; 1,200 health-licensed practitioners; 1,100 data scientists in healthcare
- Specialties: Doctors, Nurses, Pharmacists, Physiotherapists, Dentists, Certified Medical Coders
- Center locations: Philippines (70%), India (25%), USA (CO, TX); 4%), Europe (1%)

Proprietary Technologies

- Clinical Review Analytics Model to assess the cost-effectiveness of authorization at individual code level
- Accenture Clinical Health Platform (beta): clinical data exchange and workflow
- Accenture Risk Score Accuracy analytics platform
- Accenture Digital Workforce platform for performance management
- TeKI remote monitoring tool using Microsoft gaming technology
- More than 50 tools, including: STARS Optimization Tool, Utilization Management Clinical Call Flow, Automated Workload Distribution Tool , Prior Authorization Data Automation Tool

HfS BLUEPRINT REPORTS

Winner's Circle

An industry leader with a strong community-led approach to big data and analytics

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Blueprint Leading Highlights	Strengths	Challenges
• Vision for Enterprise Analytics Services • Analytics talent acquisition and development frameworks • Experience Delivering Industry-Specific Solutions • Delivery of Advanced analytics modeling and ongoing decision support • Geographic Footprint and Scale	• **Experience, scale and domain expertise.** Accenture serves 70 of the Fortune Global 100 companies with an analytics portfolio that includes industry-specific offerings, cross-industry offerings and functional solutions. It has one of the largest analytics talent pools, $3B in analytics revenues in FY14 and globally networked centers of excellence. • **Investments in R&D and alliances.** Accenture's clients commended its ability to invest in analytics, including initiatives such as Accenture Innovation Centers, academic alliance with MIT, Accenture Technology Labs, technology alliances and collaborative relationships, and client joint ventures. • **Building assets that enable Analytics As-a-Service.** Accenture has developed and acquired several key analytics platforms, models and toolkits, enabling AaaS platform delivery, rapid analytics application development, business function and vertical-specific analytics tools and solutions. • **Great market presence and community development.** Clients appreciate the opportunities Accenture creates to engage them in industry-level discussions and interact with the larger analytics community. Its market presence over the last couple years has helped differentiate Accenture Digital including analytics.	• **Perceived as expensive**. Clients mentioned that Accenture's premium pricing is a challenge – several competitors with similar capabilities are more accommodating to budget considerations. • **Sales-oriented account management.** Accenture's analytics clients noted that when delivery and business development responsibilities are shouldered by the same people, discussions are more sales oriented to growing business rather than customer servicing. • **Customizing analytics innovation to individual account needs.** Client feedback mentioned that during account level discussions, they get great ideas from Accenture on digital opportunities, but there is a room for improvement in understanding and addressing company-specific needs.

Relevant Acquisitions	Key Clients	Global Operations Centers	Proprietary Technologies
• 2014, i4C Analytics, an advanced analytics software platform provider that offers tailored industry- and function-specific analytics applications • 2013, Procurian, enhancing Accenture's capabilities in Procurement BPO with analytics and technology assets • 2013, ChangeTrack Research, adding ChangeTracking® for data collection and analytics for change program management • 2012, Neo Metrics Analytics S.L. to further develop advanced analytical models	• A global car manufacturer • A large Dutch bank • One of the largest mobile network providers • A multinational grocery and general merchandise retailer • A Canadian energy and utilities provider • A global electronics conglomerate	• Headcount: 28,000 FTEs in Accenture Digital, including 1,000 data scientists and big data engineers • 50+ global centers in the Accenture Global Delivery Network, supported by 20 Accenture Analytics Innovation Centers	• Accenture Analytics Applications Platform – enables the agile development of advanced analytics applications • Accenture Analytics Platform – enables the delivery of business intelligence and analytics-as-a-service • Accenture Marketing Analytics Platform – offers marketing mix modeled outcomes • Accenture Data Discovery – pre-integrated platform of big data technologies deployed in the cloud • Accenture Data Integration and Reporting/OLAP Accelerators • Accenture BPO Navigator – dashboard for contractual and business insight/analytics metrics

Winner's Circle

Business outcomes focused global service provider with technology and transformation capabilities

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High performance. Delivered.

- Procure to Pay
- Order to Cash
- Record to Report
- Finance Transformation

Blueprint Leading Highlights

Execution
- Quality of Account management teams
- Remote floor walks for clients
- Experience delivering industry-specific solutions

Innovation
- Vision for industry-specific solutions
- Integration of technology into business process

Strengths

- **Vertical breadth and depth.** Has real strength and depth in F&A across key industries, such as manufacturing, consumer goods, energy, insurance, and life sciences.
- **Broader focus on "operations" that encompasses BPO, transformative operational services, and IT infrastructure.** With BPO being merged into a broader Accenture Operations growth platform under the leadership of Mike Salvino, there are major "As-a-Service" benefits of having business process and cloud-enablement teams joined at the hip, supported by consultative depth (see link).
- **Tier 1 service line resources.** HfS estimates the revenues of Accenture Operations are in excess of $6 billion, which gives the F&A BPO service line ample resources to invest in strategic clients, make calculated risks, and benefit from increased sales, consulting, and marketing resources, such as 3,000+ business advisors analyzing and interpreting client data.
- **Leads in sole-sourced contracts**. Many F&A BPO contracts evolve out of long-standing relationships with clients, either in the BPO area or others, such as strategy or technology. There is less reliance on outsourcing advisors as their channel to market. Their client-focused-strategy enables deeper relationships with clients pre-sales.
- **Leverages its long-standing clients as ambassadors in the market.** Accenture has strong, collaborative relationships with its clients, who assist in its go-to-market strategy and are proud to be associated with the Accenture brand.
- **End-to-end F&A BPO capabilities that include Procurement BPO**. Market-leading Procurement BPO practice integrated into Procure-to-Pay offering.

Challenges

- **Resistance to Mid-market and SMB.** Focusing on high-end enterprises alone may leave Accenture exposed in the future, with so many of its major competitors making inroads in this segment, such as Cognizant and WNS.
- **Increased competition from India heritage providers**: In the last couple of years, India-centric providers have been more successful making inroads into Accenture's market share in F&A BPO. HfS sees aggressive moves from the likes of Genpact, TCS, Wipro, Infosys, EXL, and WNS.
- **Strong focus on Business Outcomes can alienate some clients**. While Accenture's sophisticated approach to BPO fits with the needs and demands of many of today's ambitious global enterprises, some clients may perceive that serving organizations whose goals are primarily focused on cost-reduction and standard operational performance is not its priority.
- **Inflexible during transition**. Some clients have perceived Accenture as being somewhat inflexible during transition periods – citing the "Accenture" solution. However, Accenture is clear up front as to how they like to work with clients.
- **Aggressive deal qualification.** As a result of company's aggressive deal qualification process, several opportunities have been declined. Some potential and current clients may feel that Accenture may not compete in an environment where its relationships are not as strong, especially against an incumbent provider.
- **Perceived slow adoption of new technology solutions in F&A.** Accenture is making significant investments in technology advances and adoption, but its technology adoption is evolving at a slower pace than some other service providers. Much of this is tied to Accenture's steadfast technology independence.

Client Industry Verticals

- Communications, Media, and Technology
- Financial Services
- Healthcare and Pharma
- Resources
- Public Services
- Travel & Transportation
- Manufacturing

Key Clients

115+ F&A BPO clients and 140+ active contracts. Strong demand continues from North America, as well as Europe and Asia Pacific.

- ANZ
- Baker Hughes
- BP
- CEVA Logistics
- Canon
- Cisco
- Delta
- DHL
- EMC
- Intertek
- Marriott
- Microsoft
- NCR
- Edcon
- Canon

Global Operations Centers

- **Headcount:** 21,000+ professionals

- Latin America: Argentina, Brazil, Costa Rica
- UK, Ireland, Spain
- Central & Eastern Europe: Prague, Bratislava, Bucharest, Warsaw
- India: Bangalore, Chennai, Delhi
- Mauritius
- China: Shanghai, Chengdu, Dalian
- Philippines: Manila and Cebu
- South Africa: Johannesburg

Technology

- Accenture Operations Navigator 2.0
- F&A Performance Dashboard
- Virtual Site-Visit Portal
- ChangeTrack Research
- Boardwalktech platform
- Integrated Desktop
- Digital Virtual Assistant
- Intelligent Work Allocation
- Global Productivity Hub
- Digital Workforce Platform
- The Accenture and NetSuite BPaaS
- Accenture Transaction Compliance & Analytics Tool (ATCAT)
- eInvoicing solution leveraging SAP's Ariba Network

HfS BLUEPRINT REPORTS

Winner's Circle

Business outcomes–focused global service provider with a full set of offerings in telecom

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Strengths	Challenges
• **Technology Business Integration and Vision of As-a-Service Economy.** Accenture has been investing in and developing tools and technology for telecom digital operations. It has a strong vision to gradually transform telcos' business and its own business toward digital operations, where an increasing proportion of the business processes can be delivered as BPaaS. • **Delivery of Services for All Processes.** Accenture has a depth of client experiences and capabilities across all telecom operations sub-processes in SMACA. Clients pointed to examples of digital transformative solutions in all areas and to a deep bench of skilled delivery resources. Now Accenture has also expanded the traditional telecom BPO scope and started offering services that were the earlier domain of telecom equipment providers and management consulting firms. • **Strong Initiative in Creating Telco Customer Communities**. Accenture uses client initiatives created by the CMT Operating Group such as the Accenture Network Council, which has more than 70 members to share common telco challenges and opportunities and to educate about telecom operations. • **Experience of Delivering Value Beyond Cost.** Clients pointed to Accenture's focus on tangible business outcomes such as capex efficiency, process efficiency, cost reduction, customer satisfaction, and compliance in the engagements. Clients are particularly impressed with real-time analytics capability at an employee level, which enables real-time course correction.	• **Moving Beyond Tier 1 Telcos.** There are more than 700-800 telcos in the world, but Accenture has only a handful as its customers. While Accenture focuses on Tier 1 telcos, there is an opportunity to engage with Tier 2 and Tier 3 telcos with the value proposition. • **Marketing and Positioning of New Services.** Accenture's Network BPO offering has expanded the firm's scope of offerings and is now providing some of the services, which were earlier domains of telecom equipment providers and management consultants such as network rollout monitoring, network access cost modeling and analytics, etc. We believe this enlarged scope is the right direction, but Accenture should market these offerings and wrap that with additional customer case studies and thought leadership in these areas. • **Earning Price Premium.** A number of customers and references noted that Accenture is premium priced compared to some of its offshore-centric peers, but they also noted that they get value from Accenture today. According to the customers, the biggest challenge for Accenture is to continue to earn the price premium and provide additional value to customers when there are cost pressures from all sides.

Relevant Acquisitions/Partnerships	Key Clients	Global Operations Centers	Technology Tools and Platforms
• Accenture and Alcatel-Lucent have formed a strategic alliance to help telcos and large enterprises implement integrated ultra-broadband solutions. • Accenture has expanded its access to newer analytics capabilities via its recent acquisition of i4C, which offers an advanced analytics software platform that specializes in helping clients solve complex business problems through easy-to-use analytics applications.	10+ telecom clients, including: • A Leading Dutch Telco • A Leading Australian Telco • A Leading European Telco • A Leading US Telco • A Leading Brazilian Telco • A Leading Danish Telco	**Locations**: Telecom Operations Centers in: • Argentina • Brazil • Canada • France • India • Netherlands • Philippines • Poland • Slovakia • US	• *Ticket Triage:* In-house BPaaS platform for fulfillment and assurance • *Accenture Provisioning Services (APS):* In-house BPaaS platform for order activation • *Tyrabot*: In-house network drawing automation tool • *Unified Desktop*: In-house automation tool for eliminating screen switching • *Accenture Operations Navigator:* It is used for analytics and performance management • *MyPromoter*: In-house CEM & analytics tool

Social	Mobility	Analytics	Cloud	Automation

Network	Fulfillment	Assurance	Billing

HfS BLUEPRINT REPORTS

Winner's Circle

A progressive service provider with a vision for bringing together multi-disciplinary digital marketing capabilities

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Blueprint Leading Highlights	Strengths	Challenges
• Quality of Account Management Team • Incorporation of Customer Feedback • Delivery of Marketing Content Management • Delivery of Marketing Campaign Management • Delivery of Marketing Data Management, Reporting, and Analytics • Pricing Flexibility • Concrete Plans to Deliver Value Beyond Cost and Investment into Future Capabilities • Integration of Technology into Business Processes • Vision for Digital Marketing and CEM	• **Vision for digital marketing value chain.** Accenture has evolved the most progressive vision for helping clients across the digital marketing spectrum, with demonstrated capabilities across analytics, content management, online marketing campaigns, search, and social and media management. • **Critical assets acquired.** Accenture has aggressively acquired digital specialist firms over the last few years. As a result, it now has access to industry-leading digital design and production, allowing it to offer clients a more complete end-to-end digital marketing portfolio. • **Global delivery capability.** Accenture has a global delivery network spanning key locations globally, with centers in the near-shore locations of Costa Rica, Czech Republic, Poland, and South Africa and significant offshore presences in India, China, and the Philippines. • **Existing relationships with enterprises.** Accenture has penetrated global enterprises with its advanced analytics, consulting, IT, and BPO offerings and is in a great position to begin conversations about digital marketing support with CMO offices in client organizations. • **Flexible and robust delivery of marketing processes.** Clients commended Accenture on its willingness to make engagements successful, to solve for complex marketing processes, to change internal mindsets, and to work with global brands in an integrated matter – a key challenge for dispersed or autonomous marketing units today.	• **Shaping the market and educating client organizations about a new operational model.** The marketing operations market is nascent, with few successful examples of comprehensive work in the marketing value chain. Accenture faces a challenge in evolving this space beyond the isolated engagements that currently exist around marketing analytics, content production, and social media moderation to bring marketing operations to the full vision it has already defined. • **Consistency in developing thought leadership in digital marketing and evolving best practices across clients.** Clients mentioned that, while Accenture has innovated on areas like analytics, they do not see the company innovating in all parts of the marketing ecosystem. Additionally, clients mentioned that they did not see Accenture incorporating learning and best practices from other engagements to improve processes, further outlining the lack of a standardized 'practice' in this space today. • **Onshore delivery.** Accenture Marketing BPO lacks onshore marketing delivery capability in the U.S., since it has no delivery center in the country. However, it does work onsite at client locations.

Relevant Acquisitions/Partnerships	Key Clients	Global Operations Centers	Proprietary Technologies
• July 2013: Accenture acquired Acquity Group, Ltd., a U.S.-based digital marketing company • May 2013: Accenture acquired Fjord, a London-based global service design consultancy • October 2012: Accenture acquired avVenta Worldwide, a provider of digital production services	• Global pharmaceutical company • Top 10 life sciences industry company • Major U.S. retailer • Global consumer packaged goods company • Leading multinational telecommunications company	• Headcount: 1,800 FTEs in Marketing BPO, 23,000 FTEs in Accenture Digital • Latin America (Costa Rica) • Europe (Poland) • Asia Pacific (India, China, and the Philippines)	• Accenture Digital Diagnostics – Customized dashboard reporting for website content • Accenture BPO Navigator - Dashboard for both contractual and business insight/analytics metrics • Accenture Atlas Platform - Marketing resource management and content management platform • Accenture Customer Asset Record – A customer record platform used in data management

Service Area Maturity

Content Dev & Mgt | Campaign Management | Digital CRM | Data Mgt., Reporting & Analytics

HfS BLUEPRINT REPORTS

Winner's Circle

Accenture continues to charge ahead and to innovate with the new co-innovation SAP business group.

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Market Share: 10.00 %
Overall Score: 4.68

Innovation

- Score: 4.45
- Strong overall vision for the SAP Services space.
- The new co-innovation SAP business group promises continued future leadership in the SAP Services innovation space.

Execution

- Score: 4.90
- Market share leader with strong growth. Clients are very happy with the value they receive for their money.
- Well positioned for continued market leadership.

Key Strengths

- Overall global market leader for SAP Services, covering the whole SAP lifecycle with significant resources in all key geographies. Accenture has the largest SAP team of all the service providers.
- Very deep relationship with SAP for more than 30 years. The recently founded Accenture and SAP Business Solutions Group (ASBSG) is unique in the market place and targets a continued leadership in the co-development and co-innovation space together with SAP.
- Accenture is the right partner for clients looking for one stop shopping solutions and the full scope of services and hosting. The company is capable of staffing even the largest SAP projects.
- Clients report that Accenture is very capable of linking generic SAP topics to industry-specific solutions given its long track record of successful business transformation projects.

Key Challenges

- Very large global clients report a very high satisfaction level with Accenture. Some small to midsize clients feel alienated by Accenture's strong commitment to process quality and delivery on agreed goals. This is something, smaller clients are not always used to.
- North American success, although impressive, is still lagging the European strength. Accenture is aware of this and is showing increased marketing efforts and hiring seasoned SAP specialists in the American theater.
- Accenture is not a low price service provider. As topics like ERP consolidation mature and become more and more mainstream, competition on price will become more prevalent by mid 2015.

SAP Services Scale

- Market Share: 10.00 %
- Estimated revenues: $ 5,000 M
  - Consulting: $ 3,800 M
  - Hosting: $ 1,200 M
- Market share leader with continuing strong growth.

SAP Services Coverage

- # of SAP practitioners: 39,000
- Top 3 Verticals: Consumer products/retail, oil, utilities.
- All regions and relevant countries covered extremely well.
- All relevant services covered extensively. Breadth and depth second to none.

Customer Satisfaction And Competitive Differentiation

- Highest level of customer satisfaction.
- The combination of business and IT capabilities is a huge point of competitive differentiation.

HfS BLUEPRINT REPORTS

Accenture – Talent Acquisition Service Providers – Partners on the Path to Total Talent Management 2014

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Winner's Circle

Strategic Client Advisor with Technology, Global Footprint, and C-level Trust

Blueprint Leading Highlights

- Quality of Account Management Team
- Incorporates Customer Feedback
- Geographic Footprint and Scale
- Experience Delivering Industry Specific Solutions
- Flexibility to Deliver End-to-End Solutions and Point Solutions
- Integration of Technology into the Business Process
- Leverage New Technology, Security, Social Media, Mobility, and Cloud Capabilities
- Concrete Plans To Deliver Value Beyond Cost and Investment Into Future Capabilities

Strengths

- **Workforce strategy and planning.** Even where Accenture has been contracted to fulfill what may be considered a tactical set of activities such as contract labor managed services, it is bringing market intelligence, savvy sourcing skills, and data, insights, and influence with contractors to help hiring managers and business partners understand longer term talent trends and impacts of their hiring decision making processes. This includes reducing overall hires, an outcome few rival staffing-driven firms are paid to pursue.
- **Geographic Footprint And Scale.** With one of the broadest delivery networks in the market, Accenture has built a global footprint that can provide resources from a breadth of locations.
- **Continuous Improvement Approach**. Clients recognized Accenture had rigorous methodologies (HfS identifies Lean Six Sigma, Operational Excellence, and We@Accenture, an internal employee suggestion program to harvest process improvement ideas to bring new value to clients and operations), whether or not the clients have been willing and able to consume them because of internal operational or resource constraints.
- **Delivering Value Beyond Cost.** Research for this report uncovered numerous examples where Accenture is driving traditional outsourced services for recruiting and labor contracting forward to reach business outcomes of quality of worker, increased revenues, and business agility.

Challenges

- **Jaded or jealous buyers.** A number of clients that have been using Accenture for talent acquisition services for a long period have pulled back some of their more strategic workforce and talent work as they said service delivery became too transaction-oriented and they felt strategic hiring support and services were going to be costly to add or augment the existing agreement. Similarly, some of the additional value added services that Accenture can offer may start to overlap with internal team expected contributions so the company will have to tread carefully to not step on the toes of HR partners or buyer leads.
- **No technology appetites amongst buyers.** While Accenture certainly brings strong technical resources, tools, and packaged solution implementation capabilities to prospects, many enterprises interviewed for this report, including Accenture customers, noted they are not interested in buying the technology specifically, more the outcomes of those systems in terms of efficiencies and management information. Accenture will have to figure out how it can make its money and margins to keep both customers and shareholders happy.
- **On-site support.** In its own "industrialized" operational excellence orientation, Accenture has set up on-shore, near-shore, and off-shore capabilities to best serve customers, but some companies are demanding on-site support that may not work well in practice in Accenture's own staffing models.

Relevant Acquisitions/Partnerships

- In 2013, Procurian acquisition brought expertise in manufacturing, consumer goods, high tech, and financial services as well as key analytics and tech assets to manage categories of spend, including labor.
- Also in 2013, ChangeTrack Research Pty Ltd brought analytics-based tools and services for change management.

Key Clients

53 Clients
- 50 large enterprise, including 24 ranked in the Fortune 500
- 3 mid-market ($100 M to $1 Billion in revenue)

Global Operations Centers

Headcount: 2,600

Locations:
- Core centers in Brazil, China, Czech Republic, India, UK, and US.
- Supporting centers in Italy, Romania, South Africa, and Spain.

Technologies Offered

- SAP successFactors, Oracle Taleo Recruiting Cloud Service, Avature CRM, HireVue video interviewing, SearchAll resume search,
- IQNavigator, Fieldglass, and Beeline VMSs
- Beta testing BoldChat to embed live chat into Taleo career sites, Virtual IVR, and Interview App for interview logistics
- BPO Navigator, SaS, Tableau and Accenture RADIX for outsourcing and analytics support

Accenture – Digital Transformation Services 2014

FRONT RUNNER

A true leader in Digital that combines deep industry insight with skilled delivery.

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Our Take:

With its relatively recently announced reorganization that highlights Digital and facilitates cross capability initiatives, Accenture is one of two true standouts in the market. In short, it has the goods in its industry expertise, its delivery skills and now its organization structure to boot. This is not to imply it's all downhill; the company will need to put it all together to create real world examples of client success but it is ahead of the pack in terms of the depth and breadth it brings.

Relative Strength Across the big MAC

Strengths

- Depth of digital marketing combines deep understanding of CMO challenges with strong technical capabilities around analytics.
- Accenture has significant investments in UX design with a network of 23 studios and access to 1,500 designers as well as in-house talent including that from three acquisitions in 2013.
- The company is extremely innovative in its view of "mobile" as it goes well beyond devices with a broad vision around connected products.
- It has a wide array of proprietary tools and platforms that enable it to provide faster delivery at lower cost.
- Accenture is very capable of linking generic Cloud Infrastructure Services to industry-specific solutions given its long track record of successful business transformation projects.
- Strong performance by technology consultants in moving applications to the Cloud enables it to push a broad story of Digital Transformation.
- Accenture has very strong capabilities and a vision across the analytics value chain, from strategy and analytics roadmap development to ongoing decision support and advanced modeling.
- With one of the largest analytics practices spread globally, Accenture has immense flexibility in delivering enterprise analytics through consulting and outsourcing services.

Challenges

- "Digital" today does not formally contain elements of infrastructure business and is focused primarily around customer experience and sales and marketing analytics which may create blind spots in transformation.
- Accenture is sometimes perceived by clients and prospects as being more expensive, though it performs well when total cost of a solution is taken into account.
- The company may increasingly face pressure from Public Cloud vendors – both in infrastructure and SaaS which, with a much lower cost base, could begin to put cost pressure on the hybrid space.
- Accenture is trying to create a distinct identity for the enterprise business analytics practice under the brand of Accenture Analytics, but it also operates analytics capabilities within Technology and Operations Growth Platforms. Those capabilities will need to be aligned over time.

Key Acquisitions & Partnerships

Acquisitions:
Evopro Group, Acquity Group, Fjord, NewsPage, avVenta Worldwide, Symbian, CAS, Mogenesis, i4C Analytics, ChangeTrack Research, Neo Metrics Analytics S.L., CadenceQuest

Strategic Partnerships:
Avanade, Apigee, Adobe, Hybris, Crittercism

"Digital" Operating Structure

Accenture Digital integrates the company's capabilities across Accenture Interactive, analytics and mobility to provide clients with a comprehensive portfolio of business and technology services – from developing digital strategies to implementing digital technologies and running digital processes on behalf of clients. This group includes 23,000 Accenture professionals.

Proprietary Platforms

Proprietary Platforms & Software:
Accenture Digital Optimization, Accenture Digital Diagnostic, Accenture Web Evaluator, Windows 8 Enterprise Studio (with Avanade and Microsoft), Accenture Analytics Platform, Accenture BPO Navigator, Accenture Health Analytics for Payer Operations, Accenture Insights for Enterprise Systems, Accenture Risk Based Monitoring – Pharmaceutical, Accenture Transaction Compliance & Analytics Tool, Mobility Managed Services Platform

HfS BLUEPRINT REPORTS

Winner's Circle

Business outcomes focused global service provider with a full set of SCM BPO offerings

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- Order Management
- Inventory Management
- Manufacturing Management
- Transport Management
- After Market Services
- Master Data Management
- Suitability Services

Blueprint Leading Highlights

- Delivery Of All Services & Processes
- SCM Customer Communities
- Value Beyond Cost
- Control Tower Capabilit

Strengths

- **Delivery Of Services For All Processes.** Accenture has a depth of client experiences and capabilities across all the SCM BPO sub-processes. Clients pointed to examples of transformative solutions in all areas and to a deep bench of skilled delivery resources many of whom were as consultative as operational in their approach.
- **Strong Initiative In Creating SCM Customer Communities.** Accenture uses client initiatives created by the Supply Chain consulting practice such as the Accenture CSCO (Chief Supply Chain Officer) Circle which has over 75 members to share common SCM challenges and opportunities and to educate about SCM BPO.
- **Experience Of Delivering Value Beyond Cost.** Clients pointed to Accenture's focus on tangible business outcomes such as revenue growth, working capital reduction as well as reducing operating costs in engagements.
- **Strong Control Tower Capability.** Accenture has been investing in and developing a Control Tower offering for several years now and actively looks to bring this capability into new engagements. Accenture has a large reference client base in Control Tower. Accenture Control Tower enables dynamic operation and truly connect demand with supply to allow for a more agile, streamlined, and responsive supply chain.

Challenges

- **Internal Competition With Management Consulting**. Accenture has a very large management consulting practice in supply chain which is both a blessing and a challenge for the SCM BPO offering. On the positive, SCM consultants often create new sole sourced opportunities for BPO and provide transformative (and at times operational) resources for solutioning complex SCM BPO engagements. On the negative side for SCM BPO, if a client originates in the Strategy Growth Platform (fka Management Consulting) the client sales team may steer the client toward a short-term solution involving consulting resources rather than proposing a longer-term BPO based solution.
- **Definitional.** Accenture has traditionally included in its F&A or Network BPO practice, much of what other service providers include in SCM BPO as "order management". As a result, Accenture might appear smaller comparatively in this Blueprint that a full like for like comparison would show. Instead Accenture's SCM Offering focuses primarily on a client's core supply chain, targeting supply chain specific offerings such as Order Fulfillment, Inventory Management and Transport Management.

Relevant Acquisitions/Partnerships

- Partnerships with GT Nexus and JDA, SaaS based Order Management and Logistics Management service providers.
- While 2013 acquisition of Procurian was in procurement rather than supply chain, there are opportunities to take SCM BPO propositions to the Procurian clients as well

Key Clients

23+ SCM BPO Clients across Communications Media & Technology, Financial Services, Health and Public Service, Products and Resources including:

- Global Telecom Equipment Vendor
- European ConsumerElectronic Company
- Japanese Consumer Electronic Company
- American Hypermarket Retailer

20+ clients as well for Accenture's Supply Chain Academy Offering which helps enterprises address shortcomings in their internal SC resources.

Global Operations Centers

Locations: 10+ delivery centers located in all of the key regions:

- Latin America (Brazil)
- North America (U.S.)
- Western Europe (Spain)
- Central &Eastern Europe (Czech Republic and Slovakia)
- Asia Pacific (China and India)
- Two Centers of Excellence located in Barcelona and Mumbai

Technologies Tools, Platform & Control Tower

- Control Tower: Cloud based three level framework and tool that integrates data visibility with analytics and process execution across the client's supply chain.
- BPO Navigator: It is used for analytics and performance management.
- Warehouse Productivity Tool : It estimates productivity across different parameters and identify areas for improvement.
- Network Center of Gravity Tool: It helps design a cost effective network.

HfS BLUEPRINT REPORTS

Winner's Circle

Diversified, operationally excellent global service provider

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Origination: 45%
Servicing: 20%
Default: 10%
Other: 25% - LOS/Analytics

Blueprint Leading Highlights

- Origination Processing
- Servicing Processing
- Geographic Footprint and Scale
- Experience Delivering To Top 50 Lenders
- Incorporating Customer Feedback
- Concrete Plans To Deliver Value Beyond Cost and Investment Into Future Capabilities

Strengths

- **Origination And Servicing Processing.** Accenture was seen to be best in class when it came to the delivery of origination and servicing transactions using a client's processes and combining them with their own process knowledge and experience.
- **Geographic Footprint And Scale.** With one of the broadest delivery networks in the market and scale from 3 acquisitions and organic growth, Accenture has built a market leading delivery footprint that can provide resources from a breadth of locations.
- **Experience With Top 50 Lenders.** Accenture Credit Services (or ACS, the Go To Market Name for this Offering) is designed to focus on the needs of the Top 50 lenders with access to Strategy, Digital, Technology and Operations resources across Accenture. This understanding of the needs of the largest lenders is recognized by clients.
- **Incorporating Customer Feedback.** Clients felt that Accenture was especially good at incorporating feedback based on their current and future needs and responding by either building up available resources or by integrating these needs into their offering strategy (e.g. acquisitions).
- **Delivering Value Beyond Cost.** Accenture appears to go far beyond the norm in using governance discussions to focus on value creation opportunities that go beyond cost reduction alone.

Challenges

- **Vision For Mortgage Market.** Clients cited Accenture for the excellence of delivery but the lack of a consistent vision for the direction of the mortgage market. With a consulting heritage clients felt this vision should be an area of strength for Accenture and yet if it exists, clients didn't feel that Accenture was focused on sharing these insights with them. Clients also cited a difference between the marketing messaging between mortgage services (ACS) as compared to the broader Accenture Operations capability.
- **Integrated Analytics Into Delivery.** It may be partially a case where the overall Accenture marketing push behind analytics is driving heightened expectations relative to the market but clients mentioned being underwhelmed by the level of integrated analytics in delivery. Historically Zenta was focused on a cost reduction and transactional delivery and analytics was not as featured and so clients see that legacy carrying forward to some degree today. When analytics are part of the solution they are done well by Accenture but they just don't seem to be as proactive in this as other service providers are for all clients.

Relevant Acquisitions/Partnerships

- Zenta acquisition which really brought Accenture into the Mortgage Services (both residential and commercial) BPO market for the first time
- Mortgage Cadence acquisition which bolstered the LOS capabilities of Zenta to provide an advanced mortgage processing capabilities
- Vivere Brasil, a majority stake acquisition which brings Accenture Credit Services into Brazil.

Key Clients

60+ total clients in residential and commercial mortgage services. For the purpose of this Blueprint we have focused on the residential mortgage market as many of the processes performed by the commercial side including property valuation, and commercial servicing are not generally found in the other service providers that comprise this Blueprint.

Global Operations Centers

Headcount: 3,200+

Locations:
Dallas, TX
Charlotte, NC
New York, NY (Commercial Mortgage HQ)
San Antonio, TX
Chennai, India
Mumbai, India
Manila, Philippines
Brazil

Technology Offered

- Prior to the acquisition of Mortgage Cadence most delivery occurred via Citrix connections into client LOS. Today, Mortgage Cadence is enhancing or replacing the capabilities of client LOS platforms.
- BPO Navigator for analytics and performance management
- First Pass Yield System (FPY) for continuous improvements
- Pipeline Allocation Management (PAM) for workload

HfS BLUEPRINT REPORTS

Winner's Circle

If you want cutting-edge Cloud Infrastructure, look no further than Accenture

accenture
High performance. Delivered.

Market Share: 6.73 %
Overall Score: 4.62

Innovation

- Score: 4.43
- Strong vision. Highly innovative in the Cloud Infrastructure space, particularly when it comes to bridging the gap between IT infrastructure and business needs.

Execution

- Score: 4.80
- High market share and strong growth. Clients are very happy with the value they receive for their money.
- Well positioned for continued market leadership.

Key Strengths

- Accenture's Cloud Infrastructure Services has a very large market share and is showing fast growth.
- Clients report strong performance of Accenture's consulting capability in moving applications to the Cloud. This service is driving customer adoption of Accenture's Cloud Infrastructure offerings.
- Clients also report that Accenture is very capable of linking generic Cloud Infrastructure Services to industry-specific solutions given its long track record of successful business transformation projects.
- Today, Accenture is the overall best partner for helping enterprises move their IT into the world of Cloud

Key Challenges

- Very large global clients report a very high satisfaction levels with Accenture overall. Some small to midsize clients feel less well treated by account teams that are used to larger clients. The world of Cloud will require Accenture to become more flexible.
- Accenture is not a low price vendor. While the company can compete well against established outsourcing and system integration competitors on a quality and service basis, it will increasingly come under pressure from Public Cloud vendors moving into the Hybrid Cloud space with much lower cost bases but service quality that customers have already grown used to and accepted.

SAP Services Scale

- Market Share: 6.73%
- Revenues: $3,480 M
    - IaaS: $380 M
    - Hybrid Cloud: $1,750 M
    - Private Cloud: $1,350 M
- Comment: Very high market share and strong growth.

SAP Services Coverage

- # of Employees: 9,000
- All regions and relevant countries covered extremely well.
- All relevant services covered extensively. Breadth and depth second to none

Customer Satisfaction And Competitive Differentiation

- Highest level of customer satisfaction.
- The combination of business and IT capabilities gives Accenture a huge edge in competitive differentiation.

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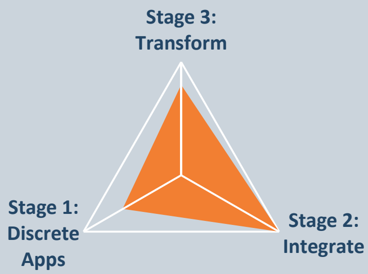
High performance. Delivered.

2013 Mobility Revenue/Growth: HfS Est.: $2B (33%)

Relative Strength Across Stages of Mobility Adoption



Strengths

- Breadth of offerings - a robust solution portfolio and is able to tackle almost any mobility need across any industry.
- Extremely innovative in its view of "mobile" as it goes well beyond devices with a broad vision around connected products.
- Deep pockets and a willingness to spend to acquire new skills and remain at the forefront of relevance in a rapidly changing market.
- Significant investments in UX design with a network of 17 studios and access to 1,500 designers as well as in house talent including that from 3 acquisitions in 2013.
- Wide array of proprietary tools and platforms enables it to provide faster delivery at lower cost.
- Broad geographic footprint allows it to follow a global concern nearly everywhere.
- Client care. Willing and able to tap the resources necessary to resolve any client problem should it arise.

Challenges

- Clients see an occasional tendency to hold back from introducing a cutting edge new technology in an ongoing engagement unless pushed.
- Sometimes perceived as expensive though it performs well when total cost of a solution is taken into account.
- Accenture's massive size affords pockets of weakness and so clients must stay diligent to make sure they are getting the best available talent or can resolve problems quickly when they don't.
- Typically not organized well internally to sell and deliver one-off projects. Company prefers ongoing engagements and relationships to minimize unrecoverable sales cost though its App Factory does break this paradigm and served more than 40 standalone clients.

Client Industry Verticals

Focus on Key Verticals:
- Products
- Resources
- Financial Services
- Communications & High Tech
- Health & Public Service

HfS Estimate of Revenue Mix:
- 55% B2C
- 45% B2B

Key Clients

In FY13, Accenture Mobility served 40 of the Fortune 100.

Enterprise Mobility Clients Include:
- 4 of the top 5 telecoms
- 5 of the top 7 commercial banks
- 2 of the top 4 health care insurance providers
- 2 of the top 3 P&C Insurance providers
- 2 of the top 3 construction & farm machinery companies
- 3 of the top 5 pharmaceutical companies
- 2 of the top 3 general merchandise retailers
- 4 of the top 6 petroleum refining companies

Global Operations

Headcount:
- ~2,500 dedicated FTEs & ~10,000 additionally aligned across the firm

Key Delivery Locations:
- India 40%
- Philippines: 10%
- Eastern Europe 5%: (predominantly Latvia)
- Onshore 45%

Acquisitions and Strategic Partnerships:
Evopro Group, Apigee, Acquity Group, Fjord, NewsPage, avVenta Worldwide, Symbian, CAS, Mogenesis, and Avanade

Technology Offered

Proprietary Platforms & Software:
Accenture Mobility Managed Services platform, Accenture Mobile Maturity Diagnostic, Accenture Digital Optimization, Accenture Digital Diagnostic, Accenture Web Evaluator, Windows 8 Enterprise Studio (with Avanade and Microsoft)

Key Partnerships:
SAP, Oracle, Apple and Salesforce

Core Technologies:
All major development environments plus Kony, Apigee, perfecto ClickSoftware, Sencha,, Keynote DeviceAnywhere, Appcelerator, Good, Mobile Iron, etc.

HfS BLUEPRINT REPORTS

Winner's Circle

accenture
High performance. Delivered.

P&C — L&A

Market Share: 5.1%

Blueprint Leading Highlights

- Strong Delivery of Claims Administration
- Strong Delivery of Policy Serving
- Strong Ability to Leverage External Value Drivers
- Experience Delivering Industry-Specific Solutions
- Highly Scalable and Large Global Footprint
- Integration of Technology Into Business Process
- Vision for Industry-Specific Solutions

Strengths

- **Scale and Global Footprint.** Accenture has 4,500 FTEs, and operates in 5 countries for insurance BPO specifically. India and the Philippines provide great back and middle office support to the US, while nearshore/onshore delivery in European countries provide language and local knowledge capabilities for European clients.
- **Large and Diversifying Client Base.** Accenture has one of the largest client bases for insurance BPO, particularly around continental Europe and a growing portfolio in Asia Pacific and North America.
- **Technology Integration and Offerings.** Accenture integrates a full suite of technology with its strong delivery of core processes to enable flexibility, scalability, and continuous improvement. Accenture boasts business platforms for both the P&C and L&A segments. These include Duck Creek policy software, plus Accenture's market-leading claims software for P&C and ALIP for L&A. This enables it to offer platform BPO solutions with output and outcome based pricing opportunities.
- **Delivery and Customer Service.** Clients commended Accenture's overall service delivery and attention to feedback to improve operations.
- **Thought Leadership.** Accenture is proactively working on embedding analytics, mobility and social components into its insurance BPO engagements, and has been developing a futuristic model of the next generation of 'digital insurers' to help clients.

Challenges

- **Weak in Some Key Client Markets.** While Accenture is a strong player in continental Europe, it has a comparatively weaker presence in the UK. The service provider will need to expand its capabilities in these established markets, and stay on top of the localization efforts for its offerings for established as well as for APAC regions.
- **Legacy European Platform Management.** Accenture has to contend with the constraints of platforms for its clients in Europe that were purchased in the past and may require further modernization.

Relevant Acquisitions/Partnerships	Key Clients	Global Operations Centers	Technology Offered
• Duck Creek Technologies, 2011 - a privately held company that specializes in software solutions for the property and casualty (P&C) insurance industry	• RSA • BNP Paribas • Generali France • Cometa • ACE • Fonchim	• **Headcount:** ~4,500 • **Locations**: Primarily in the Philippines and India, some presence across Europe (France, Romania and Italy)	• Accenture Life Insurance Platform – ALIP (Life administration system/platform) • Duck Creek (P&C Policy administration system/platform) • CCS (P&C Claims administration system/platform) • EPS (Claims vendor management) • MI Dashboard (Analytics) • Accenture Insurance Data Migration Factory

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Additional Research and Information

Blueprint Guides:

- The HfS Blueprint Guide to Industry 4.0 Services
- The HfS Blueprint Guide to Emerging Blockchain Services in BFSI

Points of View:

- The 2017 Digital OneOffice Premier League
- The 2016 RPA Premier League Table – Transformation Comes to the Fore

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About the Authors

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Overview

- Hema Santosh is a Principal Analyst at HfS supporting research in finance and accounting and related business services, and global in-house delivery centers. She has held senior research positions for organizations such as, Information Services Group, Accenture, Wipro and ITFinity Solutions. Her journey as a research professional has evolved over 14 years by working across facets of MIS, business planning, market forecast, market analysis, competitive intelligence and large strategic initiatives.
- Hema understands the nuances and dynamics of the BPO and Technology industry. Her experience ranges from custom research, quantitative studies to qualitative secondary research conducted among financial services, government and media & telecommunication industries.

Education

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

About HfS Research

HfS Research is The Services Research Company™—the leading analyst authority and global community for business operations and IT services. The firm helps organizations validate and improve their global operations with world-class research, benchmarking and peer networking. HfS Research was named "Independent Analyst Firm of the Year for 2016" by the Institute of Industry Analyst Relations which voted on 170 other leading analysts. HfS Chief Analyst, Phil Fersht, was named Analyst of the Year in 2016 for the third time.

HfS coined the terms "The As-a-Service Economy" and "OneOffice™", which describe HfS Research's vision for the future of global operations and the impact of cognitive automation and digital technologies. HfS' vision is centered on creating the digital customer experience and an intelligent, single office to enable and support it. HfS' core mission is about helping clients achieve an integrated support operation that has the digital prowess to enable its organization to meet customer demand - as and when that demand happens. With specific practice areas focused on the Digitization of business processes and Design Thinking, Intelligent Automation and Outsourcing, HfS analysts apply industry knowledge in healthcare, life sciences, retail, manufacturing, energy, utilities, telecommunications and financial services to form a real viewpoint of the future of business operations.

HfS facilitates a thriving and dynamic global community which contributes to its research and stages several OneOffice™ Summits each year, bringing together senior service buyers, advisors, providers and technology suppliers in an intimate forum to develop collective recommendations for the industry and add depth to the firm's research publications and analyst offerings.

Now in its tenth year of publication, HfS Research's acclaimed blog Horses for Sources is the most widely read and trusted destination for unfettered collective insight, research and open debate about sourcing industry issues and developments.

HfS was named Analyst Firm of the Year for 2016, alongside Gartner and Forrester, by leading analyst observer InfluencerRelations.