



Everest Group PEAK Matrix™ for Business Process Services Delivery Automation

Focus on Wipro
July 2017



Introduction and scope

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

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

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

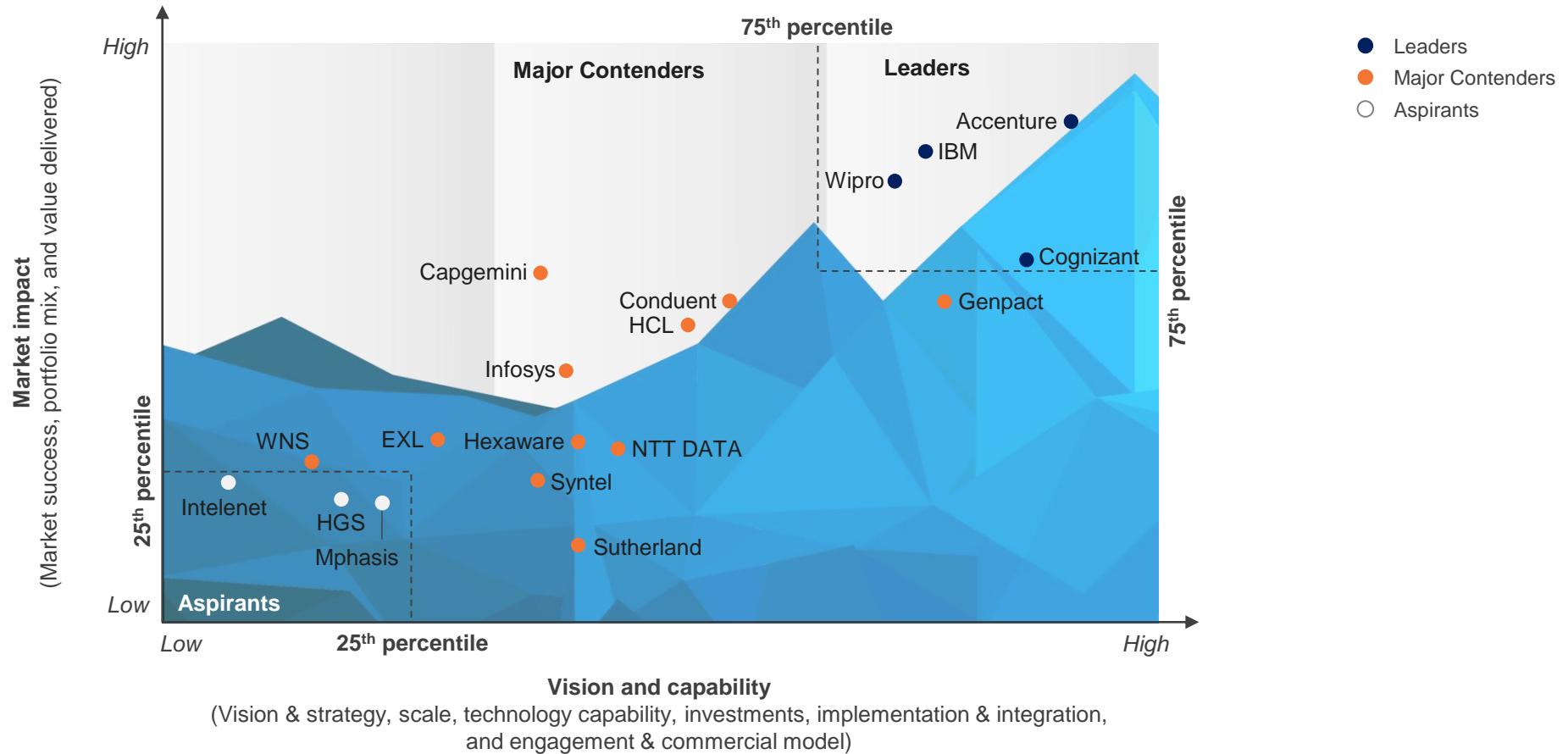
- Wipro’s position on the BPSDA PEAK Matrix
- Detailed BPSDA profile of Wipro

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

Everest Group PEAK Matrix™

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

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



Note: Service providers scored using Everest Group's proprietary scoring methodology

Source: Everest Group (2017)

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BPSDA – overview

Company overview

Wipro Limited (NYSE: WIT, BSE: 507685, NSE: WIPRO) is a global information technology, consulting, and business process services company. It has a workforce of over 170,000, serving clients across six continents. Wipro's Business Process Services (BPS) division provides technology-led business process services to global enterprises.

Key BPSDA leaders

- Abidali Z. Neemuchwala, Chief Executive Officer
- BhanumurthyB. M., President and Chief Operating Officer
- Nagendra Bandaru, Senior VP & Head – Business Process Services
- Rohit Adlakha, VP & Global Head, Wipro HOLMES
- Somit Kapoor, General Manager, Enterprise Transformation

Headquarter: Bangalore, India

Website: www.wipro.com

Recent acquisitions/partnerships

- **2017:** Partnered with Arago
- **2016:** Partnered with Avaamo to provide enterprise-grade messaging platform with bot builder capability for enterprises to build chatbots
- Set up a CoE, in partnership with Automation Anywhere, Blue Prism, and NICE comprising of trainers, architects, and consultants for training & certifying clients and advising & assisting them to setup their own CoEs
- Launched R&D labs for Automation Anywhere, Blue Prism, and NICE to foster innovation, and develop new-age solutions to customer problems
- Launched Wipro HOLMES™ AI Lab to do active research across diverse technologies and to work with clients to ideate, discover use cases, and engineer & deploy automation solutions

Adoption and capability overview

Number of active clients with BPSDA deployments: 72

Number of active BPSDA bots deployed: 2,300

Number of BPSDA FTEs: 714

Key locations with BPSDA FTEs:

- Asia Pacific (India and Australia)
- Europe
- North America (United States)
- MEA (South Africa)

Key third-party technology partners: Arago, Automation Anywhere, Blue Prism, NICE systems, Pega, UiPath, and Work Fusion

Offered Not offered

BPSDA offering structures

Stand-alone product licenses¹

Product licenses + associated BPSDA services

Stand-alone BPSDA services

BPSDA as part of broader BPO deal

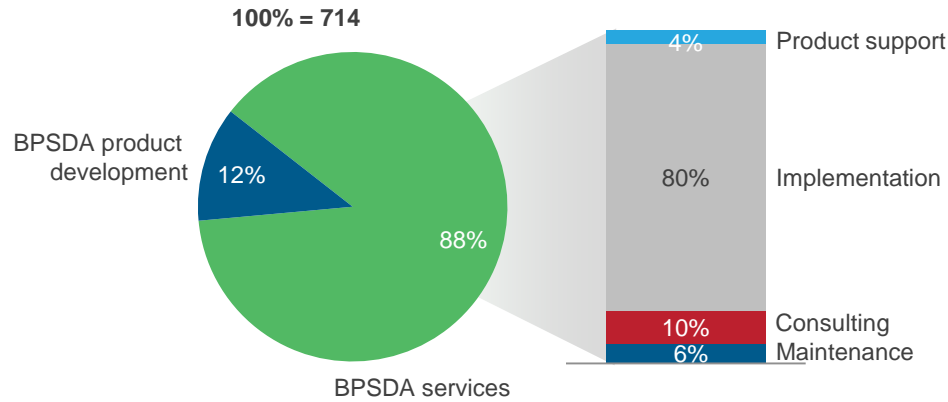
¹ Provide stand-alone licenses for our key customers

Source: Everest Group (2017)

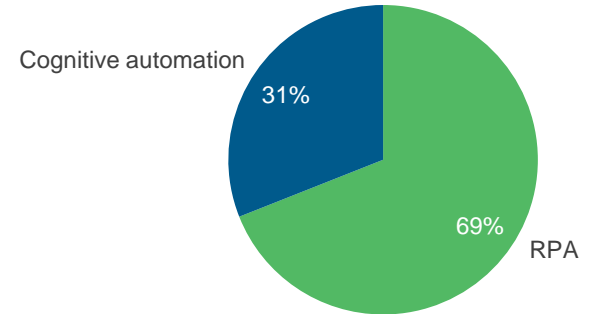
Wipro (page 2 of 4)

BPSDA – capabilities

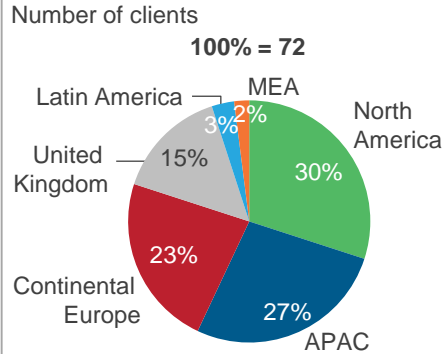
Split of BPSDA FTEs by function



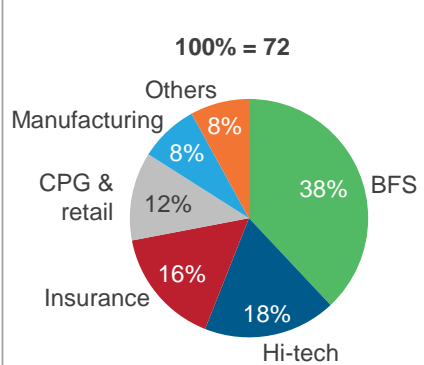
Split of BPSDA FTEs by automation type



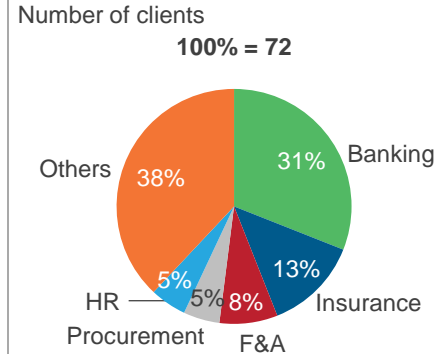
BPSDA client mix by buyer geography



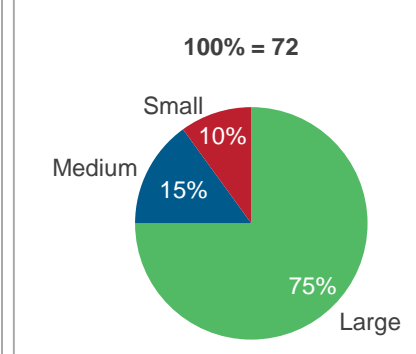
BPSDA client mix by buyer industry



BPSDA client mix by business function / process area



BPSDA client mix by buyer size



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

Note: Based on information as on December 2016

Source: Everest Group (2017)

BPSDA – technology solutions

Solution	Business functions	Year launched	Development type	Description	No. of clients
RPA tools	N/A ¹	N/A ¹	Off-the-shelf technology	Automation of partial or end-to-end processes with partnerships with third-party RPA vendors	68
BASE Harmony	F&A, HR, SCM, KPO, consulting, and transition-as-a-service	2013-2014	In-house / proprietary	Process capture and assessment solution that offers codified business knowledge capture, automated knowledge assets creation, domain-agnostic rule-based process assessment, business process interaction design using patented IP, algorithm-driven process harmonization, variance analysis-driven by process capture, and risk analysis with FMEA	32
VirtuaAssist	All	2016	Joint development	A solution that brings together secure messaging, smart cards, micro applications, and enterprise bots in a single work stream	30+
HOLMES E-KYC	BFSI, procurement, and HLS	2015	In-house / proprietary	Wipro HOLMES e-KYC solution is aimed at enabling banks to achieve regulatory compliance and derive customer insights through intelligent automation. It is targeted at processing large volumes of unstructured data with speed and accuracy	23
Source to Pay (S2P)	Procurement	2016	Off-the-shelf technology	Comprehensive set of services, partnerships, and solution accelerators, enabling enterprises to achieve efficiencies across the procurement value chain	7
HOLMES HMI	Helpdesk, service desk, and F&A	2015	In-house / proprietary	HOLMES HMI is a platform that is aimed at mimicking human-like ability of having intuitive conversations and making sensory interpretations, thereby providing personalized experience accurately and efficiently	8

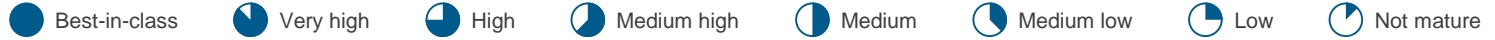
1: Not Available

Source: Everest Group (2017)

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Everest Group assessment

Measure of capability



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

Strengths

- Wipro has seen notable success in the SDA space and has a large and growing portfolio of clients with SDA deployments
- It has a holistic framework for digital transformation called EOT that includes not only automation but also advanced analytics and mobility
- Its automation offering consists of proprietary solutions as well as partnership-based ones on leading third-party products such as Automation Anywhere, Blue Prism, Work Fusion, NICE, and UiPath
- Its proprietary SDA technology called HOLMES (HOLMES HMI – an intelligent service desk automation and HOLMES E-KYC – intelligent automation of KYC compliance) has AI features such as NLP, image recognition, and machine learning. It also has an advanced process capture and assessment tool in BASE Harmony, which enables it to identify optimization and automation potential in processes
- It is investing extensively to enhance its automation capabilities. E.g., collaborations with academic institutes, HOLMES AI lab, COEs for third-party RPA products, and automation skill development
- Reference clients praised its automation expertise, implementation and integration skills, and flexibility to accommodate change requests

Areas of improvement

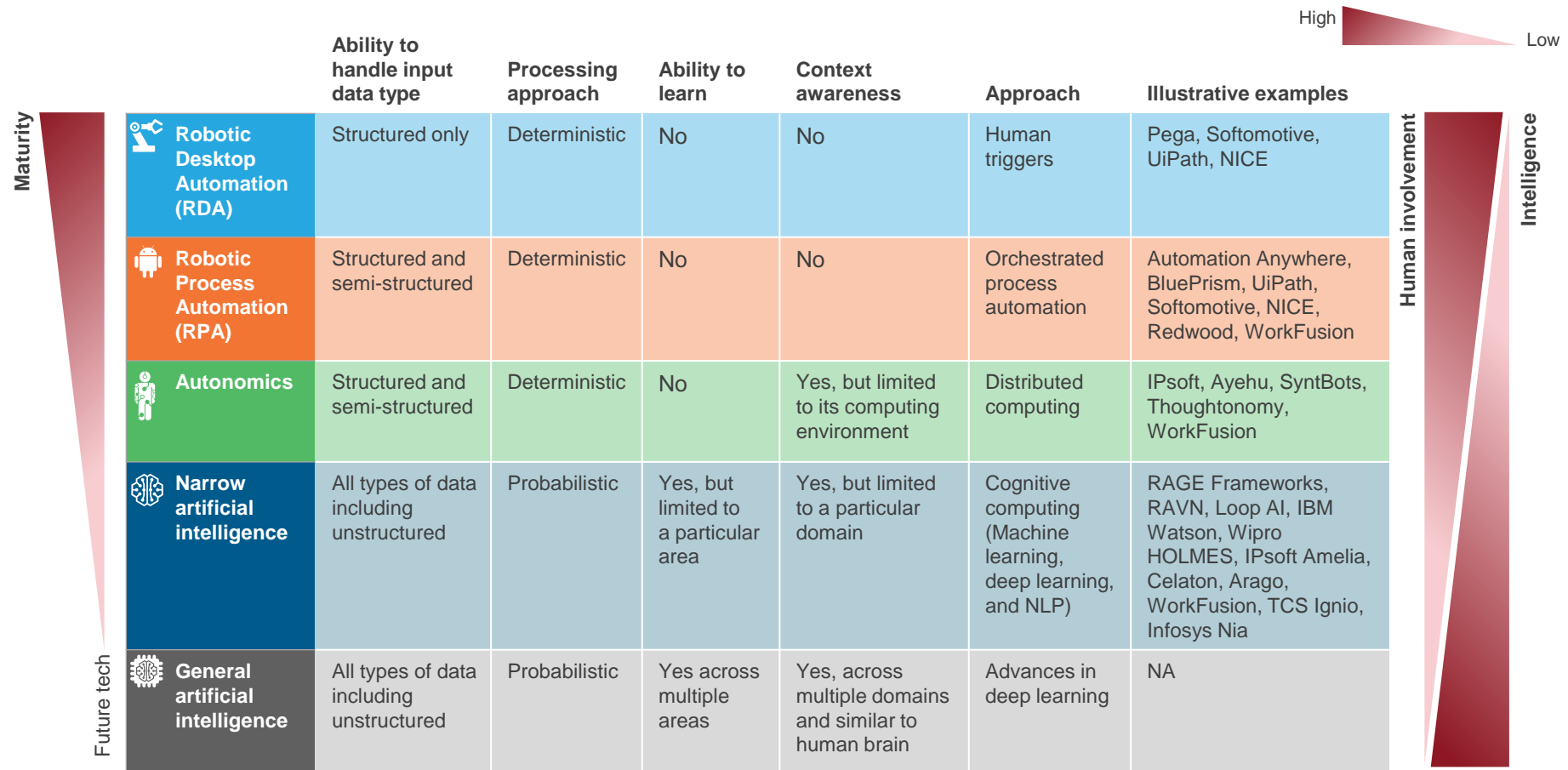
- Wipro could focus more on translating investments in advanced technologies such as HOLMES to more operationalized solutions. Moreover, it can better orient HOLMES toward BPS, as some of the technology's advanced features are currently applicable only in the context of IT services
- It can aggressively pursue automation-as-a-service opportunities to drive further growth of its automation client portfolio
- Increasing focus on optimizing processes before automation and avoiding “automating inefficiencies” and thus, improve returns on investments in automation projects
- There is opportunity for Wipro to explore means to access proprietary data to further train its AI platform for developing more vertical-specific end-to-end solutions
- Reference clients believe that its project management skills need to improve and that it can be more proactive in driving automation initiatives

Source: Everest Group (2017)

Appendix

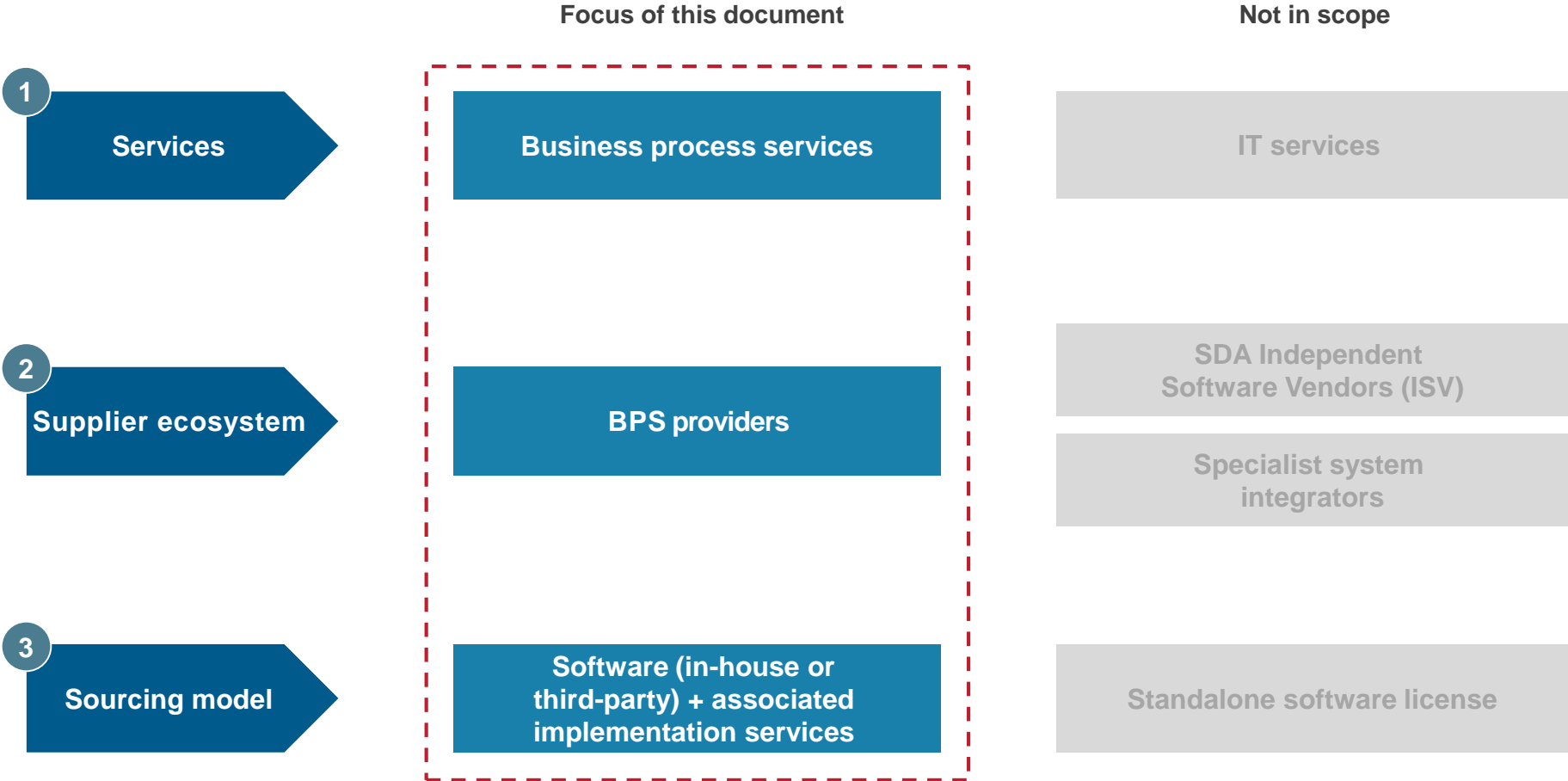
Everest Group's SDA Spectrum

SDA includes a spectrum of automation solutions for delivering global services



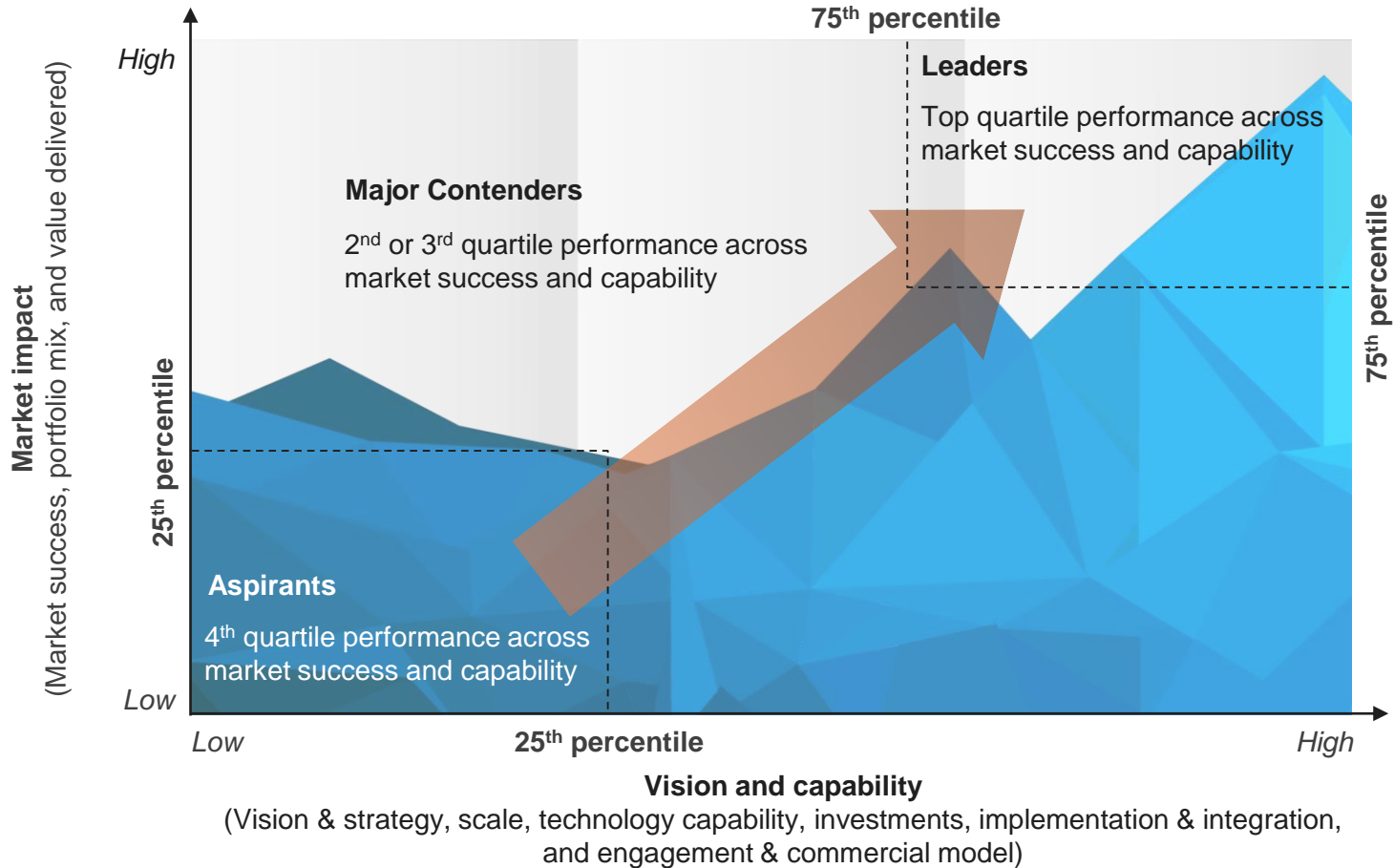
Note: In this document we have referred to rules-based/deterministic SDA solution (i.e. RDA, RPA, and Autonomics) collectively as RPA

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



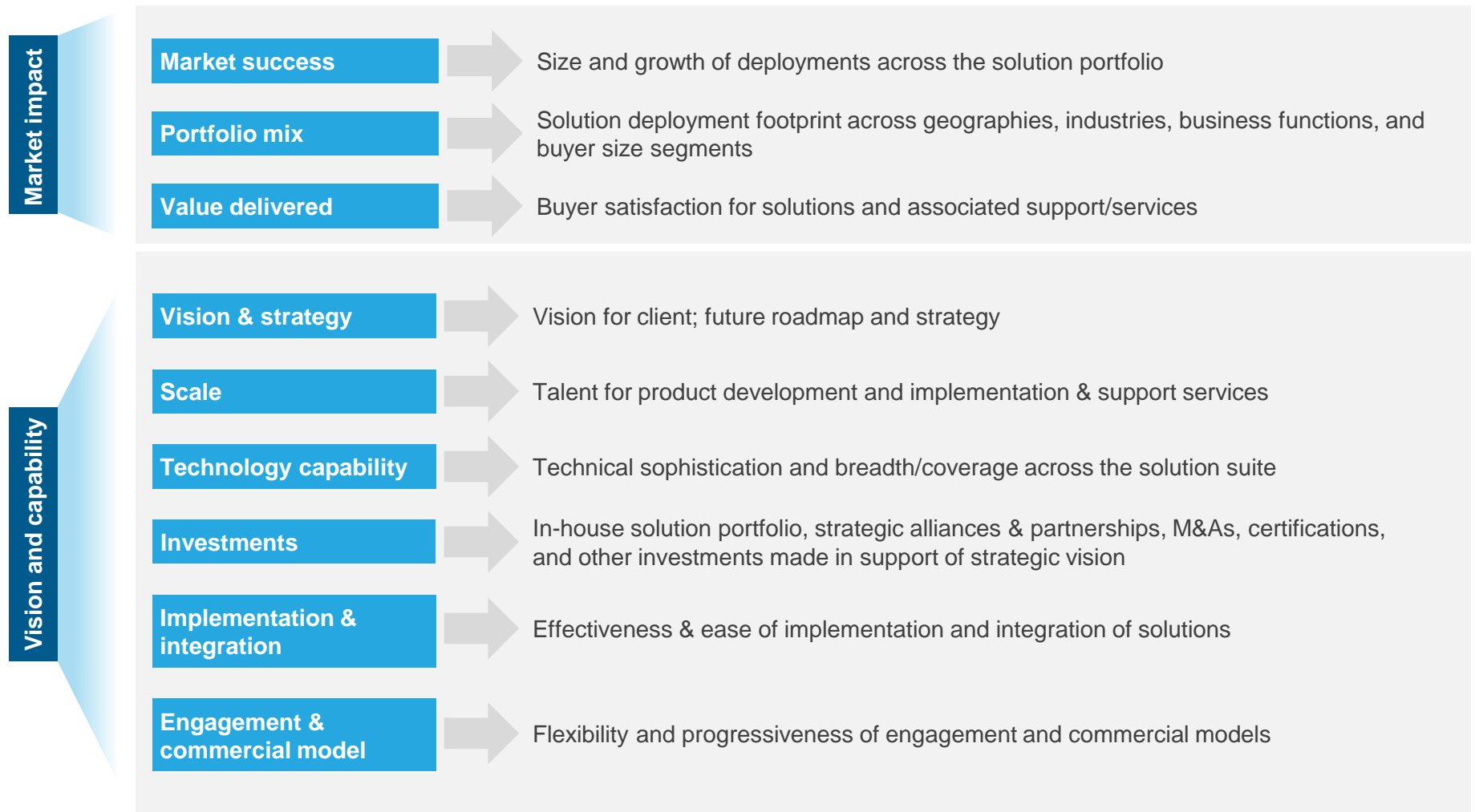
Everest Group classifies service providers into Leaders, Major Contenders, and Aspirants on the Everest Group PEAK Matrix™

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



Source: Everest Group (2017)

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



Source: Everest Group (2017)

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

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

Source: Everest Group (2017)

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

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

Source: Everest Group (2017)

Does the PEAK Matrix assessment incorporate any subjective criteria?

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

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

- No. PEAK Matrix highlights and positions only the best-in-class service providers in a particular functional/vertical services area. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

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

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

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

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

- Providers can use their PEAK Matrix positioning rating in multiple ways including:
 - Issue a press release declaring their positioning/rating
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- **The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group**



About Everest Group

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

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