



HFS Top 10: Employee Experience Services, 2022

June 2022

RESEARCH AUTHORS:

Phil Fersht, CEO and Chief Analyst

Sarah Little, VP Content and Strategy, CEO's Office



This is the first time in our history we're truly looking at the fluency of business and technology coming together in a hybrid environment, at a time when industries and business models continue to shape-shift at an extraordinary rate.

The key to business agility and a thriving organization lies squarely in the power of its people. Employee experience sets apart the winners and the also-rans in the post-pandemic era.

Phil Fersht, CEO & Chief Analyst, HFS

Contents

		Page
1	<u>Introduction and definitions</u>	4
2	<u>Executive summary</u>	15
3	<u>Research methodology</u>	25
4	<u>Employee experience services: Top 10 results</u>	29
5	<u>Employee experience services: Provider profiles</u>	33
6	<u>About the authors</u>	46

1

Introduction and definitions

Introduction

- Business leaders recognize that successfully driving engagement, productivity, and change requires the ability to bring people, process, and technology together in a fluid and meaningful way.
- Delivering superior employee experience (EX) is the catalyst for driving competitive advantage and deeper engagement across personal, social, and organizational domains. With an imperative for people, leaders are driving EX capability from across the organization.



Employee experience is an enormous field... It's not a "Process" but a cross-functional strategy that needs to be embraced by the c-suite. It's also not a "project" that will ever be done. It's a huge area of many different strategies, practices, processes, systems, services, and technologies."

Josh Bersin, The Definitive Guide: Employee Experience, 2021

- Essentially, it's a field underpinning the OneOffice organization.

The OneOffice™ organization

An ecosystem of employee experience, customer experience, and partner experience

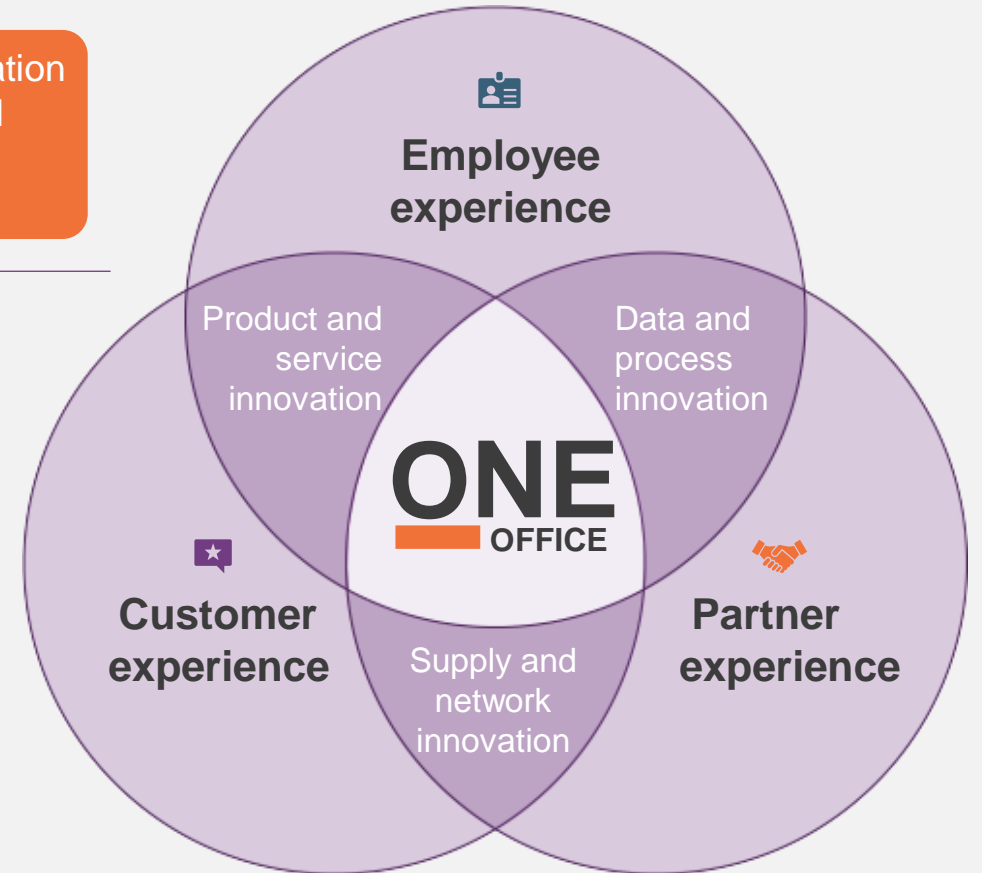
OneOffice is our view of digital transformation in action, aligning business operations and workforce interactions across an adaptive, experiential environment.

At its core, a OneOffice organization makes employee, customer, and partner experience the heart of its strategy.

“Companies that invest in employee experience are 4x more profitable than those that do not.”

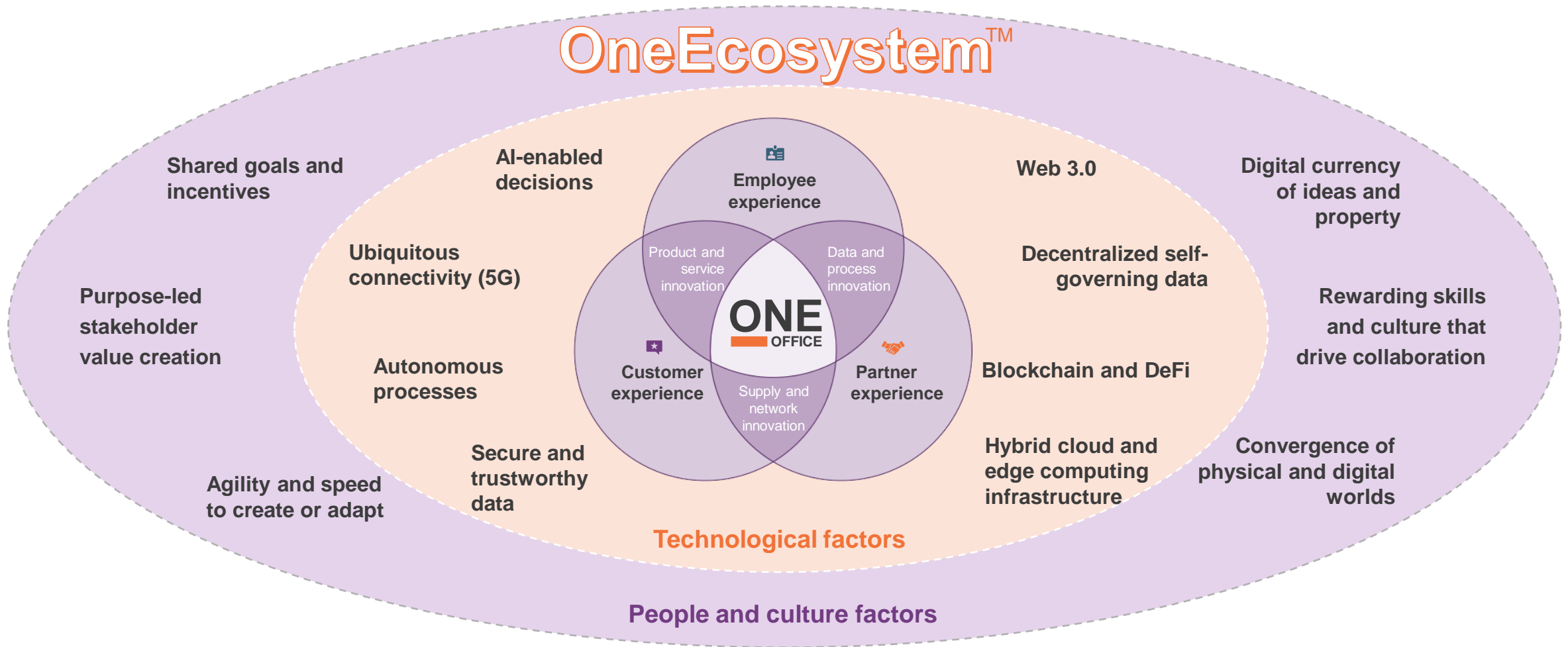
Jacob Morgan, The Employee Experience Advantage

Customer-centricity has long been at the helm of an experience framework, given the fact that without customers, there can be no company. However, it's time to rebalance the equation. Studies continue to show that employee experience (EX) is a critical contributor to competitive advantage and growth. A key challenge has been the ability to articulate EX in measurable terms.



This research examines how participating advisories and service providers are evolving their practices to support the rapidly changing dynamics of employee experience within the context of a OneOffice organization and its ecosystem.

OneOffice is the core of OneEcosystem™



Evolution to OneOffice™ and OneEcosystem™

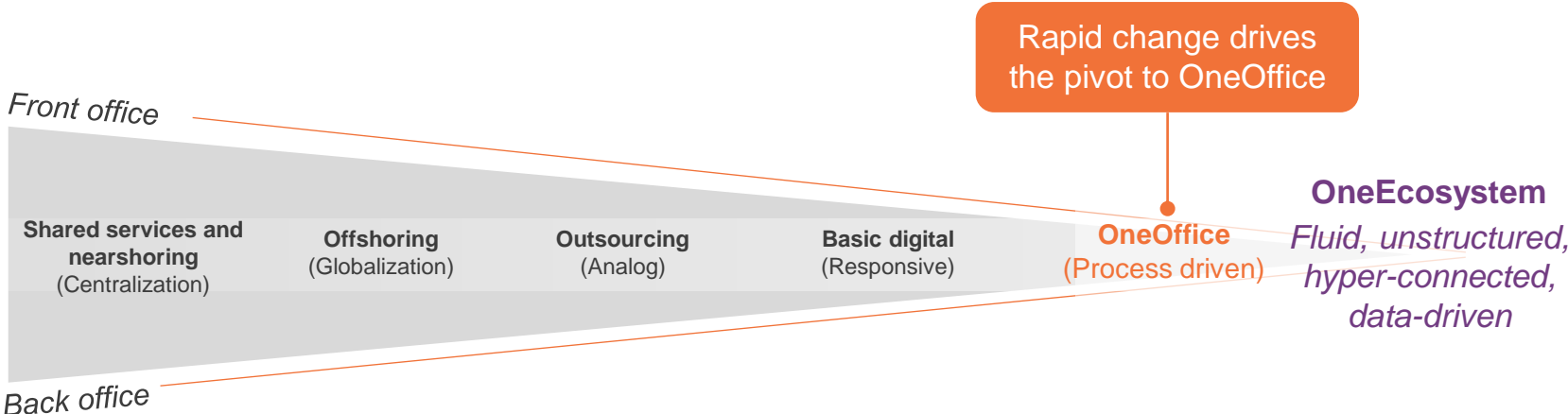
Over the last 30 years, organizations have essentially been doing the same thing the same way, just a little faster, cheaper, and more electronically. This cycle has continued to gain efficiency, but the business model has not fundamentally changed.

In the 1990s, the internet enabled the global manifestation of shared services and nearshoring, which evolved into offshoring around the turn of the century. The industry centered on functional and geographic consolidation, driven by cost reduction, efficiency, and arbitrage.

Fast forward to 2010. The first real digital models emerged as we moved into the cloud and began satisfying customer needs in near real-time. Digital was born, but there wasn't much focus on connecting digital transactions with customers past the "front office" and in the middle and backend of the organization.

The global pandemic in 2020 drove many enterprises to make real changes for the first time to enable virtual business models. The acceleration toward hyperconnected ecosystems is well underway in this ever-complexifying global business environment.

The need to develop talent to create value has never been so immediate for enterprises, and the opportunity for smart services partners has never been so prominent.



1990	1995	2000	2005	2010	2015	2020	2022+
The internet Client/server	ERP Six Sigma LEAN	Y2K Euro currency conversion VOIP 3G	Public cloud eBusiness Digital marketplaces ASPs Sox	Basel II Private cloud Open source Digital business models IOT	RPA Enterprise IT dressed up as digital Intelligent automation Machine learning	AI Blockchain 5G The guerrilla sharing economy Digital workers	Autonomous, hyperconnected supply chains Data-driven virtual organizations Final phase of widespread cloudification

Evolution to OneOffice™ and OneEcosystem™

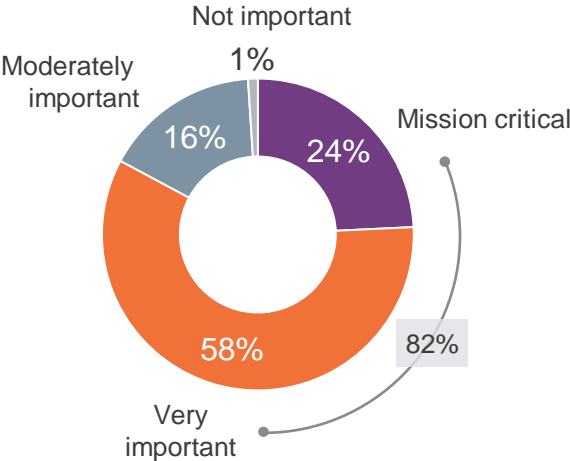
As the industry evolved, services talent shifted from being IT-centric in favor of process and domain expertise, driven by business outcomes and systems of engagement. And then the world stopped. The pandemic forced organizations into real-time transformation, and the OneOffice mindset took center stage. In a recent study, 82% of enterprise buyers believed a OneOffice mindset is “mission critical” or “very important” for their company’s overall operation and strategy.

The pandemic shock further exacerbated the need for ecosystems.

OneOffice is the core of OneEcosystem, bringing partners and employees to the forefront alongside customers for a holistic approach to stakeholder experience across the entire customer lifecycle. Ninety percent (90%) of C-level respondents to a recent study predict ecosystems will be even more important in the post-COVID world.

82%

of enterprise buyers believe a OneOffice mindset is “mission critical” or “very important” for their company’s overall operation and strategy.

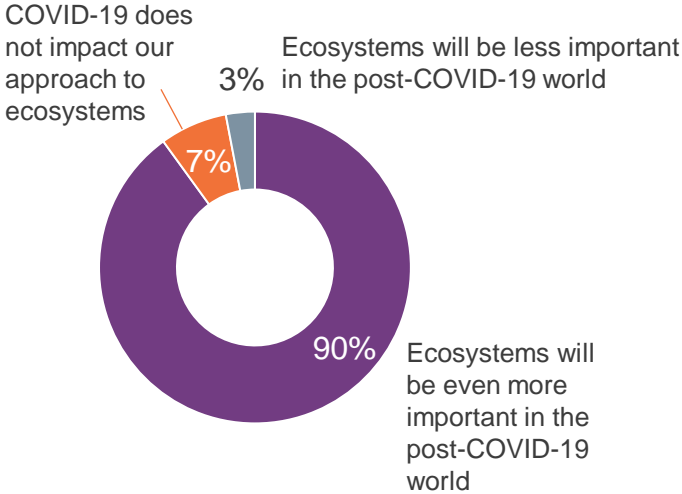


Importance of a OneOffice mindset for overall operation and strategy

Sample: 800 respondents from Global 2000 enterprises
Source: HFS Research

90%

of C-level respondents predict ecosystems will be even more important in a post-COVID world.



How has the COVID-19 pandemic changed the relative importance of ecosystems for your organization?

Sample: 158 C-level respondents from Global 2000 enterprises
Source: HFS Research

Evolution of BPO to “business data services”

Data and processes are inextricably linked. The focus on value has shifted firmly to the strategic value of data and how designing processes can help you achieve the data outcomes that create the value.

Enterprises want to buy continuous access to data outcomes and experience great service partnerships to achieve them. That is what BPO is all about and why HFS has termed the phrase “business data services.”

Advanced people data and decisioning is a critical capability for providing employee experience services.

	Globalization	Digital pontification	Big hurry, ideas to action
	Old school BPO (till 2010)	BPO services today (2010-2020)	Business Data Services (2020++)
Raison d'être	Cost savings and efficiency	Better business outcomes but still savings	Stay-in-the-game and grow
Driver	Recession in 2002, Internet	Incremental maturity of services	Pandemic, virtual business environment, great resignation
Scope / focus	Functional activities (AP, AR, claims, etc.)	End-to-end processes (O2C, P2P, R2R, H2R)	Enterprise Data flows (customer data, employee data, partner data)
Role of data	Reporting	Support decision making	Data-as-an-asset to find new sources of value
Role of talent	Labor arbitrage (primarily offshore)	Process experts (offshore + nearshore)	New or scarce skills (anywhere shore)
Role Of technology	Process enablement	Digitization delivers greater productivity	Competitive advantage
Role of change management	Lift-and-shift	Lift-shift-and-fix or Fix-lift-and-shift	Built in as a discipline, ongoing
Technologies involved	On-premise ERP	SaaS + automation	AI-driven analytics, Web 3.0, hybrid cloud
IT — business convergence	IT and business operations in silos	Boundaries between business and IT starting to blur	Full convergence of IT and business operations
Role of service provider	Vendor (order-taker)	Partner	Orchestrator

X-centricity takes all

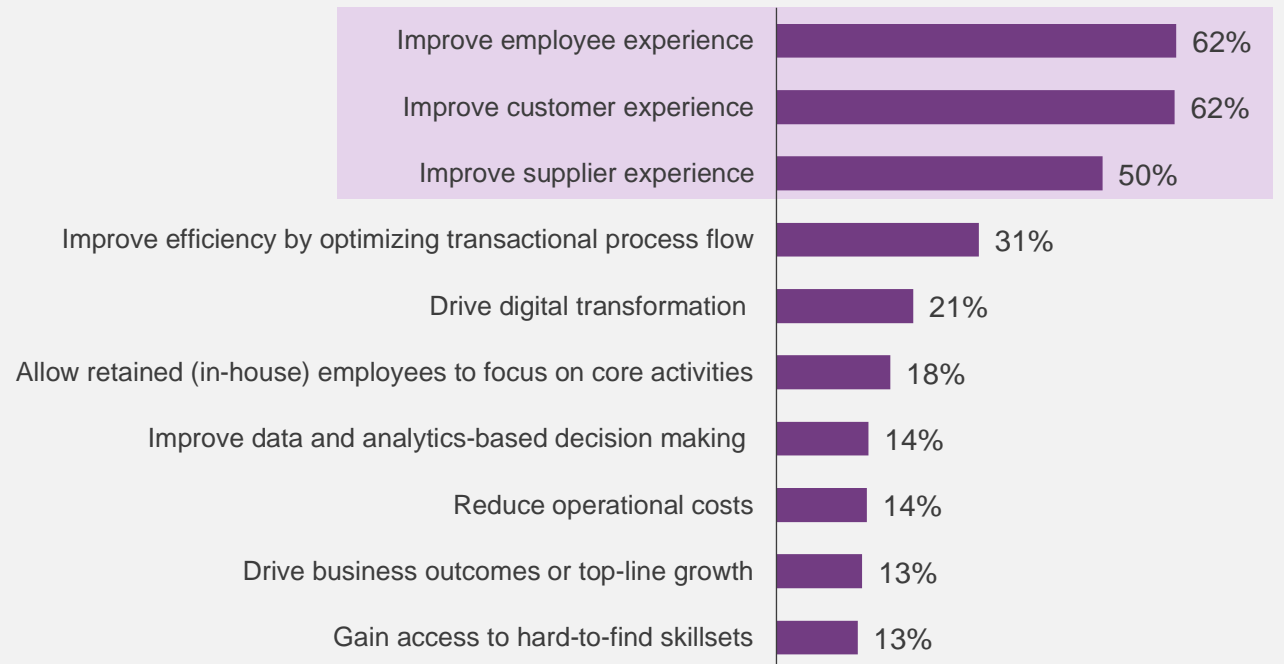
Enterprise innovation is defined at the intersection of *customers, employees, and partners*, and when it comes to deploying third-party services, X-centricity takes all.

In HFS' 2021 OneOffice Pulse study, 62% of the 800 Global 2000 executives surveyed consider improving employee experience and customer experience as the top priorities for partnering with third-party providers, with supplier experience following directly behind.

EX has moved beyond HR and IT integration. Business leaders across the organization play a critical role in shaping employee experience. It's about the *orchestration* of capabilities beyond silos and a OneOffice mindset in action.

What is the most important driver for deployment of third-party services?

% of respondents



Sample: 800 Global 2000 Enterprise executives
Source: HFS OneOffice Pulse Study

Building blocks of the HFS employee experience value chain

What are employee experience (EX) services?

In this research, we define employee experience services as the capabilities connecting the client's workforce to the strategic imperatives of the business across three perspectives:

- **Personal and purposeful**
 - Goals and purpose in work
 - Personal development
 - Interaction with tech and tools
- **Social and collaborative**
 - Interaction, access, and community with others in the ecosystem
 - Collaboration to accomplish objectives
- **Organizational and environmental**
 - Connection to organizational strategy and culture
 - Space, place, and societal environment through which we work



Building blocks of the HFS employee experience value chain

Employee Experience services must be able to measure value and articulate ROI across a digitally fluent organization

Value measurement and articulating ROI

Service providers are making great strides to articulate the value of investments in employee experience at a time when cost management and doing more with less are imperative. By targeting the right mix of services, organizations can achieve cost savings while expanding capabilities and improving experience.

Experience data, or “X-data,” provides a critical link between the three perspectives of experience and the ability to determine what levers to pull.

Digital fluency and the employee experience

Digital fluency is the ability to drive the seamless interplay between business and technology. Technology has primarily been described as a tool, but technology is truly a functioning member of the team.

Harnessing the power of digital and human talent is a prerequisite for future-forward organizations—directing the digital workforce to do the heavy lifting while enabling people to deliver on purpose through personal, collaborative, and organizational perspectives

Building blocks of the HFS employee experience value chain

HFS has identified twelve essential services and capabilities that measure value and ROI, empower people across the three perspectives of experience, and build a digitally fluent organization.

While any one of these components can improve employee experience, participants in this study are assessed on their ability to bring a matrix of services and capabilities to clients.

HFS employee experience value chain



2

Executive summary

Key enablers: Skills driving the OneOffice organization

A OneOffice organization is aligned, adaptive, and intelligent. It empowers people and enables passion and creativity for a world of work where a new set of skills—and new applications of existing skills—are required.

The Super 7

The core attributes of a OneOffice organization are correlated to seven critical skills and mindsets that drive business outcomes.

[Click here to read more:
Skills Driving the OneOffice Organization](#)



Appetite for Change

Readiness and ability to embrace change



Digital Fluency

Ability to drive interplay between business and technology



Initiative

Readiness and ability to self-direct, self-motivate, and turn ideas into action



Interaction

The ability to constructively navigate feelings and approaches with oneself and others



Problem-solving

The thinking and processes behind finding solutions to difficult or complex objectives



Social Influence

Having an impact on others in the organisation, and displaying energy and leadership



Values

Guiding principles in attitudes and actions

Key enablers: Training staff to be digitally fluent dominates our immediate future as we head to the cloud

While “digital transformation” focuses on resolving (often) decades of *technology debt*, the OneOffice mindset allows enterprise leaders to manage the *talent and process debt* that continues to be overlooked by many.

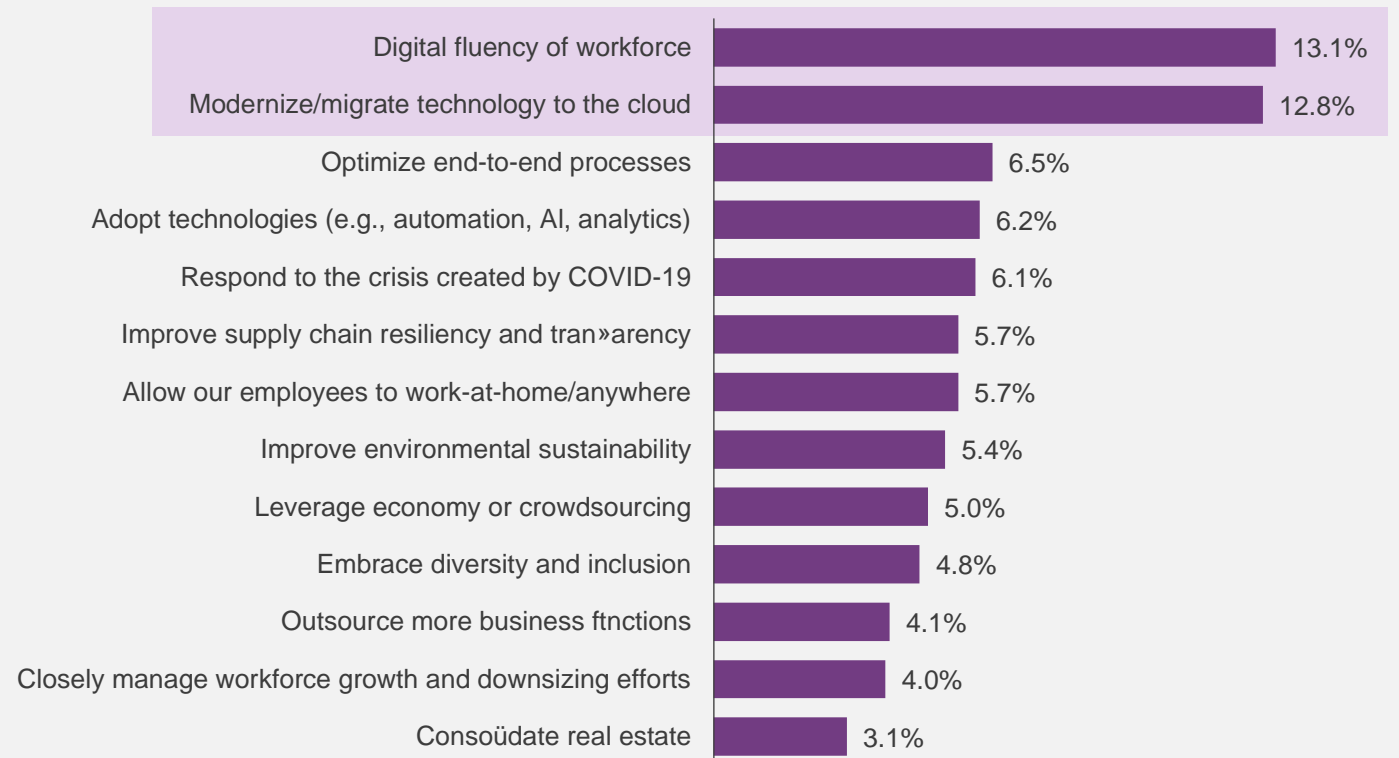
The clearest barometer that shows the major changes facing Global 2000 enterprises over the next 12-18 months are the heightened priorities to develop “Digitally Fluent” workforces to be best equipped to function effectively in the cloud.

Digital Fluency describes the ability to drive the seamless interplay between business and technology:

- Ability to translate the understanding of digital tools to create new ways to serve customers’ needs and drive value;
- Ability to consider how digital technology will impact every aspect, every functional area of the organization;
- Ability to examine the organization’s business model, strategy, and operations in the context of digital technology.¹

What are the major changes in your organization’s ways of working for the next 12 to 18 months? (only Rank #1 shown)

% respondents



Sample: 800 Global 2000 Enterprise executives
Source: HFS OneOffice Pulse Study

Key enablers: Training staff to be digitally fluent dominates our immediate future as we head to the cloud



Cloud computing is the technology wave of the future. It offers organizations levels of business agility and digital transformation that have never been seen before. As a result, we are seeing an explosion in organizations migrating to cloud computing...”

Michael Gibbs, [The hidden truth behind cloud computing](#)

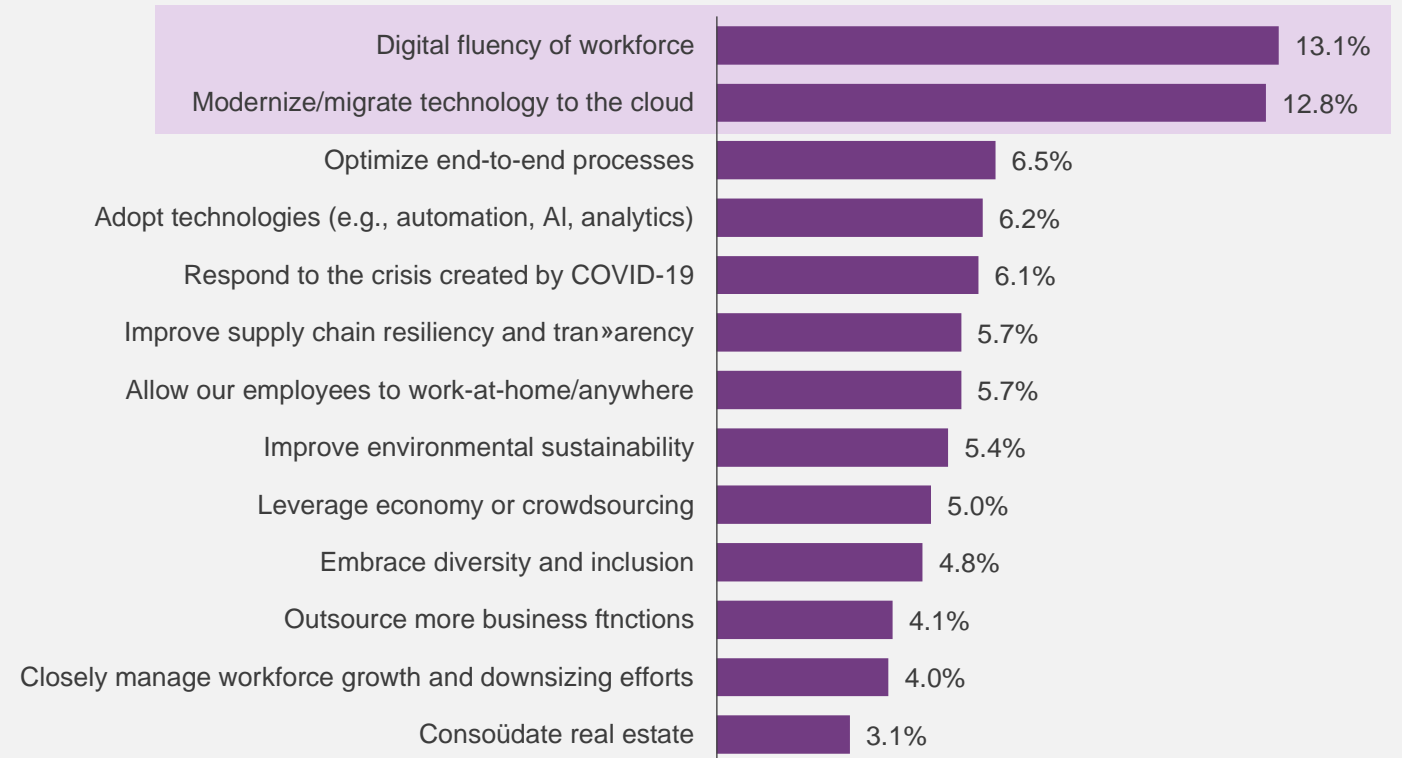
Cloud capability has evolved from an efficiency and resiliency model to the foundation of how work gets done and the experiences that go along with it, enabling unparalleled global connectivity and scale with anytime, anywhere access.

With the twelve competencies comprising the HFS employee experience value chain, there is an “unseen” number thirteen. Cloud infrastructure should be considered foundational for EX enablement.

Quite simply, people compose, consume, collaborate, and deliver in the cloud.

What are the major changes in your organization’s ways of working for the next 12 to 18 months? (only Rank #1 shown)

% respondents



Sample: 800 Global 2000 Enterprise executives
Source: HFS OneOffice Pulse Study

Employee experience services: What—and how much—buyers are buying

19.2% EX services
revenue growth

The employee experience services segment grew at an annualized rate of 19.2% from 2020 to 2021.

The top five services targeting employee experience are no surprise, spanning talent acquisition, retention and development, HR modernization, and dedicated employee experience solutions.

As the world emerges into a post-COVID era, enterprises are first and foremost targeting workspace initiatives to reimagine engagement and collaboration models in physical, virtual, and hybrid environments.

Top services enterprises are adopting to drive employee experience
% of offerings



Sample: n=56
Source: Advisories and Providers in the HFS Employee Experience Services Top 10 Report

Employee experience services: How provider partners are approaching “workspace and environment” EX services as client zero

Workspace and environment—how provider partners are handling the challenge as client zero:

Amid the challenges of security, compliance, behavioral change, and new expectations from clients, brick-and-mortar environments will never return to pre-pandemic levels. The percentage of providers’ workforce engaging in a work-from-home (WFH) model jumped from a pre-pandemic average of 8% to a 2021 average of 92%¹. For the duration of 2022, service providers are planning to continue a work from home model with nearly 49% of their total headcount in 2022.²

49%

Work from home

Work on site

In 2022, 49% of total headcount expected to continue a work-from-home model.²

¹ Sample: Inputs from 11 global service providers
Source: HFS OneOffice™ Services Top 10: People and Process Change

² Sample: Inputs from 26 global service providers
Source: HFS Top 10: CX Services in the Pandemic Economy—The Best of the Best Service Providers

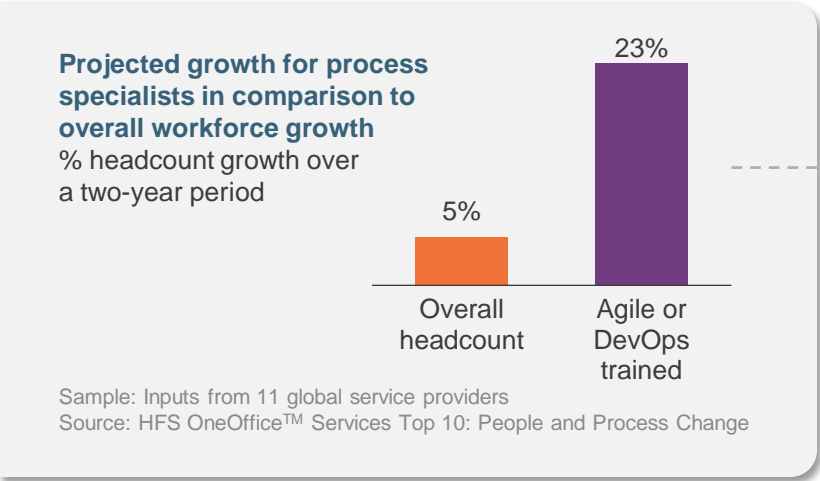
Employee experience services: the skills solving for EX

Agile is the #1 skill solving for employee experience.

The skills of the enterprise continue to change, and as silos break down, services are provided from matrixed teams across the organization. The skills of the talent organization and resources providing employee experience services reflect a firm focus on change, leading with agile, data, and DEI specialists.

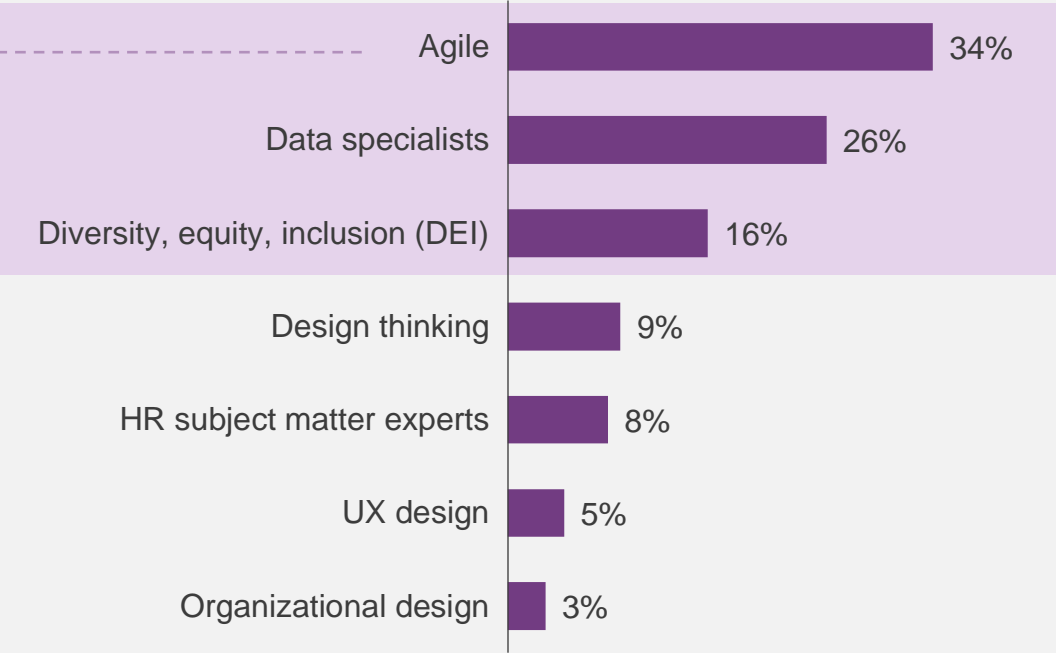
Over 4x growth for change specialists

The number of employees trained in Agile and DevOps is expected to increase approximately 23% in the workforce, more than four times the average 5% growth in overall provider headcount.



Skills solving for talent and employee experience reflect a firm focus on change, leading with agile, data, and DEI specialists

% resources



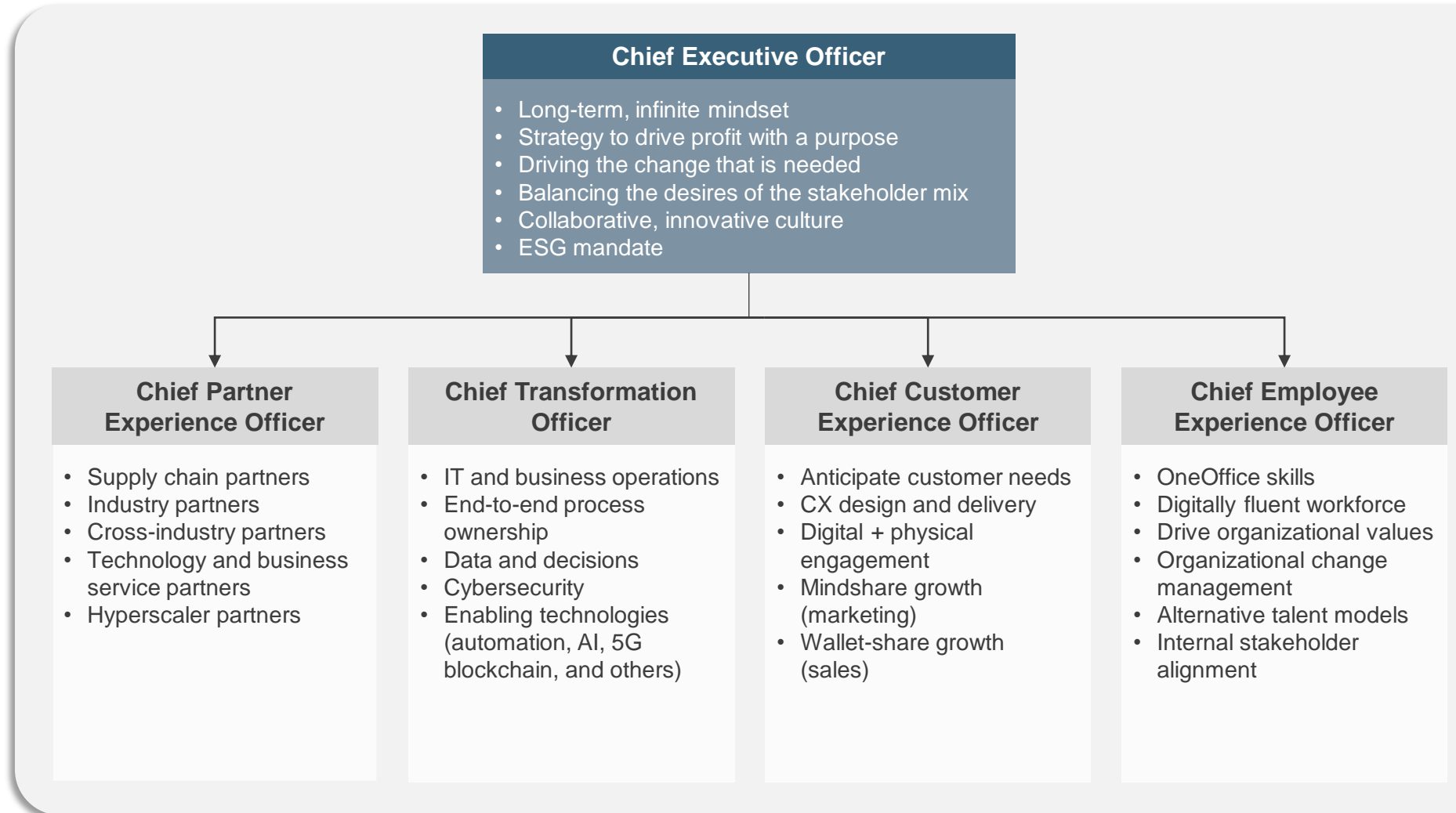
Sample: n=49,384
Source: Advisories and Providers in the HFS Employee Experience Services Top 10 Report

Ambitious organizations are creating leadership roles to support experience-centricity

Employee-centricity does not necessitate leadership through the HR function; day-to-day employee experience crosses all teams, functions, and business units. So, who should lead employee experience, and where should that capability reside?

Organizations must blow up the archaic leadership mindset to stay relevant in this post-pandemic reality.

These are the roles—and leadership traits—that will make companies much more in tune with their strategic needs and align them to their business operations.



Ambitious organizations are creating leadership roles to support experience-centricity (continued)

According to author [Simon Sinek](#) in his book *The Infinite Game*, people look to leadership to serve and protect and to “set up their organizations to succeed beyond their lifetimes.” In the modern landscape, most organizations place an unbalanced focus on near-term results, but business is no finite endeavor.

The CEO should be the leader who drives an *infinite mindset* across the organization

The Chief Transformation Officer must link the front and back offices and ensure processes run smoothly across functions to deliver the data and outcomes the organization needs.

The Chief Customer Experience Officer lives and breathes the world of the customers and obsesses with how to *engage* them as effectively as possible—right across the entire customer life-cycle.

The Chief Employee Experience Officer is responsible for making the company a great, energizing place to work, where staff of all backgrounds, ages, experience levels and cultures are energized by the values and desired outcomes of the firm.

The Chief Partner Experience Officer must become a prominent leader in the organization. The need to collaborate with entities across the entire customer value chain has never been so prominent. Partners play critical roles in providing cohesive, 360-degree customer experience.

Articulating impact with partner ecosystems

Partners have the consultative skills to understand and articulate the needs of clients; however, enterprises are finding gaps in their ability to operationalize the strategy.

Enterprises are looking for innovation throughout their partners' ecosystems to bring a diversity of specialists to proactively support their needs:

- To connect the vision and strategy through all relationship and delivery levels of their partners' teams.
- To connect to peers across functions, industries, and initiatives through their partners' client organizations.
- To connect to subject matter experts through their partners' technology partners.
- To connection to academics and analyst organizations to further validate the problem statement and approaches to solutions and services.

Clients want partners to bring a diverse set of specialists to the table to proactively support their needs.

3

Research methodology

Service providers covered in this report



Sources of data

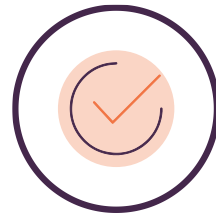
This Top 10 research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the capabilities of participating organizations covered in this study. Sources are as follows:



RFIs and briefings

Each participating vendor completed a detailed **RFI**.

HFS conducted **vendor briefings** with executives from each vendor.



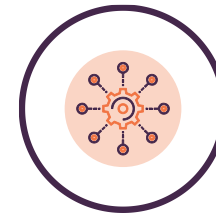
Reference checks

We conducted **reference checks** with 55 active clients of study participants via phone-based interviews and surveys.



HFS vendor ratings

Each year, HFS fields multiple demand-side surveys in which we include detailed **vendor rating** questions. For this study, we leveraged our fresh from the field HFS Pulse Study data featuring data from 600 enterprise client executive responses.



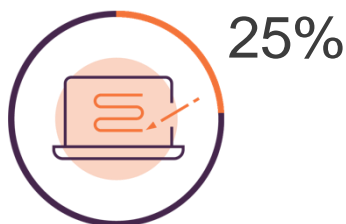
Other data sources

Public information such as press releases, web sites, etc.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

How we assessed service providers for the employee experience services Top 10 report

The study evaluates the employee experience services capabilities of service providers based on execution, innovation, voice of the customer (VOC), and a new criteria for 2021, alignment with the [HFS OneOffice model](#)—our vision for digital transformation. Details include:



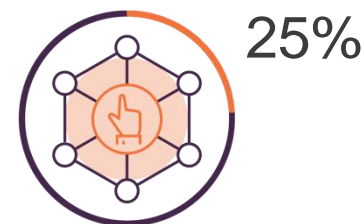
Execution

- **Breadth and depth:** Formalized employee experience capabilities and offerings, employee experience value chain capabilities.
- **Scale of employee experience services business:** Employee experience resources, geographic coverage, number of clients, scale of client engagements.
- **Growth of employee experience services:** Year-on-year revenue growth, client growth, resource growth, growth of engagements.



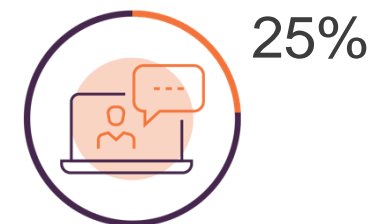
Innovation

- **Strategy and vision:** Clear articulation of value proposition, go-to-market strategy, and vision for employee experience services. Ability to address demand drivers and key client challenges.
- **Platforms, proprietary tools, and internal delivery:** In-house tools, platforms, frameworks, methodologies, and internal delivery of employee experience capabilities.
- **Co-innovation and collaboration ecosystem:** Identifiable investments and acquisitions. Collaborative approaches with clients, co-innovation centers, and creative commercial models.



OneOffice alignment

- **OneOffice scope:** Ability to help EX clients break silos and connect the front, middle, and back offices and align employees to customers with experience and skills.
- **OneOffice skills:** Cultivation of OneOffice skills internally and with clients, with a focus on driving digital fluency both internally and externally.
- **One face to the customer:** Vendor's ability to represent its full capabilities to its clients.



Voice of the customer

- **Reference checks:** Direct feedback from enterprise clients via reference check interviews and surveys.
- **HFS voice of the customer vendor rating data:** Ratings by active clients of in-scope service providers.
- **Referenceability:** Provision of references and reference responsiveness.

4

Employee experience services: Top 10 results

HFS Top 10 employee experience services—summary of providers assessed in this report













Providers (alphabetical order)	HFS point of view
Accenture	Expansive approach to business performance, driven by EX and grounded in research
Capgemini	Integrated experience framework synergizing capabilities for a comprehensive set of EX services
Deloitte	Global transformation practice, extensive thought leadership, and linking EX to outcomes
EY	Robust "pure play" EX methodologies and services linking "X" and "O" data to the top and bottom lines
HCL	Extensive, productized IP with an IT- and workplace-centric approach to EX
IBM	Ecosystem, tech-agnostic approach, and fully embedded EX capabilities bolstering strength in co-innovation and collaboration
Infosys	Design-led, ecosystem-based approach making human experience the organizational compass
KPMG	Global EX propositions connect experience to evidence through extensive research and services capabilities
PWC	"Technology-enabled, experience-led" platforms and IP targeting ROI on people priorities
Rightpoint	Deep EX and CX alignment propositions with extensive capabilities across the EX value chain
TCS	Contextual industry lens and a North Star "digitizing empathy" across a robust suite of EX services
Wipro	Dedicated EX offerings and productized IP driving operational simplicity and organizational agility

HFS Top 10 employee experience services— 2022 podium performances

HFS Winners Circle

Top five providers overall across execution, innovation, OneOffice alignment, and voice of the customer criteria

































































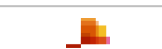
























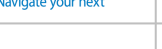







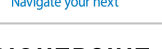
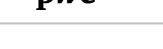



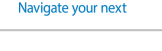




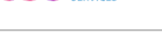
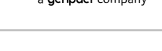

#1 	#2 	#3 	#4 	#5 
---	---	---	---	---

Execution powerhouses Top three providers on execution criteria			Innovation champions Top three providers on innovation criteria			OneOffice alignment Top three providers aligned to OneOffice			Outstanding voice of the customer Top three providers on voice of the customer criteria		
#1 	#2 	#3 	#1 	#2 	#3 	#1 	#2 	#3 	#1 	#2 	#3 

Other notable performances

- HCL scored #1 for its co-innovation and collaboration ecosystem, #4 for overall innovation, and #6 for overall execution, leveraging its strong growth story for experience-as-a-service offerings, and quite notably in Innovation, its extensive use of outcome-based commercial models.
- KPMG scored #3 placement in Innovation: Strategy and Vision for its notable ability to clearly connect clients to value; KPMG's steady state of resource growth and overall employee experience engagements landed KPMG as #5 in the Execution: Growth category.
- TCS' breadth, depth, and scale of EX services contributed to its #4 placement in Overall Execution, and the full scope of its internal employee experience journey contributed to a very strong placement as #5 in OneOffice alignment.

HFS Top 10 employee experience services—2022 rankings

Rank	Overall HFS Top 10 position	Execution				Innovation				OneOffice alignment	Voice of the customer
		Breadth and depth	Scale of EX resources and business	Growth of EX services	Overall execution	Strategy and vision	Partners, platforms, and proprietary tools	Co-innovation and collaboration ecosystem	Overall innovation		
#1											
#2											
#3											
#4											
#5											
#6											
#7											
#8											
#9											
#10											

5

Employee experience services: Provider profiles

Expansive approach to business performance, driven by EX and grounded in research



Dimension	Rank	Strengths			Development opportunities																		
HFS Top 10 position	1	<ul style="list-style-type: none"> EX strategy and direction: Accenture's narratives address the need for organizations to drive an expansive approach to business performance by developing and sustaining conditions through hyper-relevant, personalized, and collaborative environments for individuals and teams to excel. These narratives are grounded in deep research, such as its human/digital/physical Employee Experience Framework, built on the Net Better Off model, and the Omni-Connected Employee Experience, shaped on recent research of 5,000 employees and 1,100 C-suite leaders. Key EX differentiators: Accenture's approaches to innovation, sustainability, inclusion and diversity, and behavioral science are embedded across the complete compass of its services. Accenture puts its money where its mouth is, with a dedicated focus on growth and expansion of its talent and organization capabilities through EX-relevant acquisitions, such as its 2020-2021 buys of Fable+, Root Inc., Cirrus, Future State, Workforce Insight, and Kates Kesler. Ability to help clients drive EX: <i>Henkel</i>—Developed a new learning management system to support an upskilling initiative for its workforce. The e-learning curriculum consisted of 215,000+ courses, with leaders gaining insights to shape new roles for future needs. Outcomes: Employees are enabled with a transparent way to find and train for new jobs within Henkel. <i>HSBC</i>—Drove large-scale transformation of its HR platform and how most employees interacted with HR to increase efficiency, lower costs, and improve employee satisfaction. Outcomes: Improved employee performance and productivity, enhanced reporting capabilities due to streamlined HR processes and accessibility of services, enabled HR and IT to focus on services and innovation rather than maintenance and upgrades to legacy systems. Customer kudos: There is notable consensus among client references regarding Accenture's diversity of capability and ability to bring perspective and expertise "into any conversation," supported by real use cases. In addition, clients noted Accenture's ability to effectively prepare leaders to interface at the highest levels of the organization, giving the nod to the effectiveness of Accenture's client engagement strategy of facilitating connections between the CHRO, C-suite, and the board. 			<ul style="list-style-type: none"> What we'd like to see more of: Accenture's EX engagements are primarily consulting only. HFS would like to see Accenture increase its share of engagements that include implementation and managed services alongside consulting to balance its strategy and execution focus. Flexible partnership models: Clients are looking for faster, on-demand flexibility and responsiveness to help with immediate needs and micro-engagements. Accenture's consulting-centric approach can struggle to fit these needs. 																		
Overall execution	1																						
Breadth and depth	3																						
Scale of EX services business	2																						
Growth of EX services business	1																						
Innovation capability	1	EX-relevant acquisitions	Partnership ecosystem for dedicated EX services	Key clients	Offerings and engagements																		
Strategy and vision	1	Recent acquisitions: <ul style="list-style-type: none"> Fable+ (2021): Expanded capabilities in team effectiveness, culture transformation, and psychological safety using data and analytics. Root Inc. (2021): Expanded organizational change management and learning capabilities that focus on experiential learning and behavior change. Cirrus (2021): Supports C-suite transformations with leadership development and culture transformations. Future State (2021): Added capability in highly specialized expertise focused on agile business transformation and change management. Workforce Insight (2021): Expanded enterprise workforce management capabilities. Kates Kesler (2020): Drives enterprise organization and operating model transformations. 	Key strategic relationships: Workday, SAP SuccessFactors, Oracle, Microsoft, ServiceNow, Salesforce, Ultimate Kronos Group (UKG) Co-investments: Avanade Strategic investments: Pipeline, Beamery, Talespin, SkyHive, Touchcast, arabesque s-ray Illustrative ecosystem partners: Cognician, Cornerstone, eightfold.ai Internal partners: Fjord, Droga5, REPL, Workforce Insight, ?What If!, Kates Kesler, Cirrus	Total number of EX clients: 1,200+ Including: Henkel, KLM, The British Army, Unilever, NASA, City of Denver, Ferrero, World Wildlife Fund	Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> HR modernization and digitization Organizational change management Advanced learning and skilling, employee development Dedicated employee experience Talent acquisition 																		
Platforms, proprietary tools, and internal delivery	1																						
Co-innovation and collaboration ecosystem	3																						
OneOffice alignment	1																						
Voice of the customer	2																						
				Client distribution across industries <table border="1"> <tr><td>Manufacturing</td><td>7%</td></tr> <tr><td>Oil, energy, and utilities</td><td>13%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>6%</td></tr> <tr><td>Healthcare and life sciences</td><td>10%</td></tr> <tr><td>High-tech, media, and telecom</td><td>15%</td></tr> <tr><td>Retail and CPG</td><td>14%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>22%</td></tr> <tr><td>Public sector</td><td>8%</td></tr> <tr><td>Other</td><td>5%</td></tr> </table>	Manufacturing	7%	Oil, energy, and utilities	13%	Travel, hospitality, and leisure	6%	Healthcare and life sciences	10%	High-tech, media, and telecom	15%	Retail and CPG	14%	Banking, financial services, and insurance	22%	Public sector	8%	Other	5%	Distribution of EX engagements <ul style="list-style-type: none"> Consulting only Consulting and implementation Managed services
Manufacturing	7%																						
Oil, energy, and utilities	13%																						
Travel, hospitality, and leisure	6%																						
Healthcare and life sciences	10%																						
High-tech, media, and telecom	15%																						
Retail and CPG	14%																						
Banking, financial services, and insurance	22%																						
Public sector	8%																						
Other	5%																						

Robust "pure play" EX methodologies and services linking "X" and "O" data to the top and bottom lines



Dimension	Rank	Strengths	Development opportunities																																				
HFS Top 10 position	2	<ul style="list-style-type: none"> EX strategy and direction: EY addresses its humans-at-center agenda through its four services solutions: People Experience, Organization and Workforce Transformation, HR Transformation, and People Mobility. While EY provides some of the most robust "pure-play" EX services and methodologies among its competitors, its capabilities extend across the EX value chain, and it curates and delivers them to clients. Key differentiators: EY pushes the boundaries connecting experience data and operational execution to uncover how people create or erode long-term value and how much it matters to the top and bottom lines. EY's solutions are backed by a "client zero" approach within its organization of 300,000 employees. Ability to help clients drive EX: <i>Government-regulated center for nuclear engineering management</i>—Designed and delivered multiyear, blended learning capability to embed behavioral change in support of making the organization "Safer, Sooner." Outcomes: 90% of learners are confident they will change behavior, 92% of learners feel they've come away with useful learnings or realizations, and there was an 18% increase in how helpful people find communications from senior management. <i>Large (\$7.25 billion) regional American retail bank</i>—Assessed the racial equity of talent process and practices with a specific focus on the black-employee experience across the full talent value chain, conducted a holistic and data-driven analysis of biases (both conscious and unconscious), and created a 24-month implementation plan to close operational gaps and mitigate risks uncovered as part of the evaluation. Outcomes: Embedded culture and belonging elements in each of the five assessment levers: talent acquisition, performance management, rewards and recognition, career pathways and leadership development, and succession planning. Customer kudos: Client references put forth a unified voice that EY has significant strength in how it partners and "goes all out" for its relationships. EY's ecosystem approach is a "powerful" outside-in agenda; it brings partners from other organizations to the table to proactively support client needs and the business case at hand. 	<p>What we'd like to see more of:</p> <ul style="list-style-type: none"> Seventy-nine percent (79%) of EY's clients engage in both consulting and implementation. Many commend EY on its strategy and vision but sometimes found it challenging to operationalize. EY has developed innovative methods to re-skill talent at scale for certain clients, with data at the core. Developing industry-specific solutions based on recent client successes would be powerful. EY has a strong innovation reputation and has a real opportunity to invest in its people-innovation brand to set itself apart. 																																				
Overall execution	2																																						
Breadth and depth	2																																						
Scale of EX services business	1																																						
Growth of EX services business	3																																						
Innovation capability	3	<p>Partnership ecosystem for dedicated EX services</p> <table border="1"> <thead> <tr> <th>EX-relevant acquisitions</th> <th>Primary alliance partners:</th> <th>Key clients</th> <th>Offerings and engagements</th> </tr> </thead> <tbody> <tr> <td> <p>Recent acquisitions:</p> <ul style="list-style-type: none"> Clerestory (2022): Enhanced Workforce Advisory capabilities. Tao Leadership (2021): Built out change and culture capability. Lane4 (2021): Strengthened transformational leadership and culture change capabilities. PeopleFirm (2020): Leading-class track record of providing in-depth and customized client transformation services that address strategy, culture, structure, people, leadership and change. SpotMentor (2020): Strengthened EY's People Advisory portfolio of digital services to support businesses in their skilling and learning needs. MillionYou (2019): Crowdsourcing forum combining expertise in building and activating communities to unlock vast potential. </td> <td> <ul style="list-style-type: none"> Microsoft IBM ServiceNow SAP Qualtrics </td> <td> <p>Total number of EX clients: 4,269</p> <p>Including: A multinational consumer products company, multinational regional bank, Asia's leading telecommunications group of companies, government regulated center for nuclear engineering management, ride-share leader, oil and gas major</p> <table border="1"> <thead> <tr> <th colspan="2">Client distribution across industries</th> </tr> </thead> <tbody> <tr> <td>Manufacturing</td> <td>6%</td> </tr> <tr> <td>Oil, energy, and utilities</td> <td>14%</td> </tr> <tr> <td>Travel, hospitality, and leisure</td> <td>2%</td> </tr> <tr> <td>Healthcare and life sciences</td> <td>11%</td> </tr> <tr> <td>High-tech, media, and telecom</td> <td>7%</td> </tr> <tr> <td>Retail and CPG</td> <td>9%</td> </tr> <tr> <td>Banking, financial services, and insurance</td> <td>16%</td> </tr> <tr> <td>Public sector</td> <td>16%</td> </tr> <tr> <td>Other</td> <td>20%</td> </tr> </tbody> </table> </td> <td> <p>Top five fastest-growing talent and EX offerings:</p> <ul style="list-style-type: none"> People experience design HR transformation Change management Culture services Learning <p>Distribution of EX engagements</p> <table border="1"> <thead> <tr> <th>Engagement Type</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Consulting only</td> <td>1%</td> </tr> <tr> <td>Consulting and implementation</td> <td>79%</td> </tr> <tr> <td>Managed services</td> <td>20%</td> </tr> </tbody> </table> </td> </tr> </tbody> </table>		EX-relevant acquisitions	Primary alliance partners:	Key clients	Offerings and engagements	<p>Recent acquisitions:</p> <ul style="list-style-type: none"> Clerestory (2022): Enhanced Workforce Advisory capabilities. Tao Leadership (2021): Built out change and culture capability. Lane4 (2021): Strengthened transformational leadership and culture change capabilities. PeopleFirm (2020): Leading-class track record of providing in-depth and customized client transformation services that address strategy, culture, structure, people, leadership and change. SpotMentor (2020): Strengthened EY's People Advisory portfolio of digital services to support businesses in their skilling and learning needs. MillionYou (2019): Crowdsourcing forum combining expertise in building and activating communities to unlock vast potential. 	<ul style="list-style-type: none"> Microsoft IBM ServiceNow SAP Qualtrics 	<p>Total number of EX clients: 4,269</p> <p>Including: A multinational consumer products company, multinational regional bank, Asia's leading telecommunications group of companies, government regulated center for nuclear engineering management, ride-share leader, oil and gas major</p> <table border="1"> <thead> <tr> <th colspan="2">Client distribution across industries</th> </tr> </thead> <tbody> <tr> <td>Manufacturing</td> <td>6%</td> </tr> <tr> <td>Oil, energy, and utilities</td> <td>14%</td> </tr> <tr> <td>Travel, hospitality, and leisure</td> <td>2%</td> </tr> <tr> <td>Healthcare and life sciences</td> <td>11%</td> </tr> <tr> <td>High-tech, media, and telecom</td> <td>7%</td> </tr> <tr> <td>Retail and CPG</td> <td>9%</td> </tr> <tr> <td>Banking, financial services, and insurance</td> <td>16%</td> </tr> <tr> <td>Public sector</td> <td>16%</td> </tr> <tr> <td>Other</td> <td>20%</td> </tr> </tbody> </table>	Client distribution across industries		Manufacturing	6%	Oil, energy, and utilities	14%	Travel, hospitality, and leisure	2%	Healthcare and life sciences	11%	High-tech, media, and telecom	7%	Retail and CPG	9%	Banking, financial services, and insurance	16%	Public sector	16%	Other	20%	<p>Top five fastest-growing talent and EX offerings:</p> <ul style="list-style-type: none"> People experience design HR transformation Change management Culture services Learning <p>Distribution of EX engagements</p> <table border="1"> <thead> <tr> <th>Engagement Type</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Consulting only</td> <td>1%</td> </tr> <tr> <td>Consulting and implementation</td> <td>79%</td> </tr> <tr> <td>Managed services</td> <td>20%</td> </tr> </tbody> </table>	Engagement Type	Percentage	Consulting only	1%	Consulting and implementation	79%	Managed services	20%
EX-relevant acquisitions	Primary alliance partners:	Key clients	Offerings and engagements																																				
<p>Recent acquisitions:</p> <ul style="list-style-type: none"> Clerestory (2022): Enhanced Workforce Advisory capabilities. Tao Leadership (2021): Built out change and culture capability. Lane4 (2021): Strengthened transformational leadership and culture change capabilities. PeopleFirm (2020): Leading-class track record of providing in-depth and customized client transformation services that address strategy, culture, structure, people, leadership and change. SpotMentor (2020): Strengthened EY's People Advisory portfolio of digital services to support businesses in their skilling and learning needs. MillionYou (2019): Crowdsourcing forum combining expertise in building and activating communities to unlock vast potential. 	<ul style="list-style-type: none"> Microsoft IBM ServiceNow SAP Qualtrics 	<p>Total number of EX clients: 4,269</p> <p>Including: A multinational consumer products company, multinational regional bank, Asia's leading telecommunications group of companies, government regulated center for nuclear engineering management, ride-share leader, oil and gas major</p> <table border="1"> <thead> <tr> <th colspan="2">Client distribution across industries</th> </tr> </thead> <tbody> <tr> <td>Manufacturing</td> <td>6%</td> </tr> <tr> <td>Oil, energy, and utilities</td> <td>14%</td> </tr> <tr> <td>Travel, hospitality, and leisure</td> <td>2%</td> </tr> <tr> <td>Healthcare and life sciences</td> <td>11%</td> </tr> <tr> <td>High-tech, media, and telecom</td> <td>7%</td> </tr> <tr> <td>Retail and CPG</td> <td>9%</td> </tr> <tr> <td>Banking, financial services, and insurance</td> <td>16%</td> </tr> <tr> <td>Public sector</td> <td>16%</td> </tr> <tr> <td>Other</td> <td>20%</td> </tr> </tbody> </table>	Client distribution across industries		Manufacturing	6%	Oil, energy, and utilities	14%	Travel, hospitality, and leisure	2%	Healthcare and life sciences	11%	High-tech, media, and telecom	7%	Retail and CPG	9%	Banking, financial services, and insurance	16%	Public sector	16%	Other	20%	<p>Top five fastest-growing talent and EX offerings:</p> <ul style="list-style-type: none"> People experience design HR transformation Change management Culture services Learning <p>Distribution of EX engagements</p> <table border="1"> <thead> <tr> <th>Engagement Type</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Consulting only</td> <td>1%</td> </tr> <tr> <td>Consulting and implementation</td> <td>79%</td> </tr> <tr> <td>Managed services</td> <td>20%</td> </tr> </tbody> </table>	Engagement Type	Percentage	Consulting only	1%	Consulting and implementation	79%	Managed services	20%								
Client distribution across industries																																							
Manufacturing	6%																																						
Oil, energy, and utilities	14%																																						
Travel, hospitality, and leisure	2%																																						
Healthcare and life sciences	11%																																						
High-tech, media, and telecom	7%																																						
Retail and CPG	9%																																						
Banking, financial services, and insurance	16%																																						
Public sector	16%																																						
Other	20%																																						
Engagement Type	Percentage																																						
Consulting only	1%																																						
Consulting and implementation	79%																																						
Managed services	20%																																						
Strategy and vision	5																																						
Platforms, proprietary tools, and internal delivery	3																																						
Co-innovation and collaboration ecosystem	5																																						
OneOffice alignment	4																																						
Voice of the customer	5																																						

Ecosystem, tech-agnostic approach, and fully embedded EX capabilities bolstering strength in co-innovation and collaboration



Dimension	Rank	Strengths			Development opportunities																															
HFS Top 10 position	3	<ul style="list-style-type: none"> EX strategy and direction: IBM views employee experience (EX) as the sum of the impressions organizations leave on its people, defining if people come, stay, or leave. This view is backed by solutions and services such as IBM's Precision Talent Model, intelligent workflows for hiring, the IBM Talent Platform, IBM Skills Inference, and Talent and HR Strategy Transformation. IBM's tech-agnostic approach underscores clients' ability to leverage the best technology solutions for their organization. Key differentiators: IBM weaves its EX capabilities throughout the full Talent Transformation offering portfolio within IBM Consulting, leveraging the Enterprise Design Thinking framework to co-create solutions. Employee experience strategy, design, and implementation are fully integrated into its IBM Garage model, front and core to every IBM business engagement. When it comes to orchestration, IBM has built a comprehensive ecosystem to bring innovation to clients, reshape talent processes, and build out the future of people experience. Ability to help clients drive EX: <i>An American multinational managed healthcare and insurance company</i>—Leveraged the IBM Precision Talent Model recruitment framework to deliver better recruitment outcomes more efficiently while managing a 30x increase in employee hires. Outcomes: Maximum person-to-person workflow hand-offs reduced from 12 to 4, 50-point increase in NPS scores among hiring managers, 30% reduction in the time staff spend on each hire. <i>A US-based global airline</i>—Leveraged IBM Garage methodology to enable employees to be at the center of creating a positive customer experience. Outcomes: 88% reduction in Customer Care Center volume for in-flight issues, with 25,000 flight attendants who reported “feeling newly empowered.” Customer kudos: Clients uniformly consider IBM's co-innovation and collaboration capabilities a considerable strength. Clients appreciate IBM's deep bench and quality of the team, both technically and strategically, and the ability to “push the envelope” and apply concepts to the organization's real-life environment and culture. 			<ul style="list-style-type: none"> What we'd like to see more of: Across all the providers in this report, IBM brings the most balanced portfolio across consulting implementation and managed services engagements. Clients consider IBM a highly strategic partner; however, the consulting practice could benefit from improving its communication of complex concepts to executive audiences. Bringing it all together as One IBM: IBM's Virtual Enterprise model aligns with HFS' broad view of the hyper-connected OneOffice environment. However, some clients expressed a desire for IBM to engage them with broader transformational skills and capabilities to supplement their talent services. 																															
Overall execution	5																																			
Breadth and depth	1																																			
Scale of EX services business	5																																			
Growth of EX services business	12																																			
Innovation capability	2					<table border="1"> <thead> <tr> <th>EX-relevant acquisitions</th> <th>Partnership ecosystem for dedicated EX services</th> <th>Key clients</th> <th>Offerings and engagements</th> </tr> </thead> <tbody> <tr> <td> Recent acquisitions: In 2021, IBM Consulting acquired 8 businesses focused on extending its portfolio of data and hybrid cloud consulting services: NordCloud, Expertus, Bluetab, Taos, 7Summits, Boxboat, TruQua, Waeg. </td> <td> Key strategic relationships: Workday, Oracle, Cornerstone, SAP SuccessFactors, Microsoft, ServiceNow, Salesforce, Adobe Partners: Zoomi, Credly, Eightfold, Coursera, Guild, Gloat, Edcast, Lexonis, Avature, Modern Hire, Monster, CareerBuilder, Qualtrics, WalkMe, Wyzetalk, Phenom Internal partners: IBM consulting practice, IBM HR and HR employee experience teams, IBM iX and design practice </td> <td> Total number of EX clients: 1,000+ Including: Major automobile manufacturer, major US-based airline, major healthcare insurer, leading European consumer electronics organization, US federal government Client distribution across industries <table border="1"> <tbody> <tr><td>Manufacturing</td><td>22%</td></tr> <tr><td>Oil, energy, and utilities</td><td>3%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>5%</td></tr> <tr><td>Healthcare and life sciences</td><td>28%</td></tr> <tr><td>High-tech, media, and telecom</td><td>5%</td></tr> <tr><td>Retail and CPG</td><td>1%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>11%</td></tr> <tr><td>Public sector</td><td>9%</td></tr> <tr><td>Other</td><td>16%</td></tr> </tbody> </table> </td> <td> Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Managed Employee Services Talent Acquisition Services SuccessFactors HR technology-based services Talent Development Services Workday HR technology-based services Distribution of EX engagements <table border="1"> <tbody> <tr><td>Consulting only</td><td>31%</td></tr> <tr><td>Consulting and implementation</td><td>42%</td></tr> <tr><td>Managed services</td><td>27%</td></tr> </tbody> </table> </td> </tr> </tbody> </table>			EX-relevant acquisitions	Partnership ecosystem for dedicated EX services	Key clients	Offerings and engagements	Recent acquisitions: In 2021, IBM Consulting acquired 8 businesses focused on extending its portfolio of data and hybrid cloud consulting services: NordCloud, Expertus, Bluetab, Taos, 7Summits, Boxboat, TruQua, Waeg.	Key strategic relationships: Workday, Oracle, Cornerstone, SAP SuccessFactors, Microsoft, ServiceNow, Salesforce, Adobe Partners: Zoomi, Credly, Eightfold, Coursera, Guild, Gloat, Edcast, Lexonis, Avature, Modern Hire, Monster, CareerBuilder, Qualtrics, WalkMe, Wyzetalk, Phenom Internal partners: IBM consulting practice, IBM HR and HR employee experience teams, IBM iX and design practice	Total number of EX clients: 1,000+ Including: Major automobile manufacturer, major US-based airline, major healthcare insurer, leading European consumer electronics organization, US federal government Client distribution across industries <table border="1"> <tbody> <tr><td>Manufacturing</td><td>22%</td></tr> <tr><td>Oil, energy, and utilities</td><td>3%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>5%</td></tr> <tr><td>Healthcare and life sciences</td><td>28%</td></tr> <tr><td>High-tech, media, and telecom</td><td>5%</td></tr> <tr><td>Retail and CPG</td><td>1%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>11%</td></tr> <tr><td>Public sector</td><td>9%</td></tr> <tr><td>Other</td><td>16%</td></tr> </tbody> </table>	Manufacturing	22%	Oil, energy, and utilities	3%	Travel, hospitality, and leisure	5%	Healthcare and life sciences	28%	High-tech, media, and telecom	5%	Retail and CPG	1%	Banking, financial services, and insurance	11%	Public sector	9%	Other	16%	Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Managed Employee Services Talent Acquisition Services SuccessFactors HR technology-based services Talent Development Services Workday HR technology-based services Distribution of EX engagements <table border="1"> <tbody> <tr><td>Consulting only</td><td>31%</td></tr> <tr><td>Consulting and implementation</td><td>42%</td></tr> <tr><td>Managed services</td><td>27%</td></tr> </tbody> </table>	Consulting only	31%
EX-relevant acquisitions	Partnership ecosystem for dedicated EX services	Key clients	Offerings and engagements																																	
Recent acquisitions: In 2021, IBM Consulting acquired 8 businesses focused on extending its portfolio of data and hybrid cloud consulting services: NordCloud, Expertus, Bluetab, Taos, 7Summits, Boxboat, TruQua, Waeg.	Key strategic relationships: Workday, Oracle, Cornerstone, SAP SuccessFactors, Microsoft, ServiceNow, Salesforce, Adobe Partners: Zoomi, Credly, Eightfold, Coursera, Guild, Gloat, Edcast, Lexonis, Avature, Modern Hire, Monster, CareerBuilder, Qualtrics, WalkMe, Wyzetalk, Phenom Internal partners: IBM consulting practice, IBM HR and HR employee experience teams, IBM iX and design practice	Total number of EX clients: 1,000+ Including: Major automobile manufacturer, major US-based airline, major healthcare insurer, leading European consumer electronics organization, US federal government Client distribution across industries <table border="1"> <tbody> <tr><td>Manufacturing</td><td>22%</td></tr> <tr><td>Oil, energy, and utilities</td><td>3%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>5%</td></tr> <tr><td>Healthcare and life sciences</td><td>28%</td></tr> <tr><td>High-tech, media, and telecom</td><td>5%</td></tr> <tr><td>Retail and CPG</td><td>1%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>11%</td></tr> <tr><td>Public sector</td><td>9%</td></tr> <tr><td>Other</td><td>16%</td></tr> </tbody> </table>	Manufacturing	22%	Oil, energy, and utilities	3%	Travel, hospitality, and leisure	5%	Healthcare and life sciences	28%	High-tech, media, and telecom	5%	Retail and CPG	1%	Banking, financial services, and insurance	11%	Public sector	9%	Other	16%	Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Managed Employee Services Talent Acquisition Services SuccessFactors HR technology-based services Talent Development Services Workday HR technology-based services Distribution of EX engagements <table border="1"> <tbody> <tr><td>Consulting only</td><td>31%</td></tr> <tr><td>Consulting and implementation</td><td>42%</td></tr> <tr><td>Managed services</td><td>27%</td></tr> </tbody> </table>	Consulting only	31%	Consulting and implementation	42%	Managed services	27%									
Manufacturing	22%																																			
Oil, energy, and utilities	3%																																			
Travel, hospitality, and leisure	5%																																			
Healthcare and life sciences	28%																																			
High-tech, media, and telecom	5%																																			
Retail and CPG	1%																																			
Banking, financial services, and insurance	11%																																			
Public sector	9%																																			
Other	16%																																			
Consulting only	31%																																			
Consulting and implementation	42%																																			
Managed services	27%																																			
Strategy and vision	2																																			
Platforms, proprietary tools, and internal delivery	2																																			
Co-innovation and collaboration ecosystem	2																																			
OneOffice alignment	2																																			
Voice of the customer	3																																			

Global transformation practice, extensive thought leadership, and linking EX to outcomes



Dimension	Rank	Strengths	Development opportunities								
HFS Top 10 position	4	<ul style="list-style-type: none"> EX strategy and direction: Deloitte's narratives and Workplace Experience (WX) services strongly focus on workforce experience and digital workplace services, designed around the needs of people as they carry out the business of the organization. The thread of workforce experience is embedded across Deloitte's advisory, implementation, and ongoing management services to assess, activate, and continuously improve upon it. Key differentiators: 15+ years of focused thought leadership across Human Capital Trends and Insights2Action Research (formerly Bersin by Deloitte). Deloitte's Center for Integrated Research publishes widely and focuses on cross-sector, global shifts in technology, mobility, and workforce. Deloitte's Digital Workplace narratives clearly articulate examples and linkages from experience to outcomes. Its Digital Workplace Maturity Model assists organizations in understanding current-state conditions and measuring progress along four levels of workforce experiences and technology capabilities: Basic, Developing, Expanding, and Digital Workplace Leader. Ability to help clients drive EX: <i>Global engineering and professional services firm</i>—Workday-enabled learning transformation allowing employees to select curated learning paths or create their own, to "learn within the flow of work" anytime, anywhere, and to drive career paths while building skills. Outcomes: 80% enrollment across the organization within three weeks of go-live, continued initiatives leveraging people data to improve people experience. <i>Global manufacturing corporation</i>—Developed a custom iOS app to turn outdated processes and transactions into a frictionless and secure new way of working for management's global workplace. Outcomes included smoother workflows, advanced security, and reduced response time for employees at every level. Customer kudos: Client references consistently give Deloitte's practitioners high marks for infusing innovation with their services, the quality of account management, flexibility, and the ability to deliver long-term business value 	<ul style="list-style-type: none"> Cost: Some enterprises may de-select Deloitte because of its cost. A few clients did highlight that they thought Deloitte was expensive; however, clients should position the cost of the project in the context of the value they will receive. One client pointed out that they believed they received high-quality service for the price they paid. Relevance to small-and-medium enterprises: Some enterprises perceive that Deloitte solely focuses on large, global enterprises. While it does have vast experience with complex, global engagements, prospective clients should know that Deloitte also has experience with smaller enterprises. For example, for Workday engagements, Deloitte has developed its Momentum Express methodology and deployment accelerator for mid-market clients (3,500–10,000 employees). 								
Overall execution	3										
Breadth and depth	5										
Scale of EX services business	4										
Growth of EX services business	7										
Innovation capability	6										
Strategy and vision	4	<p>EX-relevant acquisitions</p> <p>Recent acquisitions:</p> <ul style="list-style-type: none"> BIAS Corporation (2021) Cloud consulting firm focused on advise, implement, and operate services for cloud infrastructure, database, middleware, applications, analytics and security. Ouest (2021) Canadian SAP consultancy firm providing a range of SAP solutions including finance, supply chain management, human capital management and safety, user experience and security. Awesome (2021) Israeli brand and product design agency KeyTree (2020) UK based, SAP-enabled digital transformation services firm focused on implementations including SAP S/4HANA®, SAP Customer Experience, SAP® SuccessFactors® and SAP Cloud Platform technologies Presence of IT (2019) Australia-based workforce management and human resources consultancy firm 	<p>Partnership ecosystem for EX services</p> <p>Strategic and Alliance partners:</p> <ul style="list-style-type: none"> IBM Oracle ServiceNow SAP SuccessFactors Workday <p>Partners:</p> <p>ADP, Adobe, Anaplan, Apple, AWS, Dell, Cisco, Conduent, Google Cloud, Genpact, Ipsoft, Qualtrics, Medallia, MicroFocus, Mulesoft SafeGuard, OneSource Virtual, Salesforce, Splunk, WalkMe, Workplace</p>	<p>Key clients</p> <p>Total number of EX Clients: 500+ Including:</p> <p>Major airline, global fast food company, global telecommunications firm, global media and financial services firm, global pharmaceutical company, US federal executive branch agency, global chemical company</p>	<p>Offerings and engagements</p> <p>Top 5 fastest growing Talent and EX offerings:</p> <ul style="list-style-type: none"> Work, Workplace, Workforce Reimagination Digital Workplace Climate, Sustainability, Equity Talent Marketplace / Skills & Capabilities Rewards & Wellbeing 						
Platforms, proprietary tools, and internal delivery	4										
Co-innovation and collaboration ecosystem	9										
OneOffice alignment	7										
Voice of the customer	4										
						<p>Client distribution across industries</p> <p>Deloitte has experience in and has developed assets to facilitate deployments across industry sectors globally.</p>	<p>Distribution of EX engagements</p> <table border="1"> <caption>Distribution of EX engagements</caption> <thead> <tr> <th>Category</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Consulting only</td> <td>5%</td> </tr> <tr> <td>Consulting and implementation</td> <td>70%</td> </tr> <tr> <td>Managed services</td> <td>25%</td> </tr> </tbody> </table>	Category	Percentage	Consulting only	5%
Category	Percentage										
Consulting only	5%										
Consulting and implementation	70%										
Managed services	25%										

Deep EX and CX alignment propositions with extensive capabilities across the EX value chain

Dimension	Rank	Strengths	Development opportunities																																			
HFS Top 10 position	5	<ul style="list-style-type: none"> EX strategy and direction: Rightpoint views employee experience (EX) as the most promising competitive advantage for organizations today, and its EX initiatives correlate with a focused perspective of customer-centricity. Rightpoint delivers across the full spectrum of the EX value chain, including strategy, implementation, and operations integrated into offerings such as Modern Workspace design and development, People Insights, Change Management, EX Transformation and Service Design, and Sales and Service Transformation. Key differentiators: Rightpoint approaches transformation as an intertwined journey of Employee Experience and Customer Experience, and it has one of the most formalized alignment propositions among its peers. Rightpoint and Genpact's partnership bridges experience innovation and process innovation for clients, bringing an evidence-based approach to experience design, extensive domain expertise in running operations, and deep data analytics to uncover root causes of pain points, indicators of opportunity, and measurable outcomes. Ability to help clients drive EX: <i>Global professional services firm</i>—Transformed knowledge management access and capability to provide predictive and immediate access to needed information. Created "one source of truth" and mined foresight from data to empower employees. Outcomes: Employees' engagement increased nearly 100%, and they realized significant time savings from effective search. <i>Leading US-based hedge fund</i>—Time-starved workforce engaged in time-consuming, mundane tasks with high employee churn complicating processes and operations. Developed a cloud-based service portal and centralized data hub with data visualization and reporting. Outcomes: Saved 40+% in operational expenses, 70% reduction for hiring managers in new hire onboarding steps, and consolidation of 50+ processes and systems to a single experience. Customer kudos: Client references consider Rightpoint a partner that thinks out of the box and "asks really good questions." Client references laud its ability to absorb information, consolidate it in a meaningful way, and provide valuable insights: "They completely changed our perspective." 	<ul style="list-style-type: none"> What we'd like to see more of: Outcome-based pricing models are increasing across the services industry, especially in the EX space. HFS would like to see more demonstrations of Rightpoint's value share models with EX clients that build on its CX experience. It's possible to move too fast: In an era where speed is of the essence, it may be possible to move too quickly. Client references consider Rightpoint to be collaborative and "spot on" for delivering on expected outcomes but feel Rightpoint has an opportunity to strike a more balanced cadence through the journey. They can be over eager to squeeze a lot into very tight timeframes, which can be challenging for clients in today's remote environments. 																																			
Overall execution	10																																					
Breadth and depth	7																																					
Scale of EX services business	8																																					
Growth of EX services business	10																																					
Innovation capability	11	<table border="1"> <thead> <tr> <th>EX-relevant acquisitions</th> <th>Partnership ecosystem for dedicated EX services</th> <th>Key clients</th> <th>Offerings and engagements</th> </tr> </thead> <tbody> <tr> <td> Recent acquisitions: <ul style="list-style-type: none"> Enquero (2020): Enquero's data engineering and services, with notable strengths in industries such as high tech and consumer goods, extend Genpact's strong foundation of existing capabilities in delivering end-to-end transformation to enterprise clients. Hoodoo Digital (2022): Hoodoo Digital's expertise with Adobe adds to Rightpoint's existing capabilities to provide clients with an end-to-end solution integrating digital content, ecommerce, data analytics, and marketing operations. </td> <td> Strategic partnerships: <ul style="list-style-type: none"> Adobe: Manages content, commerce, and marketing operations, driving smarter insights and more strategic impact. Automation Anywhere, Blue Prism, and UiPath: Develop intelligent automation and RPA solutions. Celonis: Analyzes, optimizes, and improves business process performance. Microsoft: Strategic EX advisory, design, and implementation services. Salesforce: Creates a single view of customers across sales, service, community, and field service. ServiceNow: Creates effective flow of work across systems to optimize self-service and business processes. Workday: Workday Advisory partner helping clients explore the future of finance. </td> <td> Total number of EX clients: 600+ Including: Toyota Financial Services, Astellas, global, luxury retailer, large Canadian retailer, regional energy company, professional services firm, Fortune 100 co-branded card issuer, global airline company, leading US-based hedge fund, large Australian bank </td> <td> Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Microsoft Viva: EX platform strategy People Insights: Employee workplace analytics Digital Workspace: Employee communications and personal productivity Sales Transformation: Joy of selling EX Transformation and Service Design </td> </tr> <tr> <td colspan="2"> Client distribution across industries </td> <td colspan="2"> Distribution of EX engagements </td> </tr> <tr> <td colspan="2"> <table border="1"> <tbody> <tr><td>Manufacturing</td><td>11%</td></tr> <tr><td>Oil, energy, and utilities</td><td>2%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>3%</td></tr> <tr><td>Healthcare and life sciences</td><td>23%</td></tr> <tr><td>High-tech, media, and telecom</td><td>12%</td></tr> <tr><td>Retail and CPG</td><td>12%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>37%</td></tr> </tbody> </table> </td> <td colspan="2"> <table border="1"> <tbody> <tr><td>Consulting only</td><td>10%</td></tr> <tr><td>Consulting and implementation</td><td>70%</td></tr> <tr><td>Managed services</td><td>20%</td></tr> </tbody> </table> </td> </tr> </tbody> </table>	EX-relevant acquisitions	Partnership ecosystem for dedicated EX services	Key clients	Offerings and engagements	Recent acquisitions: <ul style="list-style-type: none"> Enquero (2020): Enquero's data engineering and services, with notable strengths in industries such as high tech and consumer goods, extend Genpact's strong foundation of existing capabilities in delivering end-to-end transformation to enterprise clients. Hoodoo Digital (2022): Hoodoo Digital's expertise with Adobe adds to Rightpoint's existing capabilities to provide clients with an end-to-end solution integrating digital content, ecommerce, data analytics, and marketing operations. 	Strategic partnerships: <ul style="list-style-type: none"> Adobe: Manages content, commerce, and marketing operations, driving smarter insights and more strategic impact. Automation Anywhere, Blue Prism, and UiPath: Develop intelligent automation and RPA solutions. Celonis: Analyzes, optimizes, and improves business process performance. Microsoft: Strategic EX advisory, design, and implementation services. Salesforce: Creates a single view of customers across sales, service, community, and field service. ServiceNow: Creates effective flow of work across systems to optimize self-service and business processes. Workday: Workday Advisory partner helping clients explore the future of finance. 	Total number of EX clients: 600+ Including: Toyota Financial Services, Astellas, global, luxury retailer, large Canadian retailer, regional energy company, professional services firm, Fortune 100 co-branded card issuer, global airline company, leading US-based hedge fund, large Australian bank	Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Microsoft Viva: EX platform strategy People Insights: Employee workplace analytics Digital Workspace: Employee communications and personal productivity Sales Transformation: Joy of selling EX Transformation and Service Design 	Client distribution across industries		Distribution of EX engagements		<table border="1"> <tbody> <tr><td>Manufacturing</td><td>11%</td></tr> <tr><td>Oil, energy, and utilities</td><td>2%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>3%</td></tr> <tr><td>Healthcare and life sciences</td><td>23%</td></tr> <tr><td>High-tech, media, and telecom</td><td>12%</td></tr> <tr><td>Retail and CPG</td><td>12%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>37%</td></tr> </tbody> </table>		Manufacturing	11%	Oil, energy, and utilities	2%	Travel, hospitality, and leisure	3%	Healthcare and life sciences	23%	High-tech, media, and telecom	12%	Retail and CPG	12%	Banking, financial services, and insurance	37%	<table border="1"> <tbody> <tr><td>Consulting only</td><td>10%</td></tr> <tr><td>Consulting and implementation</td><td>70%</td></tr> <tr><td>Managed services</td><td>20%</td></tr> </tbody> </table>		Consulting only	10%	Consulting and implementation	70%	Managed services	20%
EX-relevant acquisitions	Partnership ecosystem for dedicated EX services	Key clients	Offerings and engagements																																			
Recent acquisitions: <ul style="list-style-type: none"> Enquero (2020): Enquero's data engineering and services, with notable strengths in industries such as high tech and consumer goods, extend Genpact's strong foundation of existing capabilities in delivering end-to-end transformation to enterprise clients. Hoodoo Digital (2022): Hoodoo Digital's expertise with Adobe adds to Rightpoint's existing capabilities to provide clients with an end-to-end solution integrating digital content, ecommerce, data analytics, and marketing operations. 	Strategic partnerships: <ul style="list-style-type: none"> Adobe: Manages content, commerce, and marketing operations, driving smarter insights and more strategic impact. Automation Anywhere, Blue Prism, and UiPath: Develop intelligent automation and RPA solutions. Celonis: Analyzes, optimizes, and improves business process performance. Microsoft: Strategic EX advisory, design, and implementation services. Salesforce: Creates a single view of customers across sales, service, community, and field service. ServiceNow: Creates effective flow of work across systems to optimize self-service and business processes. Workday: Workday Advisory partner helping clients explore the future of finance. 	Total number of EX clients: 600+ Including: Toyota Financial Services, Astellas, global, luxury retailer, large Canadian retailer, regional energy company, professional services firm, Fortune 100 co-branded card issuer, global airline company, leading US-based hedge fund, large Australian bank	Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Microsoft Viva: EX platform strategy People Insights: Employee workplace analytics Digital Workspace: Employee communications and personal productivity Sales Transformation: Joy of selling EX Transformation and Service Design 																																			
Client distribution across industries		Distribution of EX engagements																																				
<table border="1"> <tbody> <tr><td>Manufacturing</td><td>11%</td></tr> <tr><td>Oil, energy, and utilities</td><td>2%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>3%</td></tr> <tr><td>Healthcare and life sciences</td><td>23%</td></tr> <tr><td>High-tech, media, and telecom</td><td>12%</td></tr> <tr><td>Retail and CPG</td><td>12%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>37%</td></tr> </tbody> </table>		Manufacturing	11%	Oil, energy, and utilities	2%	Travel, hospitality, and leisure	3%	Healthcare and life sciences	23%	High-tech, media, and telecom	12%	Retail and CPG	12%	Banking, financial services, and insurance	37%	<table border="1"> <tbody> <tr><td>Consulting only</td><td>10%</td></tr> <tr><td>Consulting and implementation</td><td>70%</td></tr> <tr><td>Managed services</td><td>20%</td></tr> </tbody> </table>		Consulting only	10%	Consulting and implementation	70%	Managed services	20%															
Manufacturing	11%																																					
Oil, energy, and utilities	2%																																					
Travel, hospitality, and leisure	3%																																					
Healthcare and life sciences	23%																																					
High-tech, media, and telecom	12%																																					
Retail and CPG	12%																																					
Banking, financial services, and insurance	37%																																					
Consulting only	10%																																					
Consulting and implementation	70%																																					
Managed services	20%																																					
Strategy and vision	6																																					
Platforms, proprietary tools, and internal delivery	7																																					
Co-innovation and collaboration ecosystem	12																																					
OneOffice alignment	9																																					
Voice of the customer	1																																					

Global EX propositions connect experience to evidence through extensive research and services capabilities



Dimension	Rank	Strengths	Development opportunities																				
HFS Top 10 position	6	<ul style="list-style-type: none"> EX strategy and direction: KPMG's view of employee experience is driven by key insights gathered from its HR Pathfinders research in an approach that connects experience to evidence (P:E2). KPMG's global EX propositions cover three main areas: purpose, values, and culture; employee value proposition (EVP); and interactions with digital and physical processes. Key differentiators: <i>Learning</i>—KPMG is one of the largest learning providers in Europe, with more than 40 alliance partners and consortium members for EX alone; it launched its global learning platform in Fall 2021 with Microsoft Cloud services to provide relevant, bite-sized learning in the flow of work. <i>Customer and employee experience practices</i>—KPMG's Six Pillars of Experience Excellence consist of fundamental components to put employees in lockstep with customers. KPMG's Customer Experience Excellence center provides access to 10 years of research into key drivers delivering winning experiences; its Pathfinder research, P:E2, informs KPMG's view of a "total workforce" approach. Ability to help clients drive EX: <i>Central government department (UK)</i>—Improved performance management and reward allocations across its 35,000-strong workforce. Conducted as-is review of existing performance management approach and evaluated 82 examples of available learning. Outcomes—Training delivered to 20,000+ delegates, over 90% felt courses met stated objectives and would benefit them in their roles. Within three months of the system's launch, 85% of the workforce set goals, over 50% of staff with check-in, and 8% of the workforce with a reward. <i>National American bank</i>—Configured Workday solution alongside user-experience workshops to bring its people under the same umbrella following the bank's rapid growth due to an aggressive merger and acquisition strategy while designing to target state employee experiences. Outcomes: Fully digitized and automated employee self-service for all 85,000 bank employees; enhanced data accuracy, controls, reporting and analytics; and strong week-one endorsement, with 260,000 sign-ons, 20,000 manager- and employee-initiated transactions, and 7,000 new job requisitions. Customer kudos: Consistent with its consulting roots, KPMG is considered by clients as bearing considerable strength in connecting to the situation and formulating a vision specific to the client organization. 	<ul style="list-style-type: none"> What we'd like to see more of: HFS would like to see a stronger industry presence for KPMG's learning services with compelling customer stories and a clearly communicated market differentiation. While its learning capability has a deep history, its new learning platform launched in 2021 (built on Microsoft Azure, integrated with Microsoft 365, works with Viva, and utilizes Teams for collaboration) could benefit from stronger market visibility and clear differentiation. Operational differentiation: KPMG offers differentiated thought leadership and solutions from its peers, such as its suite of "Powered" services. However, client organizations have expressed a need for KPMG to demonstrate greater adaptability and meaningful differentiation from peer firms when executing their strategy. 																				
Overall execution	9																						
Breadth and depth	11																						
Scale of EX services business	9																						
Growth of EX services business	5																						
Innovation capability	10																						
Strategy and vision	3	EX-relevant acquisitions Recent acquisitions: <ul style="list-style-type: none"> Wirefire (2020): ServiceNow practice 	Partnership ecosystem for dedicated EX services Key strategic relationships: Platinum partners to Microsoft, Oracle, Workday, SAP SuccessFactors, and ServiceNow Partners: Medallia; Faethm, workforce analytics; Orgvue, organization design and analytics; Profinda, workforce analytics and capabilities mapping; Horsefly; IBM Watson; Degreed; Microsoft, digital experience and learning in the flow of work; Workshift, remote work; UDKU, Australia, experience design	Key clients Total number of EX clients: <i>Not available</i> Including: Global technology company, multinational food products corporation, central government department, multinational retailer, international beauty and health company, national infrastructure organization, international sportswear brand, global credit card company Client distribution across industries <table border="1"> <tr><td>Manufacturing</td><td>7%</td></tr> <tr><td>Oil, energy, and utilities</td><td>10%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>4%</td></tr> <tr><td>Healthcare and life sciences</td><td>8%</td></tr> <tr><td>High-tech, media, and telecom</td><td>11%</td></tr> <tr><td>Retail and CPG</td><td>10%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>30%</td></tr> <tr><td>Public sector</td><td>11%</td></tr> <tr><td>Other</td><td>9%</td></tr> </table>	Manufacturing	7%	Oil, energy, and utilities	10%	Travel, hospitality, and leisure	4%	Healthcare and life sciences	8%	High-tech, media, and telecom	11%	Retail and CPG	10%	Banking, financial services, and insurance	30%	Public sector	11%	Other	9%	Offerings and engagements Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Employee portals, platforms, and self-service Advanced learning and upskilling HR modernization and digitization Environment (including hybrid working) Organizational change management
Manufacturing	7%																						
Oil, energy, and utilities	10%																						
Travel, hospitality, and leisure	4%																						
Healthcare and life sciences	8%																						
High-tech, media, and telecom	11%																						
Retail and CPG	10%																						
Banking, financial services, and insurance	30%																						
Public sector	11%																						
Other	9%																						
Platforms, proprietary tools, and internal delivery	10	OneOffice alignment	Distribution of EX engagements <table border="1"> <tr><td>Consulting only</td><td>20%</td></tr> <tr><td>Consulting and implementation</td><td>50%</td></tr> <tr><td>Managed services</td><td>30%</td></tr> </table>	Consulting only	20%	Consulting and implementation	50%	Managed services	30%														
Consulting only	20%																						
Consulting and implementation	50%																						
Managed services	30%																						
Co-innovation and collaboration ecosystem	8																						
Voice of the customer	6																						

Extensive, productized IP with an IT- and workplace-centric approach to EX



Dimension	Rank	Strengths	Development opportunities																								
HFS Top 10 position	7	<ul style="list-style-type: none"> EX strategy and direction: HCL harmonized its EX strategy around its workplace solutions and FLUID framework for enabling and maintaining security, user experience, agility, and productivity. HCL productized its internal IP across multiple solutions, for example, with its IP for automation (OptiBot), real-time analytics (WorkBlaze), and consumer experience (IntelliZone) on an OPEX model. Its NIPPON solution correlates employee effort and output data to provide insight into productivity, role mapping, skilling needs, and training ROI, and HCL's FlexSpace experience-as-a-service offering combines IT services and IT hardware to personalize employee experience to work from anywhere, any time, and from any device. 	<ul style="list-style-type: none"> What we'd like to see more of: Clearer, market-facing articulation of what HCL's solutions mean from an employee point of view to help thread the narrative from technical solutions to what they mean for employee experience. Ideapreneurs in action: Client references have mixed reviews for HCL's ability to proactively arrive at the table with new ideas. Some clients feel the full force of HCL's "Ideapreneur" culture. Others would like to see more proactivity in bringing innovation to the table through internal and ecosystem experts. 																								
Overall execution	6	<ul style="list-style-type: none"> Key differentiators: HCL has extensive, productized IP across its experience services, and it provides an IT- and workplace-centric approach to EX. HCL is heavily weighted toward managed services for those offerings; 70% of overall customers have some element of experience level agreements (XLAs) in place, which are measured using user delight scores (UDS). To address the EX strategy and cultural change aspects of experience initiatives, HCL brings its Workplace Experience Consulting arm to the table alongside capabilities such as the Workplace Experience (WX) Evolution service to solicit, receive, and analyze ongoing employee feedback. 																									
Breadth and depth	9	<ul style="list-style-type: none"> Ability to help clients drive EX: <i>Global aerospace company</i>—Application portfolio transformation project to deliver anytime, anywhere, any device workplace as part of business transformation with cloud-based virtual workspace platform for inherent scalability and flexibility. Engaged outcome-based service model for enhancement of employee experience vs. standard SLA measurements. <i>Global retail and CPG company</i>—Persona-led service desk site support to uniquely identify the needs of each persona with regard to workload, mobility, resource, and application utilization. Developed user support model and allocation of devices ensuring right fit and right device. 																									
Scale of EX services business	6	<ul style="list-style-type: none"> Customer kudos: "They embody partnership." Clients praise HCL's flexibility, speed, and support as a partner. Clients also consider HCL's services as good value for money. 																									
Growth of EX services business	2																										
Innovation capability	4																										
		EX-relevant acquisitions	Partnership ecosystem for dedicated EX services	Key clients	Offerings and engagements																						
Strategy and vision	12	<p>Recent acquisitions:</p> <ul style="list-style-type: none"> GBS (2021): German IT consulting firm supporting digital transformation. Stake in Kalido (2020): London-based liquid workforce management product firm. Strong Bridge Envision (2020): Change management, business process modernization, and apps consulting. Broadcom (Symantec) (2020): Security consulting business. Point to Point (2019): Design-thinking based consultancy, workplace blueprinting capabilities. C3i Solutions (2019): Specializing in clinical and pharma salesforce service desk. 	<p>Alliances:</p> <p>IBM, Microsoft, Google, Dell, HP, WalkMe, Cisco, AWS, SAP, ServiceNow, Pegasystems, Oracle, Micro Focus</p> <p>Partners:</p> <p>Apple, Intel, Lenovo, Samsung, ZenSpace, Condec, contextere, Librestream, Ombori, WorkplaceBuddy</p> <p>Learning partners:</p> <p>Coursera, Skillsoft, Udemy, ISB, UpGrad, Wharton, Harvard Business Publishing, Shiv Nadar University, UCIrvine</p>	<p>Total number of EX clients: 400+</p> <p>Including: British multinational packaging business, leading global reinsurer, American apparel manufacturer, European multinational aerospace corporation, German multinational apparel and accessories manufacturer</p> <p>Client distribution across industries</p> <table border="1"> <tr><td>Manufacturing</td><td>24%</td></tr> <tr><td>Oil, energy, and utilities</td><td>10%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>2%</td></tr> <tr><td>Healthcare and life sciences</td><td>13%</td></tr> <tr><td>High-tech, media, and telecom</td><td>13%</td></tr> <tr><td>Retail and CPG</td><td>13%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>23%</td></tr> <tr><td>Public sector</td><td>2%</td></tr> </table>	Manufacturing	24%	Oil, energy, and utilities	10%	Travel, hospitality, and leisure	2%	Healthcare and life sciences	13%	High-tech, media, and telecom	13%	Retail and CPG	13%	Banking, financial services, and insurance	23%	Public sector	2%	<p>Top five fastest-growing talent and EX offerings:</p> <ul style="list-style-type: none"> HCL Workblaze HCL NIPPON HCL Workplace Experience Consulting HCL Kalido HCL SafeSense <p>Distribution of EX engagements</p> <table border="1"> <tr><td>Consulting only</td><td>8%</td></tr> <tr><td>Consulting and implementation</td><td>18%</td></tr> <tr><td>Managed services</td><td>74%</td></tr> </table>	Consulting only	8%	Consulting and implementation	18%	Managed services	74%
Manufacturing	24%																										
Oil, energy, and utilities	10%																										
Travel, hospitality, and leisure	2%																										
Healthcare and life sciences	13%																										
High-tech, media, and telecom	13%																										
Retail and CPG	13%																										
Banking, financial services, and insurance	23%																										
Public sector	2%																										
Consulting only	8%																										
Consulting and implementation	18%																										
Managed services	74%																										
Platforms, proprietary tools, and internal delivery	9																										
Co-innovation and collaboration ecosystem	1																										
OneOffice alignment	3																										
Voice of the customer	9																										

Design-led, ecosystem-based approach making human experience the organizational compass

Dimension	Rank	Strengths	Development opportunities				
HFS Top 10 position	8	<ul style="list-style-type: none"> EX strategy and direction: Infosys' design-led, ecosystem-based approach makes human experience (HX) the organizational compass. Its narrative focuses on humans (customers, employees, partners) at the heart, backed by its Design + Technology + Business framework. Infosys' proprietary experience platforms (including Lex, Orbit, Launchpad, and Live Enterprise) are brought to market in concert with dedicated practice units to orchestrate experience layers among tools and services, connected workspaces, and agile ways of working. Key differentiators: Infosys' trademark HX methodology, Conversation2Creation, is a collaborative and workshop-driven approach to shaping ideas into experiences. Born out of working with startups, it can be applied at scale for enterprise-level employee-centric transformations. Infosys' EX-Success Framework was designed to measure and define success to balance business and human needs to align stakeholders and empower teams to make decisions. Infosys has extensively productized its internal capabilities to create a "decoupled experience layer," providing employees with hyper-personalized single interfaces to tools, services, and platforms with a "plug-and-play" back-end, where components and capabilities can be added and removed as new solutions become available without impacting a single-pane-of-glass user experience. Ability to help clients drive EX: <i>Leading US-based food and beverage brand</i>—Scaled the client HR system landscape in line with business expansion strategy, replacing multiple legacy systems and manual workflows with cloud solutions for integrated, standardized, and streamlined talent management processes. Outcomes: 60% reduction in manual effort of hiring managers, 90% enhanced performance in the delivery of dashboards and reports, from two days to 30 minutes. Improved HR productivity, saving up to 40% of employee hours. <i>US energy corporation</i>—Transformed employee experience for 2,000+ employees with streamlined learning paths, benefits enrollment, communications, uniform candidate selection, and onboarding processes. Outcomes: 30% increase in employee satisfaction in post-implementation survey, 70% reduction in overall time to hire from 3 days to 1, 20% productivity improvement for HR partners. Customer kudos: In an era of rotating doors, clients appreciated Infosys' consistency of resources, their flexibility, and the high level of engagement of their teams, noting their ability to collaborate, test ideas, and push the thinking forward for key initiatives. 	<ul style="list-style-type: none"> What we'd like to see more of: Infosys' Talent Organization is emerging at a steady pace with continuous acquisitions on the digital experience front—Oddity Germany being the latest. We would like to see more from Infosys on its approach to organic growth and its ability to distill a "OneInfosys" engagement environment to support its expanding EX services, solutions, and client base. Digital fluency: Clients would like to ensure that Infosys' technical teams can better connect to business teams when articulating how the approach to delivery is clearly connected to the strategy (and vice versa). 				
Overall execution	11						
Breadth and depth	8						
Scale of EX services business	12						
Growth of EX services business	9						
Innovation capability	7						
Strategy and vision	10			EX-relevant acquisitions	Partnership ecosystem for dedicated EX services	Key clients	Offerings and engagements
Platforms, proprietary tools, and internal delivery	5			<ul style="list-style-type: none"> Oddity Germany (2022): Germany-based digital marketing, experience, and commerce agency. Carter Digital (2021): Australia-based experience design agency. Kaleidoscope Innovation (2020): Full-spectrum product design, development and insights firm. Blue Acorn iCi (2020): Adobe Platinum partner in US, leader in digital customer experience, commerce and analytics. Simplus (2020): Salesforce Consulting and Platinum Partner. EX offerings leverage Simplus solutions extensively for making overall HR experience simpler. Guidevision (2020): ServiceNow Elite Partner in Europe. Cloud capabilities significantly used for EX capabilities. 	<p>Key strategic partnerships: Adobe, Salesforce, SAP, Oracle, Microsoft, Sitecore, ServiceNow, SuccessFactors, Workday</p> <p>Other key partnership include: AWS, GCP, Snowflake, IBM, Informatica, Cloudera, MongoDB, DatalKU, Databricks, Denodo, Collibra, ThoughtSpot, Talend, Airviz Speck, ideaForge, WHOOP, Splunk, RSA, Anomaly, Microfocus, Gurucul, Recorded Future, Rapid7, Qualys, Onapsis, Sailpoint, Forgerock, CA technologies, Ping identity, Cyberark, Saviynt, Microfocus, Broadcom, Trend Micro, Vormetric, RSA, Zscaler, Cisco, CrowdStrike, Skybox, Checkpoint, Palo Alto, Claroty, Tenable</p>	<p>Total number of EX clients: 50+</p> <p>Including: Philip Morris, Unilever, Asia's leading communications technology group, Belgium's leading postal operator, one of Europe's largest operators of energy networks, global technology leader in the renewable energy industry, British multinational consumer goods company, American multinational toy manufacturer, German sports accessories manufacturer, American customer experience technology and services company, utility company based in Nevada, United States, British oil and gas company, multinational beverage corporation, German medical device company, French container transportation and shipping company</p>	<p>Top five fastest-growing talent and EX offerings:</p> <ul style="list-style-type: none"> Infosys Launchpad Infosys Orbit Infosys Meridian Infosys Wingspan
Co-innovation and collaboration ecosystem	7			Distribution of EX engagements			
OneOffice alignment	8						
Voice of the customer	7						

Integrated experience framework synergizing capabilities for a comprehensive set of EX services



Dimension	Rank	Strengths		Development opportunities																									
HFS Top 10 position	9	<ul style="list-style-type: none"> EX strategy and direction: Capgemini's narrative addresses the alignment of touchpoints, from devices and data to the cloud, across an employee's experience to improve engagement and enable digital adoption. Capgemini brings its Employee Experience solutions to the table through the Connected Experience Framework, a comprehensive set of services offered through four key portfolio pillars: Connected Workspace, Connected Collaboration, Connected Office, and Connected support. Key differentiators: Capgemini continues to make strides in its journey to the OneOffice, breaking down internal silos by focusing on cross-competency offerings. Its integrated Connective Experience Framework proposition is a fine example of synergizing capabilities for experience services. For value measurement across its workspace solutions, Capgemini offers an experience data and analysis platform, the Employee Experience Index, to present data and analytics across selected contexts, personas, and specific groups of employees. In 2020, Capgemini launched "Next," its personalized digital learning platform powered by Degreed, providing 250,000+ courses and 3 million learning activities. By the end of 2020, nearly 75% of Capgemini's workforce had leveraged Next to upskill themselves. Ability to help clients drive EX: <i>Leading European car manufacturer</i>—Designed and delivered digital adoption program to 60,000+ employees globally. Outcomes: 40%+ increase in adoption in four weeks from go-live. <i>Multinational pharma and life sciences company</i>—Introduced Employee Experience Index to improve EX during a major IT transition. Outcomes: Provided comprehensive view of overall user experience of IT services using quantitative and qualitative data to effectively enable decision making and drive improvements. Customer kudos: Clients praised Capgemini for relationship-driven partnerships and its ability to adapt to new situations. Clients also noted the diversity of Capgemini's teams and the various specialists it brought to the table to support engagements. 		<ul style="list-style-type: none"> What we'd like to see more of: Clients noted Capgemini's strength in its ability to draw on a diversity of specialists in the organization across technology and EX domain areas. They would like to have opportunities to glean learnings and insights from specialists across Capgemini's broader ecosystem, such as technology partners, peers in other client organizations, and academics. Localized delivery model: Capgemini can expand the US presence of its talent specialists to add more localized capabilities within major client regions. HFS note some progress in beefing up its US footprint, but Capgemini can make more aggressive inroads as the pandemic recedes. 																									
Overall execution	7																												
Breadth and depth	6																												
Scale of EX services business	11																												
Growth of EX services business	6																												
Innovation capability	5																												
Strategy and vision	8																												
Platforms, proprietary tools, and internal delivery	8																												
Co-innovation and collaboration ecosystem	6																												
OneOffice alignment	11																												
Voice of the customer	10																												
		EX-relevant acquisitions	Partnership ecosystem for EX services	Key clients	Offerings and engagements																								
		Recent acquisitions: <ul style="list-style-type: none"> Empired Limited (2021): Digital, data, and cloud capabilities (Australia and New Zealand). Acclimation (2021): SAP consulting and digital solution provider (Australia). Frog (2021): Global creative and design consultancy, bringing 35 design and innovation studios to the Capgemini Invent umbrella. RXP Services (2020): Digital, data, and cloud IT consulting firm with Microsoft, Salesforce, and ServiceNow expertise (Australia and New Zealand). 	Strategic and alliance partners: Adobe, Aruba, AWS, Avaya, BMC, Citrix, Cisco Spark, Crestron, Dell, Droplet Computing, Envoy, Flexera, Google, Hemmersbach, HP, IPsoft, Juriba, Lenovo, Lakeside SysTrack, Logitech, Microsoft, NSC, Odigo, Oracle, Poly, SAP, ServiceNow, SignageLive, Signifi, Slack, VMware Partners: Microsoft, ServiceNow, Workday, Zendesk, WalkMe, IBM, Micro Focus, Google Cloud, Pega, Lakeside, IP Soft Various partnerships in Capgemini's Global People Hub, such as Faethm and Neobrain, leverage data and AI to support organizations in re-inventing their workforce	Total number of EX clients: 500+ Including: Roche, Syngenta, Cisco, Tesco, leading European car manufacturer, multinational pharma and life sciences company Client distribution across industries <table border="1"> <tr><td>Manufacturing</td><td>9%</td></tr> <tr><td>Oil, energy, and utilities</td><td>6%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>8%</td></tr> <tr><td>Healthcare and life sciences</td><td>10%</td></tr> <tr><td>High-tech, media, and telecom</td><td>7%</td></tr> <tr><td>Retail and CPG</td><td>10%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>18%</td></tr> <tr><td>Public sector</td><td>7%</td></tr> <tr><td>Other</td><td>25%</td></tr> </table>	Manufacturing	9%	Oil, energy, and utilities	6%	Travel, hospitality, and leisure	8%	Healthcare and life sciences	10%	High-tech, media, and telecom	7%	Retail and CPG	10%	Banking, financial services, and insurance	18%	Public sector	7%	Other	25%	Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Immersive collaboration spaces Employee engagement hubs Digital experience and people experience management Adoption, learning, and gamification Employee empowerment (low code) Distribution of EX engagements <table border="1"> <tr><td>Consulting only</td><td>20%</td></tr> <tr><td>Consulting and implementation</td><td>65%</td></tr> <tr><td>Managed services</td><td>15%</td></tr> </table>	Consulting only	20%	Consulting and implementation	65%	Managed services	15%
Manufacturing	9%																												
Oil, energy, and utilities	6%																												
Travel, hospitality, and leisure	8%																												
Healthcare and life sciences	10%																												
High-tech, media, and telecom	7%																												
Retail and CPG	10%																												
Banking, financial services, and insurance	18%																												
Public sector	7%																												
Other	25%																												
Consulting only	20%																												
Consulting and implementation	65%																												
Managed services	15%																												

“Technology-enabled, experience-led” platforms and IP targeting ROI on people priorities



Dimension	Rank	Strengths	Development opportunities																								
HFS Top 10 position	10	<ul style="list-style-type: none"> EX strategy and direction: PwC places its employee experiences at the heart of its HR capability with formalized services covering HR strategy, people data and analytics, HR organizational architecture, HR technology, HR operations and process excellence, and change and communications. In the past 24 months, PwC has placed its go-to-market focus on digital assets and IP, which HFS considers to be a key differentiator vs. its peers. Key differentiators: PwC’s differentiators are its proprietary assets. Its “technology-enabled, experience-led” narrative brings to the table its proprietary EX Platform (EXP) and Business, Technology (BXT) methodology to identify EX drivers with the biggest impact and ROI on people priorities while providing the optimum return on experience. Additional proprietary assets in the EX value chain include ProEdge, PwC’s digital upskilling platform launched in early 2021. Ability to help clients drive EX: <i>Global pharmaceutical company</i>—Updated key HR processes to improve EX and ensure processes were global, relevant, and inclusive. Launched PwC EX Analytics Tool to gather employee journey data at a global level. Outcomes: Identified 400+ pain points that influenced the design of 80+ Level 4 global processes. 350+ steps were removed, and 600+ tasks were automated and simplified. <i>Global travel technology company</i>—Designed bespoke employee journeys through experience assessments for joining the organization, learning and performance, and reward cycles. Outcomes: EX Platform categorized 5,000+ pieces of feedback into themes and visual articulation of the gaps in experience at a location, management, and persona level. Enabled direct validation points for decision-making in process design and change management. Customer kudos: Client references consider PwC to be “hugely collaborative,” for example, by connecting clients with subject matter experts across ecosystem players, including competitors, to provide deep expertise and key insights into the art of the possible. PwC’s agile methodology is notable with clients who give the approach high marks for encouraging feedback and enabling a high degree of flexibility and responsiveness. 	<ul style="list-style-type: none"> Globally consistent narrative: PwC has an opportunity to create a more consistent voice that articulates and differentiates its employee experience capabilities across its clients. We felt the “Why PwC for EX” is not always clear beyond the firm being a respected consultancy. Taking strategy into tactical action: PwC’s consulting chops are noted by clients, with references pointing to PwC’s strategic capabilities and transformational thinking. However, clients noted inconsistency regarding the ability for PwC’s teams to blend strategy with tactical implementation. 																								
Overall execution	8																										
Breadth and depth	10																										
Scale of EX services business	10																										
Growth of EX services business	4																										
Innovation capability	12			EX-relevant acquisitions Recent acquisitions: Pollen8 (2022): UK-based technology innovation consulting.	Partnership ecosystem for dedicated EX services Key strategic relationships: <ul style="list-style-type: none"> Workday: For HR technology implementation SuccessFactors: For HR technology implementation SalesForce: Customized digital solutions powered by Salesforce SAP: System integration and implementation services across multiple SAP applications, products, and technologies Oracle: Cloud-fueled, driven transformation Microsoft: Modern workplace, business applications, applications and infrastructure, data and artificial intelligence Partners: <ul style="list-style-type: none"> HPE, Qualtrics, Tableau, Power BI, Alteryx Internal partners: <ul style="list-style-type: none"> Katzenbach Center: Organizational culture, leadership, and teaming 	Key clients Total number of EX clients: 100+ Including: Fortune 500 insurance company, US national retailer, global pharmaceutical company, professional services firm, multinational software and information technology business, travel technology company, Japanese technology company Client distribution across industries <table border="1"> <tr><td>Manufacturing</td><td>19%</td></tr> <tr><td>Oil, energy, and utilities</td><td>13%</td></tr> <tr><td>Healthcare and life sciences</td><td>13%</td></tr> <tr><td>High-tech, media, and telecom</td><td>15%</td></tr> <tr><td>Retail and CPG</td><td>16%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>14%</td></tr> <tr><td>Public sector</td><td>9%</td></tr> <tr><td>Other</td><td>1%</td></tr> </table>	Manufacturing	19%	Oil, energy, and utilities	13%	Healthcare and life sciences	13%	High-tech, media, and telecom	15%	Retail and CPG	16%	Banking, financial services, and insurance	14%	Public sector	9%	Other	1%	Offerings and engagements Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> HR function transformation Workforce performance and productivity Talent management, with focus on tech talent attrition Dedicated employee experience Wellness Distribution of EX engagements <table border="1"> <tr><td>Consulting only</td><td>30%</td></tr> <tr><td>Consulting and implementation</td><td>50%</td></tr> <tr><td>Managed services</td><td>20%</td></tr> </table>	Consulting only	30%	Consulting and implementation	50%
Manufacturing	19%																										
Oil, energy, and utilities	13%																										
Healthcare and life sciences	13%																										
High-tech, media, and telecom	15%																										
Retail and CPG	16%																										
Banking, financial services, and insurance	14%																										
Public sector	9%																										
Other	1%																										
Consulting only	30%																										
Consulting and implementation	50%																										
Managed services	20%																										
Strategy and vision	11																										
Platforms, proprietary tools, and internal delivery	11																										
Co-innovation and collaboration ecosystem	11																										
OneOffice alignment	6																										
Voice of the customer	8																										

Contextual industry lens and a North Star “digitizing empathy” across a robust suite of EX services



Dimension	Rank	Strengths	Development opportunities																						
HFS Top 10 position	11	<ul style="list-style-type: none"> EX strategy and direction: TCS' go-to-market strategy lies within a contextual industry lens and a North Star of “digitizing empathy.” Its employee experience (EX) focus targets employee value chain transformation journeys delivered through four key offering towers: HR Strategy and Transformation, Platform and Digital Solutions, HR Service Delivery, and People Analytics. Key differentiators: TCS offers a robust solution suite across the HFS EX Value chain, such as TCS Happy Workforce (productivity and wellbeing), TCS iON (talent development and learning), and TCS Cognix (HR and digital workspace). TCS' solutions blend cognitive technology, intelligent automation, cloud, and agile practices. By 2020, TCS' entire talent pool was trained in agile methodologies through its location-independent Agile delivery model, the scale of which will support its ability to consistently co-create and deliver consumer-style employee experience to clients across delivery teams. Ability to help clients drive EX: <i>Multinational telecommunications company</i>—Transformed learning capability to deliver personalized, multi-channel employee learning capability on SAP SuccessFactors platform. Outcomes: TCS' migration approach delivered 15,000 courses and three million+ historical records using its Machine First Delivery Model to 170,000 users across 70+ countries. It completed 300,000+ trainings within three months of launch. <i>American media and entertainment company</i>—Modernized HR system to enable self-service capabilities, provide accurate reporting across all regions in 33 countries, and integrate system across the entire talent suite, including training, performance, recruiting, and compensation. Outcomes: Integrated HRMS with upstream and downstream systems to create a fully integrated HR ecosystem with enterprise-wide visibility to the talent base through a unified and integrated platform for employee and talent data. Customer kudos: TCS garners client accolades for its notable strength in execution, delivery, understanding problem statements, and solving for them, with a “secret sauce” of engaging and integrating well with client teams. TCS' scale is considered an advantage for the ecosystem of skillsets it can draw from. TCS has made great strides toward consulting and services integration to build more business understanding and context into delivery. Clients holistically conveyed their view of TCS as a strategic partner. 	<ul style="list-style-type: none"> Conservative acquisition strategy: TCS has a strong partnership and innovation ecosystem but lacks a clear acquisition strategy compared to its leading competitors, with the last relevant acquisition taking place in 2018 (W12 Studios) and an increased stake in TCS Japan in 2019. What we'd like to see more of: Client references give kudos to TCS' ability to bring constructive challenges and influential perspectives from its leaders; they would like to see the same level of radical thinking brought to the table from TCS' middle management and project teams. 																						
Overall execution	4																								
Breadth and depth	4																								
Scale of EX services business	3																								
Growth of EX services business	11																								
Innovation capability	9																								
Strategy and vision	7	EX-relevant acquisitions <p>Recent acquisitions:</p> <ul style="list-style-type: none"> Increased stake in TCS Japan Ltd (JV with Mitsubishi Corp, 2019) from 51% to 66%. TCS' Co-Innovation (COIN) ecosystem (ongoing): These companies are not acquired but work through tightly coupled contracts. These relationships and partnerships continue to expand. 	Partnership ecosystem for EX services <p>Key strategic relationships:</p> <ul style="list-style-type: none"> SAP, Oracle, Workday, Microsoft, ServiceNow, SuccessFactors, Ultimate Kronos Group (UKG) <p>Partners:</p> <ul style="list-style-type: none"> Josh Bersin Academy ADP, Avature, BetterWorks, Calm, Celonis, Ceridian, cloudpay, Cornerstone, CSOD, Degreed, EdCast, Eightfold, EdCast, Faethm, FX Solution (FX Get Active), Glint, Headspace, Kronos, Livitay, MyGuide, Neocase, Orgvue, Unily, Visier, Wellnesys, Whatfix <p>TCS' Co-Innovation (COIN) partners:</p> <ul style="list-style-type: none"> A network of 3,000+ start-ups, 150+ partners, 300+ venture capitalists, 50+ academic alliances including MIT, UC Berkeley, Columbia University, Singapore Management Univ, IIT Mumbai, IIT Delhi (India), Univ of New South Wales 	Key clients <p>Total number of EX clients: 700</p> <p>Including: UK-based stock exchange and financial information company, leading global professional services firm, leading US healthcare company, multi-national insurance organization</p> <p>Client distribution across industries</p> <table border="1"> <tr><td>Manufacturing and utilities</td><td>10%</td></tr> <tr><td>Healthcare and life sciences</td><td>10%</td></tr> <tr><td>Communications, media, and Information Services</td><td>7%</td></tr> <tr><td>High-tech</td><td>9%</td></tr> <tr><td>Retail and CPG</td><td>15%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>32%</td></tr> <tr><td>Other</td><td>17%</td></tr> </table>	Manufacturing and utilities	10%	Healthcare and life sciences	10%	Communications, media, and Information Services	7%	High-tech	9%	Retail and CPG	15%	Banking, financial services, and insurance	32%	Other	17%	Offerings and engagements <p>Top five fastest-growing talent and EX offerings:</p> <ul style="list-style-type: none"> HR strategy and transformation Ways of working, including workforce optimization Intelligent talent services for insight driven talent management Technology enablement of EX (e.g., HCM enterprise applications) Execution excellence for effective operationalization of talent transformation <p>Distribution of EX engagements</p> <table border="1"> <tr><td>Consulting only</td><td>10%</td></tr> <tr><td>Consulting and implementation</td><td>35%</td></tr> <tr><td>Managed services</td><td>55%</td></tr> </table>	Consulting only	10%	Consulting and implementation	35%	Managed services	55%
Manufacturing and utilities	10%																								
Healthcare and life sciences	10%																								
Communications, media, and Information Services	7%																								
High-tech	9%																								
Retail and CPG	15%																								
Banking, financial services, and insurance	32%																								
Other	17%																								
Consulting only	10%																								
Consulting and implementation	35%																								
Managed services	55%																								
Platforms, proprietary tools, and internal delivery	6	OneOffice alignment	Voice of the customer																						
Co-innovation and collaboration ecosystem	10																								
Co-innovation and collaboration ecosystem	10																								
OneOffice alignment	5																								
Voice of the customer	12																								

Dedicated EX offerings and productized IP driving operational simplicity and organizational agility



Dimension	Rank	Strengths	Development opportunities																				
HFS Top 10 position	12	<ul style="list-style-type: none"> EX strategy and direction: Wipro has a formalized employee experience (EX) practice leading its dedicated Employee Experience Transformation (EXT) and Future of Work offerings through the Digital Consulting group. EXT consists of a defined go-to-market framework and engagement model for bringing in IP and assets, accelerators, and EX value chain capabilities (e.g., privacy, security and compliance, sustainability, and DEI) from across the organization to support client needs. Wipro's EX consulting services are anchored through four broad categories of <ul style="list-style-type: none"> attraction, transformation, retention, and growth. Key differentiators: Wipro's EXT offering aligns with the OneOffice model. It uses experience transformation to move from process to service to microservice to create consumption-based experience services that drive operational simplicity, break down process-centric organizational silos, and create a more agile organization. Wipro is the only one of its peer group to have a Chief Employee Experience Officer, which in addition to its productized IP, further embeds its "client zero" mindset and approach to employee experience from the inside out. Ability to help clients drive EX: <i>Global oil and gas major</i>—Blended digital consulting, domain, design, and technology expertise to create knowledge management, case management, and smart search solutions to break down knowledge silos and improve employee productivity. Outcomes: Resource optimization increased by 20%, 50% adoption achieved within four weeks, and a 30% reduction in operating costs. <i>Global CPG company</i>—Created an omnichannel solution powered by a digital platform to make consumption of services for 55,000+ employees simple and intuitive. Outcomes: 20% improvement in employee productivity, +40% improvement in CSAT/NPS, increased adoption by 50%, 22% reduction in support OpEx. Customer kudos: Client references specifically noted flexibility as a key strength throughout their engagements and conveyed Wipro's mindset of continuous improvement and innovation. 	<ul style="list-style-type: none"> What we'd like to see more of: Wipro's unifying concept of employee experience transformation is powerful. We'd like to see more examples of how this approach translates to strategic value for the clients it serves. Strategy support: Clients are looking for Wipro to support them in developing their thinking and wider strategies through all areas of their engagements. HFS sees an opportunity for Wipro to close the gaps in its vision and narratives between strategy/consulting and implementation/delivery teams. 																				
Overall execution	12																						
Breadth and depth	12																						
Scale of EX services business	7																						
Growth of EX services business	8																						
Innovation capability	8	EX-relevant acquisitions Recent acquisitions: 2021: <ul style="list-style-type: none"> IVIA 4C Encore Theme Eximius CAPCO Ampion Edgile LeanSwift 2020: <ul style="list-style-type: none"> Rational Interaction 2019: <ul style="list-style-type: none"> International TechneGroup Incorporated ("ITI") Designit 	Partnership ecosystem for dedicated EX services Key strategic and alliance partnerships: SAP, Microsoft, Salesforce, AWS, Google Cloud, Appian, Oracle Joint GTM investments, co-innovation, and solution development with MS Viva, ServiceNow, SuccessFactors, and Avaamo Key partnerships: Whatfix, Adobe, WalkMe, ASSIMA, Pegasystems, SAP, Microsoft, CultureAmp, Burning Glass, Lilferay, Acquia, Druppal, Whitty Parrot, 2 Spark, ClearReview, Faethm Sustainability partners: The Index Project, Sustainability First, UNGS, Nobel, Equality Forward.	Key clients Total number of EX clients: Including: Large Australian bank, large European food and drink wholesaler, British multinational software and IT provider, Scottish healthcare provider, American natural gas distribution company Client distribution across industries <table border="1"> <tr><td>Manufacturing</td><td>5%</td></tr> <tr><td>Oil, energy, and utilities</td><td>12%</td></tr> <tr><td>Travel, hospitality, and leisure</td><td>2%</td></tr> <tr><td>Healthcare and life sciences</td><td>17%</td></tr> <tr><td>High-tech, media, and telecom</td><td>18%</td></tr> <tr><td>Retail and CPG</td><td>17%</td></tr> <tr><td>Banking, financial services, and insurance</td><td>35%</td></tr> <tr><td>Public sector</td><td>5%</td></tr> <tr><td>Other</td><td>5%</td></tr> </table>	Manufacturing	5%	Oil, energy, and utilities	12%	Travel, hospitality, and leisure	2%	Healthcare and life sciences	17%	High-tech, media, and telecom	18%	Retail and CPG	17%	Banking, financial services, and insurance	35%	Public sector	5%	Other	5%	Offerings and engagements Top five fastest-growing talent and EX offerings: <ul style="list-style-type: none"> Employee experience transformation (EXT) Workforce transformation Future of work Sustainability by design Learning experience transformation (LXT)
Manufacturing	5%																						
Oil, energy, and utilities	12%																						
Travel, hospitality, and leisure	2%																						
Healthcare and life sciences	17%																						
High-tech, media, and telecom	18%																						
Retail and CPG	17%																						
Banking, financial services, and insurance	35%																						
Public sector	5%																						
Other	5%																						
Strategy and vision	9																						
Platforms, proprietary tools, and internal delivery	12																						
Co-innovation and collaboration ecosystem	4																						
OneOffice alignment	12																						
Voice of the customer	11		Distribution of EX engagements <table border="1"> <tr><td>Consulting only</td><td>20%</td></tr> <tr><td>Consulting and implementation</td><td>50%</td></tr> <tr><td>Managed services</td><td>30%</td></tr> </table>	Consulting only	20%	Consulting and implementation	50%	Managed services	30%														
Consulting only	20%																						
Consulting and implementation	50%																						
Managed services	30%																						

6

About the authors

HFS Research authors



Phil Fersht

CEO & Chief Analyst

phil.fersht@hfsresearch.com

Phil Fersht is widely recognized as the world's leading independent analyst focused on the alignment of business operations and technology spanning more than two decades. He has a global reputation for calling out the big trends, being unafraid to share his honest views, and driving a narrative on the technology and business services industries that shape many leadership decisions. His reputation drove him to establish HFS Research in 2010. Fersht coined the term "OneOffice" in 2016 to describe HFS Research's vision for future business operations amidst the impact of cloud, automation, AI, and disruptive digital business models.



Sarah Little

Vice President, Content and Strategy, CEO's Office

sarah.little@hfsresearch.com

Sarah Little acts as Vice President, Content and Strategy, CEO's Office, focusing on big industry themes such as leadership, culture, employee experience, and skills for the future of work.

Sarah joined HFS in 2012 and has worked across functions and roles, supporting the CEO on key projects for internal and client delivery. Sarah has spent her career driving the interplay between business, marketing, and technology and holds a Bachelor of Arts degree in Digital Media Studies from the University of Denver.

About HFS

Insight. Inspiration. Impact.

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as "RPA" (Robotic Process Automation) in 2012 and more recently, the HFS OneOffice™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation, Artificial Intelligence, Blockchain, Internet of Things, Digital Business Models and Smart Analytics.

www.hfsresearch.com



[hfsresearch](https://www.linkedin.com/company/hfsresearch)



www.horsesforsources.com

