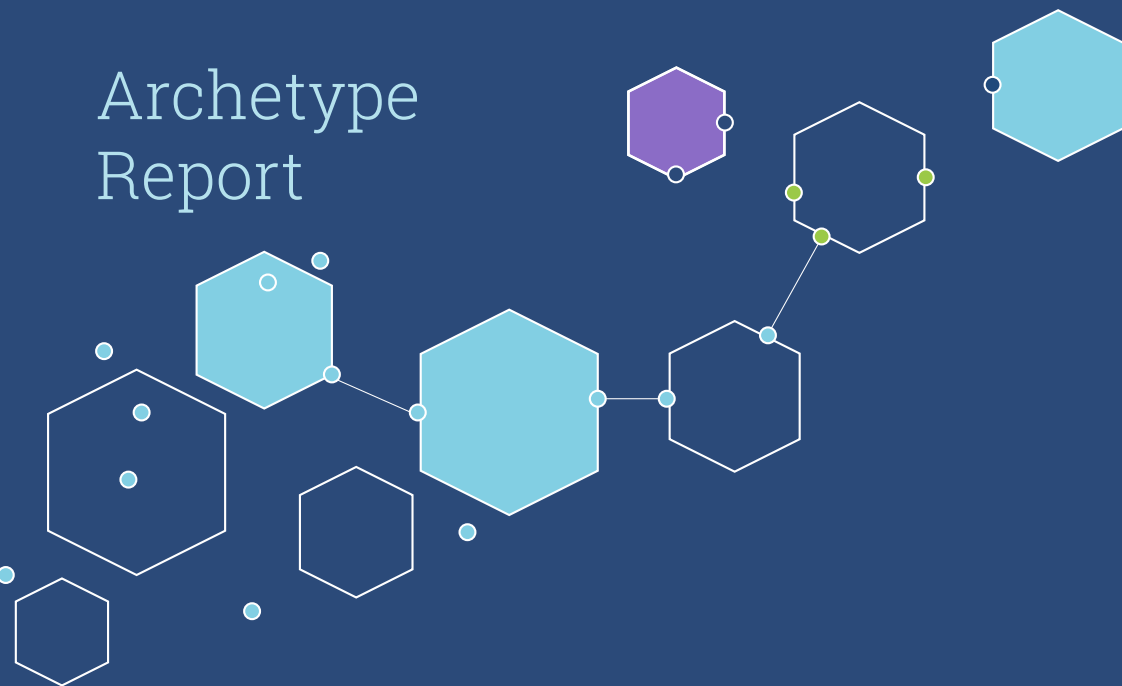


Finance & Accounting (F&A) Digital Outsourcing Services

Archetype Report



A research report
aligning enterprise
requirements and
provider capabilities

June 2020

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Infosys®

About this Report

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The research and analysis presented in this report include research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of Dec. 10, 2019, to Jan. 29, 2020. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

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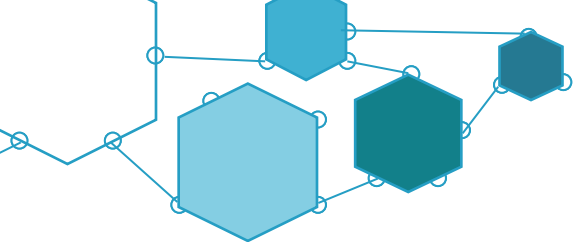
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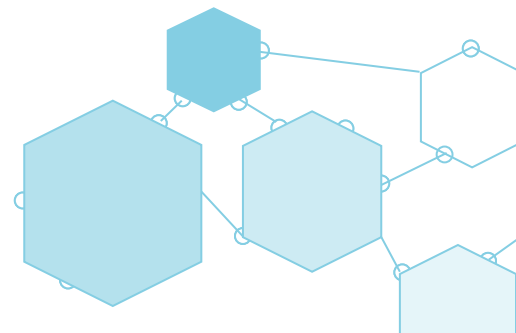
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EXECUTIVE SUMMARY

With evolving buyers' needs, finance and accounting outsourcing (FAO) services are maturing. As the expectations of buyers are rapidly increasing, the nature of engagements is evolving from a transactional type to a strategic function. Enterprises are moving away from the piecemeal approach and are embracing a holistic view towards outsourcing. Gaining visibility into a finance organization and making data-driven decisions are top priorities of enterprise CFOs.

The F&A domain has extensively adopted the use of various technologies such as bots, automation platforms and solutions to automate finance functions. Artificial intelligence (AI) and machine learning (ML) have made inroads into finance functions and transformed traditional operating processes. Analytics is a significant value addition and brings in highly valuable insights that benefit CFOs.

Traditionally, enterprises were in the practice of outsourcing non-critical finance functions. As service providers began expanding their portfolio of services at a rapid pace, enterprises became more comfortable with outsourcing complex finance functions. To

serve these clients, service providers are investing heavily in developing their capabilities, onboarding skilled employees and expanding partnerships with the likes of the Big 4.

As the nature of engagements are becoming more strategic, ISG believes that technology, people and skills, domain and vertical expertise, open communication and collaboration will play a critical role in ensuring a successful engagement. The following are some key trends that are shaping the industry:

Outsourcing of complex finance functions primed for growth

Conventional outsourcing typically sees more of order-to-cash (O2C) or procure-to-pay (P2C) functions, and only about half of record-to-report (R2R) functions, that are being outsourced. As service providers continue to exhibit and build on their finance and accounting (F&A) capabilities, clients are leaning on them to outsource complex finance functions that were traditionally not outsourced. From bookkeeping needs to budgeting, forecasting, cash flow modeling, decision support, management reporting, tax and compliance support, and audit support among other functions, enterprises are increasingly relying on their sourcing partners to support these activities and provide CFOs with better insights.

To offer these services to clients, providers are investing in hiring skilled resources or reskilling their existing employees to handle complex queries. Some are establishing partnerships with major firms to deliver these services.



Consulting services take center stage as enterprises boldly embrace transformation

As the complexity of engagement is increasing with the evolving technological needs, expectations from service providers are changing. While moving away from lift-and-shift models to complex functions and technology roadmaps, enterprises are keen to transform finance functions and are ready to embrace technology to make their processes more efficient. They are already under pressure to transform their finance functions but are unsure where to begin the journey. To address this challenge, they lean on the expertise and capabilities of service providers to develop and design the transformation roadmap. Correspondingly, the supply side of the industry is making heavy investments in growing its consulting practice either organically or inorganically. Design thinking, partnerships, transformation frameworks and reskilling are some of the various investment areas that service providers are focusing on.

Research and development is one of the critical investment areas for service providers. Establishing a framework based on enterprise client needs, building a best practices framework modeled on use cases, and staying abreast of market and industry trends are becoming more pertinent for developing successful consulting services.

Verticalization becomes pivotal

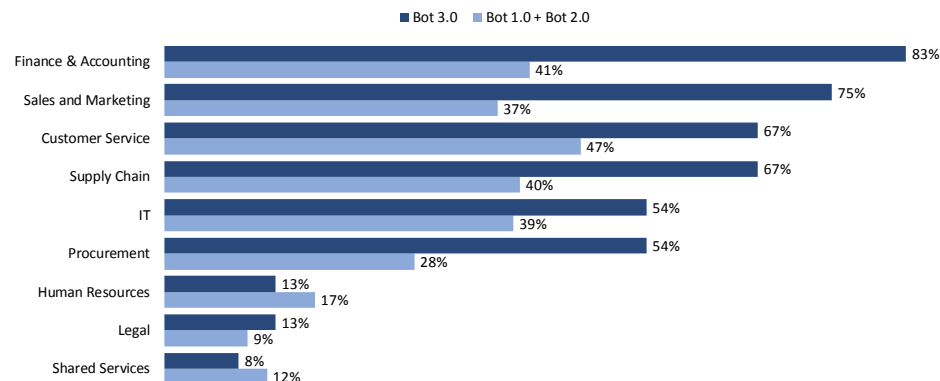
As engagements are embracing a holistic approach, a deeper understanding of the vertical nuances in the F&A space is important for enterprises and service providers to demonstrate their knowledge and skillsets in helping clients reap the benefits of outsourcing. Claims management in the insurance sector, revenue assurance in telecom, fuel accounting in energy and airline billing management are some of the industry-specific finance functions that should be managed by experienced and skilled resources.

Leveraging such talent would be also beneficial for developing industry specific bolt-on solutions, especially for digital-native companies that are ready to plug and play from day one.

Automation deployments is at its peak

Back-office functions are expecting to scale robotic process automation (RPA) significantly because F&A processes are ripe for a large number of bot deployments. According to ISG Research, 83 percent – a significant number of enterprises with mature automation practices – lead the way with RPA deployments in the F&A space. These enterprises have adopted the technology at scale and have automated two or more functions. Those that are beginning to explore opportunities are gradually catching up in terms of deployment but are keen to adopt as accuracy and higher efficiencies are critical.

Figure 1.



Source: ISG Insights 2019 RPA Deployment & Capability Study, n=346

As the industry is seeing more of such use cases and enterprises expectations are increasing around automation, service providers are making heavy investments to grow their capabilities in RPA through homegrown solutions or expansive partnerships. Many mid-size service providers are building and bringing in extensive automation capabilities and are moving ahead aggressively with an outcome-based pricing model.

Adoption of AI/ML is gaining traction

Nearly 95 percent of enterprises are either experimenting with or have deployed ML in F&A processes. The increased adoption of image processing, natural language processing (NLP), robo advisors on the front end, most finance processes such as accounts payables have become touchless processes with minimal human interaction. AI and ML are being extensively leveraged across billing and collections, email classification, fraud detection, invoice processing of unstructured data and industry specific processes such as insurance claims processing.

Organizational change management continue to play an important role

As more enterprises are keen to embrace technology and with the rapid adoption of automation, organizational change management plays a critical role in helping employees to adapt to technological changes. Enterprises should reskill or upskill their employees in order to move their resources to adjacent or higher up roles to handle complex processes. Some service providers such as Infosys and TCS have developed elaborate learning platforms to help enterprise clients in reskilling their employees. Infosys Wingspan and TCS iON offers elaborate online content about the latest technologies and an on-the-go learning experience for employees.

Figure 2.

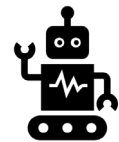
On an average 73% of the enterprises say technologies such as NLP, image processing OCR, and conversational AI are in experimentation mode or production mode



NLP



OCR



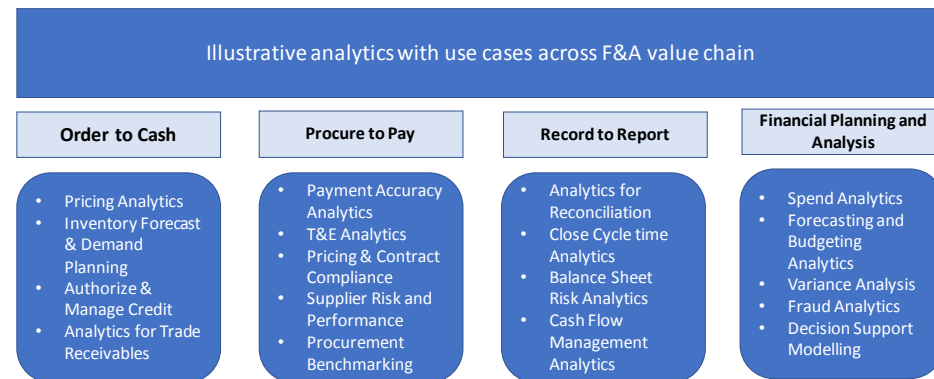
Conversational
AI

Analytics takes center stage in FAO

With the changing role of CFOs, analytics is a critical enabler for CFO organization. Providing a real-time view of a finance organization will drive data-driven decisions quickly and effectively help them to be more proactive than reactive. For example, collections is one of the biggest focus areas for most organizations. Having visibility into cash flow is a highly valuable measure for a CFO. With the emergence of technology, rapid AI adoption and mature processes, obtaining insights from data, identifying the pain points or deciding on the next action item are not farfetched. Analytics spans across finance and accounting value chain and is the biggest value addition for enterprise clients in a sourcing engagement.

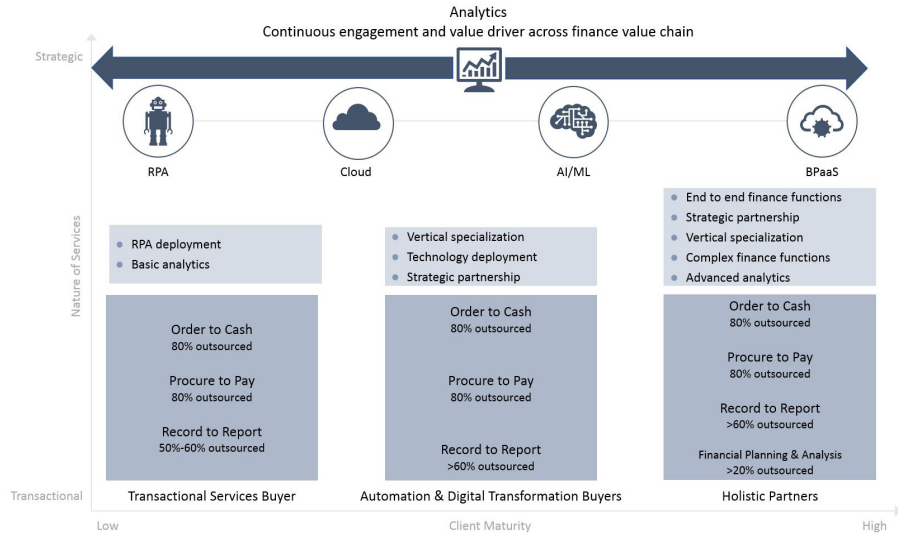
As the nature of client engagements become less transactional and more strategic, service providers are expected to deliver valuable insights for enterprises. A mature engagement does not limit the provider in giving insights but recommends the next action item to help drive business outcomes.

Figure 3.



Introduction

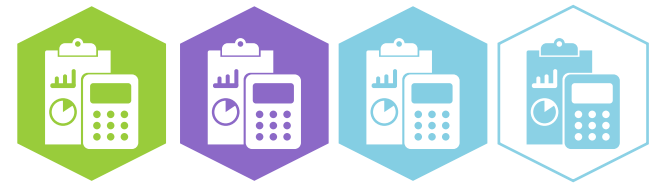
Figure 4.



The buying behavior of an enterprise is largely influenced by technology, changing user demands and changing role of CFOs. Once heavily led by the labor arbitrage model, finance and accounting outsourcing is now deeply influenced by technological transformations. Broadly, buyers can be defined under four categories, namely, transactional, automation, transformational and holistic. With growing need to modernize finance functions, a significant number of enterprises fall in the automation and transformational categories. Most enterprises today are in the midst of scaling automation, where they are embracing AI, deriving insights by leveraging analytics and adopting a platform-led approach.

The conversations surrounding transformation and automation have evolved over the years, and with the COVID-19 pandemic disrupting most industries, transformation and automation journeys of enterprises will only pick up speed. This trend will, in turn, have an impact on the buyers in the holistic category with a surge in number of enterprises moving to this category. Interestingly, while the pace of transformation will drastically increase due to the pandemic, the buyers in the transactional category will either significantly reduce or the category will cease to exist in the next couple of years. Enterprises in the transactions category will be keen to fast track their automation journey and will start moving away from the piece meal approach of outsourcing, with the result that every outsourcing engagement/conversation will have elements of transformation for these buyers and it will begin with the onset of the engagement rather than as a long-term plan.

Moving forward, dependency on automation will increase among enterprises and AI/ML will start leading the way in most engagements. Platforms will see a significant spike in adoption as users will lean on the anytime, anywhere approach to ensure fewer disruptions. Analytics will continue to be the biggest value driver across buyer categories. Most companies were not prepared for the situation triggered by the pandemic, or worse, have been impacted significantly. Hence, they will look for more value-driven partnerships with service providers. At the same time, strategic data that will help companies gain visibility into their finance functions and derive actionable insights will take precedence. Therefore, outsourcing engagements will turn more holistic in nature and expectations from sourcing partners — to proactively aid enterprises with research, advise on the way forward, determine vertical trends, aid technology adoption to improve efficiencies and offer value-added services, including hybrid pricing or outcome- based pricing — will change significantly.



About This Research

This ISG Provider Lens™ report summarizes the relative capabilities of 22 FAO service providers and their abilities to address the requirements of five typical, frequently encountered categories of enterprise buyers referred to as archetypes. Each archetype represents a unique set of business and technological needs and challenges. Our research found no shortage of providers with capabilities to satisfy the FAO needs across most user archetypes. This is largely due to two core realities regarding the archetypes:

1. The characteristics of each archetype are moving targets because while the core requirements rarely change, the relative importance of different requirements can vary based on business and/or technology environment changes.
2. Most enterprises, especially larger firms, tend to have multiple archetypes. As each archetype's requirements evolve based on business and technological changes, so does the presence and value of each archetype within the enterprise. Therefore, enterprises have an ongoing series of choices when it comes to selecting the FAO service provider. They will need to strike a balance between optimal business value and relative cost of the provider engagement, integration and management. Market changes, new business models, fluctuating economic factors and other variables continually add to and subtract from user needs.

This report uses research and analysis from ISG's long-running work with enterprise clients and business process outsourcing service providers to identify and examine key changes in, approaches for and buyers of F&A services. We map the user-side requirements to provider-side offerings and capabilities. Not every user enterprise has the same requirements. In this report, we use five buyer archetypes (detailed in the following sections) to identify and assess buy-side requirements for business value relative to provider-side offerings and capabilities. All revenue references are in U.S. dollars (\$US) unless noted.

The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their services requirements and from working with services providers to understand how those buyer requirements influence the development of suitable solutions and go-to-market strategies.

This report assesses the capabilities of 19 providers. Some service providers that are typically included in our work are not included in this report because they were unable to or declined to participate. They may be included in future versions of this report, based on their merit and willingness to provide current and relevant materials. Readers should not make any inferences based on a services provider's absence from this report.

How to Use This Report

This report is intended to provide advice founded on ISG's experienced-based, proprietary assessment of the services providers' relative suitability to the needs of the typical FAO customer. This advice is then applied across each of the five archetypes as profiled. No recommendation or endorsement is indicated, suggested or implied. Clients must make the decision to engage with any provider based not only on their specific, current workplace needs but also on other factors such as cost, culture and timing.

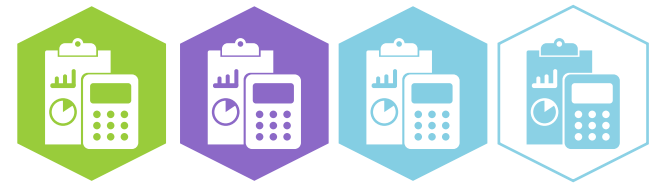
This report is organized as follows:

Client Archetype Descriptions – This section identifies and describes the most common user-side archetypes that we have identified in our ongoing research and analysis.

Assessments by Archetype – These sections first detail each of the client archetypes, along with the types of service offerings that can realize the most business value. Each archetype section includes our assessment of the relevant capabilities and positioning of the services providers surveyed and interviewed. It covers the relative suitability of the providers for each archetype based on the information they have provided to ISG. These assessments are developed using the data, analysis and comparative methodology described in the methodology section.

Methodology – In this section, we outline and explain how we developed and applied the data, analysis and insights provided in this report.

Please note: *This report presents the known capabilities of services providers in the context of user enterprises' typical project needs (categorized as specific archetypes). It is not meant to rank providers or to assert that there is one top provider with the ability to meet the requirements of all clients that identify as a particular archetype.*

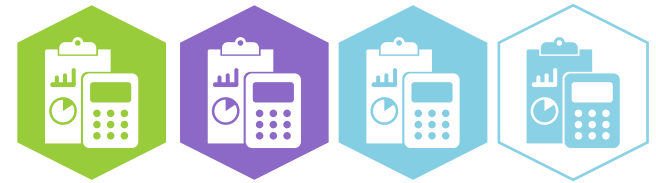


CLIENT ARCHETYPE DESCRIPTIONS

The client archetypes used in this report (and in our ongoing advisory and consulting engagements) represent the various types of clients that ISG has observed and how we classify them according to their relative outsourcing maturity and objectives. Each client archetype encapsulates the typical characteristics of a specific type of buyer that is looking to outsource one or more processes or functions. The use of archetypes enables us to develop sets of characteristics and needs that can be applied uniformly and repeatedly across multiple environments, industries, provider types and other variables within one service line.

The archetypes are not meant to be comprehensive examinations of all potential or likely client situations and requirements. They are meant to provide a simple, relevant and repeatable set of user-side requirements against which a similarly simple, relevant set of provider capabilities can be assessed.

The archetypes included in our reports are based on the most current marketplace knowledge regarding prevalent buy-side goals, resources, initiatives and requirements. Archetype characteristics are also developed (and refined over time) based on our advisory and consulting work with enterprise clients and IT service providers and on our global business IT market research and advisory programs.





TRANSACTIONAL SERVICES BUYERS

Typically, these are first-generation outsourcers that are looking to outsource less complex finance functions that are repetitive and transactional in nature. Mostly O2C, P2P and some components of R2R transactions are the most frequently outsourced functions. These buyers are looking for point solutions and are not inclined to outsource other critical finance functions. One of the key characteristics of this archetype is they want to reduce cost of processing transactions by using offshore labor arbitrage. However, RPA adoption is increasing among these buyers and basic automation has become table stakes with these engagements.

AUTOMATION IMPLEMENTERS

Automation implementers are buyers that are looking to leverage automation extensively and their outsourcing objective is not limited to cost savings. The clients in this archetype are more matured and have considered outsourcing finance functions that go beyond transactional, including critical functions. The objective is to reap the benefits of technology to get deeper insights for supporting decision making. Automation in this category is not limited to rule-based automation; instead, it blends intelligence into the process.



A3

TRANSFORMATION-ORIENTED BUYERS

Buyers in this category are looking to transform their F&A operations to be ahead of the curve, improve customer experience and optimize the use of technology to their advantage. Embracing the chain of digital technologies is of prime importance for these buyers. Their outsourcing objective is not limited to transactional processes. Analytics is one of the key focus areas as CFOs want to focus on their core business and use technology to get real-time insights to make quick decisions and enable their finance departments to function more effectively.

HOLISTIC PARTNER BUYERS

Clients in this archetype are looking to outsource end-to-end F&A functions so that they can focus on their core business activity. The objective of buyers in this archetype goes beyond technology which continues to be a priority. The buyers are looking for a strategic partner that can understand their business and its related processes and offer solutions that can help them achieve their business objectives. Leveraging technology to accelerate the time to market is a critical initiative with this type of engagement.

A4



Finance & Accounting (F&A) Digital Outsourcing Services Archetypes



TRANSACTIONAL SERVICES BUYERS

Typically, these are first-generation buyers looking to outsource less complex finance functions that are repetitive and transactional in nature. O2C, P2P and some components of R2R transactions are the most frequently outsourced functions. These buyers are looking for point solutions and are not inclined to outsource other critical finance functions. One of the key characteristics of this archetype is they want to reduce the cost of processing transactions by using offshore labor arbitrage. However, RPA adoption is increasing among these buyers and basic automation has become table stakes with these engagements.

Clients in this archetype have low IT maturity and are not digitally inclined. They want to reduce their spending on people for routine transactional services and take advantage of the skilled labor and technology that service providers have to offer, allowing them to focus on improving their business operations. Traditionally, transactional services buyers adopted FTE-based or fixed-fee contract models while engaging with service providers. However, the focus has also shifted towards the adoption of basic automation.

Having skilled labor that has domain expertise and understands the local norms and regulations is a prerequisite for serving these buyers. Local language support and strong F&A capabilities and experience are critical factors in service provider selection. For larger enterprises, it is important for service providers to have a global presence that can support clients from offshore or nearshore locations.

A1 Transactional Services Buyers' Client Objectives

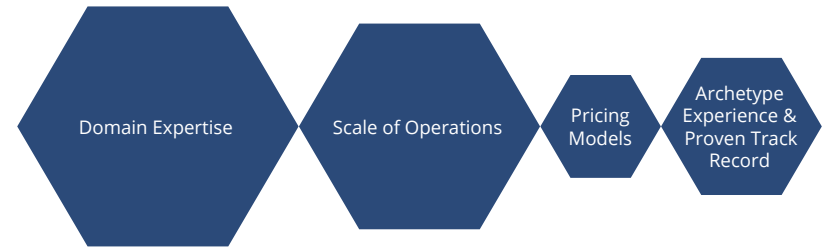
- Overcome insufficient in-house capability in terms of skills and technology
- Save costs through offshore labor arbitrage or automation
- Take advantage of language support capabilities
- Leverage global expertise and presence
- Leverage domain expertise
- Leverage flexible pricing models



Fig 5

Transactional Services Buyers Influence of Provider Capabilities

■ Increase in future influence ■ Decrease in future influence



Size based on relative current importance in the archetype profile

Fig 6 Transactional Services Buyers Leaders

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

Of the 22 services providers included in our research, 10 stand out and match the transactional services buyer archetype based on our assessment of their capabilities as described in the methodology section in the appendix. These 10 referred to as archetype leaders, and their relevant capabilities are presented in Figure 6, and briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

A	Transactional Services Buyers Leaders			
	Domain Expertise	Scale of Operations	Pricing Models	Archetype Experience & Proven Track Record
Capgemini	●	●	●	●
Cognizant	●	●	●	●
EXL	●	●	●	●
Genpact	●	●	●	●
HCL	●	●	●	●
IBM	●	●	●	●
Infosys	●	●	●	●
TCS	●	●	●	●
Wipro	●	●	●	●
WNS	●	●	●	●

Infosys

Infosys has been providing F&A services since 2004 and has signed 141 contracts in this domain. It has 27 delivery centers and provides support in 40 languages to serve enterprises of all sizes. The firm has more than 16,000 finance professionals spread almost equally across three major finance functions (P2P, O2C and R2R). It has processed more than 13 million invoices, nearly 1 million T&E claims and over \$129 billion payments per year. Infosys has posted more than 398,000 number of journals per year. It has added customers in various industry segments such as financial services, logistics, insurance and healthcare. The firm actively engages with FAO clients, offering them time-and-materials, FTE-based, fixed-fee, hybrid models and transaction-based pricing models.



OTHER NOTEWORTHY PLAYERS – TRANSACTIONAL SERVICES BUYERS ARCHETYPE

Some other providers scored high in one or more areas that are important for the transactional services buyer archetype. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for the transactional services buyer archetype are:

Fig 7 Other Noteworthy Players – Transactional Services Buyers



Domain Expertise

Accenture
Conduent
DXC
Sutherland
Teleperformance

Scale of Operations

Accenture
Conduent
DXC
NTT DATA

Pricing Models

Accenture
Datamatics
Hexaware
NTT DATA
Sutherland
Tech Mahindra

Archetype Experience & Proven Track Record

Conduent
Hexaware
Quattro
Tech Mahindra
Teleperformance

A2 AUTOMATION IMPLEMENTERS

Buyers in this archetype are not merely deploying automation for cost savings. These clients are looking to leverage technology, outsource more of their critical functions, and gain deeper insights to support decision making.

With matured functions and processes, these buyers are moving ahead from RPA into intelligent automation. They use intelligent automation to gain insights from unstructured data and process both paper and digital invoices. Technologies such as NLP, intelligent optical character recognition (OCR) and conversational AI are taking precedence, and clients in this archetype are open to sharing more data with their service providers so that it can be used to train automation bots to perform more intelligent work and thus minimize human effort and errors. Some processes that are likely candidates for automation include dispute management, fraud detection, reconciliations and exception handling. These clients are also looking for platforms that are embedded with automation, AI and analytics to help them generate standard reports as part of management reporting.

These clients are looking for flexible or hybrid pricing options and are moving toward transaction-based, outcome-based or risk-sharing models. They are driven to improve customer experience by leveraging automation and/or AI technologies.

For these clients, service providers are well equipped to offer a whole suite of automation offerings spanning from RPA to AI and analytics delivered through in-house platforms of partnerships. The providers are also measured based on their skilled workforce, trained and certified resources, data scientists and automation experts with domain expertise.

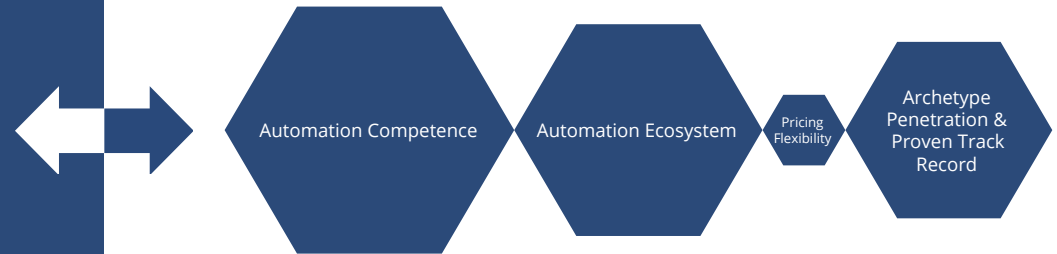
A2 Automation Implementers' Client Objectives

- Significantly improve productivity and efficiency
- Leverage automation/AI to reduce human effort and cost
- Rely on domain experts
- Bring best-of-breed automation products and solutions
- Leverage outcome-based pricing models

Fig 8

Automation Implementers Influence of Provider Capabilities

■ Increase in future influence ■ Decrease in future influence



Size based on relative current importance in the archetype profile

Fig 9 Automation Implementers Leaders

● Score 4 out of 4

◐ Score 3 out of 4

◑ Score 2 out of 4

◒ Score 1 out of 4

Of the 22 services providers included in our research, 11 stand and match the automation implementers archetype based on our assessment of their capabilities as described in the methodology section in the appendix. These Eleven companies, referred to as archetype leaders, and their relevant capabilities are presented in Figure 9 and briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

A2	Automation Competence				Automation Ecosystem				Pricing Flexibility				Archetype Penetration & Proven Track Record			
Accenture	●	●	●	●	●	●	●	●	◑	◑	◑	◑	●	●	●	●
Capgemini	●	●	●	●	●	●	●	●	◑	◑	◑	◑	●	●	●	●
Cognizant	●	●	●	●	●	●	●	●	◑	◑	◑	◑	◑	◑	◑	◑
EXL	●	●	●	●	●	●	●	●	◑	◑	◑	◑	●	●	●	●
Genpact	●	●	●	●	●	●	●	●	◑	◑	◑	◑	●	●	●	●
Hexaware	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑
IBM	●	●	●	●	●	●	●	●	◑	◑	◑	◑	●	●	●	●
Infosys	●	●	●	●	●	●	●	●	◑	◑	◑	◑	●	●	●	●
Sutherland	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	●	●	●	●
TCS	●	●	●	●	●	●	●	●	◑	◑	◑	◑	●	●	●	●
WNS	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑	◑

Infosys

Infosys provides next-generation digital services with a blend of propriety and partner solutions combined with niche capabilities such as AI, RPA, ML and blockchain. With more than 1,200 RPA consultants and developers and 142,000 design thinking trained professionals, the firm offers an analytical methodology to support clients with the consolidation of data across functional silos, standardization, visualization and decision-making processes. It has accelerated its investments across multiple automation levers to drive transformation. It is focused on enhancing the capabilities of its RPA CoE by investing in consultants and extending its partnership with multiple platforms to complement its present portfolio. The proprietary automation platform, AssistEdge, helps to increase productivity and improve customer experience. The firm provides automation through four robust, non-intrusive modules based on customer needs. These include smart user environment, RPA, real-time expertise manager and integrated device monitoring. As a transformation player, Infosys has built frameworks, methodologies, processes and systems to work collaboratively with the client's ecosystem and deliver success in terms of adherence to time, cost and minimizing risk. The company is continuing to invest heavily in innovation to create intellectual property and proprietary tools. It has also developed a Smart Workflow Operations solution that can enhance the customer experience by bringing together automation, AI, ML, analytics and OCR to provide real-time visibility into business operations. The solution improves sales and CSO effectiveness by enhancing order visibility, reducing holds and ensuring greater collaboration. With its digital pentagon approach, Infosys delivers design-led customer experiences through integrated compliance solutions.



OTHER NOTEWORTHY PLAYERS – AUTOMATION IMPLEMENTERS ARCHETYPE

Some other providers scored high in one or more areas that are important for the automation implementers archetype. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for automation implementers are:

Fig 10 Other Noteworthy Players – Automation Implementers



Automation Competence

DXC
HCL
Hexaware
Tech Mahindra
Wipro

Automation Ecosystem

Conduent
HCL
Hexaware
NTT DATA
Tech Mahindra
Wipro

Pricing Flexibility

Conduent
Datamatics
HCL
NTT DATA
OneSource Virtual
Tech Mahindra
Wipro

Archetype Penetration & Proven Track Record

Datamatics
DXC

A3 TRANSFORMATION - ORIENTED BUYERS

Buyers in this category are looking to transform their F&A operations to get ahead of the curve, improve customer experience and use technology to their advantage. Embracing a range of digital technologies is of prime importance to them. These buyers are looking to expand their sourcing relationships to go beyond mere transactional sourcing. They are more inclined to collaborate and embrace a host of digital solutions to modernize their finance functions.

Transformation-oriented buyers are higher on the IT maturity curve than the earlier archetypes and are ready for digital transformation. These buyers are open to moving data to the cloud to gain anytime, anywhere access. They are also eager to adopt automation and AI to reduce human effort and cost and improve efficiency. Analytics is a key component for transformation. It plays a vital role in transforming F&A functions and providing CFOs with meaningful insights to make quicker decisions.

Cost reduction remains an objective, but it is not the top priority for these buyers. Transformation would remain as their primary objective. Clients in this archetype focus on technological advancements and improving day-to-day F&A activities, with an emphasis on improving customer experience. They engage with service providers on a risk-sharing basis, using outcome-based model or hybrid pricing models. They also rely on service providers to take them through the transformation journey with process improvement suggestions.

To cater to this set of clients, services providers are expected to be equipped with technologies such as cloud solutions, integrated ERP systems, analytics solutions, intelligent automation, ML, NLP and cognitive computing. Along with technology, the provider's ability to provide consulting services is key to achieving transformation. To enable scalable and faster time-to-market opportunities, services providers also offer BPaaS solutions that organizations can implement quickly.

A3 Transformation-oriented buyers' Client Objectives

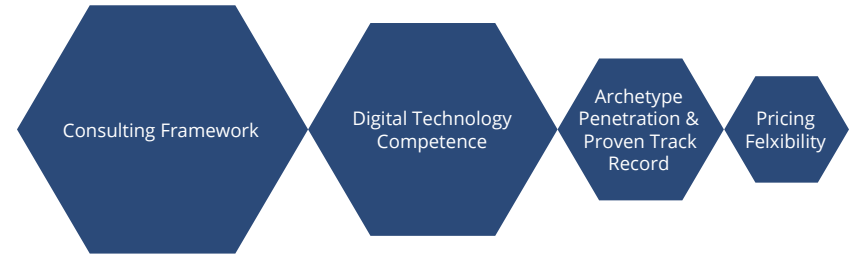
- Get real-time insights
- Leverage technology for speed to market
- Gain a competitive edge
- Improve end-user experience
- Engage with flexible pricing models and risk sharing
- Accelerate decision making
- Create a collaborative approach
- Build strategic relationships



Fig 11

Transformation-oriented buyers Influence of Provider Capabilities

■ Increase in future influence ■ Decrease in future influence















































Size based on relative current importance in the archetype profile

 Fig 12 Transformation-oriented buyers Leaders

 Score 4 out of 4
  Score 3 out of 4
  Score 2 out of 4
  Score 1 out of 4

Of the 22 services providers included in our research, 11 stand out and match the transformation-oriented buyers archetype based on our assessment of their capabilities as described in the methodology section in the appendix. These 11 leaders, referred to as archetype leaders, and their relevant capabilities are presented in Figure 12 and briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

A3	Transformation-Oriented Buyers Archetype			
	Consulting Framework	Digital Technology Competence	Archetype Penetration & Proven Track Record	Pricing Flexibility
Accenture				
Cognizant				
EXL				
Genpact				
HCL				
IBM				
Infosys				
Sutherland				
TCS				
Wipro				
WNS				

Infosys

With Digital Finance as one of its key offerings, Infosys stands out as a leading player in the transformation archetype. The solution drives the digital transformation journey for clients by helping them to orchestrate their financial data and technology strategies. Infosys' digital operation levers, namely DigiTran and Digital Command Console (DCC), combine analytics and process optimization to deliver enhanced outcomes for clients. The firm designs transformation solutions by using a pentagon approach that takes into consideration the five dimensions of experience, insights, assure, accelerate and innovation. This holistic approach helps to create sustainable transformations that translate them into significant business outcomes for enterprises. Its F&A transformation services, supported by its proprietary AI and RPA-based AssistEdge and Nia™ solutions along with third-party solutions, provide actionable insights to help clients strategize, design, transform and manage operations. Infosys is one of the few providers that has accelerated the pace of change for finance transformation by making significant progress in blockchain technologies.



OTHER NOTEWORTHY PLAYERS – TRANSFORMATION-ORIENTED BUYERS ARCHETYPE

Some other providers scored high in one or more areas that are important for transformation-oriented buyers. However, they were not categorized as leaders in this space because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for transformation-oriented buyers are:

Fig 13 Other Noteworthy Players – Transformation-Oriented Buyers



Consulting Framework

Capgemini
Conduent
DXC

Digital Technology Competence

Capgemini
Hexaware
OneSource Virtual
Tech Mahindra

Archetype Penetration & Proven Track Record

Conduent
Datamatics
DXC
IQ BackOffice
NTT DATA
Tech Mahindra

Pricing Flexibility

Capgemini
Conduent
Datamatics
Hexaware
NTT DATA
Tech Mahindra

A4 HOLISTIC PARTNER BUYERS

Clients in this archetype are looking to outsource end-to-end F&A functions so that they can focus on their core business activity. They are looking for a strategic partner that can understand their business and related processes and offer solutions that help them achieve their business objectives. The KPIs are but not limited to achieving efficiency and productivity gains but are more aligned to business outcomes and a joint go-to-market.

Technology implementation and process improvement are key objectives for holistic buyers. These clients have moved beyond outsourcing traditional finance functions and are looking to outsource core F&A processes such as external reporting, management reporting, budgeting and forecasting, audit and risk management, cost accounting, project accounting and treasury accounting. They are open to sharing their business data and allowing service providers to handle most R2R and FP&A processes that were earlier not outsourced at all. The requirement for tax and compliance support is also high, and clients expect service providers to offer regulatory reporting support in areas such as SOX compliance, VAT accounting and reporting, and audit support. These clients would like to have real-time insights into company's finances.

Clients in this archetype are also looking to strategically partner with providers that can not only bring in best-of-breed technologies but also industry expertise. Vertical specialization along with strong domain expertise is a prerequisite for serving this type of client.

Vertical specialization plays a key role in benchmarking, bringing in industry best practices, and customizing the solutions with the right technology. They want to leverage digital technologies such as automation, AI and analytics while maintaining compliance with regulatory requirements.

To win these clients, services providers must demonstrate strong domain expertise along with vertical specialization as well as a best-of-breed technology offering. Some services providers in the market have developed deep-dive consulting and design thinking practices that are comparable to the tax and financial consulting practices of the Big 4 firms. On the technology front, leading outsourcing services providers are offering robust analytics tools and AI capabilities that take over some manual tasks, provide real-time insights, reduce costs and support critical and faster decision-making abilities. They should also demonstrate their investments in research and development and benchmarking to provide industry best practices to their clients.

A4 Holistic Partner Buyers' Client Objectives

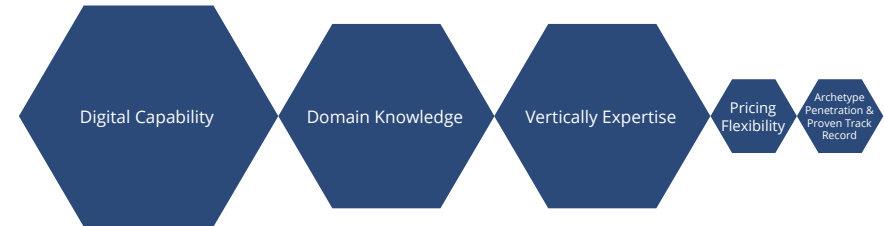
- Focus completely on core business
- Outsource more complex functions of finance
- Build strategic partnerships with providers and rely on their expertise
- Leverage digital technologies to reduce human effort and cost
- Gain value that enables real-time decision making
- Leverage outcome-based or risk-sharing pricing models
- Reap vertical specialization benefits



Fig 14

Holistic Partner Buyers Influence of Provider Capabilities

■ Increase in future influence ■ Decrease in future influence



Size based on relative current importance in the archetype profile



Fig 15

Holistic Partner Buyers Leaders



Score 4 out of 4



Score 3 out of 4



Score 2 out of 4



Score 1 out of 4

Of the 22 services providers included in our research, 10 stand out and match the holistic buyers archetype based on our assessment of their capabilities as described in the methodology section in the appendix. These ten leaders, referred to as archetype leaders, and their relevant capabilities are presented in Figure 15 and briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

A4	Domain Knowledge	Digital Capability	Vertical Expertise	Pricing Flexibility	Archetype Penetration & Proven Track Record
Accenture	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Capgemini	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Cognizant	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
EXL	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Genpact	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
IBM	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Infosys	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
TCS	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Wipro	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
WNS	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>

Infosys

Infosys stands out as a leader in this archetype with its significant client wins in 2019, large pool of more than 16,000 finance professionals, end-to-end F&A services, strong focus on FP&A, and continued investments in delivery centers. The firm is also focused on strengthening its high-end finance services. Its digital pentagon approach is an elaborate representation of the deep domain expertise it brings to its clients. Under this approach, Infosys has established a training and development program to upskill and train its employees to handle the complex queries on finance transactions, including one of the largest tax centers of excellence. It has also built extensive benchmarks and industry best practices to benefit clients. Infosys leads its way in automation capabilities with in-house tools and an extended partnership ecosystem. Infosys Nia™ is leveraged to deliver AI transformation and advance analytics to clients. With its broad technological capabilities, domain expertise, investments in reskilling or upskilling its talent using in-house platforms such as Wingspan, vertical knowledge bank and a constant endeavor to grow, Infosys has bagged many transformation-led deals and served a significant number of clients with tangible outcomes. Its scale of operations, digital capabilities, and vested interest to expand its F&A services make it a strong competitor in this domain.



OTHER NOTEWORTHY PLAYERS – HOLISTIC PARTNER BUYERS ARCHETYPE

Some other providers scored high in one or more areas that are important for the holistic buyer archetype. However, they were not categorized as leaders in this space because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for holistic buyers are:

Fig 16 Other Noteworthy Players – Holistic Partner Buyers



Domain Knowledge

Conduent
Datamatics
DXC
HCL
Sutherland
Tech Mahindra
Teleperformance

Digital Capability

Conduent
DXC
HCL
Hexaware
Sutherland
Tech Mahindra

Vertical Expertise

HCL
IQ BackOffice
NTT DATA
Sutherland

Pricing Flexibility

Conduent
Datamatics
HCL
Hexaware
NTT DATA
Tech Mahindra

Archetype Penetration & Proven Track Record

Conduent
Datamatics
Hexaware
Tech Mahindra
Sutherland

SERVICE PROVIDERS ACROSS ARCHETYPES

	Transactional Services Buyers	Automation Implementers	Transformation-oriented Buyers	Holistic Partner Buyers
Accenture	✓✓✓	*	*	*
Capgemini	*	*	✓✓✓	*
Cognizant	*	*	*	*
Conduent	✓✓✓	✓✓	✓✓✓	✓✓✓✓
Datamatics	✓	✓✓	✓✓	✓✓✓
DXC	✓✓	✓✓	✓✓	✓✓
EXL	*	*	*	*
Genpact	*	*	*	*
HCL	*	✓✓✓	*	✓✓✓✓
Hexaware	✓✓	*	✓✓	✓✓✓
IBM	*	*	*	*

- * = Leaders
- ✓ = Noteworthy Providers (number of check marks indicate the degree of alignment with the capability requirements of each client archetype)
- = Not In (the Service Provider wasn't considered a leader in any of the capability requirements for this archetype)

NOTE: All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to the capability requirements were identified as Leaders or Noteworthy Providers

SERVICE PROVIDERS ACROSS ARCHETYPES

	Transactional Services Buyers	Automation Implementers	Transformation-oriented Buyers	Holistic Partner Buyers
Infosys	*	*	*	*
IQ BackOffice	□	□	✓	✓
NTT DATA	✓✓	✓✓	✓✓	✓✓
OneSource Virtual	□	✓	✓	□
Quattro	✓	□	□	□
Sutherland	✓✓	*	*	✓✓✓✓
TCS	*	*	*	*
Tech Mahindra	✓✓	✓✓✓✓	✓✓✓✓	✓✓✓✓
Teleperformance	✓✓	□	□	✓
Wipro	*	✓✓✓✓	*	*
WNS	*	*	*	*

- * = Leaders
- ✓ = Noteworthy Providers (number of check marks indicate the degree of alignment with the capability requirements of each client archetype)
- = Not In (the Service Provider wasn't considered a leader in any of the capability requirements for this archetype)

NOTE: All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to the capability requirements were identified as Leaders or Noteworthy Providers

GUIDANCE

Buying patterns of enterprises have evolved and are maturing with time. While basic automation was a large area of focus a few years back, automation is now table stakes with all engagements. The transactional archetype that traditionally dealt with FTE-driven engagements is now focused on implementing rapid automation. Likewise, transformation and automation buyers have drastically moved from basic transformation needs to more value-driven services. AI/ML is driving significant changes to finance functions as the processes are riper for AI adoption. While technology continues to pave the way and create a significant difference to the workplace, enterprises are now moving to the next

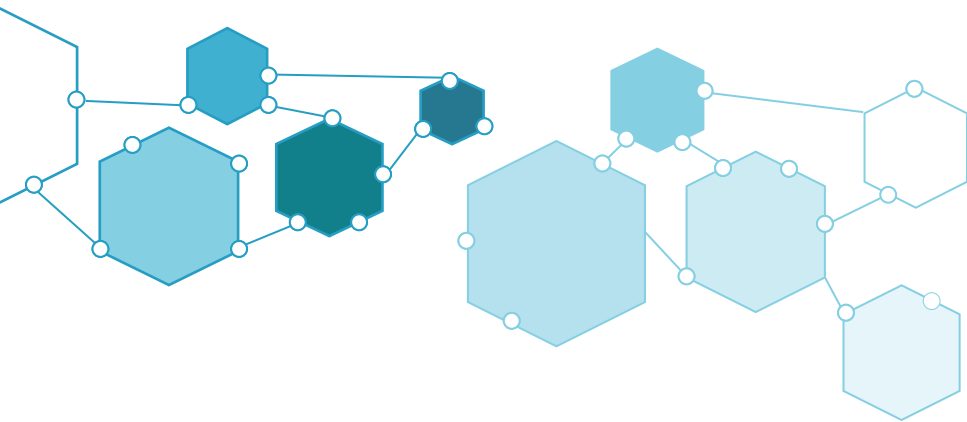
wave of partnership with service providers, for example, to focus on value-added services. With millions of transactions and data that service providers gather over time, enterprises are keen to jointly explore opportunities and glean insights to make data-driven decisions. Thus, analytics is changing how enterprises viewed and used the data.

After establishing their trust, enterprises are now more focused on building a holistic partnership with service providers by outsourcing strategic finance functions. Some digital-native companies and other enterprises are outsourcing end-to-end finance functions so that they continue to focus on core business activities. However, they should be aware that their partnerships with service providers will enable more business outcomes.

While the landscape is continuously changing, enterprises are under pressure to embrace transformation, but some of them are still dealing with legacy issues. Despite this, they have come a long way in reaping the benefits of automation.

Cloud platforms and solutions have never been more important than now. With situations like COVID-19, reliance on technology is likely to increase to manage such uncertainties.

Service providers and their offerings have also matured to accommodate the changing buying behavior. Organic and inorganic expansions, enhancement of portfolio of services, focus on expanding skillsets, technology acquisitions and numerous other activities have shown that significant investments are made to bolster F&A offerings. A large number of service providers today have broad capabilities to cover and cater to end-to-end finance transformation engagements.



Enterprise Leadership Actions

Communication and collaboration and key

These components continue to be of prime importance as the engagements are maturing and becoming more transformation oriented. Innovation is a major criterium of most contracts today, but it cannot be one-sided approach. Collaboration between enterprises and service providers is essential to reach the desired levels of transformation and achieve innovation. More often, lack of communication and a conservative approach lead to non-collaborative engagements and project failure. Service providers are working on allocating innovation funds and moving towards outcome-based models to help clients achieve their transformation goals. However, it is equally important for enterprises to accept the changes and break away from the state of inertia.

Revisiting the Business Continuity Plan

Although every single contract embeds a business continuity (BCP) plan, it is questionable if the course of action is defensive during an unprecedented crisis such as the ongoing pandemic. Most of the business processes were FTE driven and a large portion of the workforce operated from large infrastructures under stringent security measures. However, with the sudden movement of resources to a work-from-home facility, the situation has sparked a sudden concern in the industry about security and business continuity. Hence, working proactively with service providers to embed a plan that takes into consideration such extreme situations is critical. Also, working on a continuous basis to identify mission-critical processes and find ways to keep them going is essential for enterprises.

Is it time to fast track your digital transformation journey?

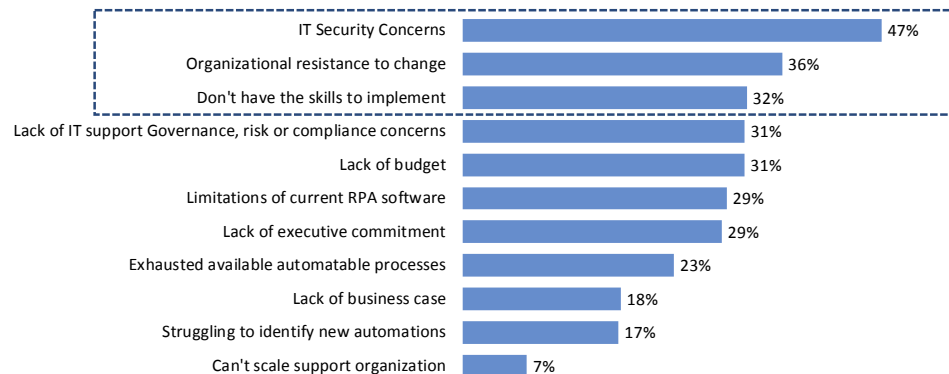
In the last couple of months, the employee workplace has been completely transformed for most IT and business process outsourcing sectors. Embracing technology has never been so rapid as it during the said period. As newer ways of working emerge, it could potentially disrupt the industry more with technology taking precedence. Accelerating the digital transformation journey could become most an organization's priority over the next few months. The adoption of cloud to access data anytime and anywhere, using extensive automation to maintain process efficiencies and keep productivity going, or leveraging conversational AI to solve most queries during agent downtime are likely to take center stage. With the disruption and slowdown in productivity in the wake of the COVID-19 outbreak, reliance on technology will increase significantly. Working with service providers to see potential opportunities in futureproofing the business will be an important point of consideration for most enterprises.

Provider Leadership Actions

Organizational Change Management is a must have capability

In figure.3 below, according to ISG Bot 3.0 study, the second most important challenge inhibiting enterprises from RPA deployment is organizational resistance to change. In other words, a state of inertia.

Global - Top three challenges your company has faced with RPA



Source: ISG Insights 2019 RPA Deployment & Capability Study, n=346

Most enterprises are keen to transform their finance functions by embracing technology. However, if resistance takes precedence, it becomes a huge roadblock for transformation. Identifying these challenges and solutions to mitigate them is key. Thus, having a strong organizational change management capability is of high importance considering that these skills will be highly leveraged to educate enterprises about the change, importance of technology adoption, benefits and value addition. To support enterprises, some service providers are offering vast learning platforms to help reskill employees. However, having a robust plan of action to manage situations is an extremely important capability, which would otherwise significantly delay the journey of transformation.

Consulting becoming the cornerstone for all transformation engagements

In a conversation with ISG, most enterprises stated that achieving transformation goals takes longer than anticipated if the initial assessment of businesses is not carried out correctly. Hence, building strong vertical knowledge coupled with domain and technical expertise is important as designing solutions has become complex by manifolds. Performing an accurate or nearly accurate assessment of the business complexity upfront and the solutions that have more realistic goals is important in setting the right expectations. Investing in building a team of experts and embedding design thinking concepts are areas of focus for most service providers.

Talent reskilling and retention must take priority

Enterprises often struggle when stakeholders from the provider organizations change. Transformation is a long-term journey; a careful understanding of business nuances is important and involves continuous engagement to achieve the end goals as they are not fragmented projects. Hence, a change in resources mid-way could lead to potential delays. With technology augmenting people and allowing them to take up complex roles, hiring, reskilling and retaining talent to handle complex queries or situations must be critical areas of focus for service providers. Service providers must invest in employee engagement programs, robust training programs and retention programs to encourage and motivate employees, as talent central to all client engagements.



Appendix



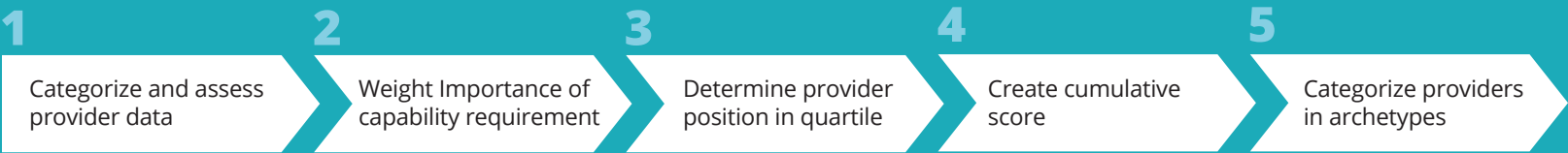
APPENDIX

Methodology

As previously noted, this report uses five archetypical sets of buy-side client requirements to assess the relative suitability of finance and accounting outsourcing (FAO) services providers. Data regarding the providers’ capabilities and positioning was provided to ISG via briefings, ISG advisor interviews and surveys of service providers, including client references if appropriate.

FAO services providers shared their data across different finance and accounting (F&A) service dimensions through the research initiatives noted above. These dimensions cover their technological competency, preferred engagement models, scope of work performed, service capability, functional expertise and industry and regional presence.

Report Methodology







Methodology Details

- 1 The data provided by the services providers were categorized and assessed according to the FAO services requirements described for each of the five client archetypes. In cases where the provider descriptions and data were not worded as precisely as our archetype requirements, our FAO services analysts relied on their expertise and experience to classify provider capabilities.
- 2 Each archetype capability requirement was weighted based on its relative importance to that archetype's typical requirements. Weightings for each archetype's requirements add up to a total of 100 percent. Specific weightings are not disclosed in this report. The relative importance of each capability requirement is depicted in illustrations at the beginning of each archetype section using differently sized hexagon icons.
- 3 Once the relative ability of each services provider was assessed for each of the archetype requirements, each provider was then positioned in a relevant quartile (for example, top 25 percent, second 25 percent and so on). The top quartile was given a numerical capability score of 4/4; the second quartile earned a score of 3/4, the third quartile scored 2/4, and the fourth quartile was awarded 1/4. Those with no capabilities to meet the archetype requirements were not included in the assessment.
- 4 Provider capability scores from Step 3 were then multiplied by the weightings developed for each client archetype requirement in Step 2. The results for each provider were then totaled to develop a cumulative score for each service provider. These cumulative scores are not disclosed in this report.
- 5 The cumulative scores were then used to identify the services providers that are most suited for each archetype's requirements. These providers are listed alphabetically and briefly profiled in each archetype section. Wherever relevant, additional services providers with noteworthy capabilities are also mentioned (for example, providers that may have scored well on a specific requirement but not across all the requirements for that archetype).

Please note: This report simply presents service providers' known capabilities in the context of the typical project needs of user enterprises. This report is not meant to rank providers or to assert that there is one top provider with the ability to meet the requirements of all clients that identify themselves with a particular archetype.

Fig17 Provider Capability Scores as Harvey Balls

Score	Harvey Ball representation
Score 4 out of 4	
Score 3 out of 4	
Score 2 out of 4	
Score 1 out of 4	

The cumulative score for each of the selected services providers against each archetype requirement is represented using Harvey Balls. For e.g., if a provider is assessed with a score of 4 out of 4, then a full Harvey Ball is used to represent their capability against that requirement. Similarly, if a provider is assessed a score of 1 out of 4, then a one-quarter Harvey Ball is used, as shown in below.

Additional Relevant FAO services providers

The capabilities of 22 providers were assessed in this report. Some services providers that are typically included in our work are not included in this report. Some of the companies that were not included were not able to participate or had declined. Providers that do not offer a full portfolio of FAO services have not been included in the study. They may be included in future versions of this report, based on merit and on the services providers' willingness to provide current and relevant materials. Readers should not make any inferences about a services provider's absence from this report.

Appendix: Additional Relevant FAO Services Providers

Other Relevant Service Providers	Headquarters Country
API Outsourcing	U.S.
Arvato	Germany
BearingPoint	Netherlands
Ciber Global	U.S.
Indra Sistemas	Spain
Invensis	U.K.
Serco	U.K.
TMF Group	Netherlands

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ISG Provider Lens™ Archetype Report: Finance & Accounting (F&A) Digital Outsourcing Services

June 2020

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