

***ISG** Provider Lens™

Intelligent Automation – Solutions and Services

Intelligent Business Automation

U.S. 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



February 2021

About this Report

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The research and analysis presented in this report includes 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 ISG believes to be current as of November 2020, for providers who actively participated as well as for providers who did not. 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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For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under [ISG Provider Lens™](#).



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EXECUTIVE SUMMARY

Covid-19 Pandemic Fast-Tracks Enterprise Roadmap to Intelligent Automation

With the COVID-19 pandemic, enterprises across industries worldwide are embracing digital transformation to future proof their businesses. Intelligent automation, at the heart of this transformation, combines robotic process automation (RPA) with artificial intelligence (AI), cognitive optical character recognition (OCR), machine learning (ML), natural language processing (NLP), advanced analytics and other digital technologies for improved productivity, data accuracy and customer experience, alongside reduced costs.

The need to remain competitive, agile and effective in delivering value to customers, partners and stakeholders is the trigger for adopting intelligent automation. However, inadequate knowledge/skills often derail this digital transformation journey, driving enterprises to seek transformational sourcing options to revamp business and IT operations.

The economic impact of COVID-19 will be long-lasting for enterprises and the ones that implement intelligent automation now will be able to optimize on cost, productivity and capacity, and reduce risks in the short term to stay prepared for the future.

ISG has observed the following trends in the global intelligent business automation space:

Large enterprises are rapidly embracing intelligent automation: Intelligent automation finds more acceptance among large enterprises as they have the resources to implement such solutions. Mid-sized companies too are gradually making a headway in this direction.

Extending automation to front and middle office: Although automation is common in IT infrastructure operations and traditional back-office tasks such as finance and accounting, enterprises now are automating beyond these support functions to sales and marketing, supply chain and customer service.

Benefits beyond headcount reduction: The goal of automation is increasingly shifting from cost savings to improved productivity, indicating an understanding that technology automates routine work, and not jobs. Enterprises with advanced automation capabilities expect automation to provide improved employee productivity, data accuracy and customer experience.

Focus on change management: Organizational change management (OCM) plays a vital role in helping employees adapt to the introduction of advanced technologies into business processes and allay fears about job loss. Companies are increasingly motivating employees to embrace automation and fostering a culture of collaboration between them and digital workers for transactional tasks.

Outcome- and transaction-based pricing attaining traction: Subscription-based pricing has overtaken perpetual licensing as the preferred commercial model, with enterprises increasingly opting for transaction- and outcome-based pricing models. Concurrently, providers are confident about promising higher productivity/outcomes while negotiating on sourcing engagements. Outcome-based pricing is particularly gaining favor among enterprises in the mature stage of automation.

Reskilling and upskilling workforce for jobs of future: With increasing back-office function automation, talent management is a challenge, carrying the risk of existing employee skills soon becoming obsolete. Therefore, training and upskilling is critical. Several organizations are collaborating with providers to upskill their workforce on digital skills such as AI, ML and advanced analytics to empower them to focus instead on high-value tasks.

Vertical-specific business process expertise: The changing business environment is pushing enterprises to try to find a competitive edge in their respective industry. Hence, companies are on the lookout for providers with vertical-specific automation expertise such as claims bill payment in Insurance and inventory monitoring in Retail. Providers that bring in extensive domain/industry knowledge alongside intelligent automation technologies are head and shoulders above the others.

Process mining is key to proving automation opportunities and benefits: A key reason preventing companies from realizing return on investment (ROI) on automation is the poor identification of use cases and inclination to automate processes as-is. To gain the benefits of automation, business processes must be assessed through multiple

lenses with the help of process and task mining technologies. Process mining solutions will see a high demand in the near future, particularly among large organizations looking to optimize legacy business processes.

Growing importance of ethical AI: As companies scale their automation programs, providers of AI solutions will have access to critical enterprise data. In this context, providers that have invested significantly in R&D for the ethical, transparent and accountable use of AI technologies will find favor among enterprises.

AI and ML led automation has been gaining traction in the past few years: With the global IT environment undergoing digital transformation, independent software vendors (ISVs) and system integrators worldwide need to create the right setting for data and systems to be managed from a centralized location. IT assets and workloads would need to be orchestrated across edge, cloud and on-premises resources, making use of analytics — for actionable deep insights — critical. AIOps blends AI, ML and big data to analyze the large volume of data generated in the wake of digital transformation. Most verticals are adopting AIOps to improve business processes in terms of increasing revenue and reducing IT operational costs.

The ISG Provider Lens report for Intelligent Automation this year compares service providers on their proprietary solutions and services and positions them based on their portfolios and future outlook. This comparison has been done across three quadrants — Intelligent Business Automation, AIOps and Conversational AI — that represent the services and products that typical enterprise clients are acquiring in the intelligent automation space.

Diverse automation offering: The global IBA and AIOps services market primarily comprises of two sets of offerings from ITO BPO providers — a homegrown proprietary platform and services around tools offered by ISVs. Many enterprise clients are seeking providers that offer a proprietary IBA and/or AIOps platform. However, a large percentage of clients are working with automation service providers that are platform/vendor agnostic and are thus able to support custom business requirements.

The ISG Provider Lens report for Intelligent Automation this year compares service providers and software solution vendors on their proprietary solutions and services and positions them based on their portfolios and outlook. This comparison has been made across three quadrants — Intelligent Business Automation, AIOps and Conversational AI, which represent the services and products that typical enterprise clients are acquiring in the intelligent automation space.

Disclaimer: ISG Automation is a sister division to ISG Research, and we have purposely selected quadrants and the eligibility criteria that would exclude ISG Automation from being evaluated in order to avoid any conflict of interest.

U.S. Market Overview

Intelligent Business Automation

The U.S. market is the largest adopter of intelligent business automation solutions and has reached maturity with the increase in engagements over the years. Enterprises in the U.S. are more transformation focused and are increasingly leveraging new-age technologies to accelerate their digital transformation journey, at scale. According to ISG Research, on

average, about 80 percent of the U.S. enterprises are either experimenting with or have deployed technologies such as ML based OCR, NLP, and conversational AI in business processes. This trend is expected to accelerate in the near term.

ISG sees that second- and third-generation outsourcers in the U.S. are beginning to engage with providers more holistically. They work collaboratively with providers and adopt a partnership model to walk the intelligent business automation led transformation journey. During the complete transformation of their business processes, it is difficult, at times, to convince employees and external parties such as vendors and suppliers to stay on board with the transition. Therefore, it is imperative to find a suitable provider that can assist with end-to-end business process transformation, not only by offering strong domain and vertical expertise and best-of-breed digital technologies, but also providing effective advisory, change management and maintenance support services to ensure overall success.

AIOps

The development of data agnostic AIOps platforms has been a priority in this space. In 2020, many global system integrators are expected to launch AIOps platforms. These platforms and frameworks will be a big win for the industry as the more varied the data ingested into an AIOps platform is, the greater the value the algorithms can accomplish. The goal of global system integrators is to build deeper visibility of the context to relate data such as events, metrics, logs and traces to one another. This means users can accurately determine issues, predict impacts and understand how change can affect business-critical activities. With the AIOps platform, enterprise clients in U.S. and the rest of the world will witness agility, diversity and resilience in their supply chain operations.

Conversational AI

North America, and the U.S., in particular, are leading in terms of adoption of enterprise intelligent virtual agents and conversational AI technology, in general. Multiple independent studies have shown that people in the U.S. are comfortable with interacting with a bot instead of a human, which explains the growing interest in interacting with a virtual agent for quick resolution of issues. In addition, with the developments in conversational AI solutions, there is specific focus on how and when calls can be transferred to a human agent. The number of generic queries that can be answered by an intelligent conversation solution has increased, and includes resolving a problem, getting detailed answers, finding a human assistant, making a reservation or paying an invoice. As conversational AI solutions learn to better discern user intent, clients are experimenting to implement them in additional use cases. Banking and financial institutes and enterprises are leading in terms of implementing conversational AI solutions, and users prefer to leverage such solutions for common issues. As the level of confidence in dealing with conversational AI solutions increases and vendors improve on their solutions, the market is expected to see a boom in the near future.

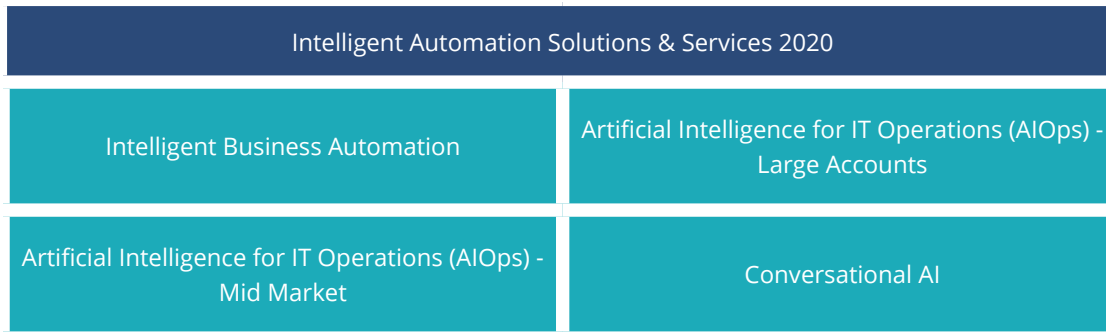
Some global trends in conversational AI are also applicable for the U.S. market:

- **Low-code/no-code development:** As focus shifts toward enabling citizen developers, and a young, smart and tech-savvy workforce finds employment, users would seek solutions to help rapidly implement business context to an existing framework and build customized conversational AI bots or virtual assistants.

- **Integration with business applications:** Solutions that can integrate with more leading enterprise technology stack solutions and offer application programming interface (API) integration would lead the market. A conversational AI solution should be able to integrate with all and many such technologies to decide on response and fetch the required data.
- **Reusable pre-packaged business process and industry focused virtual agents:** Clients would seek solutions that offer pre-packaged modules or virtual agents for common business processes such as HR, operations and IT. Similarly, clients are interested in, or expected to show interest in solutions with prebuilt modules for industry specific operations. Clients would prefer solutions with more of these prepackaged modules as they would need minimal customizations.
- **Bots talking to bots:** Many vendors are investing in solutions with capabilities to enable virtual agents to converse with each other, thereby automating many processes and making a huge change in the way business processes work.

Introduction

Simplified illustration



Source: ISG 2020

DISCLAIMER: ISG Automation is a sister division to ISG Research and therefore we have purposely selected quadrants and eligibility criteria that would exclude ISG Automation from being evaluated in order to avoid any appearance of a conflict of interest

Definition

According to the ISG Research **December 2019 RPA Deployment & Capability study**, organizations are improving their automation capabilities, but many are still in the early stages of the automation journey. Only 7 percent have progressed into enriching their RPA with intelligent automation. While RPA can automate simple, rules-based tasks, previously performed by humans, it needs structured data as input and can perform only standardized processes. Therefore, inability to handle unstructured data, lack of AI capabilities and in-house skills limitations is driving enterprise clients to look for transformational sourcing options, which include intelligent automation.

Definition (cont.)

Intelligent automation enables software bots to interact with unstructured data and generally includes the following capabilities: image recognition, NLP, cognitive reasoning and conversational AI. Enterprise clients worldwide are focusing on building intelligent automation capabilities into their RPA initiatives in keeping with the growing need to stay apace with competition with next-generation technologies. Well-orchestrated intelligent automation technologies are enabling enterprises to automate processes once considered as beyond the purview of automation, and deliver higher productivity, reduced costs, improved data accuracy and enhanced customer experience.

This study on Intelligent Automation Solutions and Services is aimed at understanding enterprise requirements and provider capabilities in meeting these demands.

Scope of the Report

The ISG Provider Lens™ study offers business and IT-decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness;
- A perspective on different markets, including the U.S., U.K., Nordics, and Germany.

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate current vendor relationships and potential new engagements.

For this reason, ISG's report on Intelligent Automation is comprised of multiple quadrants covering the spectrum of solutions and services that an enterprise client requires.

The quadrants descriptions are as follows:

Intelligent Business Automation: This quadrant analyzes information technology outsourcing/ business process outsourcing (ITO/BPO) service providers that offer proprietary automation and AI platform, solutions, and frameworks, along with associated services to enable enterprises automate business processes and augment the capabilities of their workforce.

Definition (cont.)

AIOps for Large Accounts: This quadrant assesses a service company's AIOps ability of an automation as a service solution and framework to evaluate the state of the company's multi-cloud IT workload and analyze the data it senses to facilitate automated operation. Enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and revenues of more than US\$1 billion.

AIOps for Mid Market: This quadrant assesses a service company's AIOps ability, of an automation as a service solution and framework, to evaluate the state of the company's multi-cloud IT workload and analyze the data it senses to facilitate automated operation. Enterprises are subject to strict regulations that can complicate engagements. The enterprise client typically has fewer than 5,000 employees or generates less than US\$1 billion in revenue.

Conversational AI: This quadrant includes providers that offer conversational AI solutions to facilitate a development environment and an API for automated conversational agents. These solutions integrate with chat interfaces such as messaging platforms and social media platforms, allowing third-party extensions and customization. Conversational AI solutions interact with users through text or voice, similar to what a human would do. These applications run on programmable commands and AI technologies, and are commonly classified as chatbots and virtual assistants.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Mid Market:** Companies with 100 to 4,999 employees or revenues between US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US\$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly fall behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Companies that receive the Rising Star award have a promising portfolio or the market experience to become a leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 1 of 4

| | Intelligent Business Automation | Artificial Intelligence for IT Operations (AIOps) - Mid Market | Artificial Intelligence for IT Operations (AIOps) - Large Accounts | Conversational AI |
|----------------------|---------------------------------|--|--|----------------------|
| [24]7.ai | ● Not in | ● Not in | ● Not in | ● Leader |
| Accenture | ● Leader | ● Not in | ● Leader | ● Not in |
| Aivo | ● Not in | ● Not in | ● Not in | ● Contender |
| Artificial Solutions | ● Not in | ● Not in | ● Not in | ● Leader |
| Atos | ● Product Challenger | ● Not in | ● Product Challenger | ● Not in |
| Avaamo | ● Not in | ● Not in | ● Not in | ● Market Challenger |
| AWS | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| Birlasoft | ● Contender | ● Contender | ● Contender | ● Not in |
| Capgemini | ● Leader | ● Not in | ● Leader | ● Not in |
| CGI | ● Not in | ● Market Challenger | ● Not in | ● Not in |
| Coforge | ● Product Challenger | ● Product Challenger | ● Not in | ● Not in |
| Cognigy | ● Not in | ● Not in | ● Not in | ● Rising Star |
| Cognizant | ● Leader | ● Not in | ● Leader | ● Not in |

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 2 of 4

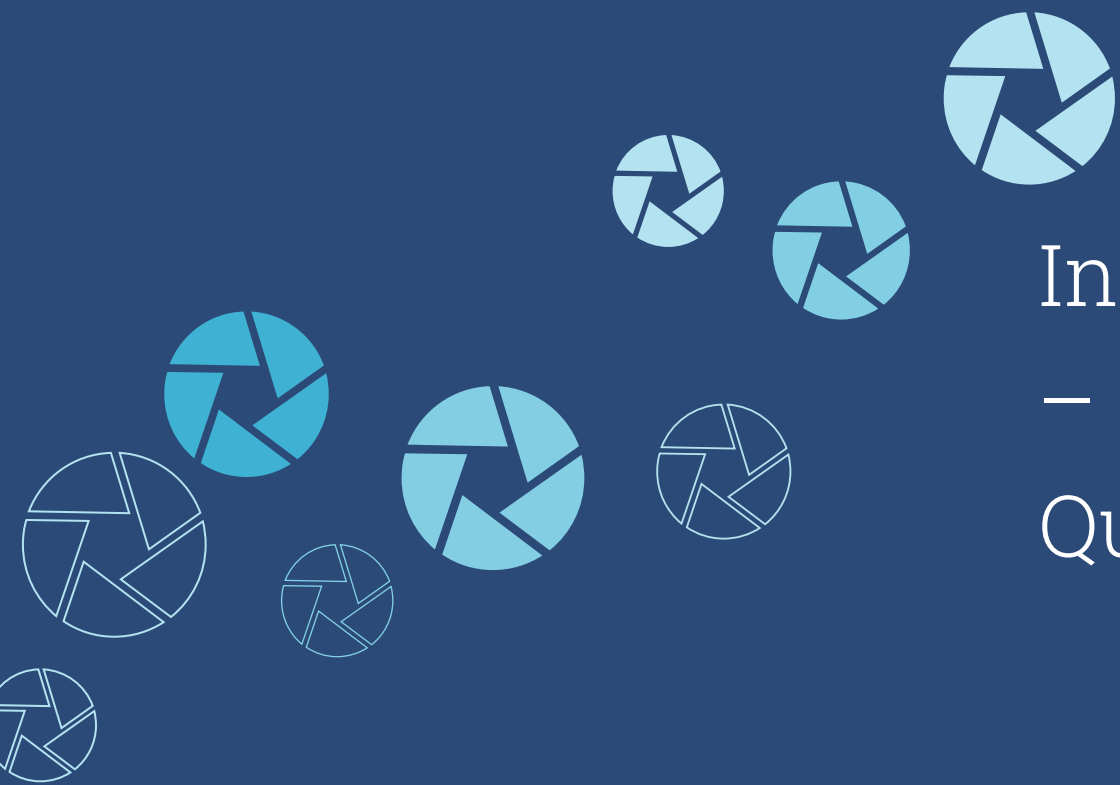
| | Intelligent Business Automation | Artificial Intelligence for IT Operations (AIOps) - Mid Market | Artificial Intelligence for IT Operations (AIOps) - Large Accounts | Conversational AI |
|------------------|---------------------------------|--|--|----------------------|
| Creative Virtual | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| CSS Corp | ● Contender | ● Contender | ● Contender | ● Not in |
| Datamatics | ● Product Challenger | ● Not in | ● Not in | ● Not in |
| DXC | ● Rising Star | ● Not in | ● Product Challenger | ● Not in |
| eGain | ● Not in | ● Not in | ● Not in | ● Contender |
| EXL | ● Leader | ● Not in | ● Not in | ● Not in |
| Fujitsu | ● Market Challenger | ● Product Challenger | ● Market Challenger | ● Not in |
| GAVS | ● Not in | ● Contender | ● Contender | ● Not in |
| Genpact | ● Leader | ● Not in | ● Not in | ● Not in |
| Google | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| HCL | ● Leader | ● Not in | ● Leader | ● Not in |
| Hexaware | ● Rising Star | ● Leader | ● Product Challenger | ● Not in |
| IBM | ● Leader | ● Not in | ● Leader | ● Product Challenger |

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 3 of 4

| | Intelligent Business Automation | Artificial Intelligence for IT Operations (AIOps) - Mid Market | Artificial Intelligence for IT Operations (AIOps) - Large Accounts | Conversational AI |
|------------|---------------------------------|--|--|----------------------|
| Inbenta | ● Not in | ● Not in | ● Not in | ● Contender |
| Infosys | ● Leader | ● Not in | ● Leader | ● Not in |
| IPsoft | ● Not in | ● Not in | ● Not in | ● Leader |
| Kore | ● Not in | ● Not in | ● Not in | ● Leader |
| LivePerson | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| LTI | ● Not in | ● Leader | ● Product Challenger | ● Not in |
| Microland | ● Not in | ● Contender | ● Contender | ● Not in |
| Microsoft | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| Mindtree | ● Not in | ● Leader | ● Rising Star | ● Not in |
| Mphasis | ● Product Challenger | ● Leader | ● Product Challenger | ● Not in |
| NTT DATA | ● Product Challenger | ● Not in | ● Contender | ● Not in |
| Nuance | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| OneReach | ● Not in | ● Not in | ● Not in | ● Rising Star |

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 4 of 4

| | Intelligent Business Automation | Artificial Intelligence for IT Operations (AIOps) - Mid Market | Artificial Intelligence for IT Operations (AIOps) - Large Accounts | Conversational AI |
|-----------------|---------------------------------|--|--|----------------------|
| OpenStream | ● Not in | ● Not in | ● Not in | ● Product Challenger |
| Persistent | ● Contender | ● Not in | ● Not in | ● Not in |
| Softtek | ● Product Challenger | ● Not in | ● Not in | ● Not in |
| Sonata Software | ● Contender | ● Contender | ● Not in | ● Not in |
| Sutherland | ● Product Challenger | ● Not in | ● Not in | ● Not in |
| TCS | ● Leader | ● Not in | ● Leader | ● Not in |
| Tech Mahindra | ● Product Challenger | ● Leader | ● Product Challenger | ● Not in |
| UST | ● Product Challenger | ● Rising Star | ● Contender | ● Not in |
| Wipro | ● Leader | ● Not in | ● Leader | ● Not in |
| Zensar | ● Not in | ● Contender | ● Contender | ● Not in |



Intelligent Automation – Solutions and Services Quadrants

ENTERPRISE CONTEXT

Intelligent Business Automation

This report is relevant to enterprises across industries in the U.S. for evaluating IT and business process outsourcing providers that offer proprietary automation and AI platforms, solutions and frameworks, along with associated implementation, advisory and support services.

In this quadrant report, ISG highlights the current market positioning of providers of intelligent business automation (IBA) — including proprietary solutions and services — in the U.S. based on the depth of their solution and service offerings and market presence.

The market in North America, and the U.S. in particular, is more mature compared with other regions, and it is the largest adopter of IBA services and solutions. Enterprises in the U.S. are more transformation focused and open to embracing advanced technologies such as machine learning (ML), natural language processing (NLP), intelligent optical character recognition (OCR) and process mining and have, subsequently, started reaping the benefits in their business processes. Enterprises in the banking, financial services and insurance (BFSI) sector are leading in the adoption of IBA solutions and services, primarily driven by significant cost pressure, compliance burden and the need for high accuracy.

Enterprises that have not embraced such digital technologies to optimize and transform their business processes are losing out on outcomes such as improved productivity, high data accuracy, cost savings and enhanced customer experience.

Line of business leaders (LOBs) should read this report to understand the relative positioning and capabilities of providers that can assist with end-to-end intelligent business process automation to deliver the benefits higher efficiency and effectiveness. The report also supports the technical and integration capabilities of service providers as well as their strategic partnerships.

Digital transformation professionals should read this report to understand how providers of IBA solutions and services fit their intelligent-automation-led digital transformation initiatives and how they compare with each another.

IT and technology leaders should read this report to understand how IBA providers are integrating multiple technologies into their proprietary offerings and how, subsequently, the technical capabilities of these providers can be compared with the rest of the market.

Sourcing and vendor management professionals should read this report to understand the provider ecosystem for IBA solution and services in the U.S. and gain insights into how providers can be compared to each another.

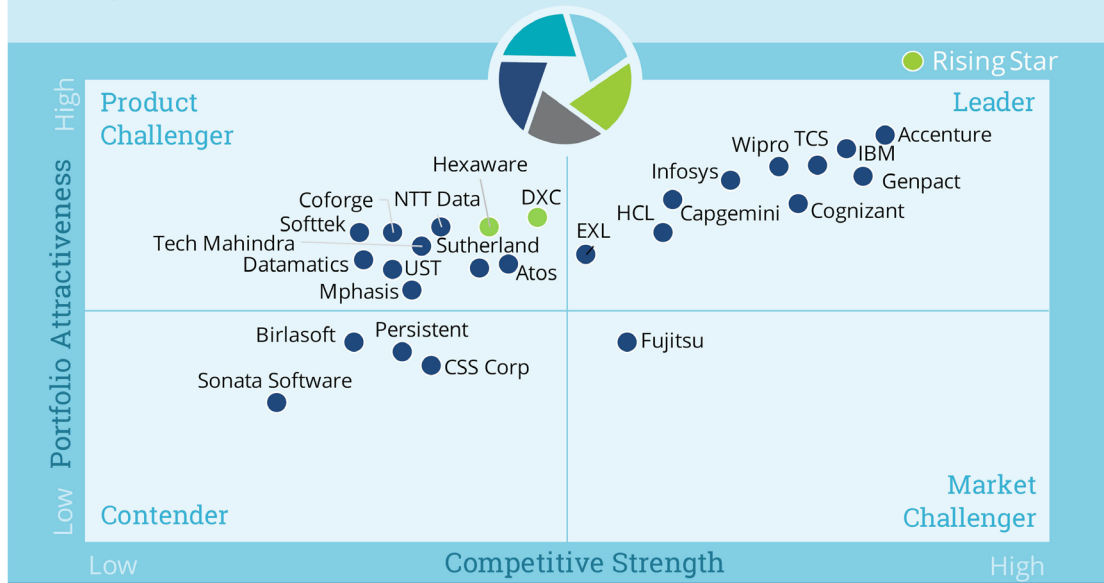
INTELLIGENT BUSINESS AUTOMATION

Definition

This quadrant analyzes (ITO/BPO) service providers that offer proprietary automation and AI platform, solutions, and frameworks, along with associated services, to enable enterprises to automate business activities and augment the capabilities of their workforce. These solutions can be implemented in any facet of an enterprise where repetitive and manual processes are in place, but are primarily used in finance and accounting (F&A), human resources (HR), procurement and supply chain functions. They supplement automation with advanced analytics and AI technologies such as compute vision, machine/deep learning, and natural language processing (NLP) to digitally transform enterprise business operations at scale, and are aimed at eliminating inefficiencies in business operations and pave the way for reduced costs, high productivity, improved data accuracy and enhanced customer experience.

Intelligent Automation - Solutions and Services Intelligent Business Automation

2020
U.S.



ISG Provider Lens™

DISCLAIMER: ISG Automation and other providers who do not offer a proprietary automation/AI platform, have not been evaluated in this quadrant.

Source: ISG Research 2020

INTELLIGENT BUSINESS AUTOMATION

Eligibility Criteria

- Must offer proprietary automation/AI platform and solutions, implement them and provide ongoing support;
- Should have the ability to foster end-to-end business transformation of enterprises by leveraging next-gen technologies such as automation, AI and advanced analytics;
- Have the ability to support the integration with various enterprise applications (for example, , customer relationship management systems for customer data or enterprise resource planning systems for finance) and existing IT infrastructure;
- Capable of offering out-of-the-box application programming interface (APIs), multitenancy and secured deployment of platform;
- Offer solutions that harness and digitalize large volumes of structured, semi-structured and unstructured data from multiple sources; provide actionable intelligence and generate insights from business processes data; and have machine learning capabilities embedded within their solutions to improve learning from the data over time, resulting in increased accuracy and reduced exceptions;
- Demonstrate capabilities in process mining, opportunity assessment for facilitating automation and strong business advisory capabilities to help enterprises in internal buy-in and guide them through a business process transformation journey;
- Offer industry and/or function-specific (for example, finance, procurement or HR) automation/AI proprietary solutions.

INTELLIGENT BUSINESS AUTOMATION

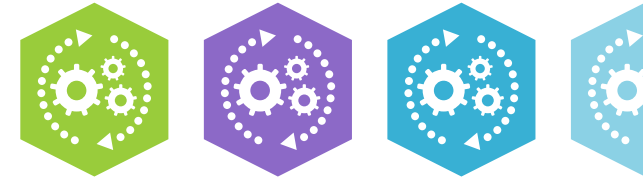
Observations

- **Accenture** leads the intelligent business automation market by leveraging its deep industry and functional expertise, homegrown SynOps platform, continued focus on inorganic growth, and vast network of innovation hubs across the U.S.
- **Capgemini's** continuous focus on proprietary IP investments in intelligent business automation and proven expertise has helped clients transform their business operations significantly, improving efficiency and customer experience.
- **Cognizant**, with its strong market presence and a digital-first approach, brings in-depth expertise across domains and intelligent business automation space to serve a large base of clients in the U.S. market.
- **EXL** has extensive domain experience across selective verticals and has developed several proprietary automation solutions to accelerate end-to-end automation across data-driven business processes.
- **Genpact** uses a combination of its rich domain and process expertise, and proprietary pre-trained AI accelerators to fast-track the pace and impact of intelligent automation across an enterprise.
- **HCL** has focused its investments on intelligent business automation IPs, proprietary tools and accelerators, along with its wide network of co-innovation labs, providing innovative solutions tailored to client-specific needs.
- **IBM's** comprehensive portfolio of proprietary intelligent business automation solutions, and strategic R&D focus to assimilate innovation across each automation engagement, make it a leader in the intelligent automation space.
- **Infosys** combines its strong domain expertise with its proprietary AssistEdge and Nia™ platform as well as a deep partner ecosystem to help clients hasten and mount the implementation AI-based automation across the enterprise.
- **TCS** offers a comprehensive intelligent automation portfolio underpinned by its proprietary Machine First Delivery Model (MFD™) framework that gives machines the “first right of refusal” ability in managing work across business operations.

INTELLIGENT BUSINESS AUTOMATION

Observations (cont.)

- **Wipro** has developed compelling capabilities to help large clients derive superior business results with the help of its domain knowledge combined with strong proprietary intellectual property, platforms (Wipro HOLMES™, Harmony) and an ecosystem approach.
- **DXC Technology** (Rising Star) has a host of proprietary intelligent business automation offerings, from an automated process discovery to agile process automation platform and a dedicated Applied AI studio to engage and demonstrate to its customers what AI can do, with a focus on practical applications that can be integrated across an enterprise.
- **Hexaware** (Rising Star) is well positioned with its “automation first” approach and flexible engagement models to enable enterprises to enforce significant process efficiency and effectiveness by leveraging its proprietary offerings, including HIPAS™ and AutomatON.



RISING STAR: HEXAWARE

Overview

Hexaware is an India-based, fast-growing service provider, delivering IT, BPO and consulting services. It offers business process transformation services with a high focus on automation to boost efficiency and bottom line for its clients. The company has industry veterans as part its leadership to support these services. In the intelligent process automation business, Hexaware has strong presence in the banking and financial services market, followed by business services, healthcare and pharma industries.

Strengths

Proprietary intelligent automation capabilities: Hexaware offers proprietary platform, tools and frameworks, including AutomaTON, HiPAS and Digital Operating Command Center to deliver automation solutions that are further strengthened by its partnerships with leading automation platform vendors. With these proprietary platforms, tools and frameworks, the company has been able to deliver end to end automation solutions to more than 125 clients, and has deployed over 1,200 bots.

Automation-first approach with fearless revenue cannibalization: Hexaware has been rapidly expanding its presence in the U.S. business process automation market with its “Automate Everything” philosophy. Its approach toward bringing in higher efficiencies, productivity gains and transformation of customer experiences by leveraging a whole range of technologies from RPA to AI and no fear of revenue cannibalization differentiates Hexaware from its peers.

Flexible engagement models: Going by its customer-first approach, Hexaware provides its clients next-gen pricing models with commercial and contractual flexibility. It demonstrates skin in the game by offering enterprises with use case-based catalogs and gain share models based on threshold automation levels achieved. This has helped its clients to reap assured benefits from the onset.

Caution

While Hexaware has already assured over 100 million savings for its IBA clients, till date, by leveraging its proprietary open-source platform (AutomatON), framework (HiPAS) as well as third-party platforms, it should focus on improving branding and creating awareness of its proprietary platform and point solutions to garner market recognition and realize mindshare equivalent to the competencies already showcased.

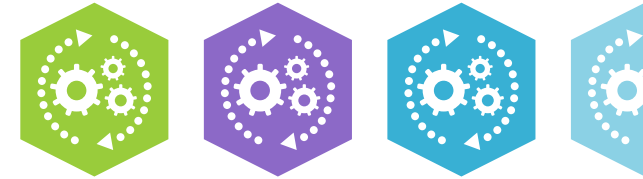


2020 ISG Provider Lens™ Rising Star

Hexaware's visionary delivery leadership, “automation first” go-to-market approach, and flexible, outcome driven engagement models make it a prominent partner of choice for enterprises.



Methodology



METHODOLOGY

The research study “ISG Provider Lens™ Intelligent Automation - Solutions and Services 2021” analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of 2021 ISG Provider Lens™ Intelligent Automation - Solutions and Services market.
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics.
3. Interactive discussions with service providers/vendors on capabilities and use cases.
4. Leverage ISG’s internal databases and advisor knowledge and experience (wherever applicable).
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements

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