

HFS Top 10: Triple-A Trifecta Services 2020

Assessing the power of “and” for
automation, artificial intelligence, and
smart analytics services

Excerpt for KPMG

November 2020

HFS Research authors:

Elena Christopher, SVP Research

Reetika Fleming, VP Research

Tanmoy Mondal, Senior Research Analyst



The Triple-A Trifecta is HFS terminology for the intersection of three critical change agents—automation, artificial intelligence (AI), and smart analytics. While they are each powerful in their own right, they are exponentially so when used together and enable scalable, end-to-end intelligent automation.”

—Elena Christopher, Senior Vice President, HFS Research

CONTENTS

1

[Introduction, methodology, and definitions](#)

[4](#)

2

[Executive summary](#)

[12](#)

3

[Top 10 results: Triple-A Trifecta services 2020](#)

[18](#)

4

[Participant profile: Triple-A Trifecta services 2020](#)

[22](#)

5

[About the authors](#)

[25](#)



Introduction, methodology, and definitions

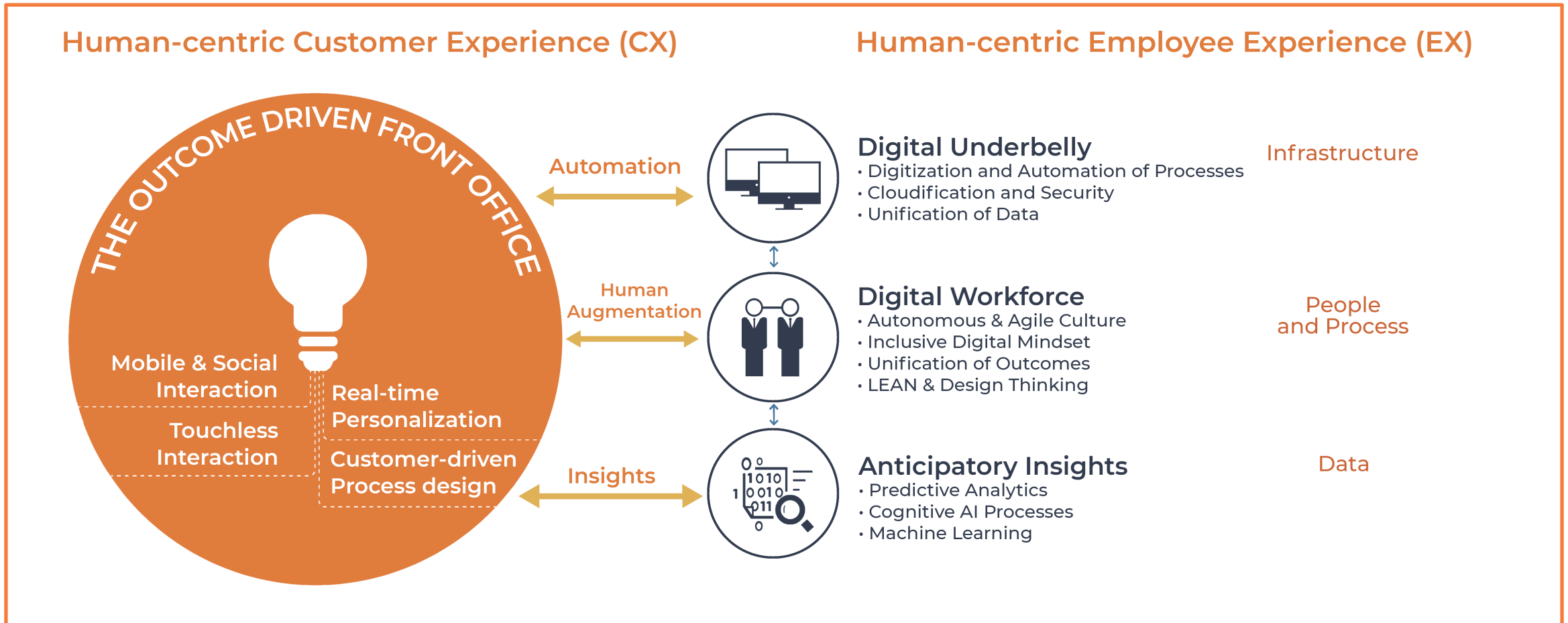
Introduction—What the heck is the Triple-A Trifecta, and why does it matter?

- The Triple-A Trifecta is HFS terminology for the intersection of three critical change agents—automation, artificial intelligence (AI), and smart analytics.
- HFS developed the Triple-A Trifecta framework to unify how these digital transformation change agents work together to deliver business outcomes in pursuit of the OneOffice. While many enterprises continue to adopt and utilize the piecemeal components of the Trifecta, HFS believes that the future of service delivery and the ability of enterprises to truly digitally transform their business operations are tied to using these technology elements in concert. While they are each powerful in their own right, they are exponentially so when used together and enable scalable, end-to-end, intelligent automation.
- In a first-of-its-kind study, the HFS Triple-A Trifecta Services Top 10 assessed 21 service providers in terms of how well they are helping their clients embrace and realize results from the full array of Triple-A Trifecta technologies and related services.
- This report rates how well each provider performed across a defined series of execution, innovation, and voice of the customer criteria, showcasing the overall leaders and top 10 performers by sub-category. We've included detailed profiles on each provider showcasing their performance, strengths and development areas, and key facts.
- Happy reading!

~Elena, Reetika, and Tanmoy

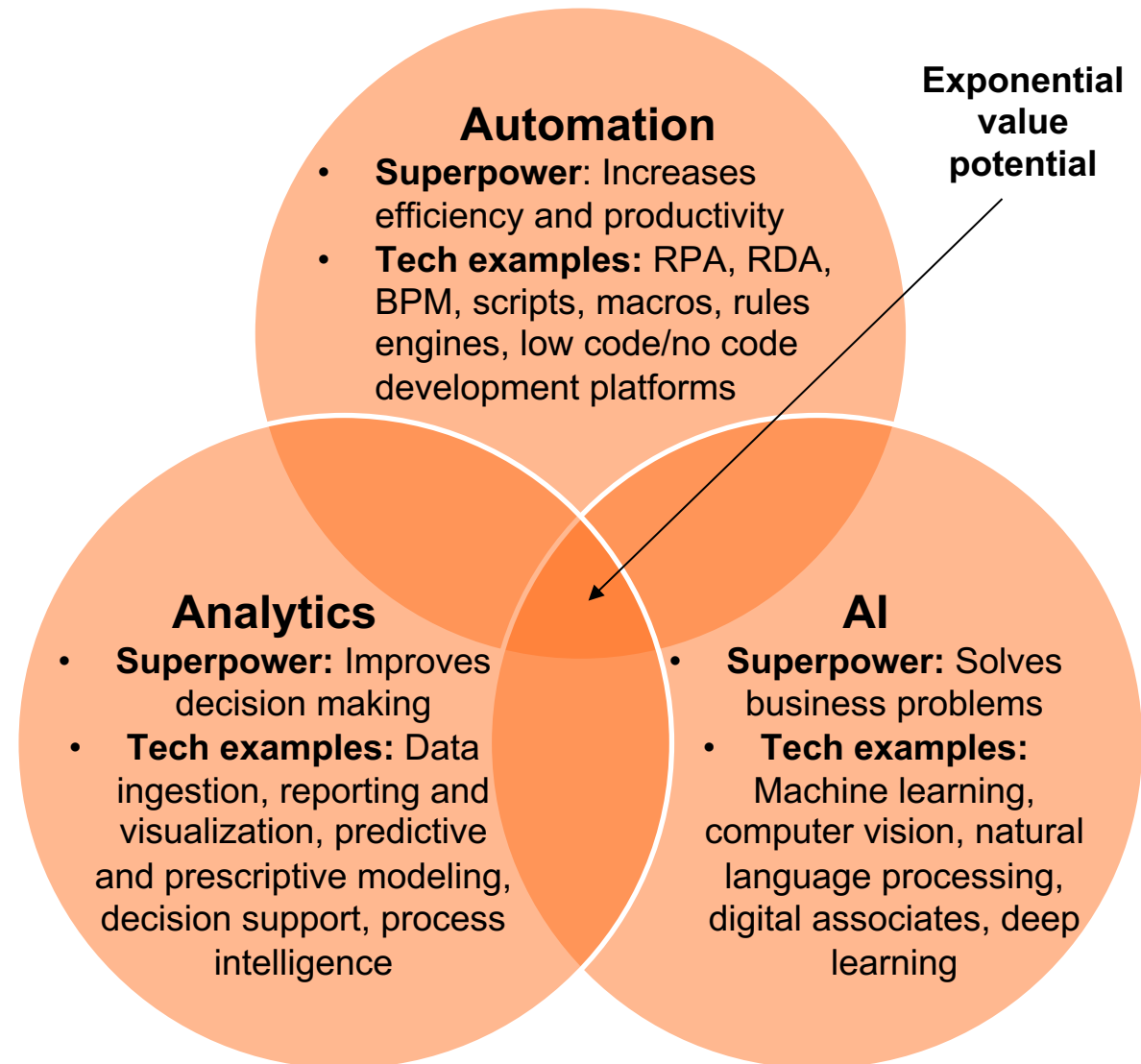
HFS OneOffice™ organization enabled by the Triple-A Trifecta

The OneOffice™ is HFS' vision for the digitally transformed enterprise. Triple-A Trifecta technologies help organizations break down their front-, middle-, and back-office silos to mature into **one integrated system** to enable employees, delight customers, and deliver on its purpose. Our ability to make Triple-A Trifecta change agents native elements of enterprise business architecture is a prerequisite for digital transformation and the OneOffice.



The HFS Triple-A Trifecta definition

- HFS developed the Triple-A Trifecta to provide a framework that unifies how digital transformation change agents work together to deliver business outcomes. The Trifecta consists of automation, smart analytics and artificial intelligence. Two critical points to note are
 - The Trifecta elements intersect with each other. While each element of the Trifecta has a distinct value proposition (automation drives efficiency, smart analytics improves decision-making, and AI solves business problems), there is increasing convergence between the three elements. For instance, smart analytics are increasingly reliant on AI tools such as natural language processing (NLP) to conduct search-driven analytics, neural networks for data exploration, and learning algorithms to build predictive models.
 - The Trifecta is nonlinear and without a definite starting point. Transformation is not a linear progression. Enterprises can start anywhere across the Trifecta. It is not necessary to start with basic automation and then advance to AI-based automation. However, it is critical to understand the business problem that you are trying to solve and then apply the relevant value lever or a combination of value levers.



The Triple-A Trifecta services value chain

Triple-A Trifecta services are the provision of planning, implementation, management, operations, and optimization services in support of enterprise utilization of automation, AI, and analytics software, processes, and resources to achieve digital transformation and defined business outcomes. HFS depicts Triple-A Trifecta services in a value chain, as follows:

Plan	Implement	Manage	Operate	Optimize
<ul style="list-style-type: none"> • Technology advisory • Vendor selection support • Opportunity identification and assessment • Business case development • Operating model evaluation • IA roadmap • Compliance and risk assessment • Security implications • HR and talent strategy management • Change management • Governance policy • Rollout strategy 	<ul style="list-style-type: none"> • Program management for process automation • Process automation and customization • Solution and technical design • Process mining, mapping and updating • Data extraction from heterogenous systems • Leverage repository of pre-built components and utilities • Model building and testing • Intelligent automation integration • Enterprise systems integration 	<ul style="list-style-type: none"> • Governance management • Maintenance of automated processes and use cases • Optimization of BPO contracts and shared service centers • Upgrade support • Help desk • Support and maintenance • Testing and QA • New releases and update coordination • Training and certification • Acceptance testing • Change management • CoE management 	<ul style="list-style-type: none"> • Infrastructure management • Application management • IT help desk • BPO • IA-as-a-service • Real-time analytics • Identify changes in service delivery to support changing business requirements (e.g., M&A, new IT) • Mandatory regulatory adjustment ramification and resolution 	<ul style="list-style-type: none"> • New feature value identification and benefit analysis • Ongoing adds, upgrades, migrations, and consolidation • Integration of relevant ecosystem technologies and data • Best practice documentation and curation • User community participation

Service providers covered in this report

accenture

AtOS

Capgemini

Coforge

Cognizant

EXL

genpact

HCL

HEXWARE

IBM

Infosys

KPMG

LTI

Mphasis
The Next Applied

NTT DATA

Persistent

pwc

tcs | TATA
CONSULTANCY
SERVICES

Tech
Mahindra

wipro

WNS

Sources of data

This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the Triple-A Trifecta services capabilities of each of the 21 service providers covered in our study. Sources are as follows:



RFIs and briefings

- **RFIs**—Each participating vendor completed a detailed RFI.
- **Vendor briefings**—HFS conducted briefings with executives from each vendor.



Reference checks

- We conducted reference checks with **58 active clients** of the study participants via detailed phone-based interviews.



HFS surveys

- Each year, HFS fields multiple demand-side surveys in which we include vendor rating questions. For this study, we drew on more than **2,100 vendor ratings** from 2020 enterprise demand-side surveys.



Other data sources

- Public information such as press releases, web sites, etc.
- Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

How we assessed providers for the Triple-A Trifecta services Top 10

Execution—33.3%

Formalized capabilities around Triple-A Trifecta services (33%)

- Proven integration of automation, AI, and smart analytics services
- Formal offerings
- Leadership alignment
- Delivery abilities

Scale (33%)

- Number of resources
- Certified resources
- Availability of talent
- Geographic coverage
- Industries covered
- Clients—number and footprint

Growth (33%)

- Trajectory of Triple-A business
- Revenue
- Client growth
- Engagements by stage and percentage beyond proofs of concept and pilots
- Monetization

Innovation—33.3%

Strategy and vision (33%)

- Value proposition for Triple-A services
- Credibility of strategy and roadmap
- Identifiable investments in strategy (e.g., M&A)

Ability to deliver business transformation (33%)

- Consulting approach
- Change management
- Co-innovation approaches
- Delivery of business outcomes

Technology innovation (33%)

- Cultivation of internal IP
- Patents
- Innovative solution combinations
- Use of best-of-breed partner technologies
- Investment in R&D

Voice of the customer (VOC)—33.3%

- Direct feedback from enterprise clients via reference check interviews (40%)
 - HFS Voice of the customer rating data (40%)
- Referenceability: provision of references and responsiveness (20%)



Executive summary

Executive summary

Triple-A Trifecta rising

The Triple-A Trifecta is HFS terminology for the intersection of three critical change agents: automation, AI, and smart analytics. These technology change agents are each powerful, but when combined, they offer exponential value potential. The service providers covered in this report are helping their clients determine the best ways to benefit from the combined power of the Triple-A Trifecta.

The starting point is often “single-A”

Enterprise maturity and associated readiness to change generally dictate how intelligent automation engagements start. Few organizations are ready for a big bang change right out of the gate; thus, they may initially begin with a “single-A” or “double-A” approaches such as RPA alone or combined with cognitive OCR. Service providers’ ability to build to a Triple-A Trifecta approach is not just upselling; it’s the path to greater results.

Where the magic happens

How providers bring the Triple-A Trifecta elements together aligns with their competencies. Those with a siloed approach tend to make strong implementation partners. Those that have formalized the integration of the Triple-A elements within specific functional or domain-focused silos such as operations services tend to be strong solution providers. Those providers that have elevated the Triple-A to native building blocks used across all service offerings are strong digital transformation partners.

The winners

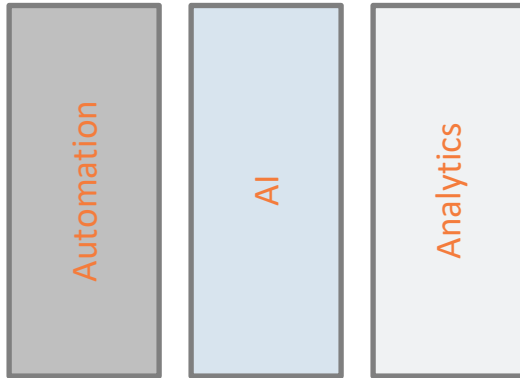
We assessed 21 service providers across execution, innovation, and voice of the customer criteria. The top five leaders are 1. Accenture, 2. IBM, 3. KPMG, 4. Capgemini, and 5. TCS. These leaders’ shared characteristics include formalized Triple-A Trifecta offerings and leadership, clear value propositions for the power of “and” rather than piecemeal tech, excellence in internal IP development, deep and ever-evolving third-party partnerships, and the ability to deliver business outcomes.

Voice of the customer

The concept of the Triple-A Trifecta resonated with 100% of the 58 reference interviews we conducted for this study. Despite the validation, many enterprises indicated that they had siloed approaches to each of the Triple-A elements, with separate leaders and resources. However, the need for better solutions and deeper results is starting to change this, driving capability expansion within siloed groups and bringing AI, automation, and analytics capabilities together to build capabilities and drive business results. The pandemic is bringing new meaning to “leverage what you have.”

Many service providers have the three As, but how they intersect is where the magic happens

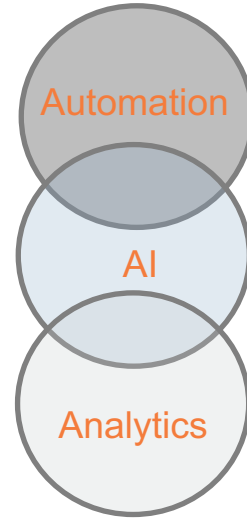
Ad hoc Triple-A integration



“Implementation partners”

- All providers covered in this report have standalone capabilities in each of the “single-As.”
- While the silo approach builds competencies in each, they often go to market as separate capabilities, which keeps the focus on piecemeal solutions rather than value-added integrated solutions.
- Providers with this model are often strong implementation partners.

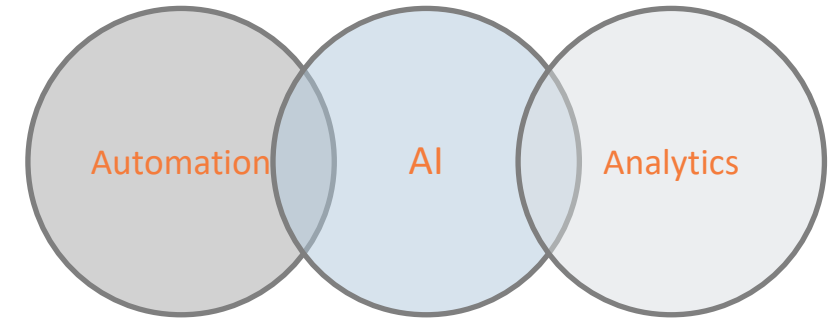
Integration within functional silo(s)



“Solution partners”

- Some providers have formalized integrating the Triple-A elements within certain functional or domain-focused silos, such as operations services or within an industry group.
- This helps formalize integrated solution development, best practices, uses cases, etc., all in the name of enhancing client value in specific domains.
- Providers with this model are often excellent solution partners skilled at identifying use cases and building workflows within domains, functions, and industries.

Integration across all service lines



“Transformation partners”

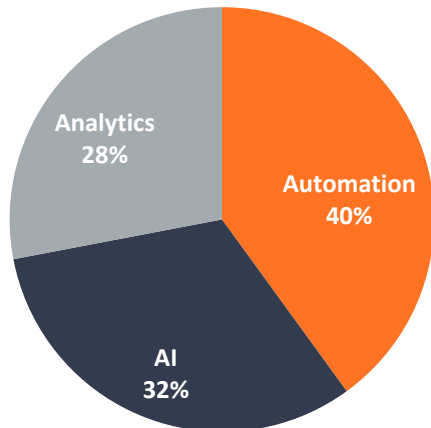
- A few providers have gone all-in on the Triple-A Trifecta and the power of “and,” elevating these change agents and related capabilities to standard, native building blocks used together across all service offerings.
- This helps ensure that the power of the Triple-A Trifecta is considered for all service engagements and that it is available for integration with other emerging change agents, such as cloud, IoT, and 5G.
- Providers with this model are often effective transformation partners skilled at vision, strategy, and priorities, with deep change management chops.

As enterprises strive for the OneOffice, the Triple-A Trifecta is helping pave the way

Automation is often the anchor “A.”

Service providers indicate that automation, these days often RPA, is the biggest contributor to their Triple-A engagements. While engagements can start anywhere, they often begin with “single-A” projects that blossom into “double-A” and then eventually Triple-A engagements, generally in line with the additional value enterprises want to derive from emerging technology and their broader digital transformation plans.

Contribution of each “A” to Triple-A Trifecta engagements

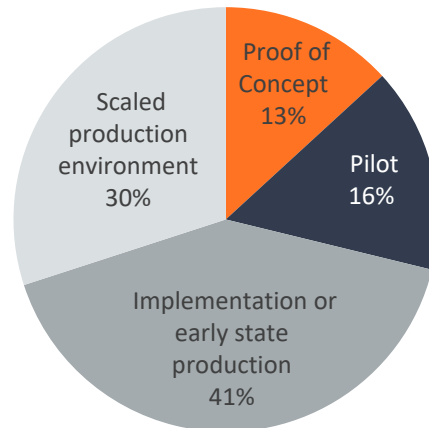


Source: HFS Research, 2020
N= 21 service providers

The majority of Triple-A engagements are just coming to life.

As [HFS data](#) has shown, the state of intelligent automation coming into the pandemic was lots of potential but limited scale. And that was for piecemeal tech across the trifecta! It’s no surprise then that the current state of Triple-A engagements shows the majority at the implementation stage or early production environments.

Current state of Triple-A Trifecta services engagements



Expect relatively fast growth as projects expand.

While just 19% of service provider engagements now include integrated automation, AI, and analytics elements, their inclusion is on the rise. Providers indicated their year-over-year growth (FY2019–20) is a whopping 52% compared to the pre-pandemic IT and business process service market growth of ~5%. The majority of these engagements are being implemented as part of projects rather than ongoing annuity deals.

19% Service provider engagements that include all three elements of the Triple-A Trifecta

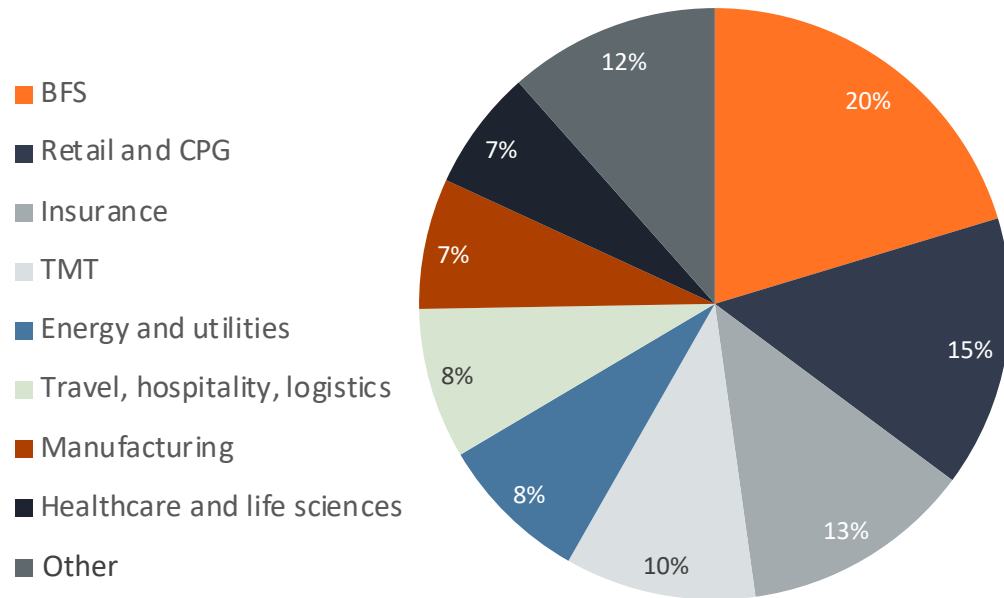
52% Average year-over-year growth in providers’ Triple-A Trifecta services revenue

61% Percentage of Triple-A engagements that are project-based versus ongoing, annuity-based deals

As applied emerging tech continues to grow, Triple-A deals are cropping up across sectors and geographies

Triple-A Trifecta service engagements by industry

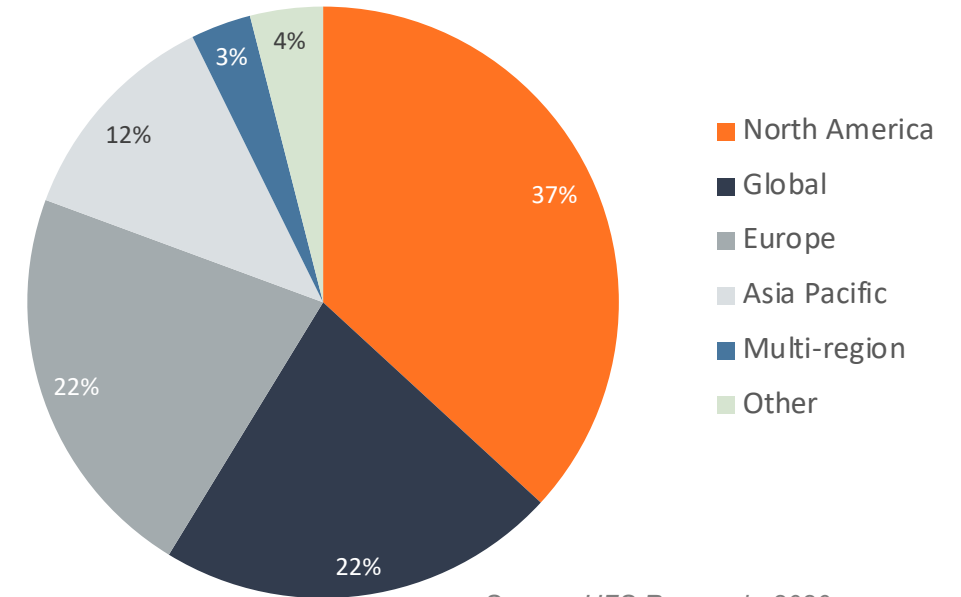
- BFSI sectors dominate the Triple-A with their continued embrace of emerging tech.
- Retail and CPG and TMT sectors are also going deep with the Triple-A, buoyed by the dual need for operations modernization and increased digital experiences.



Source: HFS Research, 2020
N= 182 Triple-A Trifecta services case studies

Triple-A Trifecta service engagements by geography

- While the majority of Triple-A Trifecta engagements are taking place in North America and Europe, HFS notes the contribution of global deals.
- The global and multi-regional deals are often major transformation engagements that leverage the Triple-A for its change potential.



Source: HFS Research, 2020
N= 182 Triple-A Trifecta services case studies

Leading use cases for Triple-A Trifecta services

Industry-specific (representative)

- **BFS:** Payment investigation, commercial cards, accounts services, settlements, fund accounting, fraud detection, collateral monitoring, portfolio administration
- **Insurance:** Claims processing, new business, underwriting, billing and collections, subrogation
- **Retail and CPG:** Digital shopping experience, smart home, smart store, trade promotions, order management and experience, customer journey optimization

Finance and accounting

- A broad range of use cases across accounts payable, order to cash, record to report, controllership activities, and finance transformation:
- Reconciliations, identity management, digitization of the controllership function, revenue forecasting, invoice management, journey entry exceptions management, audit, reporting, fraud

Customer service

- Customer service use cases are dominated by contact center optimization and the quest to make agents as productive as possible across all channels:
- Customer loyalty program management, agent optimization in contact centers, next best action, customer email management, classification and response, contact analytics, digital associates for self-service and off-hours coverage, repeat call optimization

Sales and marketing

- Triple-A usage in sales and marketing focuses heavily on campaign optimization and revenue enhancement:
- Marketing campaign management and lead conversion, improved return on campaigns through optimal website ad placements, quote management, order management and upselling, price and portfolio management, behavioral correlations across sales funnel, dynamic pricing

Human resources

- Focus on enhanced support across the spectrum of hire-to-retain with an increased emphasis on employee experience:
- Streamlined onboarding and provision, enhanced self-service moving from search-based experience to conversation-driven experience, creation of intelligent workflows, recruitment effectiveness, query resolution, benefit administration

The Triple-A Trifecta goes deep with industry-specific use cases and value beyond cost and efficiency.

- The 21 service providers covered in this report shared **180+ case studies** showcasing how they bring the enhanced value of the Triple-A Trifecta to their clients.
- Across the providers, the **leading** category of Triple-A use cases is for **industry-specific processes and functions**. This points to better alignment of emerging technologies use with core business needs and objectives and outcomes focused on revenue growth, CX, and EX.
- **F&A and other back office and operations-centric domains** persist as strong poster children for Triple-A Trifecta services engagements in alignment with the perpetual need to drive efficiency and cost optimization.

An aerial, black and white photograph of the New York City skyline. The image is dominated by numerous skyscrapers, with the Empire State Building being the most prominent on the right side. A large, semi-transparent number '3' is overlaid on the left side of the image, partially covering several buildings. A vertical orange bar is positioned to the right of the number '3', extending from the top to the bottom of the page.

3

Top 10 results: Triple-A
Trifecta services 2020

Triple-A Trifecta services—Summary of providers assessed in this report













Provider (alphabetical)	HFS point of view on Triple-A Trifecta services capabilities
Accenture	A transformation-focused global provider with formalized Triple-A Trifecta capabilities through “Applied Intelligence”
Atos	A French firm with a growing global footprint harnessing the value of the Triple-A Trifecta plus IoT with unique industry and domain expertise
Capgemini	A global provider using the power of the Triple-A Trifecta to unify its capabilities and deliver end-to-end value to clients
Coforge*	Fast-growth mid-tier firm with a fresh new brand and deep process automation and analytics capabilities
Cognizant	An operations-led approach to the Triple-A Trifecta, enhanced by the broader power of Cognizant and a singular focus on the customer
EXL	BPO firm leveraging the Triple-A Trifecta to bring domain-focused digital impact to its client base
Genpact	A Triple-A Trifecta trailblazer driving process, data, and experience-focused digital transformation
HCL	IT services and engineering powerhouse bringing strong Triple-A Trifecta products and services to meet clients’ digital needs
Hexaware	A rising mid-tier firm using its Triple-A Trifecta capabilities opportunistically to try and “automate everything”
IBM	An execution and innovation powerhouse leveraging the power of the Triple-A Trifecta to help enterprises achieve the Cognitive Enterprise
Infosys	A global IT services major with a competency-focused approach to delivering Triple-A Trifecta value to its clients
KPMG	Consulting-led Triple-A Trifecta transformation leader with strong investment in digital innovation
LTI	A growing mid-tier firm using the Triple-A Trifecta and a focused platform approach to help clients harness the value of data
Mphasis	Nimble mid-tier firm using Triple-A Trifecta services and solutions to help clients move faster
NTT DATA	Global provider using the power of the Triple-A Trifecta to align and enable IT and business transformation needs
Persistent	An up-and-coming mid-tier firm representing the Triple-A Trifecta as part of its digital mosaic approach to verticalized solutions
PwC	A global advisory firm bringing the fruits of its Triple-A-powered internal transformation to its clients
TCS	IT services powerhouse bringing Triple-A Trifecta value to clients with its Machine First approach
Tech Mahindra	Global provider with deep telecom domain expertise using an inside-out approach to embed Triple-A capabilities across its client base
Wipro	An early adopter of the Triple-A Trifecta approach, using it to drive persona-based operations transformation to its clients
WNS	A business process specialist leveraging the power of the Triple-A Trifecta to build digital ecosystems and improve outcomes for its clients

HFS Top 10 rankings: Triple-A Trifecta services 2020

Rank	Overall HFS Top 10 position	Execution				Innovation				Voice of the customer
		Formalized Triple-A Trifecta services	Scale	Growth	Overall execution	Strategy and vision	Business transformation	Technology innovation	Overall innovation	
#1										
#2										
#3										
#4										
#5										
#6										
#7										
#8										
#9										
#10										

Notes: HFS Top 10 Triple-A Trifecta services 2020 report assessed and ranked 21 service providers across execution, innovation, and voice of the customer criteria. The inputs to this process included detailed RFI responses and structured briefings with service provider leadership as well as interviews and surveys from their clients. In order to drive objectivity to our research methodology, we interacted with reference clients provided by the service providers as well as non-reference clients sourced through our own network for each vendor assessed. The companies assessed in this report include (in alphabetic order): Accenture, Atos, Capgemini, Coforge, Cognizant, EXL, Genpact, HCL, Hexaware, IBM, Infosys, KPMG, LTI, Mphasis, NTT DATA, Persistent, PwC, TCS, Tech Mahindra, Wipro, WNS.

Notable performances in HFS Top 10 Triple-A Trifecta services 2020

HFS Podium Winners								
Top three providers overall across execution, innovation, and voice of the customer criteria								
#1.			#2.			#3.		
								
Execution powerhouses			Innovation champions			Outstanding voice of the customer		
Top three providers on execution criteria			Top three providers on innovation criteria			Top three providers on voice of the customer criteria		
#1	#2	#3	#1	#2	#3	#1	#2	#3
								
Other notable performances								
<ul style="list-style-type: none"> • Capgemini ranked #3 for scale supported by depth of resources, certifications, clients, and geographic and industry coverage. • Wipro ranked #3 for technology innovation: Its cultivation of strong internal IP, R&D, Triple-A-related patents, partnerships, and interesting solution combinations bubbled it up to the top 3. • Genpact is the only business services-led firm to crack the Top 10, with strong performances across execution, innovation, and VOC. 								

Notes:

- HFS Top 10 Triple-A Trifecta Services 2020 report assessed and ranked 21 service providers across execution, innovation, and voice of the customer criteria. The inputs to this process included detailed RFI responses and structured briefings with service provider leadership as well as interviews and surveys from their clients. In order to drive objectivity to our research methodology, we interacted with reference clients provided by the service providers as well as non-reference clients sourced through our own network for each vendor assessed.
- The companies assessed in this report include (in alphabetic order): Accenture, Atos, Capgemini, Coforge, Cognizant, EXL, Genpact, HCL, Hexaware, IBM, Infosys, KPMG, LTI, Mphasis, NTT DATA, Persistent, PwC, TCS, Tech Mahindra, Wipro, WNS.



Participant profile: Triple-A
Trifecta services 2020

How to read profiles

Summary statement about Triple-A Trifecta services capabilities



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#	<ul style="list-style-type: none"> Approach to Triple-A Trifecta services. How formalized are their capabilities in terms of leadership, organization, offerings, GTM approach, identifiable investments in strategy. Key differentiators. Ability to generate enhanced value with the Triple-A Trifecta. Proof points that exemplify our basic point that the power of “and” is greater than the parts—include notable business benefit examples. Technology innovation. Notable partnering approach, IP, R&D, etc. Customer kudos. From references and HFS surveys and enterprise interactions. 	<ul style="list-style-type: none"> What we’d like to see more of. What we’d like to see less of. Customer critiques. From references and HFS surveys and enterprises interactions. 		
Ability to execute	#				
Formalized Triple-A Trifecta service capabilities	#				
Scale	#				
Growth	#				
<div style="background-color: #f4a460; padding: 10px; border: 1px solid black;"> Sections and headings are standardized for all Triple-A profiles </div>					
Innovation capability	#	Relevant Acquisitions and Partnerships	Key Clients	Operations	Flagship Internal IP and Technologies
Strategy and vision	#	Acquisitions: <ul style="list-style-type: none"> Must be directly relevant to Triple-A Nothing before 2017 	Key clients include: <ul style="list-style-type: none"> Names preferred No more than 10 	Total number of data scientists: Included as one of the most tangible numbers available from providers.	<ul style="list-style-type: none"> Triple-A Trifecta focused
Ability to deliver business transformation	#	Key partnerships: <ul style="list-style-type: none"> Must be directly relevant to Triple-A Includes only most significant partners 		R&D centers and innovation labs: <ul style="list-style-type: none"> Triple-A aligned Geographic delivery spread: <ul style="list-style-type: none"> Triple-A aligned 	
Technology innovation	#				
Voice of the customer	#				

Consulting-led Triple-A Trifacta transformation leader with strong investment in digital innovation



Dimension	Rank	Strengths	Development opportunities
HFS Top 10 position	#3	<ul style="list-style-type: none"> Approach to Triple-A Trifacta services. KPMG's integrated automation, AI, and smart analytics teams reside within its Digital Lighthouse organization, which is designed to centralize digital capabilities and domain knowledge. It was established originally to focus on data and analytics capabilities, but it has evolved. Its most recent update added an intelligent automation platform competency to the mix. The Digital Lighthouse team partners across KPMG to integrate Triple-A Trifacta capabilities into offerings and develop new solutions aligned to its Digital Transformation methodology enabled by its connected, powered, and trusted framework. 90%+ of its Triple-A Trifacta resources are consultants. Key differentiators. KPMG follows a transformation approach for Triple-A Trifacta services. Its digital framework enables end-to-end management from strategy to implementation, including operational architecture, digital architecture, and governance. For example, its Connected Enterprise framework manages stakeholder management, business requirements, technology implementation, and customer journeys. KPMG has continued to invest in digital capabilities and has developed solutions that work across Triple-A Trifacta technologies, including Medical Device Management System, LIBOR Transition, and Client Due Diligence (customer credit risk for financial services clients). The firm has committed \$5 billion to further enhance innovation, people, technology, and partnerships. Ability to generate enhanced value with the Triple-A Trifacta. KPMG jointly develops success measures with clients. It follows a business-first perspective to solve a client's challenges to deliver business value around growth, risk, quality, and efficiency, creating an enhanced customer experience. For example, KPMG engaged with a large US healthcare company to improve call center staff's efficiency and service levels. It leverages the KPMG Intelligent Interactions solution to improve overall customer service, reducing call volumes, hold times, and talk time. Technology innovation. Its "Lighthouse COE" in its Innovation Group focuses on new technologies, creating new service offerings, and developing new capabilities. KPMG has Ignition and Insight Centers across 25+ countries and mobile Insight Centers and Virtual Insight Centers to fuel innovation. It has formalized 25+ micro-innovation projects to develop new use cases like AI-driven reconciliation and intelligent maintenance. KPMG also has partner-specific innovation centers such as the KPMG Google Innovation Lab team focused on research and technical solutions development leveraging Google technology. KPMG also has strong academic relationships for research and talent sourcing. Customer kudos. Clients describe KPMG as a trustworthy, flexible, and innovative partner with effective solutions that support service delivery excellence. Clients appreciate their patience and diligence in understanding requirements, which helps them design solutions fit for purpose. 	<ul style="list-style-type: none"> What we'd like to see more of. KPMG could develop more use-case and horizontal-specific solutions that can be re-purposed across client engagements. In line with this, it can tweak its Ignite platform promotion strategy beyond highlighting it as a cognitive platform to showcase industry and use-case coverage. It could also use more branding around the innovative solutions hosted by Lighthouse. It can also be more proactive in M&A for specific technology capabilities. What we'd like to see less of. Though KPMG has a business outcome-focused approach, it needs to demonstrate more synergy among the Triple-A Trifacta technologies for amplified outcomes with client examples. Customer critiques. Clients have sometimes found KPMG teams to be overly technical, which can fall flat when bridging the gap between technical and business conversations. Additionally, clients would like to see more domain and industry-specific tools and accelerators that support their specific needs and demonstrate leverageable best practices.
Ability to execute	#7		
Formalized Triple-A Trifacta service capabilities	#3		
Scale	#8		
Growth	#11		
Innovation capability	#3		
Strategy and vision	#3		
Ability to deliver business transformation	#2		
Technology innovation	#7		
Voice of the customer	#5		

Relevant Acquisitions and Partnerships	Key Clients	Operations	Flagship Internal IP and Technologies
<p>Acquisitions:</p> <ul style="list-style-type: none"> Recommender Labs (2019), RAV Holdings (2019), Adoxio Business Services (2018), Bookly.co (2018), AdviceRobo (2018), Rainmaker Labs (2018), DEVtalk/AXelia (2017) <p>Key partnerships:</p> <ul style="list-style-type: none"> AntWorks, Appian, Automation Anywhere, AWS, Blue Prism, BoostAI, BotXO, Celonis, Cogknit, DevelopDiverse, Google, IBM Watson, Ikarus, Informatica, Microsoft, Nuix, Oracle (Cloud), Outsystems, Salesforce, ServiceNow, Soul Machines, Tencent/Alibaba, Trintech, UiPath, Valuar.AI, Workday 	<p>Key clients include:</p> <ul style="list-style-type: none"> Siemens, Santander, AIG, Transamerica, Nissan North America, US retail bank, leading US health insurer, UK-based bank, German industrial company, leading Australian pension plan 	<p>Total number of data scientists: ~2,000</p> <p>R&D centers and innovation labs locations: 40</p> <p>Geographic delivery spread:</p> <ul style="list-style-type: none"> North America (50%) EMEA and UK (30%) APAC (15%) LATAM (5%) 	<ul style="list-style-type: none"> KPMG Ignite. AI platform with patented IP, accelerators, and pre-trained models. KPMG Sofy. An advanced, configurable, and ready-to-use data analytics platform with repeatable algorithms. KPMG Signals Repository. Platform bringing together multiple data sources, translated into over 65,000 signals to assist with prediction, recommendation, and decision-making. KPMG AI in Control. Framework and supporting tools to test AI-based algorithms for resilience, integrity, fairness, and explainability. KPMG Intelligent Platform for Automation (IPA). Internal storefront allowing staff to access pre-developed automations, analytics, and accelerators to support client delivery.



About the authors

HFS Research authors



Elena Christopher
Senior Vice President - Research
elena.christopher@hfsresearch.com

Elena Christopher is Senior Vice President – Research at HFS. Elena leads HFS’ coverage of Triple-A Trifecta change agents—AI, automation, and smart analytics. She is also responsible for driving the industry-specific research agenda for HFS, digging into the major trends impacting each in-scope industry and the implications for business process and IT services.



Reetika Fleming
Research Vice President
reetika.fleming@hfsresearch.com

Reetika Fleming is Research Vice President at HFS Research. Her research extends into defining future business operations for property and casualty, life, and annuities and reinsurance companies. She studies the broad use of data and analytics within enterprises, with a new research focus on machine learning and AI techniques to improve business decision making.

HFS Research authors



Tanmoy Mondal

Associate Director- Research

tanmoy.mondal@hfsresearch.com

Tanmoy Mondal is an Associate Director of Research at HFS, identifying global trends in engineering services from both industry & technology perspectives, tracking global outsourcing deals & investments including partnership agreements & R&D announcements in the sector and supporting the domain leads in secondary research, data analysis, PoVs and research writing.

About HFS Research

The HFS mission is to provide visionary insight into major innovations impacting business operations, including: automation, artificial intelligence, blockchain, Internet of things, digital business models, and smart analytics.

HFS defines and visualizes the future of business operations across key industries with our Digital OneOffice™ Framework.

HFS influences the strategies of enterprise customers to help them develop OneOffice backbones to be competitive and to partner with capable services providers, technology suppliers, and third-party advisors.

Read more about HFS and our initiatives on www.HFSresearch.com or follow [@HFSResearch](https://twitter.com/HFSResearch).

HFSResearch.com | [@HFSResearch](https://twitter.com/HFSResearch)

