



HFS Vision 2025: Research Agenda

**The New Dawn to become a
OneOffice Organization**

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HFS Vision 2025 - Research Coverage Areas

Visionary Insight into Pivotal Innovations Impacting the Global 2000 Enterprises

1. DIGITAL ONEOFFICE

2. CHANGE AGENTS

Triple-A Trifecta:

Robotic Process Automation (RPA)
Artificial Intelligence (AI)
Smart Analytics
Process Intelligence
Digital Associates

Cloud

Internet of Things (IoT)

Blockchain

3. FUNCTIONS

Business services:
Customer Engagement and CX
Employee Experience
Finance & Accounting (F&A)
Sourcing & Procurement
Supply chain

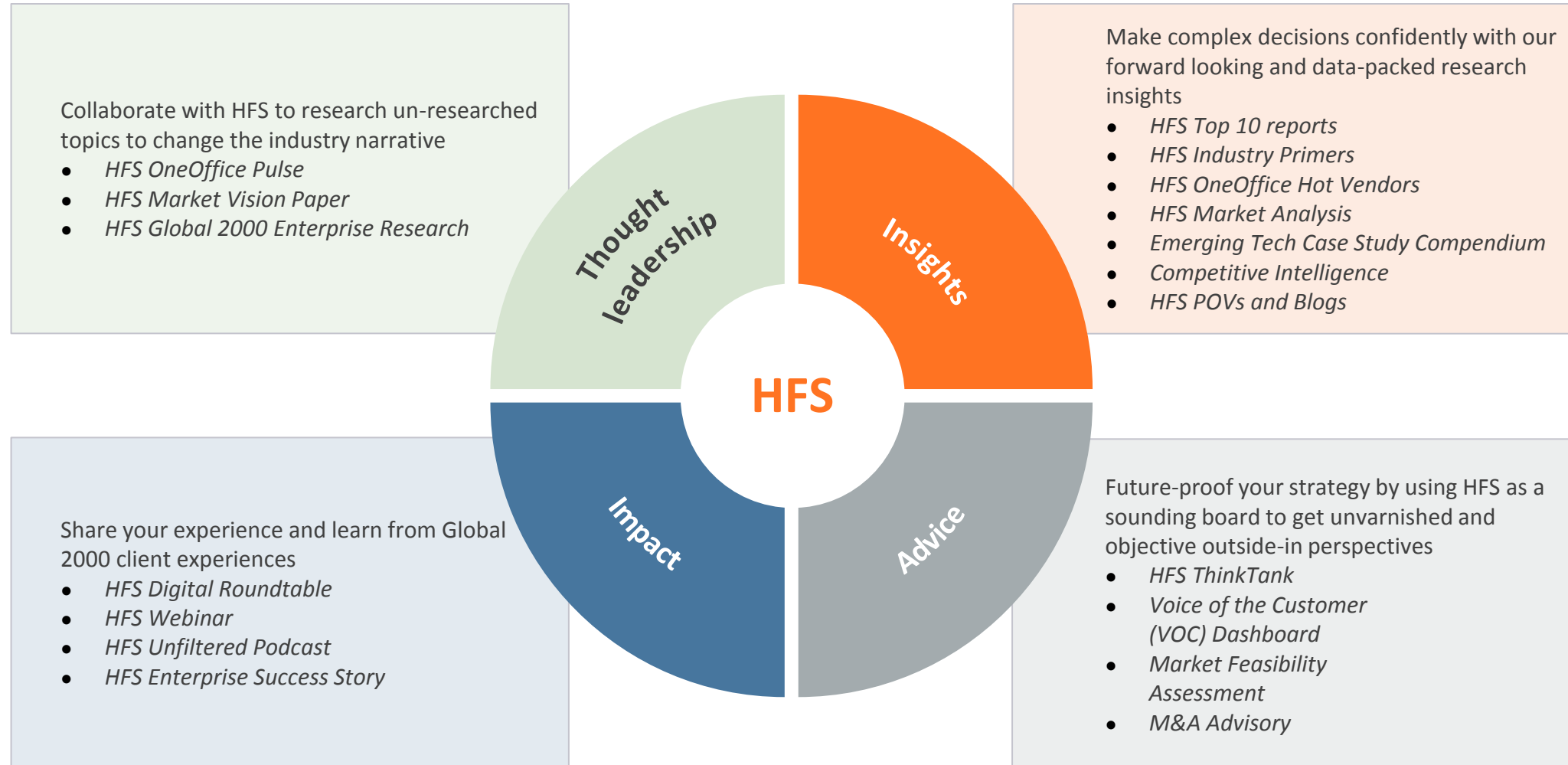
IT Services:
Hybrid and multi Cloud
Application modernization
Quality assurance
Digital trust / cybersecurity
SaaS services

4. INDUSTRIES

Banking & Financial Services
Insurance
Technology, Media & Telecom
Retail and CPG
Travel, Hospitality & Logistics
Energy & Utilities
Manufacturing
Healthcare & Life Sciences

5. NEXT-GEN DELIVERY MODELS. Localization, WFH, Crowdsourcing, As-a-Service

HFS Client Engagement Model



An aerial, grayscale photograph of a dense city skyline, likely New York City, featuring numerous skyscrapers. A prominent vertical orange bar is positioned on the left side of the image. Overlaid on the right side of the image is white text.

HFS Vision 2025
Research Theme:
The New Dawn to
Become
a OneOffice
Organization

HFS Vision 2025 – The New Dawn for Bold Enterprises

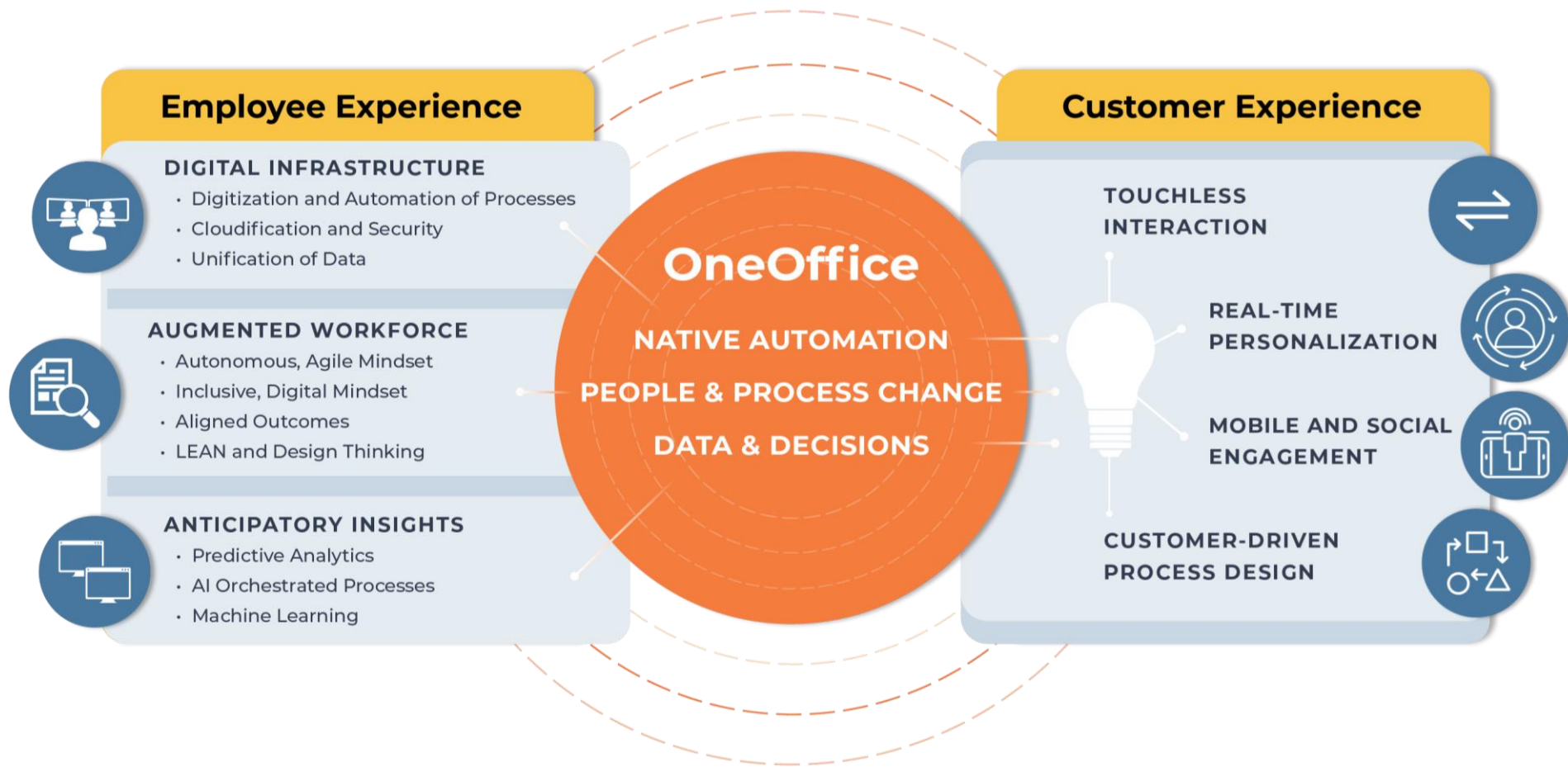
- HFS sees a New Dawn emerging as the fog of 2020 eventually clears. We have no choice but to embrace this emerging business world where a perfect alignment of business outcomes and their enabling technologies demands all our focus and creativity.
- We have no choice but to develop our employees' digital fluency to embrace change and better anticipate our customers' critical needs. We must collapse legacy corporate silos to align our customers, employees, and partners as "OneOffice," which creates outcome-oriented process chains that function in the Cloud.
- The HFS 2025 Vision represents the North Star for bold enterprises to design their organizations to thrive in this new era

The HFS 2025 Vision: Five Fundamentals of the OneOffice Organization



For more details, read the [HFS Vision 2025 report here](#)

Connect the front, middle, and back offices to deliver the “OneOffice Organization”



Seven Skills Attributes Making OneOffice Effective

	Appetite for Change Readiness and ability to embrace change
	Digital Fluency Ability to drive interplay between business and technology
	Initiative Readiness and ability to self-direct, self-motivate, and turn ideas into action
	Interaction The ability to constructively navigate feelings and approaches with oneself and others
	Problem-solving The thinking and processes behind finding solutions to difficult or complex objectives
	Social Influence Having an impact on others in the organisation, and displaying energy and leadership
	Values Guiding principles in attitudes and actions
Source: HFS Research 2020	

Emerging Tech is the Digital Enabler for OneOffice

The top-ranked objective of investments in emerging technologies

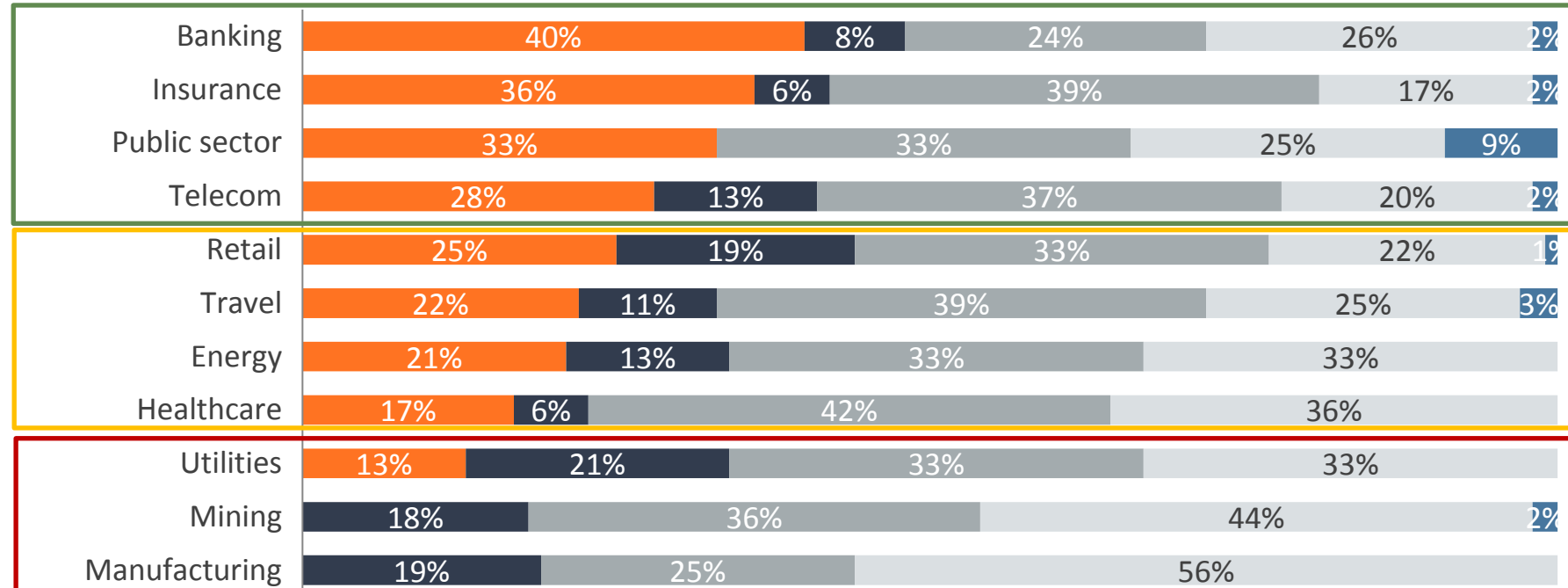
Emerging technology	Pre-COVID-19 (March-April 2020)	Post-COVID-19 (May-June 2020)
Process automation	Cost-reduction (10%), improve brand value (10%), top-line growth (10%)	Essential for future survival (31%)
Artificial intelligence	Cost-reduction (12%)	Essential for future survival (22%)
Smart analytics	Improve decision making (12%)	Essential for future survival (21%)
Hybrid or multi-cloud	Cost-reduction (12%)	Essential for future survival (20%)
Blockchain	Foundation for infrastructure modernization (10%), improve decision making (10%), cost-reduction (10%)	Improve competitive positioning (23%)
Edge computing	Improve brand value (12%)	Improve competitive positioning (20%)
5G	Essential for future survival (10%), improve decision making (10%)	Essential for future survival (22%)

Sample: 300 executives (May-June 2020, Phase II sample) and 600 executives (March-April 2020, Phase I sample) across Global 2000 enterprises
 Source: HFS Research in conjunction with KPMG

Industries are reacting differently – some are hunkering down to save costs, others are finding opportunities

What is the nature of the COVID-19 impact on your business?

% respondents



Industries finding opportunities as a result of the crisis and making investments

Industries still unclear on strategy for survival

Industries hunkering down and planning cost saving measures

- We see emerging opportunities as a result of this crisis and are making appropriate investments
- The situation is still unclear, and we are uncertain how this will change our priorities
- It is tentatively business as usual, but we are planning appropriate contingencies
- We are hunkering down and planning cost saving measures
- Others

Sample: 400 executives across global 2000 enterprises. Source: HFS Research 2020



Introducing the
HFS OneOffice Pulse
Don't just react to demand,
anticipate it.

Introducing the HFS OneOffice Pulse

Don't just react to demand, anticipate it.

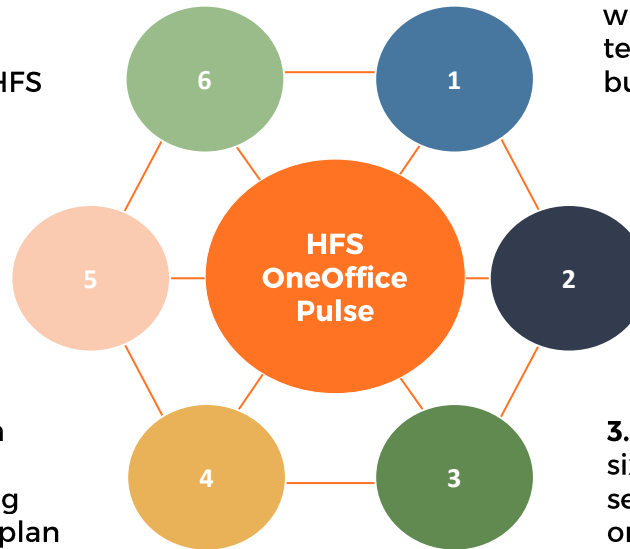
- HFS is launching a brand-new set of research products in 2021—the “HFS OneOffice Pulse,” envisioned to be the ultimate semi-annual guide to technology and business services.
- Organizations that will thrive in the pandemic economy must be in step with and ultimately anticipate customer requirements and expectations. They will need to become pre-emptive in every sense of the word. However, legacy research products rely heavily on sell-side data that have a lag effect when pinpointing emerging market demand trends. HFS OneOffice Pulse is designed to focus on anticipated demand changes for technology and business services.
- HFS OneOffice Pulse will be driven by an extensive survey and analyst interviews across 800+ global 2000 enterprise executives across our research coverage areas.

The OneOffice Pulse. Six-pack deliverables published every six months.

6. Tailored Advisory Sessions. HFS clients will also be able to understand differences by industry, geography, and size of the clients through customized advisory sessions with HFS analysts.

5. OneOffice Maturity Diagnostic will allow our enterprise clients to compare their OneOffice journey with 800 other enterprises across the 5 pillars of HFS Vision 2025 and engage with HFS analysts to understand emerging best practices.

4. Industry Snapshot Reports will focus on industry-specific drivers, challenges, IT and business services and adoption of emerging technologies by industry value chains. We plan to publish these reports for each of the 10 industries¹ covered by HFS.



1. The journey to the OneOffice. The semi-annual report will focus on current enterprise maturity across the 5 tenets of HFS Vision 2025: OneOffice philosophy, talent, business architecture, competencies, and strategy.

2. Outlook for technology and business services. The semi-annual report will focus on the adoption and investment priorities across emerging technologies, relative growth across IT and business services, and anticipated changes to consumption and delivery models.

3. Deep dive on the current hottest area. Every six months, we will focus on one of the hottest segments across our research coverage based on client demand. The first coverage area will be the **2021 state of “Cloudification.”**

1: Global industry coverage across banking & financial services; insurance; healthcare; life sciences; energy; utilities; technology, media & telecom; retail & CPG; travel, hospitality & logistics; and industrial manufacturing



HFS Research Agenda for 2021 Top 10 Reports

OneOffice| HFS 2021 Top 10 Research Agenda (1/5)

In 2021, we are launching a series of Top 10 reports that focus on each of the core elements of the OneOffice – Native Automation, People and Process, and Data & insights. The insights from each of these three Top 10s will be amalgamated to form a OneOffice Top 10.

Topic		2021			
		Q1	Q2	Q3	Q4
OneOffice	Top 10 Native Automation The Native Automation Top 10 covers services that leverage a range of emerging technologies to create intelligent and automated workflows in the cloud, enabling the new "native" standards for consistent cross-functional enterprise operations.		√		
	Top 10 People and Process Change The People and Process Change Top 10 focuses on how your organization is developing and managing talent and integrating process change capabilities across your entire services portfolio as you go to market.		√		
	Top 10 Data and Decisions The Data and Decisions Top 10 covers the array of services designed to help your clients create a culture of data that drives new opportunities through interactions, insights, and predictive capabilities, giving clients the ability to access data at a speed which drives critical decisions for their business		√		
	Top 10 OneOffice Services Assess service providers capabilities to realize the HFS OneOffice Vision 2025				√

Emerging technologies | HFS 2021 Top 10 Research Agenda (2/5)

Topic	2020	2021			
	Q4	Q1	Q2	Q3	Q4
Top 10 Triple-A Trifecta Services Assess service provider capabilities for integrated Automation, Analytics, AI.	√				
Top 10 Digital Associate Services Assess service provider capabilities for Digital Associates services.		√			
Top 10 Enterprise Blockchain Services Assess service provider capabilities for Enterprise Distributed Ledger Technologies (DLT) aka Blockchain services.			√		
Market Analysis on RPA Products in Latin America A regional report spotlighting the emerging RPA technology leaders in Latin America.			√		
Market Analysis on RPA Products in Asia Pacific A regional report spotlighting the emerging RPA technology leaders in Asia Pacific.			√		
Top 10 IoT Services Assess the IoT services capabilities of leading service providers.				√	
Top 10 Native Automation The Native Automation Top 10 covers services that leverage a range of emerging technologies to create intelligent and automated workflows in the cloud, enabling the new "native" standards for consistent cross-functional enterprise operations.			√		
Top 10 Data and Decision The Data and Decisions Top 10 covers the array of services designed to help your clients create a culture of data that drives new opportunities through interactions, insights, and predictive capabilities, giving clients the ability to access data at a speed which drives critical decisions for their business			√		
Top 10 Cloud Services Assessing service provider capabilities to lead transformation toward cloud native					√
Top 10 Artificial Intelligence (AI) Services Assessing service provider capabilities for evolving AI services.					√
Top 10 Industry 4.0 Services Assess the leading service providers and their Industry 4.0 services capabilities.					√

Emerging technologies

Business and IT services| HFS 2021 Top 10 Research Agenda (3/5)

Topic	2020	2021				
	Q4	Q1	Q2	Q3	Q4	
Business services	Top 10 Finance & Accounting (F&A) Services Assess the service provider capabilities across Procure-to-Pay (P2P), Order-to-Cash (O2C), Record-to-Report (R2R), and Financial, Planning & Analysis (FP&A).	√				
	Top 10 Digital Contact Center Services Assess the service provider capabilities for front office customer engagement operations.			√		
	Top 10 Supply Chain Management (SCM) Services Assess service provider capabilities across critical aspects of supply chain i.e., Planning and Design, Order Management, Inventory Management, Procurement and Sourcing, and Aftermarket Services.		√			
	Top 10 People and Process Change The People and Process Change Top 10 focuses on how your organization is developing and managing talent and integrating process change capabilities across your entire services portfolio as you go to market.			√		
	Top 10 Source-to-Pay (S2P) Services Assess service provider capabilities for end-to-end sourcing and procurement operations.				√	
	Top 10 Employee Experience Services Assess service provider capabilities for talent development strategy and development					√
	Top 10 Finance & Accounting (F&A) Services Assess the service provider capabilities across Procure-to-Pay (P2P), Order-to-Cash (O2C), Record-to-Report (R2R), and Financial, Planning & Analysis (FP&A).					√

Business and IT services| HFS 2021 Top 10 Research Agenda (4/5)

Topic		2021			
		Q1	Q2	Q3	Q4
IT Services	Top 10 Hyperscale Public Cloud Services Assess service provider capabilities across AWS, Google, Azure, and other hyperscale cloud providers	√			
	HFS Market analysis: Disruptive Hyperscaler Cloud Service Providers	√			
	Top 10 ServiceNow Services Assess the evolving ServiceNow ecosystem, expanding from the roots in ITSM toward broader enterprise service management.		√		
	Top 10 Workday HCM Services Assess service provider capabilities in Workday Human Capital Management	√			
	Top 10 Workday FM Services Assess service provider capabilities in Workday Financial Management		√		
	Top 10 Pega SaaS Services Assess service provider capabilities in Pegasystems		√		
	Top 10 SAP S4/HANA Services Assess service provider capabilities in SAP S4/HANA			√	
	Top 10 Apps Modernization / Agile Assessing the operationalization of distributed agile across the application development lifecycle with a strong focus on complex engagements such as outsourcing			√	
	Top 10 Salesforce Services Assess service provider capabilities in Salesforce				√
	Top 10 Quality Assurance Services Assess the testing of innovation such as automation and AI, but equally analyzing the application of innovation in offerings				√

Industry services| HFS 2021 Top 10 Research Agenda (5/5)

Topic		2020	2021			
		Q4	Q1	Q2	Q3	Q4
Industry services	Travel, Hospitality, and Logistics Industry Primer		√			
	Top 10 Healthcare Payer and Provider Services	√				
	Healthcare Industry Primer		√			
	Top 10 Telecom, High-Tech, and Media Services		√			
	Telecom, High-Tech, and Media Industry Primer			√		
	Top 10 Banking and financial services			√		
	Banking & financial services industry primer				√	
	Top 10 Retail & CPG Services				√	
	Retail and CPG Industry primer				√	
	Top 10 Energy services				√	
	Top 10 Utilities services				√	
	Energy Industry primer				√	
	Utilities services primer					
	Top 10 Insurance services				√	
	Insurance industry primer					√
Top 10 Life Sciences Services					√	

Note: HFS Industry Primers offer a comprehensive view of industry trends, including the HFS Industry Health Index, sector-specific business drivers and challenges, enterprise adoption trends for IT and business process services, supply-side trends in offerings and capabilities, and perspectives on the adoption and impact of emerging technologies.

HFS Research

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ARE TUNING IN
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A MONTH

For more information on HFS Vision 2025
email Vision2025@hfsresearch.com

- HFS is a unique analyst organization: We combine deep expertise with rapid, demand-side analysis of the Global 2000 to create a visionary narrative on the interplay between business operations and technology. We provide tailored, innovative insights to help you solve problems, make critical decisions, and realize long-term value on your journey to the new.
- The HFS OneOffice Organization is our vision for aligning business operations to customer, partner, and workforce interactions across an adaptive, digital environment. Our analysts provide insight into emerging skillsets and major innovations powering the OneOffice Organization, including Automation, Artificial Intelligence, Cloud, Digital Business Models, and Smart Analytics.
- HFS analysts are respected for their industry knowledge and no-nonsense insights, informed by demand side data and engagements with industry practitioners. Our bi-annual HFS OneOffice pulse study tracks demand trends over time across industry domains, horizontal services and technologies, so we always have our finger on the pulse of the market.