



Welcome to the OneEcosystem!

HFS Research Agenda, 2022

December 2021

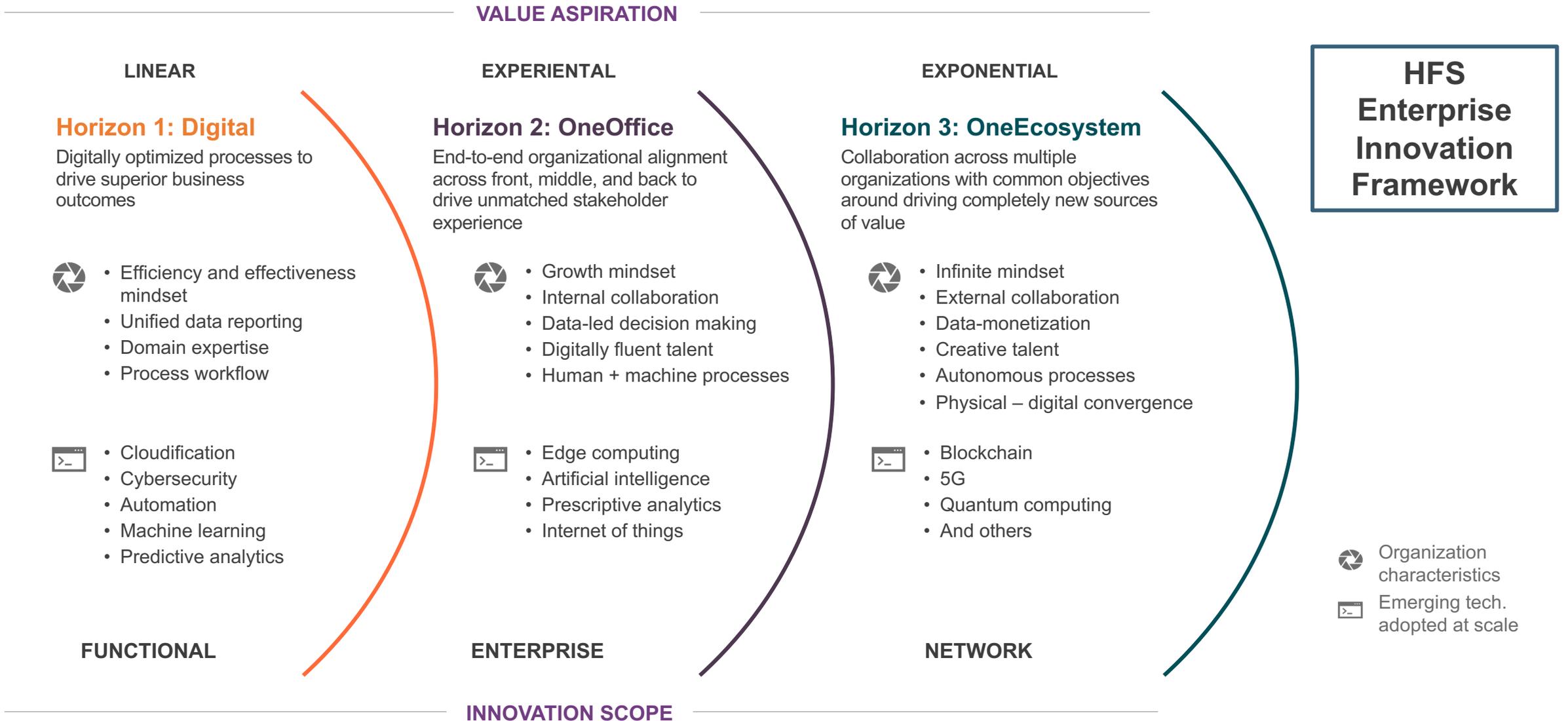
PRESENTED BY:

HFS Research Leadership Team

Welcome to the OneEcosystem!

- We are not so afraid of change as Horizon 3 unfolds before our eyes. The last 12 months were the most significant change in our lifetimes, but we are still standing. Change does not sound so scary anymore.
- Digital is now Horizon 1. Digitally optimized processes to drive superior business outcomes across our business functions is necessary for survival. Cloudification of our infrastructure, applications, and processes is now inevitable. Enabling technologies like process automation, machine learning, smart analytics are now proven, and the focus should be on scaling them across the enterprise.
- Despite significant progress in functional transformation, value continues to be leaked at the intersections. We need to look at our enterprise as a whole—not in silos. The OneOffice approach now resonates with practically 99% of enterprise leaders. End-to-end organizational alignment across front, middle, and back to drive unmatched stakeholder experience. While the digital narrative has been dominated by the technical debt in global 2000 enterprises, Horizon 2 is about resolving the process debt and the talent equation.
- Embracing change has also made us more ambitious as business leaders. Are we satisfied with slightly cheaper, slightly better, or somewhat faster, or are we searching for fundamental new sources of value? Horizon 3 initiatives that go beyond the walls of our own organization to collaborate across multiple like-minded organizations with common objectives are underway. Welcome to the OneEcosystem!
- We must adapt to AND leverage these market shifts to avoid the “oh crap, I wish...” moment down the line. ***Our 2022 research agenda is designed to help our clients anticipate the changes, not merely react to them.***

Horizon 3 is no longer ‘five years away’—it is unfolding right before our eyes.



HFS Research coverage areas

1. ENTERPRISE INNOVATION powered by OneOffice and OneEcosystem

2. REIMAGINED OPERATIONS

Finance and accounting (F&A)
Sourcing and procurement
IT operations
Supply chain
Sustainability
Employee experience (EX)
Customer experience (CX)
Digital contact centers
Digital sales and marketing

3. ENABLING TECHNOLOGY

Process automation
Process intelligence
Artificial intelligence (AI)
Data and decisions
Digital associates
Internet of things (IoT)
Blockchain
5G
Quantum computing

4. VIRTUAL ENTERPRISE

Cloud transformation
Cybersecurity
Application modernization
Quality assurance
Engineering services

5. SAAS BUSINESS VALUE

Cloud providers
Functional SaaS
Tool and development SaaS
Data, analytics, and AI SaaS
Productivity and collaboration SaaS

6. INDUSTRIES

Banking and financial services (BFS)
Insurance
Healthcare and life sciences
Energy and utilities
Technology and telecom
Travel, transportation, and hospitality
Retail and CPG
Industrial manufacturing

7. HFS PULSE. Designed to focus on anticipated demand changes for technology and business services and software

8. HFS HOT VENDORS. Exclusive group of emerging players, each with a differentiated value proposition for the OneOffice and OneEcosystem

2022 HFS Research Calendar

1. Enterprise Innovation

| Research report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|---|---|----|----|----|----|
| <p>Top 10 Snapshot: OneOffice services HFS' OneOffice services is designed to assess the digital transformation capabilities of services providers across the trio of core enabling capabilities, which represent the fundamental tenets of OneOffice:</p> <ul style="list-style-type: none">• Native automation• People and process• Data and decisions | Phil Fersht, Saurabh Gupta, Sarah Little, Elena Christopher, Reetika Fleming, David Cushman | ✓ | | | |

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2. Reimagined Operations (Page 1 of 2)

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|---|--|----|----|----|----|
| <p>Top 10 Report: Employee experience (EX) services Delivering superior employee experience (EX) is the catalyst for driving competitive advantage and deeper engagement across personal, social, and organizational domains. With an imperative for people, leaders are driving EX capability within HR and across the organization. This research examines how participating consultants and service providers are evolving their practices to support clients through the rapidly changing dynamics of employee experience services.</p> | Phil Fersht, Sarah Little | ✓ | | | |
| <p>Top 10 Report: Finance and accounting The HFS Top 10 finance and accounting service providers examines leading service providers across a defined series of innovation, execution, voice of the customer and OneOffice alignment criteria. The report highlights the overall rankings for all participants and the leaders for each sub-category. It focuses on ongoing third-party services as defined by our F&A value chain.</p> | Saurabh Gupta, Reetika Fleming, Hridika Biswas | | ✓ | | |
| <p>Top 10 Snapshot: Source-to-pay (S2P) A snapshot of sourcing and procurement services capabilities of leading F&A service providers, carved out from the F&A Top 10.</p> | Saurabh Gupta, Reetika Fleming, Hridika Biswas | | ✓ | | |
| <p>Top 10 Snapshot: Financial planning and analysis (FP&A) A snapshot of financial planning and analysis services capabilities of leading F&A service providers, carved out from the F&A Top 10.</p> | Saurabh Gupta, Reetika Fleming, Hridika Biswas | | ✓ | | |
| <p>Top 10 Report: Digital marketing A new market is emerging from the race to become “experience agencies,” driven by the need to create digital customer experiences. Social media advertising, understanding customer segments on the web and mobile apps, purpose marketing, personalization, and sales conversion all require speed, efficiency, and more relatable engagement. In this report, we analyze the top service providers in the market for these services today.</p> | Melissa O’Brien, Krupa KS | | ✓ | | |
| <p>Top 10 Snapshot: Digital marketing in banking and financial services (BFS) Leading digital market service providers for the BFS industry</p> | Melissa O’Brien, Krupa KS | | ✓ | | |

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2. Reimagined operations(Page 2 of 2)

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|--|------------------------------|----|----|----|----|
| Top 10 Report: Sustainability service providers Sustainability services providers across consulting, tech, execution, managed services, as well as their sustainability services embedded in broader portfolios—and a ranking of their internal sustainability as enterprises. | Josh Matthews | | | ✓ | |
| Top 10 Report: Supply chain Assessment and ranking of supply chain service capabilities of leading service providers across a defined series of innovation, execution, one office alignment and voice of the customer criteria. | Saurabh Gupta, Josh Matthews | | | | ✓ |
| Top 10 Snapshot: Order management Assessment and ranking of order management capabilities of leading service providers across a defined series of innovation, execution, one office alignment and voice of the customer criteria. | Saurabh Gupta, Josh Matthews | | | | ✓ |
| Top 10 Snapshot: Supply chain planning Assessment and ranking of supply chain planning capabilities of leading service providers across a defined series of innovation, execution, one office alignment and voice of the customer criteria. | Saurabh Gupta, Josh Matthews | | | | ✓ |

2022 HFS Research Calendar

3. Enabling Technology

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|---|------------------------------|----|----|----|----|
| <p>Top 10 Report: Industry 4.0 service providers Leading service providers in the smart manufacturing domain. The report focuses on emerging technologies enabling digital manufacturing. The research does not focus on horizontal IT and BPS services, PLM services, and enterprise services such as ERP implementation.</p> | Tanmoy Mondal, Mayank Madhur | | ✓ | | |
| <p>Top 10 Report: 5G service providers Assess how well service providers are helping their customers support and accelerate their transition to 5G networks and services.</p> | Ralph Diaz | | | ✓ | |
| <p>Top 10 Report: Process intelligence products The 2022 HFS Top 10 Process Intelligence Products report examines key technology vendors in this evolving market. HFS includes both process mining and discovery vendors into an umbrella term—"process intelligence"—focusing on the unifying outcome that these technologies provide to clients.</p> | Reetika Fleming, Sam Duncan | | | | ✓ |
| <p>Top 10 Snapshot: Process intelligence services A snapshot of the emerging services capabilities and practices evolving rapidly to wrap around the technology adoption of process intelligence products.</p> | Reetika Fleming, Sam Duncan | | | | ✓ |
| <p>Top 10 Report: Blockchain services A detailed assessment of the top services firms in the enterprise blockchain market, examining how they perform across execution and innovation, as well as their OneOffice alignment and voice of the customer.</p> | Sam Duncan, Saurabh Gupta | | | | ✓ |
| <p>Top 10 Snapshot: Blockchain platforms An assessment of the leading blockchain platforms from a B2B adoption perspective based on detailed conversations from users of these platforms; enterprise clients and solutions providers, as well as analysis of thousands of blockchain engagements.</p> | Sam Duncan, Saurabh Gupta | | | | ✓ |

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4. Virtual Enterprise (page 1 of 2)

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|--|--------------------------------|----|----|----|----|
| <p>Top 10 Report: S4 Hana A comprehensive study on SAP S/4HANA services, that analyses how services providers are helping clients in their transformation journey. The study deeply analyzes the provider's execution, innovation, VoC, and OneOffice capabilities across the value S4H value chain (i.e., assessment, migration/implementation, and managed services).</p> | Don Ryan, Martin Gabriel | ✓ | | | |
| <p>Top 10 Report: Application modernization Leading providers of applications modernization services based on execution, innovation, OneOffice, and Voice of Customer.</p> | Joel Martin, Martin Gabriel | ✓ | | | |
| <p>Formidable Challengers: Application modernization Challengers of applications modernization services based on execution, innovation, OneOffice, and Voice of Customer.</p> | Joel Martin, Martin Gabriel | ✓ | | | |
| <p>Top 10 Snapshot: Application modernization in banking and financial services An industry snapshot of how services providers are delivering applications modernization to banking and financial services customers.</p> | Joel Martin, Elena Christopher | | ✓ | | |
| <p>Top 10 Report: Security services The Top 10 Security Services study evaluates the capabilities of service providers across HFS Cybersecurity Services value chain than spans four core categories: advisory services, implementation services, operation services and continuous improvement services.</p> | Ralph Diaz, Mayank Madhur | | ✓ | | |

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4. Virtual Enterprise (page 2 of 2)

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|---|---|----|----|----|----|
| Top 10 Report: Cloud transformation An assessment of how service providers are delivering transformational outcomes, how they drive change, and how they are providing quality assurance for those outcomes. | Tom Reuner, Martin Gabriel, Saurabh Gupta | | ✓ | | |
| Top 10 Snapshot: AWS cloud transformation A snapshot assessment of how service providers are leveraging the AWS ecosystem to deliver cloud transformation. | Tom Reuner, Martin Gabriel | | ✓ | | |
| Top 10 Snapshot: Microsoft cloud transformation A snapshot assessment of how service providers are leveraging the Azure ecosystem to deliver cloud transformation. | Tom Reuner, Martin Gabriel | | ✓ | | |
| Top 10 Snapshot: Google cloud transformation A snapshot assessment of how service providers are leveraging the Google ecosystem to deliver cloud transformation. | Tom Reuner, Martin Gabriel | | ✓ | | |
| Top 10 Report: Software product engineering Assessment of leading service providers in the software product engineering services market including new product development, product sustenance, product testing, product deployment, product support, and product management services. | Tanmoy Mondal | | | ✓ | |

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5. SaaS for Business Value

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|---|-----------------------------|----|----|----|----|
| SaaS XXV End-user and services provider primary research into the convergence of software and services. Will include a ranking of the top 25 software vendors based on value creation for the customer. | Joel Martin, David Cushman | ✓ | | | |
| SaaS XXV Snapshot: Business operations SaaS providers List of the top software firms providing business value in business operations with a value ranking. | Joel Martin, David Cushman | ✓ | | | |
| SaaS XXV Snapshot: Data, AI, and process intelligence SaaS providers List of the top software firms providing business value in data, AI, and process intelligence with a value ranking. | Joel Martin, David Cushman | | ✓ | | |
| SaaS XXV Snapshot: Productivity and collaboration SaaS providers List of the top software firms providing business value in productivity and collaboration with a value ranking. | Joel Martin, David Cushman | | ✓ | | |
| SaaS XXV Snapshot: Tool and development SaaS providers List of the top software firms providing business value in business operations with a value ranking. | Joel Martin, David Cushman | | ✓ | | |
| Top 10 Report: ServiceNow services Analysis of service providers developing ServiceNow capabilities across a defined series of innovation, execution, and voice of customer criteria. | Tom Reuner | | | | ✓ |
| Top 10 Report: Salesforce services Analysis of service providers developing Salesforce capabilities across a defined series of innovation, execution, and voice of customer criteria. | Joel Martin, Martin Gabriel | | | | ✓ |

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6. Industries (Page 1 of 2)

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|--|------------------------------|----|----|----|----|
| Top 10 Report: Utilities An assessment of the utilities industry and its leading business and technology service providers across execution, innovation, OneOffice alignment, and voice of the customer. | Josh Matthews, Saurabh Gupta | ✓ | | | |
| Top 10 Report: Insurance services Ranking and profiling leading providers of services to global insurance carriers based on execution, innovation, OneOffice, and Voice of Customer. We cover property and annuities, life and annuities, reinsurance, brokers, and other intermediaries within the scope. | Reetika Fleming, Sam Duncan | ✓ | | | |
| Top 10 Report: Industry 4.0 service providers Leading service providers in the smart manufacturing domain. The report focuses on emerging technologies enabling digital manufacturing. The research does not focus on horizontal IT and BPS services, PLM services, and enterprise services such as ERP implementation. | Tanmoy Mondal, Mayank Madhur | | ✓ | | |
| Top 10 Report: Capital markets A detailed assessment of the top services firms supporting the capital markets segment of BFS across execution, innovation. OneOffice, and voice of the customer criteria. | Elena Christopher | | ✓ | | |
| Formidable Challengers: Capital markets Challenger services firms supporting capital markets segment of BFS | Elena Christopher | | ✓ | | |
| Top 10 Snapshot: Capital market by region - the best service providers for North America, Europe, and AP A geographic view of the leading service providers supporting capital markets firms | Elena Christopher | | | ✓ | |
| Top 10 Report: Retail banking A detailed assessment of the top services firms supporting the retail banking segment of BFS across execution, innovation. OneOffice, and voice of the customer criteria. | Elena Christopher | | | ✓ | |
| Formidable Challengers: Retail banking An assessment of up-and-coming challenger firms offering services to retail banks. | Elena Christopher | | | ✓ | |
| Top 10 Snapshot: North American regional and local banks Regional and local banks in North America are just as hungry for digital change and modernization as their global brethren. This report will assess the top services firms addressing unique needs of regional and local banks. Trickle down economics will not cut it! | Elena Christopher | | | ✓ | |

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6. Industries (Page 2 of 2)

| Research Report | Author(s) | Q1 | Q2 | Q3 | Q4 |
|--|--------------------------------|----|----|----|----|
| Top 10 Report: Healthcare providers Ranking and profiling leading providers of services to health systems and healthcare providers in the US based on execution, innovation, OneOffice, and voice of customer. | Rohan Kulkarni, Mayank Madhur | | ✓ | | |
| Top 10 Snapshot: Healthcare primary care Service providers that have a deeper level of expertise, focus and revenues in the primary care market. | Rohan Kulkarni, Mayank Madhur | | ✓ | | |
| Top 10 Snapshot: Acute and specialty care Service providers that have a deeper level of expertise, focus and revenues in the acute and specialty care segment. | Rohan Kulkarni, Mayank Madhur | | ✓ | | |
| Top 10 Snapshot: Post acute and rehabilitation Service providers that have a deeper level of expertise, focus and revenues in the post acute and rehabilitation care market. | Rohan Kulkarni, Mayank Madhur | | ✓ | | |
| Top 10 Report: Travel, transportation, and hospitality HFS' assessment of the leading service providers in the travel, transportation, and hospitality sectors | Melissa O'Brien, Mayank Madhur | | | | ✓ |
| Top 10 Report: Health plans Ranking and profiling leading providers of services to health plans in the US based on execution, innovation, OneOffice, and voice of customer. | Rohan Kulkarni, Mayank Madhur | | | | ✓ |