



Targeting Multi-Process HR Outsourcing

Market Analysis
Abstract

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Who Is This Report For?

NelsonHall's "Targeting Multi-Process HR Outsourcing" (MPHRO) report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within MPHRO
- Vendor marketing, sales and business managers developing strategies to target BPO service opportunities within MPHRO
- Financial analysts and investors specializing in the IT services and MPHRO sector.

Scope of the Report

The report analyzes the global market for MPHRO and addresses the following questions:

- What are the top drivers for adoption of MPHRO services?
- What are the benefits currently achieved by users of MPHRO services?
- What factors are inhibiting user adoption of MPHRO services?
- What is the average contract length for MPHRO, and how is this changing?
- What pricing mechanisms are typically used within MPHRO and how is this changing?
- What is the market size and projected growth for the global MPHRO market?
- What is the market size and projected growth for the MPHRO market by geography?
- What is the profile of activity in the global MPHRO by industry sector?
- Who are the leading MPHRO vendors by geography?
- What combination of services is typically provided within MPHRO contracts, and how is this changing?
- What is the current pattern of delivery location used for MPHRO, and how is this changing?
- What new developments have occurred in the last year and how is this changing?
- What are the challenges and success factors within MPHRO?



Key Findings & Highlights

NelsonHall's market analysis of the MPHRO industry and MPHRO trends consists of 82 pages.

The current MPHRO market continues to grow and is heavily focused on delivering administrative services, mainly payroll and HR administration, which will continue in the future as demand for cloud based HR systems increases. Attachment rates for ancillary services will be mixed and, if included, will focus on administrative support, with more organizations relying on RPO and LBPO specialists.

Approximately 52% of MPHRO contacts over the last two years were focused solely on the core bundle of HR administration, payroll, and employee helpdesk services.

The need to offer end to end MPHRO services is declining as demand for HR BPaaS increases, and organizations perceive that visibility will be greater and will allow them to take back certain administrative functions, mainly talent management and workforce development services, in-house with ease.

In the last 18 months, vendors have been developing their MPHRO offerings by launching or enhancing a cloud based HR service offering, which includes HR BPO services as a component. The main initiative for vendors in the next 12 months is to build out cloud based HR services, combining MPHRO with a SaaS platform and ramping up HR analytic capabilities.

Reducing costs while mitigating risks, including non-compliance, especially around payroll is the top driver for MPHRO. Implementing a new cloud technology structure is also an important driver among organizations, followed by obtaining greater transparency and visibility, including through enhanced analytics.

Desire to maintain the status quo, lack of support from executives and upper management, and the perceived risk in transitioning are the top barriers to MPHRO.

The MPHRO market is dominated by the private sector, with the public sector accounting for less than ~15% of the market. Top verticals for MPHRO are manufacturing, financial services and insurance, and business/professional services.

Contents

1. Changing Shape of Learning BPO
2. Customer Requirements
3. Market Size & Growth
4. Vendor Market Shares
5. Vendor Offerings
6. Delivery Capabilities
7. Vendor Targeting
8. Vendor Challenges and Success Factors

Report Length

82 pages, consisting of 9 chapters

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