Outsourcing becoming a necessity more than a need:

Evolving with the generations

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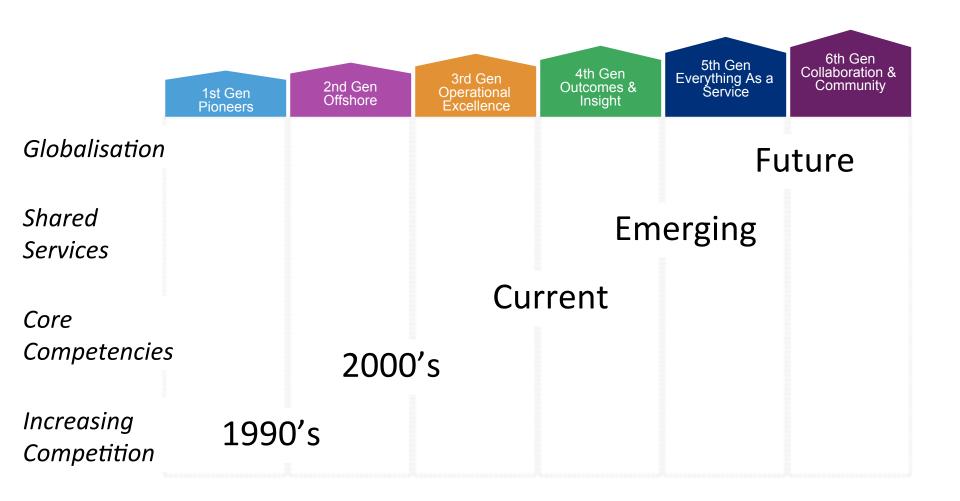
Global Services Forum May 28, 2013, Beijing

High performance. Delivered.

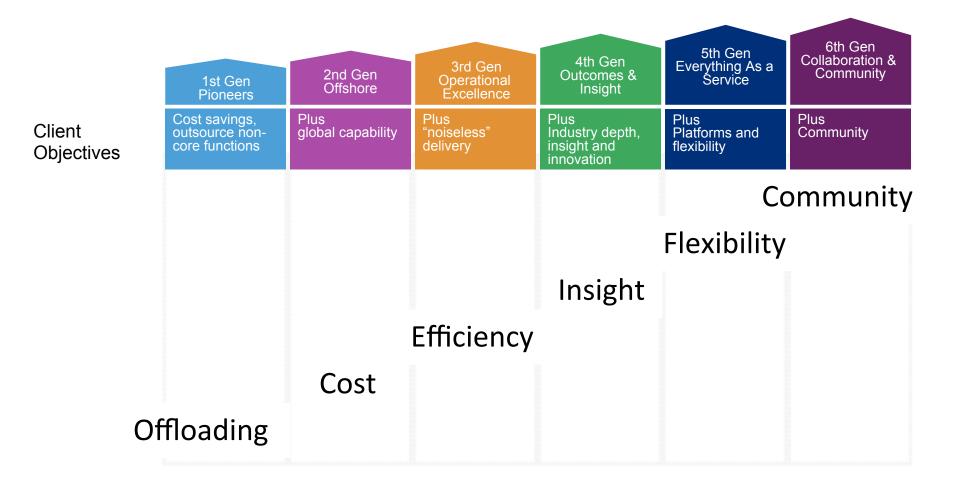


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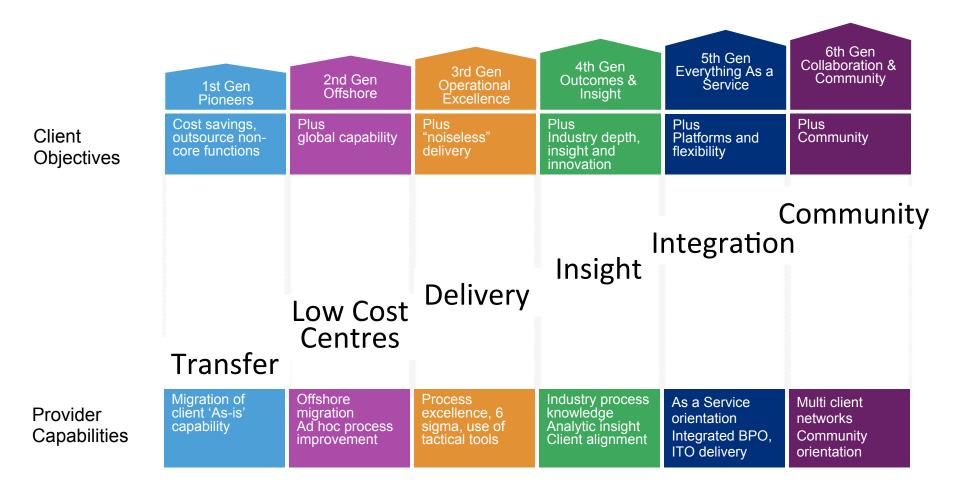
Evolution of Business Process Outsourcing



Evolution of BPO – Clients Perspective



Evolution of BPO – Providers Perspective



Evolution of BPO – Provider Evolution

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	1st Gen Pioneers	2nd Gen Offshore	3rd Gen Operational Excellence	4th Gen Outcomes & Insight	5th Gen Everything As a Service	6th Gen Collaboration & Community
Client Objectives	Cost savings, outsource non- core functions	Plus global capability	Plus "noiseless" delivery	Plus Industry depth, insight and innovation	Plus Platforms and flexibility	Plus Community
Offerings	Financial Services, F&A, HR	More back office and industry processes	Moving into the "middle office"	All "offices" with insight & industry focus	Offerings coupled with cloud based platforms	Scaled across industry and community
Deal	Pioneering mega deals with lift & shift focus	FTE-based focused on labor arbitrage	FTE-based with SLA's and limited gain sharing	Aligned to business outcomes to clients	Business outcome with embedded technology	Multi client consistency and end-customer charging
Platforms	Intend to use client platforms for 1:many	Client's own platforms	Client's own platforms plus provider tools	Broader use of providers tools and embedded analytics	Cloud based standardised applications and analytics	Broader use of collaboration and social media
Capabilities	Migration of client 'As-is' capability	Offshore migration Ad hoc process improvement	Process excellence, 6 sigma, use of tactical tools	Industry process knowledge Analytic insight Client alignment	As a Service orientation Integrated BPO, ITO delivery	Multi client networks Community orientation
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Implications for Buyers and Providers

Our research shows that high performers in BPO exhibit eight core management behaviors and practices



Thank you.