

HFS Top 10: Retail and CPG Services, 2022

Services shaping retail and CPG in 2021 and beyond

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Excerpt for Tech Mahindra



Retail and CPG firms have seen tremendous changes in the past 18 months. As the pandemic wanes, these industries are experiencing accelerated disruption and convergence, and they have been forced to pivot and shift like never before. Embracing change has made savvy retail and consumer packaged goods business leaders even more ambitious. They rely on their partner network to help tap new business models and create a connected ecosystem to unlock new sources of value.

Melissa O'Brien, Research Leader, HFS

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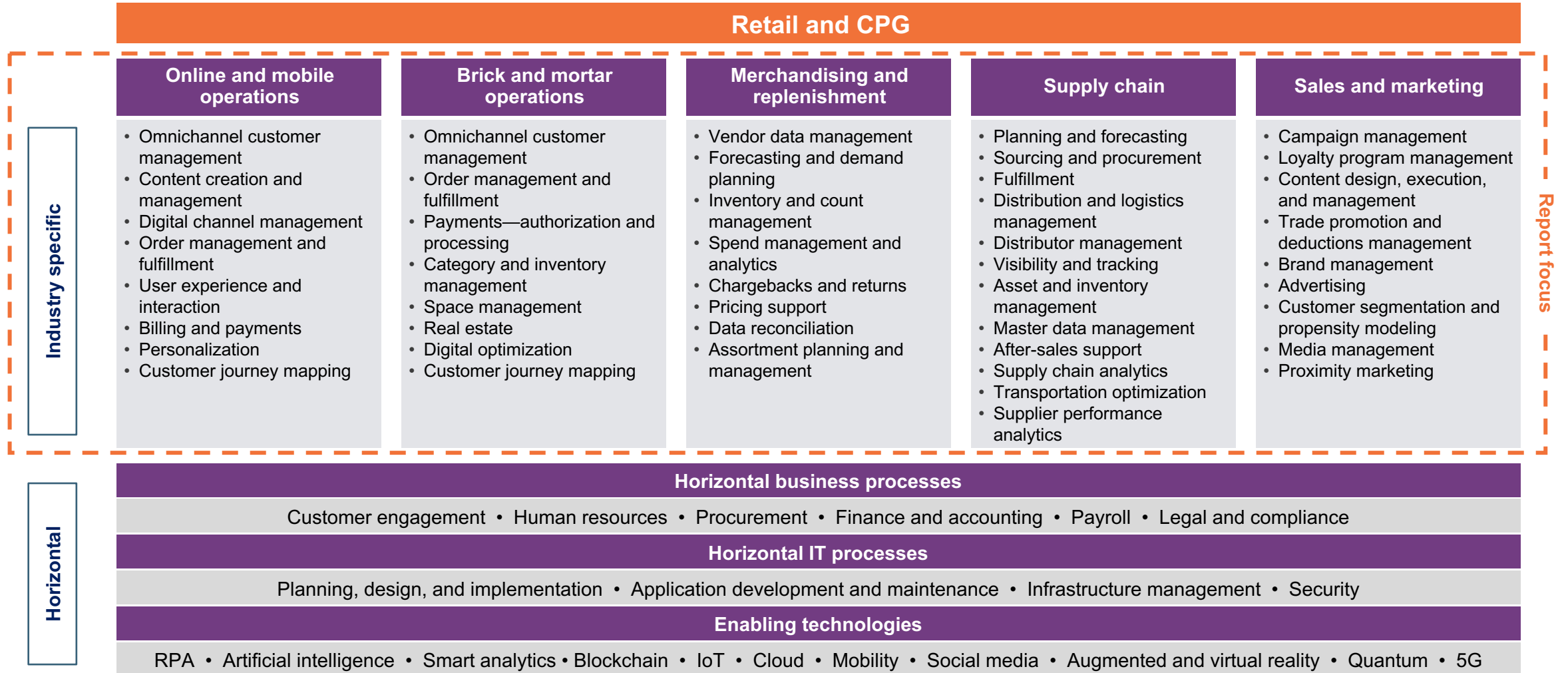
1

Introduction and definitions

Introduction

- The RCPG (retail and consumer packaged goods) sector is enabling much of the innovation and change occurring across all industries with its products and services while simultaneously pivoting businesses to ensure they remain relevant and competitive. There is immense pressure on established tech firms to become nimbler, while digital natives are expected to stay ahead of the curve. In either case, it takes a substantial ecosystem to achieve success.
- The *HFS Top 10: Retail and CPG Services* report examines service providers' role in the evolving *Retail and CPG* industry. We assessed and rated the industry-specific service capabilities of 12 service providers across a defined series of innovation, execution, HFS OneOffice (slide 9) alignment and voice of the customer criteria. The report highlights the overall ratings for all 12 participants and the top 10 leaders for each subcategory.
- This report also includes detailed profiles of each service provider, outlining their overall and subcategory rankings, provider facts, and detailed strength and weaknesses.
- The report focuses on industry-specific capabilities for the *Retail and CPG* sector, as defined in our RCPG operations value chain. It does not focus on horizontal IT services or BPS (business process services) such as application management or finance and accounting outsourcing, which may be delivered to *Retail and CPG* clients.

Retail and CPG operations value chain



The retail and CPG operations value chain defined (1 of 2)

HFS developed the industry value chain concept to graphically depict our understanding of the processes and functions that specific industries engage in to operate their businesses.

HFS' industry value chain for retail and CPG operations provides a comprehensive overview of services for the retail and CPG industries. **Industry-specific processes** include the following specific value chain functions:

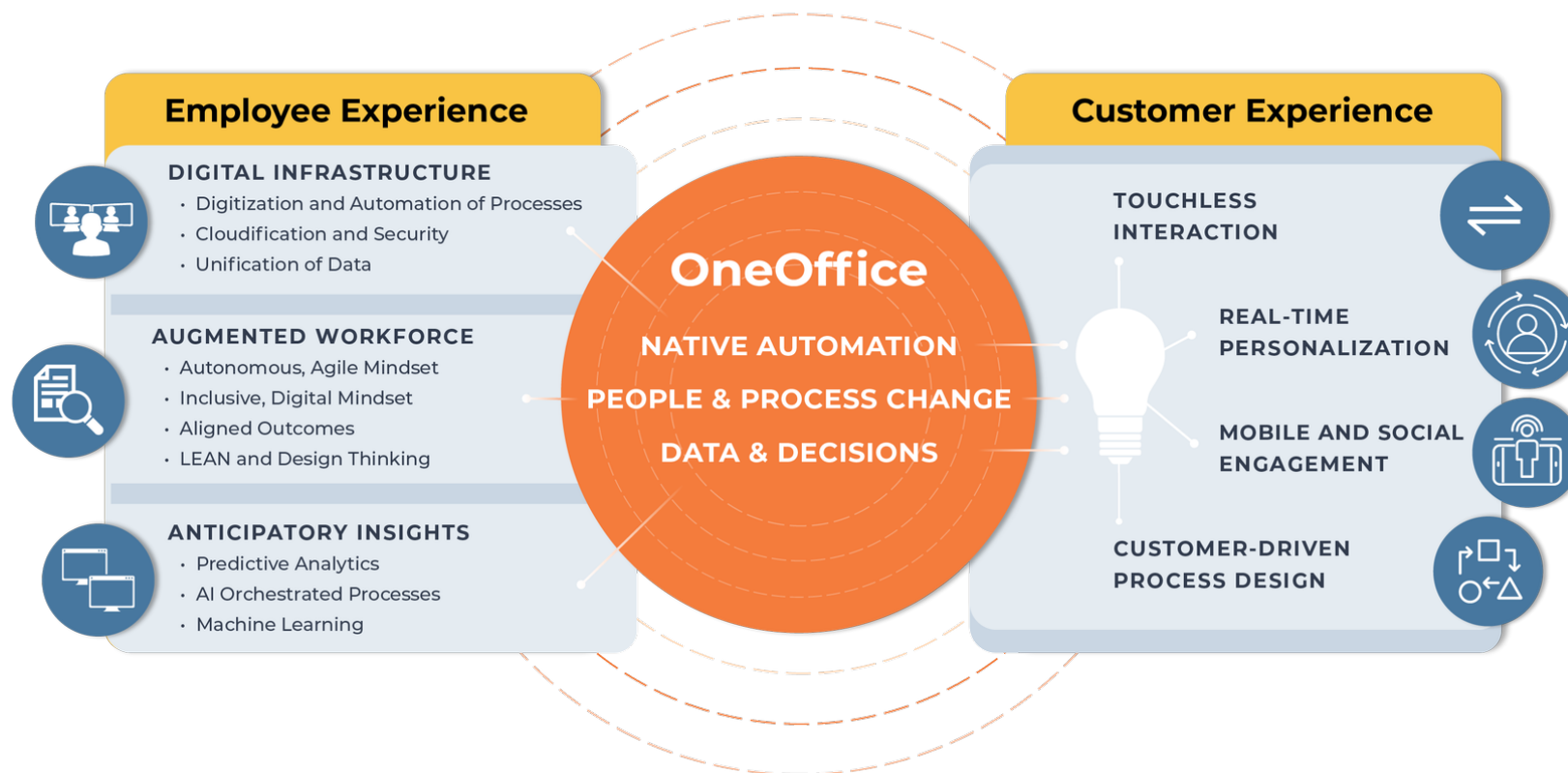
- **Online and mobile operations**—Services focused on the set-up, operations, and optimization of online and mobile retail sales;
- **Brick and mortar operations**—Services focused on the set-up, operations, and optimization of physical retail store locations;
- **Merchandising and replenishment**—Processes focused on the planning and management of inventory;
- **Supply chain**—Various services designed to manage the supply of products or services to be sold through retail channels;
- **Sales and marketing**—Processes focused on enabling the promotion and sale of products and services through retail channels.

The retail and CPG operations value chain defined (2 of 2)

- **Enabling technologies**—So much of the change that is taking place in retail and CPG is driven by enabling technologies, which include elements such as RPA (robotic process automation) and AI (artificial intelligence), and blockchain. We view them as horizontal as they can be used across RCPG enterprises and leveraged for horizontal and industry-specific processes. Our research on these topics will focus on how they are used in retail and CPG, which service providers are bringing them to the table, and what real business impact is being realized.
- **Horizontal IT and business processes**—Enterprises in all sectors have a range of consistent business and IT processes essential to running their businesses but executed similarly regardless of industry. We refer to these as horizontal processes, and we segmented them by IT and business functions on Slide 6. Horizontal business processes include customer engagement and HR. IT processes include application development and infrastructure management. Our industry-specific coverage of these areas will focus on instances where something unique has been developed for the industry, such as cloud-based trade promotion services or personalized offers enabled by IoT beacons (such as proximity marketing). In addition to industry coverage of these horizontal topics, they will also be well covered as part of our functional research dimension.

The HFS OneOffice™—digital transformation in action

The HFS OneOffice™ is our vision for actionable digital transformation. At its heart is the core concept that emerging technologies combined with people, process, and data innovation can break down the silos that limit our success, dissolving barriers between the front and back office to create the only office that matters—OneOffice. It represents a mindset shift to collaborative cross-functional enterprise operations powered by an integrated stack of emerging tech that complements your core, natively automates your processes, enables your employees and customers, and powers your decisions—breaking down your legacy silos in the process.



2

Executive summary

Executive summary

- **Most RCPG services value chain elements are growing, with supply chain, data, modernization, and customer experience (CX) (particularly digital marketing) leading the way.** Retailers have been dealing with a whole new competitive landscape and consumer-expectation set since the pandemic. They've been tasked with rewiring their businesses, and they need help across the value chain—most importantly with supply chain, data, modernization, and customer experience.
- **CX, revenue, and profit are the most important initiatives for RCPG executives.** Customer experience trumps even revenues and profit as the top objective for business operations transformation over the next three years.
- **Talent remains the top challenge and barrier to transformation for RCPG firms.** Retail and CPG firms are challenged to completely re-imagine their workforces to be more diverse, agile, safe, and empowered employees. Talent management is the most significant challenge RCPG firms see going into 2022.
- **COVID-19 accelerated many RCPG trends, including direct-to-consumer (DTC) and e-commerce.** E-commerce spikes have redefined the ecosystem, and DTC is arguably the most significant paradigm shift to influence operating model and ecosystem changes.
- **Sustainability is now a key determinant of brand value.** Retail and CPG firms are advancing their efforts to combine operational efficiency with social and environmental responsibility. Much of this is driven by consumers' expectations. Consumers are much more demanding about the transparency of the brands they patronize, and they are concerned about the impact of environmental, social, and governance factors.

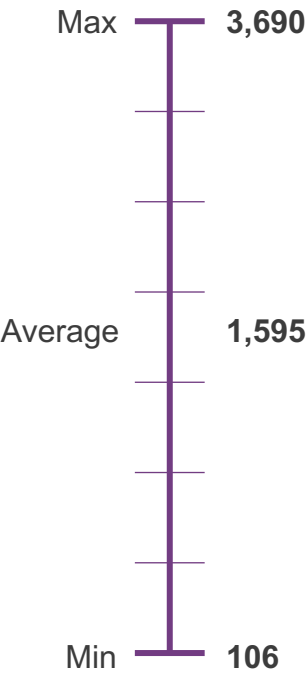
Key service offerings for retail and CPG firms in 2021–2022

Rank	Offering	Analysis
1	Connected supply chain	RCPG firms are more focused than ever on optimizing the supply chain to contain costs and mitigate disruption.
2	Data and analytics	As a result of pandemic-induced pressures, RCPG firms have less confidence in accurate forecasting and seek partners' help for more visibility into their operations, supply chains, and customers.
3	Customer experience	Customer experience is a top initiative for executives in their quest to stay competitive.
4	Digitalization and modernization	RCPG firms are looking to make the most of prior investments to ensure they're pursuing digitalization in the front and back offices.
5	Digital marketing	Direct-to-consumer and e-commerce acceleration have made it even more important for RCPG firms to understand their customers and tailor products and messages to their preferences. One piece is the ever-evolving landscape of digital marketing and the opportunities it presents to reach customers in new ways.

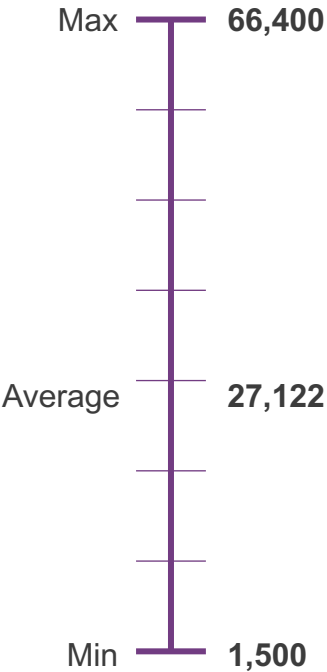
Retail and CPG | Benchmarking

Revenue

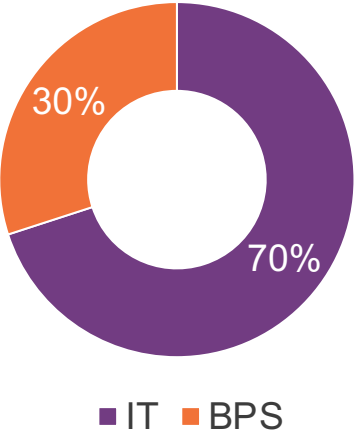
In US\$ million



Full-time Employee count



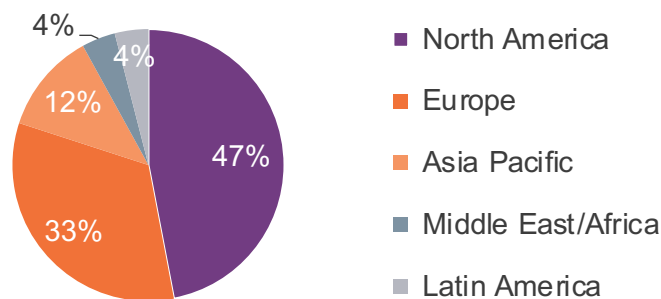
IT/BPS revenues



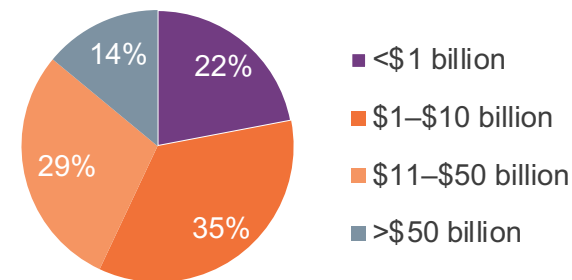
Source: 12 Service providers profiled in 2021 RCPG Top 10

Retail and CPG | Benchmarking

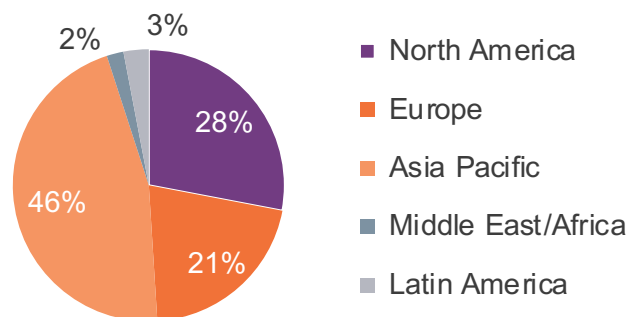
RCPG clients by Geography



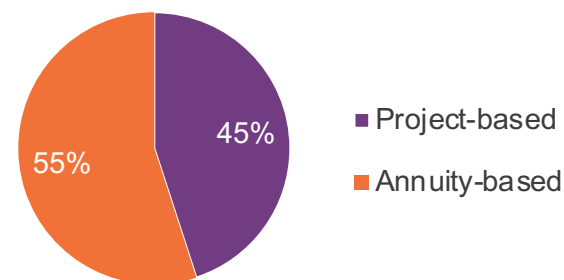
RCPG clients by revenue size



RCPG delivery location by geography



RCPG revenue type breakdown



Source: 12 Service providers profiled in 2021 RCPG Top 10

Retail and CPG services are the most mature, with limited greenfield opportunities

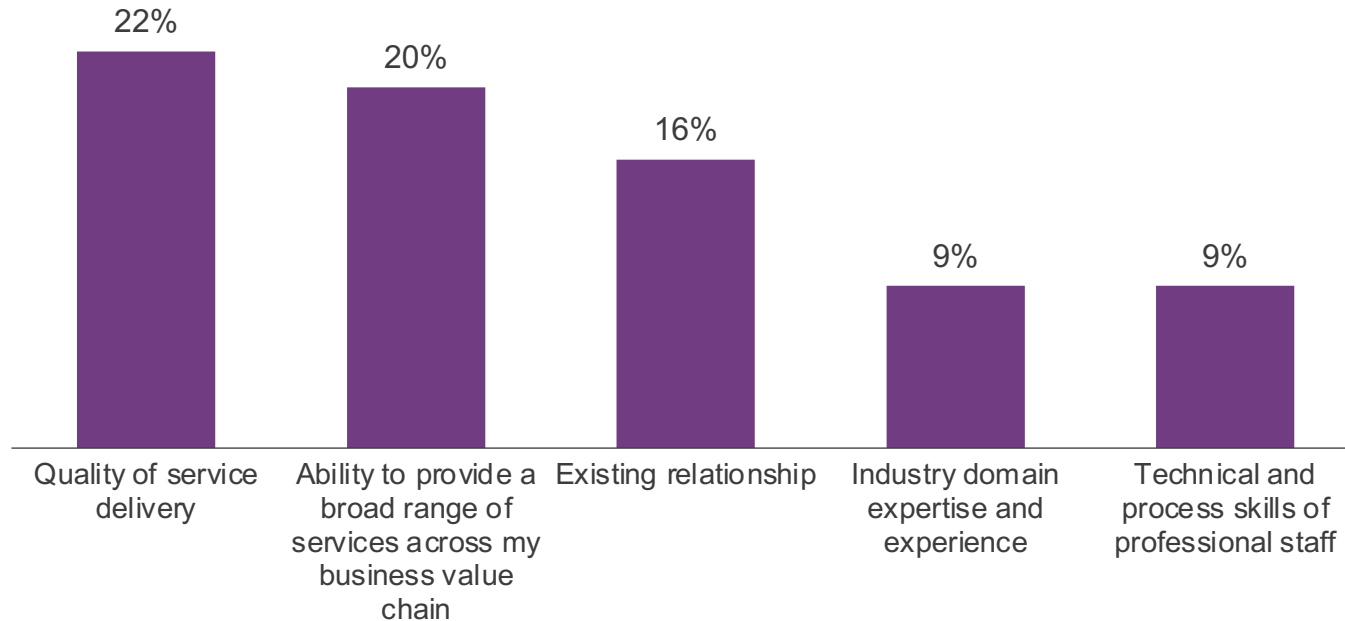
Relative maturity of RCPG-specific services



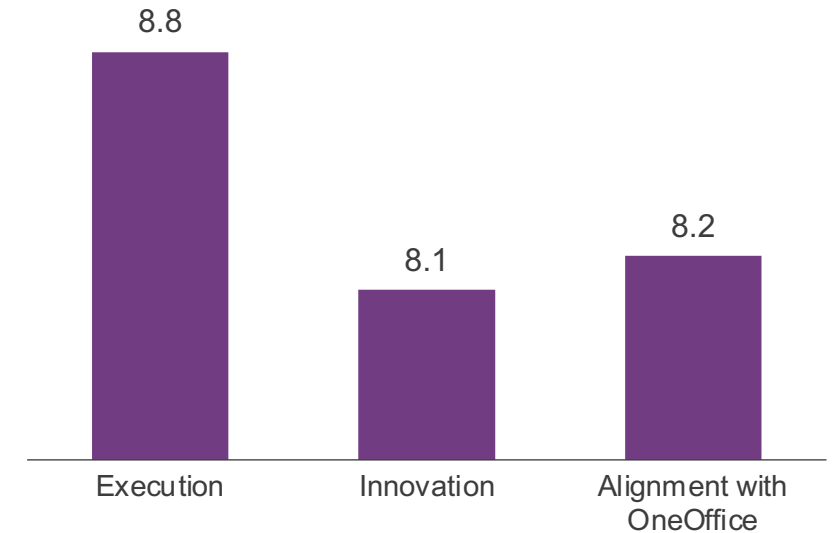
Based on assessment of RCPG offerings of 12 service providers
Source: HFS Research, 2021

Retail and CPG firms pick their service partners based on execution criteria, not innovation potential

What is the single-most important factor when selecting a service provider?
(top five responses)



RCPG enterprise satisfaction with their service providers
(1–10 scale)

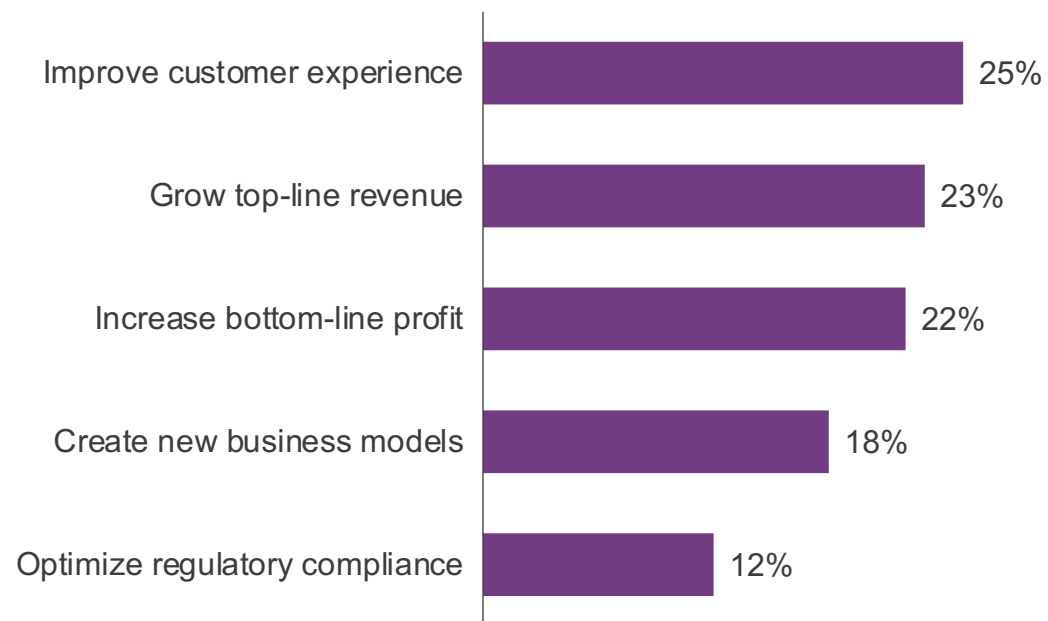


Source: HFS Research 2021
Sample: n = 46

Improving customer experience remains the top-most objective for retail and CPG firms

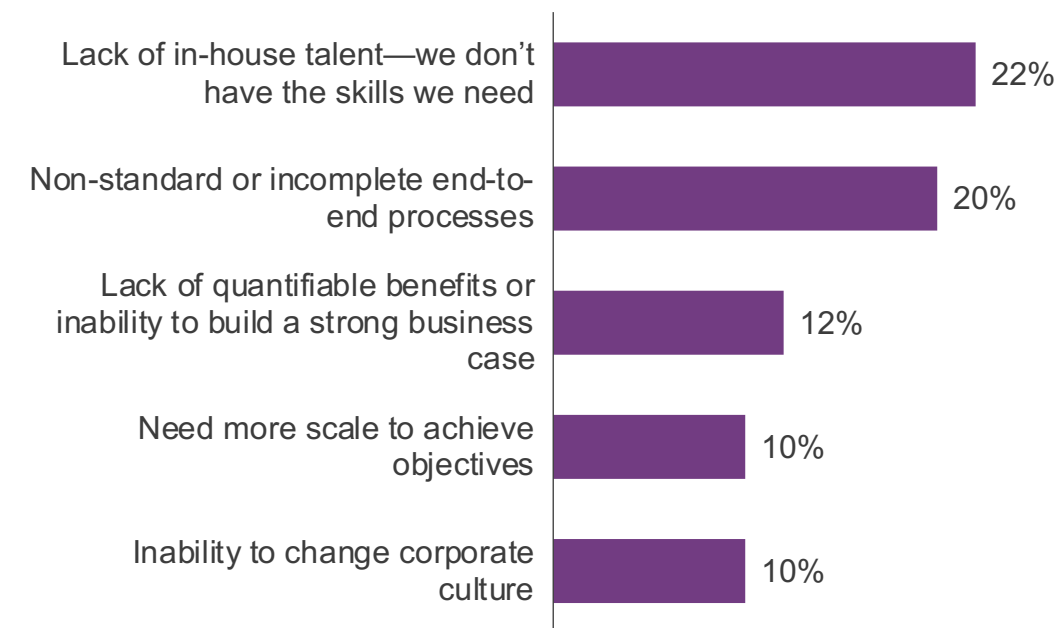
Please rank the following statements about your organization's objectives for business operations transformation over the next three years.

(rank all the options)



What are the top three inhibitors that are holding you back from achieving your digital transformation objectives?

(top five responses)



Source: HFS Research 2021
Sample: n = 45 RCPG executives

Demand is increasing across the retail and CPG services value chain

- We asked the 12 service providers profiled in this report to assess the change in demand for their services across the RCPG value chain over the past 12 months from +2 (a significant increase) to -2 (a significant decline).
- Demand is increasing across the whole value chain. The fastest growth in demand is for online and mobile operations and metering and supply chain.
- There is standout growth for omnichannel customer management.

Services demand is increasing across the value chain

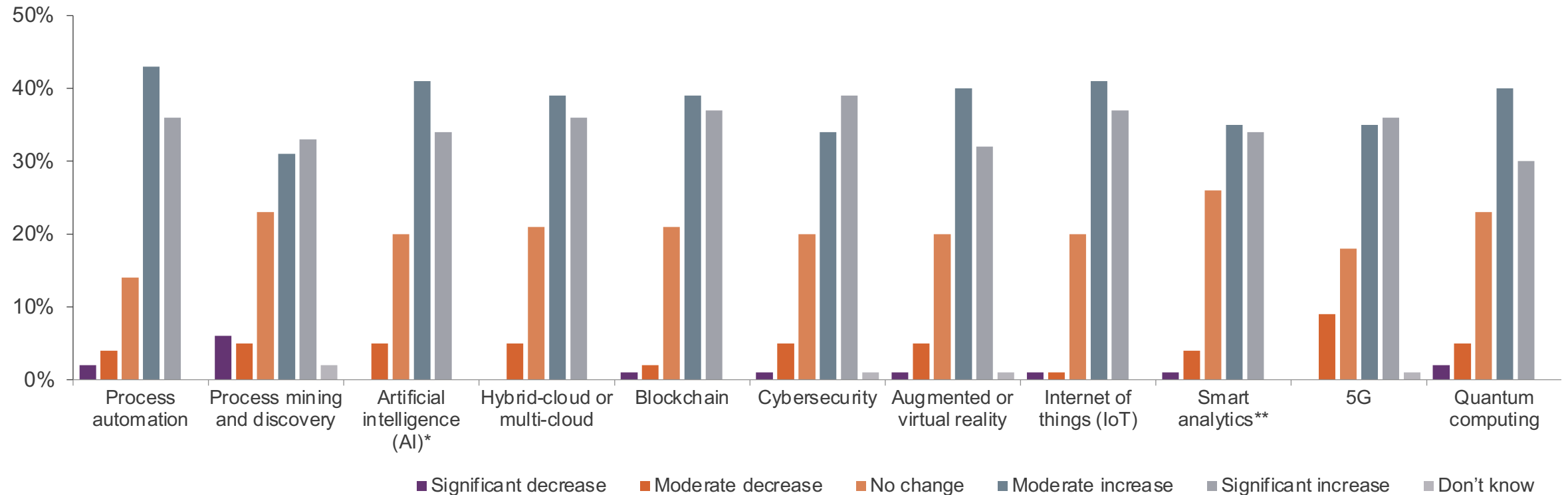
Online and mobile operations		Brick and mortar operations		Merchandising and replenishment		Supply chain		Sales and marketing	
Average	1.7	Average	1.4	Average	1.3	Average	1.6	Average	1.2
Omnichannel customer management	1.8	Omnichannel customer management	2.0	Vendor data management	1.1	Planning and forecasting	1.8	Campaign management	1.3
Content creation and management	1.7	Order management and fulfilment	1.8	Forecasting and demand planning	1.8	Sourcing and procurement	1.7	Loyalty program management	1.1
Digital channel management	1.9	Payments—authorization and processing	1.5	Inventory and count management	1.3	Fulfilment	1.8	Content design, execution, and management	1.6
User experience and interactions	1.9	Category and inventory management	1.7	Spend management and analytics	1.3	Distribution and logistics management	1.8	Trade promotion and deductions management	1.3
Order management and fulfilment	1.9	Space management	0.5	Chargebacks and returns	1.0	Distributor management	1.4	Brand management	1.2
Billing and payments	1.2	Real estate	0.2	Pricing support	1.1	Visibility and tracking	1.8	Advertising	0.5
Personalization	1.6	Digital optimization	1.8	Data reconciliation	1.4	Asset and inventory management	1.4	Customer segmentation and propensity modeling	1.5
Customer journey mapping	1.8	Customer journey mapping	1.8	Assortment planning and management	1.1	Master data management	1.3	Media management	0.7
						After-sales support	0.7	Proximity marketing	0.6
						Supply chain analytics	1.9		
						Transportation optimization	1.3		
						Supplier performance analytics	1.4		
						Inventory optimization	1.8		

Source: HFS Research, 2021

Sample: 12 leading RCPG service providers covered in this report

Retail and CPG emerging technology is prevalent across the board

How do you see investments changing for these technologies over the next 12 to 18 months?



*Including machine learning, deep learning, computer vision, NLP/NLG

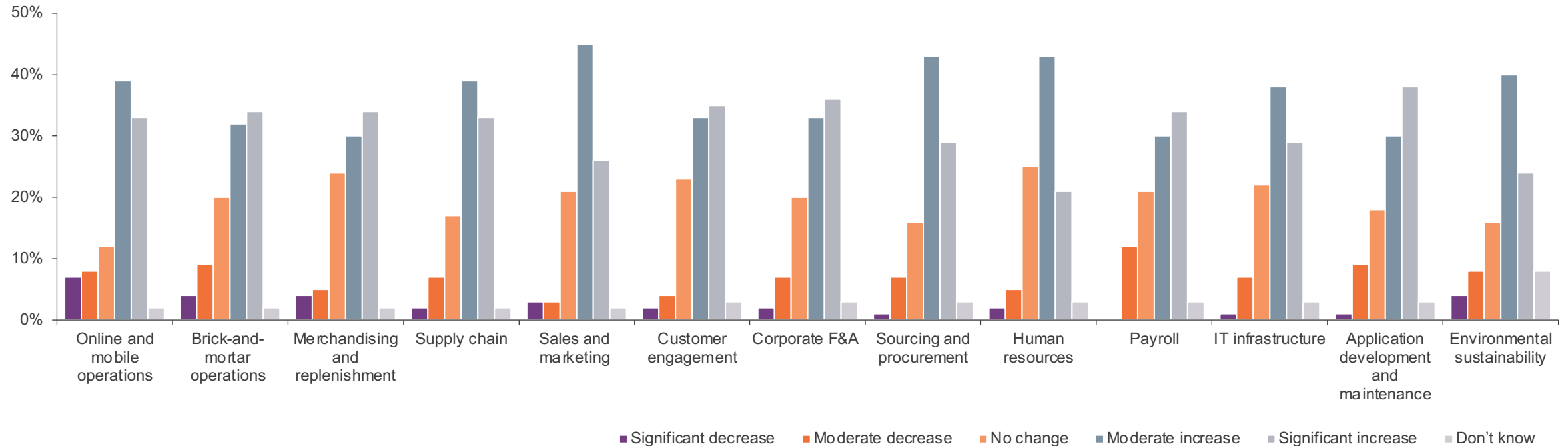
**Predictive and prescriptive analytics

Sample: 84 Global 2000 RCPG enterprise leaders

Source: HFS OneOffice™ Pulse Study, May 2021

Various factors across the value chain drive emerging technology adoption

How do you expect the adoption of emerging technologies to change across your industry's value chain in the next 24 months?



Sample: 84 Global 2000 RCPG enterprise leaders
Source: HFS OneOffice™ Pulse Study, May 2021

3

Research methodology

Service providers covered in this report

 **accenture**

Capgemini 

Cognizant

 **genpact**

HCL

Infosys[®]
Navigate your next

 **Mindtree**
Welcome to possible

LTI

tcs **TATA**
CONSULTANCY
SERVICES

Tech
Mahindra

 **wipro**

WNS

Sources of data

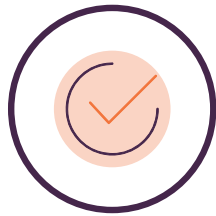
This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the RCPG service capabilities of the service providers covered in our study. Sources are as follows:



RFIs and briefings

Each participating vendor completed a detailed **RFI**.

HFS conducted **briefings** with executives from each vendor.



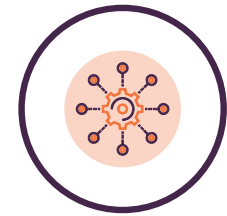
Reference checks

We conducted **reference checks with 50+ active clients** of the study participants via detailed surveys and phone-based interviews.



HFS vendor ratings

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh from the field HFS Pulse Study data featuring **~290 vendor ratings from enterprises using Retail and CPG services**.



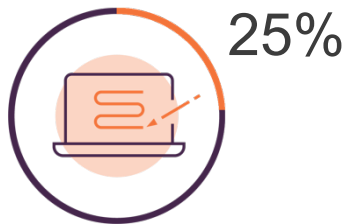
Other data sources

Public information such as press releases, and websites.

Ongoing interactions, briefings, virtual events, and other sources, with in-scope vendors and their clients and partners.

How we assessed service providers for this Top 10 study

The study evaluates the capabilities of providers across the [RCPG value chain](#) based on execution, innovation, voice of the customer (VOC), and a new criteria in 2021, alignment with the [HFS OneOffice model](#)—our vision for digital transformation. Details include



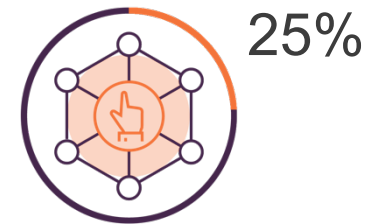
Execution

- **Breadth and depth:** Formalized Retail and CPG capabilities and offerings, leadership, domain and functional experience, delivery abilities.
- **Scale of native automation business:** RCPG resources, talent cultivation, geographic coverage, industries covered, number of clients, RCPG revenue and revenue contribution, scale of client engagements.
- **Growth of RCPG business:** Year-on-year revenue growth, client growth, resource growth, RCPG offering expansion.



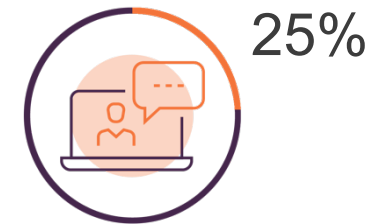
Innovation

- **Strategy and vision:** Vision for the RCPG business, credibility of growth strategy and roadmap, identifiable investments in strategy, clear articulation of value proposition.
- **Technology innovation:** Cultivation of internal IP, patents, RCPG solution combos, use of best-of-breed partner tech, start-up ecosystem approach, investment in R&D.
- **Co-innovation and collaboration:** Co-development approaches with RCPG clients, co-innovation centers, creative commercial models.



OneOffice alignment

- **Alignment with the HFS OneOffice model:** Ability to help RCPG clients connect the front, middle, and back offices and realize transformation potential.
- **Internal OneOffice alignment:** Vendor's internal alignment with OneOffice.
- **One face to the customer:** Vendor's ability to represent its full capabilities to its clients.
- **Change management and digital fluency:** Formal approach to change management, ability to drive digital fluency internally and externally.

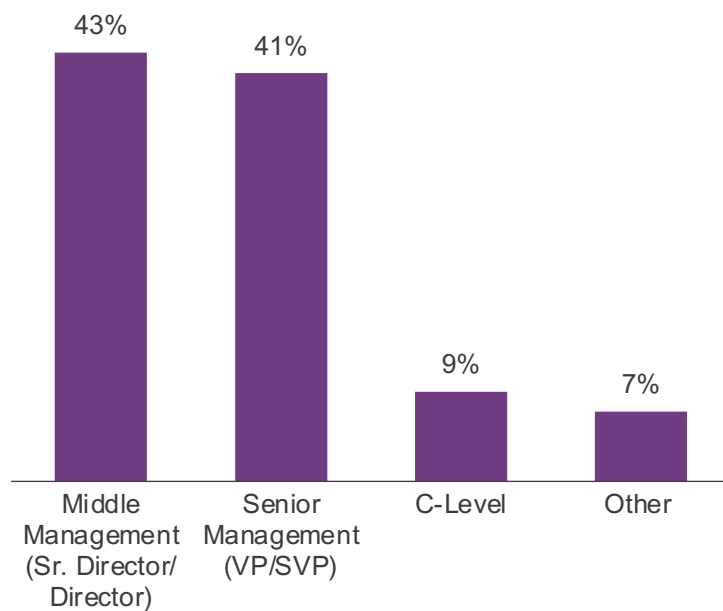


Voice of the customer

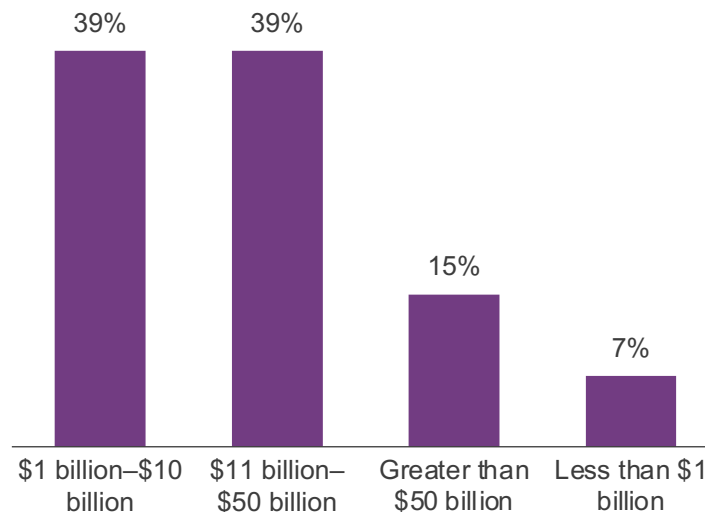
- **Reference checks:** Direct feedback from enterprise clients via reference check interviews and surveys.
- **HFS voice of the customer vendor rating data:** Ratings by active RCPG clients of in-scope service providers.
- **Referenceability:** Provision of references and reference responsiveness.

Client reference demographics

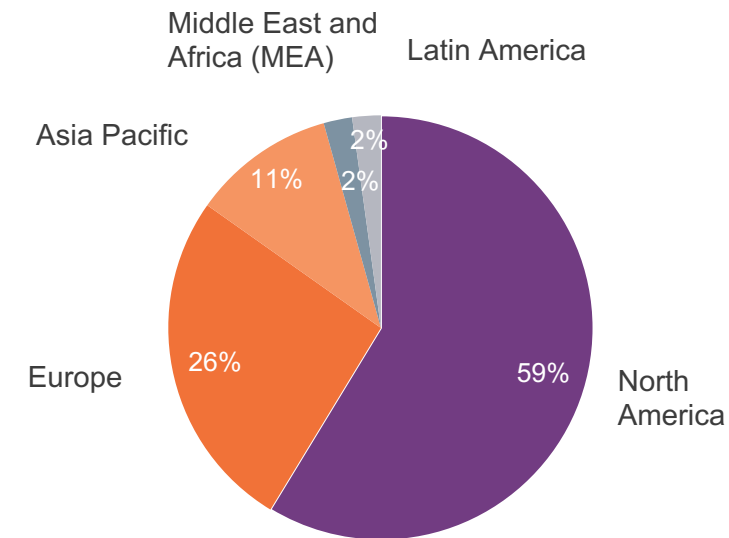
Titles/ roles



Company revenue



Geography



Source: HFS Research 2021
Sample: n = 46

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Top 10 results: Retail and CPG services

Retail and CPG | A summary of the providers assessed in this report













Provider (alphabetical)	HFS' take
Accenture	An innovation-focused global provider with a solid client portfolio and acquisition-led growth strategy
Capgemini	A holistic approach to solving client business problems leveraging consulting, design, and technology expertise
Cognizant	Full-service digital partner with industry-focused solutions and strong client portfolio, especially in North America
Genpact	Insights and digital-driven RCPG ecosystem player differentiating through process excellence and strong alignment with the HFS OneOffice
HCL	Leveraging engineering DNA for customer experience and technology innovation
Infosys	Developing digital retail solutions through co-innovation, start-up networks, and emerging technology
LTI	Enabling transformation through strong in-house solutions portfolio and robust ecosystem
Mindtree	A client-centric firm using domain capability to drive large-scale client transformation engagements
TCS	Strategic growth and transformation partner with unique algorithmic approach, strong delivery capability, and industry-focused IP portfolio
Tech Mahindra	Shaping the future of retail and CPG through a platform-led approach and strong digital focus
Wipro	Digital technology-focused vendor with strong vision, innovation initiatives, and client relationship management
WNS	BPO firm with a strong talent development program focusing on intelligent interactions and experience management to drive client engagements

Notable performances in the retail and CPG services Top 10, 2021

HFS Winners Circle

Top five providers overall across execution, innovation, OneOffice alignment, and voice of the customer criteria















































































































#1	#2	#3	#4	#5
				

Execution powerhouses Top three providers on execution criteria			Innovation champions Top three providers on innovation criteria			OneOffice alignment Top three providers aligned to OneOffice			Outstanding voice of the customer Top three providers on voice of the customer criteria		
#1	#2	#3	#1	#2	#3	#1	#2	#3	#1	#2	#3
											

Other notable performances

- TCS landed in #1 for both breadth and depth, and scale
- HCL had a strong showing in all execution categories, landing #7 overall, and #7 and above in each execution area
- Genpact's strong CPG capability stood out, and won the firm #5 in growth and in strategy and vision
- Capgemini has strong capabilities for execution in particular, landing #4 and #3 in breadth and depth and scale, respectively
- WNS has one of the strongest RCPG growth stories, coming in at #4 in growth

HFS Top 10 rankings—Retail CPG Services Top 10 2021

Rank	Overall HFS Top 10 position	Execution				Innovation				OneOffice alignment	Voice of the customer
		Breadth & depth	Scale of Retail and CPG business	Growth of Retail and CPG business	Overall execution	Strategy & vision	Retail and CPG technology innovation	Co-innovation and collaboration	Overall innovation		
#1	 accenture	 TCS TATA CONSULTANCY SERVICES	 TCS TATA CONSULTANCY SERVICES	 Tech Mahindra	 accenture	 accenture	 accenture	 Capgemini	 accenture	 accenture	 Infosys Navigate your next
#2	 TCS TATA CONSULTANCY SERVICES	 accenture	 accenture	 wipro	 wipro	 Cognizant	 Infosys Navigate your next	 accenture	 Capgemini	 TCS TATA CONSULTANCY SERVICES	 wipro
#3	 wipro	 Infosys Navigate your next	 Capgemini	 accenture	 TCS TATA CONSULTANCY SERVICES	 wipro	 Capgemini	 Infosys Navigate your next	 Cognizant	 Tech Mahindra	 TCS TATA CONSULTANCY SERVICES
#4	 Tech Mahindra	 Capgemini	 wipro	 WNS	 Tech Mahindra	 Capgemini	 HCL	 TCS TATA CONSULTANCY SERVICES	 Infosys Navigate your next	 wipro	 Cognizant
#5	 Infosys Navigate your next	 Cognizant	 Infosys Navigate your next	 genpact	 Capgemini	 genpact	 wipro	 Cognizant	 wipro	 Cognizant	 HCL
#6	 Cognizant	 HCL	 Cognizant	 LTI	 HCL	 Infosys Navigate your next	 Cognizant	 Tech Mahindra	 TCS TATA CONSULTANCY SERVICES	 Mindtree Welcome to possible	 accenture
#7	 HCL	 genpact	 HCL	 HCL	 genpact	 LTI	 TCS TATA CONSULTANCY SERVICES	 wipro	 genpact	 WNS	 Tech Mahindra
#8	 Capgemini	 wipro	 Tech Mahindra	 TCS TATA CONSULTANCY SERVICES	 Infosys Navigate your next	 TCS TATA CONSULTANCY SERVICES	 LTI	 HCL	 LTI	 HCL	 genpact
#9	 genpact	 Mindtree Welcome to possible	 genpact	 Mindtree Welcome to possible	 WNS	 Mindtree Welcome to possible	 WNS	 genpact	 HCL	 Infosys Navigate your next	 WNS
#10	 WNS	 LTI	 Mindtree Welcome to possible	 Capgemini	 LTI	 Tech Mahindra	 Mindtree Welcome to possible	 WNS	 Tech Mahindra	 genpact	 Mindtree Welcome to possible

5

Top 10 profile: Tech Mahindra

Shaping the future of RCPG through a platform-led approach and strong digital focus

Dimension	Rank	Strengths	Development opportunities									
HFS Top 10 position	4	<ul style="list-style-type: none">• Approach to RCPG services. Tech Mahindra has positioned its services as vertically focused. Its RCPG vertical constitutes about 11% of its overall revenue. Tech Mahindra has horizontals spanning verticals, such as customer experience, F&A, digital marketing, supply chain management, procurement, and human resource management. Some of its key subsegments in this domain are food and grocery, fashion and lifestyle, beauty and personal care, and home and hygiene.• Key differentiators. Tech Mahindra built its offerings with a well-defined “outcome” and “future-readiness” mindset. Offerings include platform-based approaches for formulating different frameworks and accelerators such as SPRINT (Supply Chain Recall Management Platform), Consumer Engagement Platform, and Customer Lifetime Value (CLTV) Platform. It developed two end-to-end solution suites, Store of the Future and Store in a Box. It has a marquee client portfolio, including seven of the top 20 RCPG enterprises. Tech Mahindra has established a retail domain university to digitally empower retail delivery teams with retail process know-how.• Technology innovation. Tech Mahindra collaborates with 30+ new-age technology players, start-ups, and academia globally. Some of its joint solutions are Intelligent Supply Chain, Store Reimagination, Digital Operations Management. It is also leveraging the capabilities of its acquired entities across different areas of RCPG, such as brand experience (leveraging Born), CCaaS and consulting (EventUs), user experience (leveraging BiO and MadPow), and physical experience (leveraging Pininfarina). For example, Pininfarina has designed futuristic machines for large companies like Costa Coffee and Coca-Cola.• Customer kudos. Clients applaud Tech Mahindra’s domain expertise, ability to scale-up quickly, and flexibility within engagements.	<ul style="list-style-type: none">• What to continue. Tech Mahindra follows a digital-first and automation-first approach for most of its engagements. Also, it has developed IP around this, such as Omnichannel Consumer Automation Journey. Given the importance of digital in this domain, these solutions and mindsets are important capabilities for the clients.• Other next steps for development. Tech Mahindra’s capability in this domain is heavy on the technology side. Given its domain understanding, the firm should develop more consulting and business process expertise to complement its IT ability.• Customer critiques. Tech Mahindra needs to add additional local talent.									
Ability to execute	4											
Breadth and depth	12											
Scale of RCPG business	8											
Growth of RCPG business	1											
Innovation capability	10	<div><div><div>Geographic spread of clients</div></div><div><div>IT vs. BPS revenue</div></div><div><div>Revenue distribution</div></div></div> <div><div>Focus across the RCPG value chain</div><table><thead><tr><th>Online & mobile operations</th><th>Brick and mortar operations</th><th>Merchandising & replenishment</th><th>Supply chain</th><th>Sales & marketing</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td><td></td></tr></tbody></table><div><div>Mature</div><div>Emerging</div><div>Not a focus</div></div></div>	Online & mobile operations	Brick and mortar operations	Merchandising & replenishment	Supply chain	Sales & marketing					
Online & mobile operations	Brick and mortar operations	Merchandising & replenishment	Supply chain	Sales & marketing								
Strategy and vision	10	<div><div>Relevant acquisitions and partnerships</div><div>Recent acquisitions<ul style="list-style-type: none">• 2021: EventUs, strengthens CCaaS and cloud-based solution capability and consulting• 2019: BORN Group, strengthens retail, e-commerce, and CPG capability• 2019: MadPow, strengthens design innovation capabilitiesPartnerships<ul style="list-style-type: none">• Capillary: Consumer management and personalization• Ace Turtle: Retail omnichannel platform• Ask Sid: Retail conversation AI• Cuddle: AI-based analytics• SUSE: API-driven automation for point-of-sale• Stylumia: ML-based demand sensing• O9: Digital transformation• Dataweave: Competitive intelligence as a service• Incorta: Business intelligence• Born Group: E-commerce• Relex: Unified retail transformation• Yepme: Unified commerce service platform</div><div>Key clients</div><div>Number of RCPG clients: 103 clients Including<ul style="list-style-type: none">• Swiss multinational food and drink processing conglomerate• American multinational personal care corporation• World's leading manufacturer of chocolate, chewing gum, mints, and fruity confections• Finnish retailer• Europe's leading frozen food company• American multinational food, snack, and beverage corporation• British multinational groceries and general merchandise retailer• British multinational consumer goods company• American chain of luxury department stores• Indian e-commerce company• Swedish multinational clothing company• German multinational corporation• American multinational technology company• American mobility-as-a-service provider• Austrian company created</div></div> <div><div>Global operations and resources</div><div>RCPG headcount: 21,000 RCPG-specific delivery locations:<ul style="list-style-type: none">• 50+ delivery centers supporting RCPG• 10+ COE, innovation centers, and labs supporting innovation</div><div>RCPG in-house platform and tools</div><div><ul style="list-style-type: none">• UDMF: Unified Data Management Framework, a data migration framework with inbuilt data quality functionality.• Prism: Data science workbench that improves the productivity of data science teams by providing out-of-the-box data ingestion, cleaning, modeling, and deployment functionality.• Supply Chain Management Platform (SCM): Enables decisions for SCM stakeholders.• Idecision: Framework to accelerate analytics implementation.• Infowise: Business intelligence ops workbench to enable data governance, augmented by AI.• SeeR: Self-service platform to cater to bespoke contact center analytics requirements mapping customer journey analytics and micro and macro inputs for go-to-market and product strategy.• M.A.I.A: Conversational AI intelligent bot, a proprietary virtual assistant service built on industry-leading platforms such as GCP and AWS with curated conversation design.• Feeds: In-house supply chain platform for fresh produce.</div></div>										
RCPG technology innovation	12											
Co-innovation and collaboration	6											
OneOffice alignment	3											
Voice of the customer	7											

6

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