

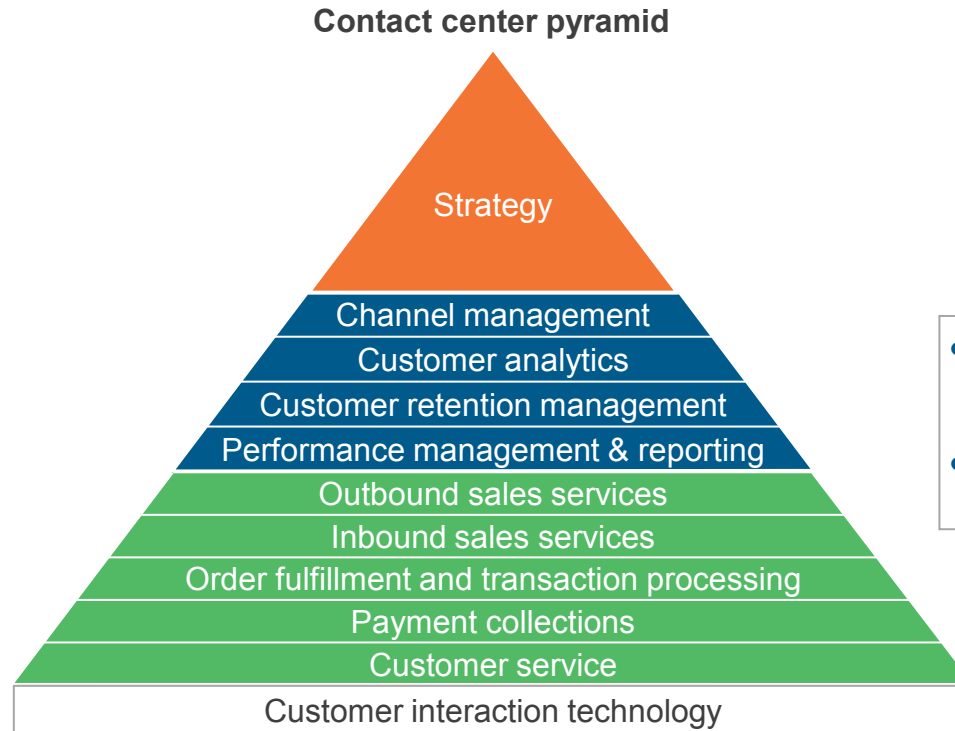


# Topic: Everest Group PEAK Matrix™ for CCO Service Providers

Focus on Teleperformance  
February 2014



# Everest Group's definition of the CCO market is centered on the delivery aspects of customer interaction



Strategy

Value-added services

Operational services

- Traditional CCO primarily focuses on individual operational services
- Increasingly, value-added services are included in CCO

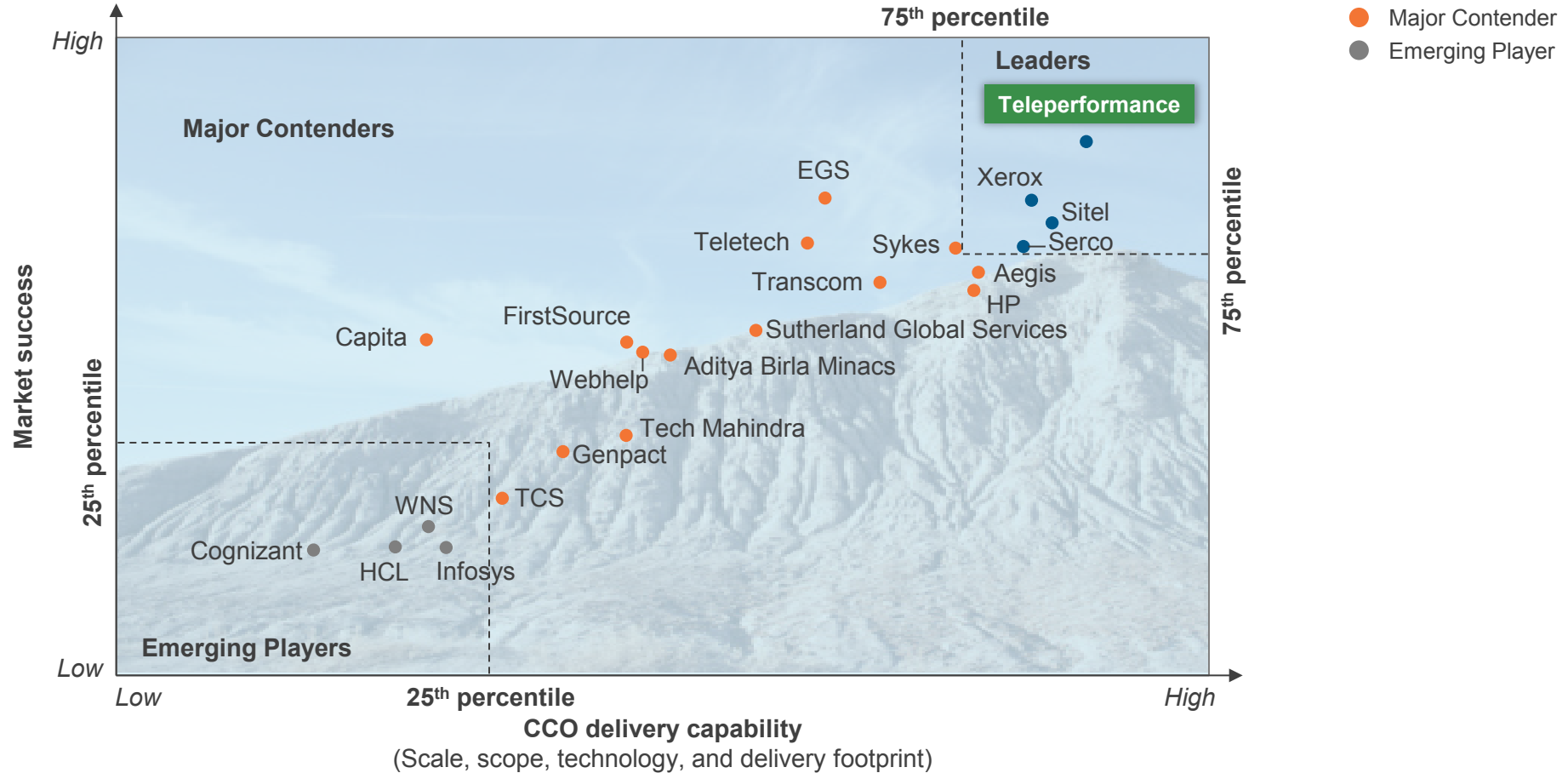
- Everest Group defines the CCO market as engagements with the primary purpose to support all forms of direct and indirect (or in support of direct) interactions with customers, both external and internal. It involves a structured multi-channel and remote communication environment
- CCO does not include contact center services embedded within the scope of outsourcing engagements targeting processes other than customer care, such as IT Outsourcing (ITO) or Human Resources Outsourcing (HRO)

Source: Everest Group (2014)

# Everest Group PEAK Matrix – 2013 CCO market standings

Performance | Experience | Ability | Knowledge

Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix for CCO<sup>1</sup>



<sup>1</sup> Service providers scored using Everest Group's proprietary scoring methodology given on page 13  
 Note: For a detailed service provider profile, refer to CCO Service Provider Profile Compendium 2013 released in December 2013  
 Source: Everest Group (2014)

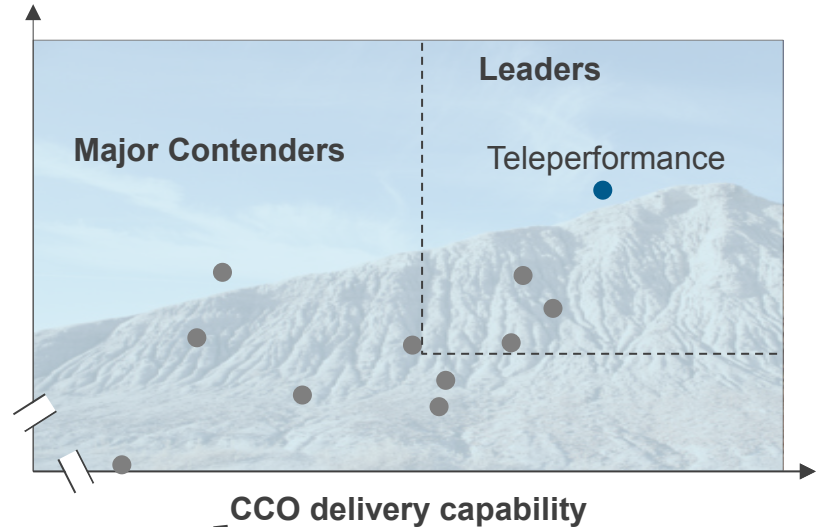
# Teleperformance is a CCO Leader on the Everest Group PEAK Matrix based on their top quartile performance across both market success and delivery capability

## Teleperformance's position on Everest Group PEAK Matrix for CCO

### Market success

- Top quartile performance in market success with CCO revenue of over US\$ 3 billion and client base across geographies and industries
- Clients present across all major industries and geographies

Market success



### Delivery capabilities

- Scale of over 100,000 FTEs serving over 680 clients across multiple geographies
- Covers over 60 different languages with focus on English and European languages. Launched five EMEA multilingual hubs to further augment language capabilities
- Balanced revenue mix across geographies and industries. A top five service provider across all regions – North America, EMEA, and Latin America
- Strong focus on HR practices and operational excellence to ensure high quality service delivery and client satisfaction
- Balanced delivery model using over 250 delivery centers across the world to ensure round-the-clock presence

### Company overview

Teleperformance is a global customer service, technical support, call center, debt collection, and social media company with 270 contact centers in 46 countries. The company conducts programs in more than 66 different languages and dialects in various industries

### Key leaders

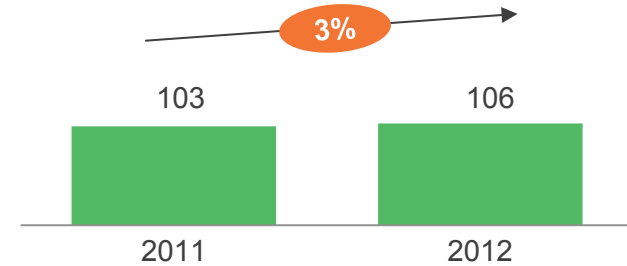
- Daniel Julien, Chairman of the Board
- Paulo César Salles Vasques, Chief Executive Officer
- Brigitte Daubry, President of CEMEA
- Alejandro Perez, President of IBERO-LATAM
- Brent Welch, President of EWAP

**Headquarter:** Paris, France

**Website:** [www.teleperformance.com](http://www.teleperformance.com)

### Scale of CCO

Number of FTEs in '000s



### Recent developments

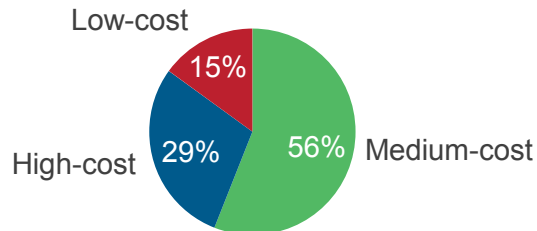
- Launched five EMEA multilingual hubs
- Teleperformance facilities in China and Colombia become LEED Certified and in Germany and United Kingdom became ISO 14001 certified

### Split of CCO FTEs

Number of FTEs in '000s

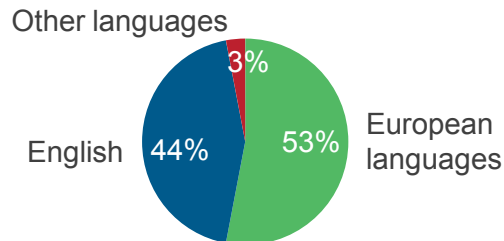
#### By location

100% = 1.06



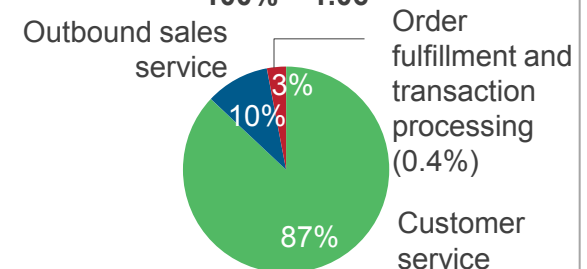
#### By language

100% = 1.06



#### By process

100% = 1.06



Source: Everest Group (2014)

# Teleperformance (page 2 of 4)

## CCO location landscape

### CCO delivery location



Source: Everest Group (2014)

# Teleperformance (page 3 of 4)

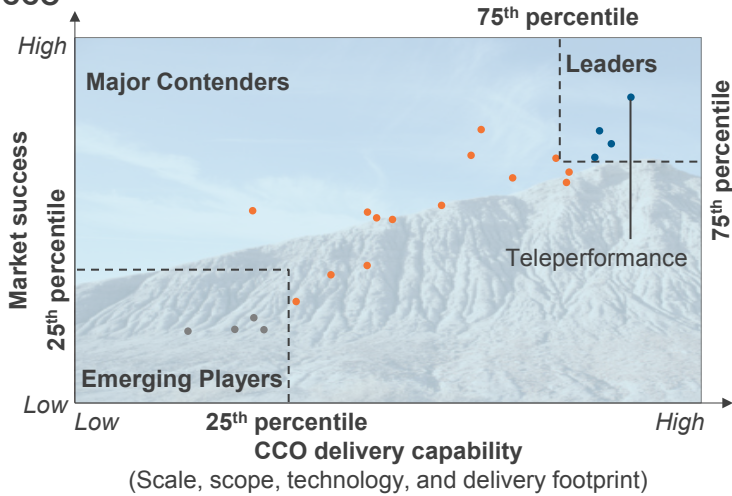
## Key CCO investments

Description	Investment type	Year of investment	Comments
CCMS	Internal	2005	Proprietary contact center system for clients only
TOPS, BEST, and JUMP	Internal	2006	Best practice processes for operations, HR, quality, and development
TP Platinum	Internal	2009	Premium customized customer delivery centers
SOC	Internal	2010	Industry leading security practice and operation centers
e-Performance	Internal	2011	Tiered social media and multichannel customer experience solutions
TP Observer and TP Desktop	Internal	2011	Proprietary monitoring, measurement, and operating systems
TP AVAN	Internal	2012	Advanced research and analytics solutions
CX Lab	Internal	2012-2013	Multi-channel customer experience research & development trends labs
Multi-lingual Hubs	Internal	2012–2013	Five pan-European multi market outsourced facilities
Dominican Republic	Internal	2013	Nearshore delivery center
TP FLOWARD	Internal	2013	Non-voice CRM BPO global solution

# Teleperformance (page 4 of 4)

## Everest Group assessment

### Teleperformance is a Leader on the Everest Group PEAK Matrix for CCO



### Delivery capability assessment<sup>1</sup>

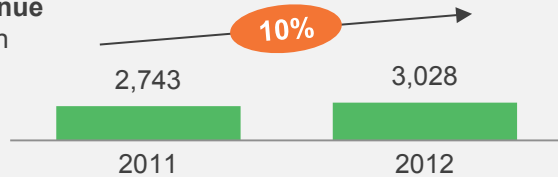
● Low ● Medium ● Medium-high ● High

Assessment dimension	Rating	Remarks
Scale	●	Largest contact center provider with over 100,000 FTEs and 680 clients
Scope	●	Balanced presence across all geographies, industries, and languages
Technology capability	●	Investments made to develop solutions across CRM and enabler technologies
Delivery footprint	●	Balanced delivery model with scale across high-, medium-, and low-cost locations

### Market success assessment

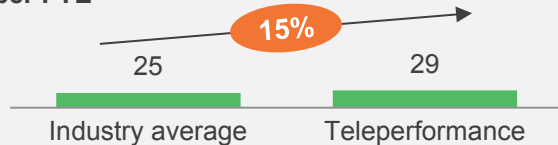
#### CCO revenue

US\$ million



#### Revenue per FTE

US\$ '000s



### Overall remarks

- Teleperformance is a Leader on the Everest Group PEAK Matrix for CCO
- Well balanced portfolio across geographies, languages, and industries
- Teleperformance has made extensive investments in training and development programs to identify best practice processes and deliver high quality customer experience
- Along with agent training, investment in technology solutions has helped Teleperformance grow their revenue at a higher rate than their scale
- Teleperformance has a higher revenue per FTE due to a balanced delivery model serving clients

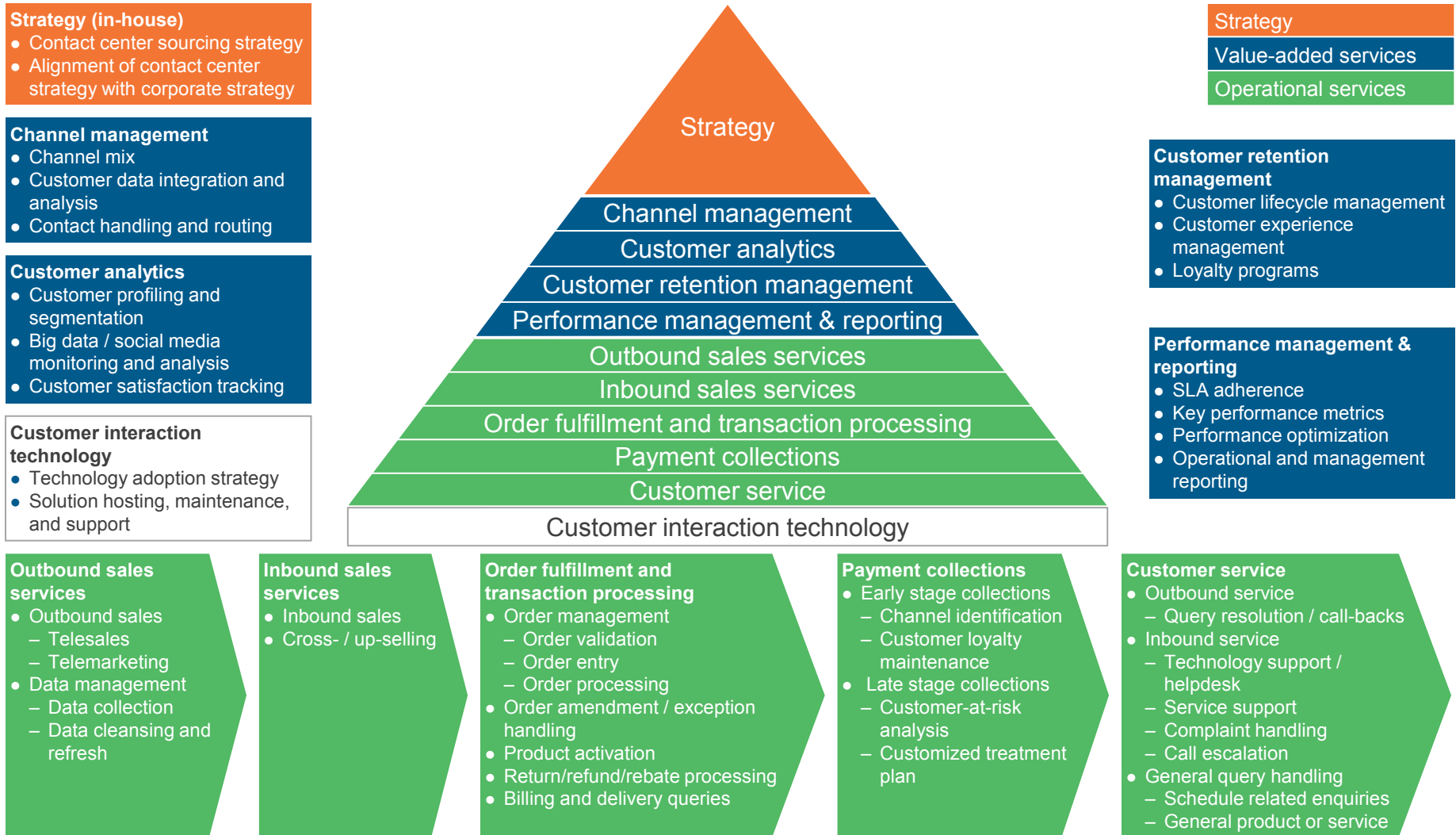
<sup>1</sup> Everest group estimates based on contractual and operational information till December 2012

Source: Everest Group (2014)



# Appendix

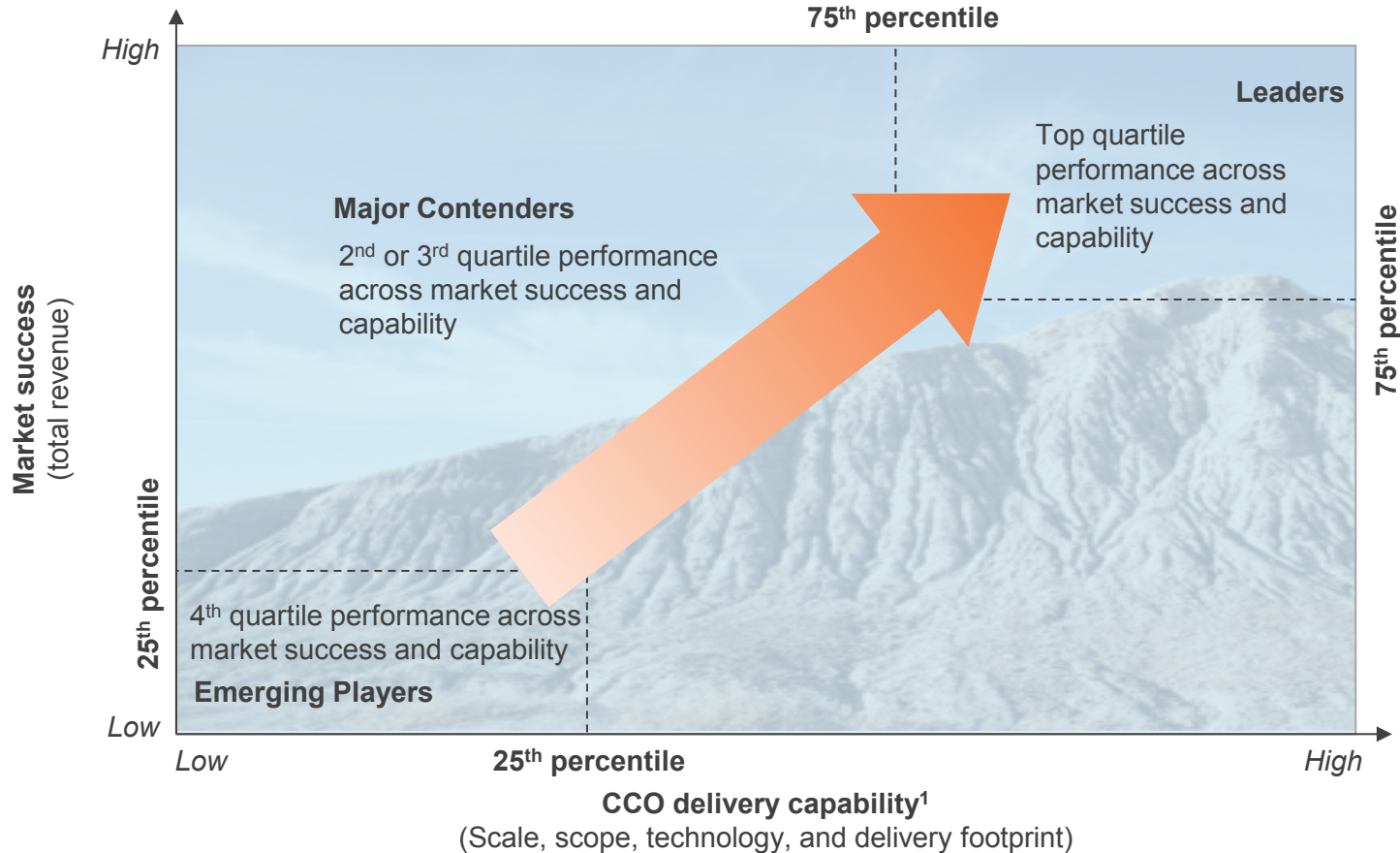
# Everest Group breaks each element into subprocesses of the customer interaction value chain



# Everest Group classifies the CCO service provider landscape based on its PEAK Matrix

## Performance | Experience | Ability | Knowledge (PEAK) Matrix

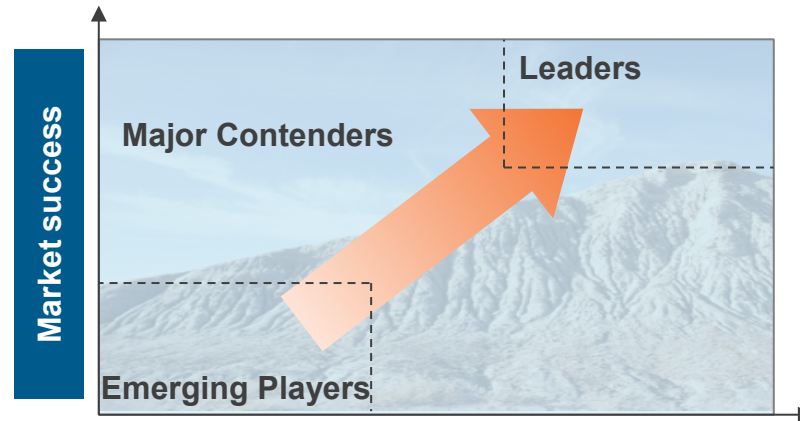
Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix for CCO



1 Service providers scored using Everest Group's proprietary scoring methodology given on page 13  
 Source: Everest Group (2014)

# Service providers are positioned on Everest Group PEAK Matrix based on evaluation of two key dimensions

Measures success achieved in the market. Captured through CCO revenue



Measures ability to deliver services successfully. Captured through four subdimensions

## Delivery capability

### Scale

Measures the scale of operations through:

- Overall company revenue
- Number of current CCO clients
- CCO FTEs

### Scope

Measures the scope of services provided through:

- Process coverage
- Number of channels covered
- Geographic scope
- Number of industries served
- Number of languages covered

### Technology capability

Measures the capability and investment in technology through:

- Investments in contact center-related technology
- Enabler technology solution capability, including analytics and social media

### Delivery footprint

Measures the delivery footprint and the global sourcing mix through:

- Delivery footprint across nine regions<sup>1</sup>
- Balanced shoring capability

<sup>1</sup> North America, Latin America, Western Europe, Eastern Europe, Australia & New Zealand, India, Philippines, Rest of Asia, and Middle East & Africa

## **Does the PEAK Matrix assessment incorporate any subjective criteria?**

- Everest Group's PEAK Matrix assessment adopts an objective and fact-based approach (leveraging service provider RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider briefings

## **Is being a “Major Contender” or “Emerging Player” on the PEAK Matrix, an unfavorable outcome?**

- No. PEAK Matrix highlights and positions only the best-in-class service providers in a particular functional/vertical services area. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

## **What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?**

- PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender” or “Emerging Player” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric level assessment and associated commentary is helpful for buyers in selecting particular providers for their specific requirements. It also helps providers showcase their strengths in specific areas

## **What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?**

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

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### What is the process for a service provider to leverage their PEAK Matrix positioning status ?

- Providers can use their PEAK positioning rating in multiple ways including:
  - Issue a press release declaring their positioning/rating
  - Customized PEAK profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- **The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group**



### At a glance

- With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of the next generation of global services
- Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches
- Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories

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