HFS Top 10 Manufacturing Service Providers 2019 – Excerpt for Accenture

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“The manufacturing industry is going through a major transformation, and technology is the most influential enabler. Digital technologies in manufacturing have come a long way from being just efficient working practices to being significant strategic differentiators for a competitive advantage. Manufacturing enterprises are depending on their technology partners in this transformation journey, so the onus is on the tech firms to elevate their value propositions, innovation, and execution capabilities to a different plane and help their clients achieve the future state with ease.”

—Tapati Bandopadhyay, Research Vice President
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Introduction, methodology, and definitions
Introduction

- Manufacturing enterprises across the world are suffering from low margins and high cost pressure, forcing them to reinvent manufacturing operations. Technology is playing a major role in this transformation. We have observed that manufacturers are very keen to reap the benefits of digital technologies in the manufacturing landscape. Service providers are also preparing themselves with a number of digital solutions that can provide some business benefits to the manufacturing enterprises.

- The HFS Top 10 Manufacturing Service Providers 2019 report examines the role service providers play in the evolving manufacturing industry. We assessed and rated the industry-specific service capabilities of 16 service providers across a defined series of innovation, execution, and voice of the customer criteria. The report highlights the overall ratings for all 16 participants and the top five leaders for each sub-category.

- This report also includes detailed profiles of each service provider, outlining their overall and sub-category rankings, provider facts, and detailed strength and weaknesses.

- The report specifically focuses on industry-specific capabilities for the manufacturing sector, as defined in our manufacturing operations value chain. It does not focus on horizontal IT or BPS services such as application management or finance and accounting outsourcing, which may be delivered to manufacturing clients.
Service providers covered in this report
The HFS Top 10 Manufacturing Service Providers report assessed and scored service provider participants across execution, innovation, and voice of the customer criteria. The inputs to this process were detailed RFIs we conducted with 16 service providers, reference checks with 20 manufacturing clients, briefings with leaders of manufacturing services practices within service providers, HFS surveys with 350 Global 2000 enterprises, and publicly available information sources. Specific assessment criteria and weighting include:

**Ability to execute**
- **Depth and breadth of industry-specific offerings and expertise**—Including capabilities across the manufacturing services value chain, depth of industry knowledge, and level of sector experience.
- **Talent and service delivery excellence**—Ability to attract and retain qualified talent with relevant industry, process, and technical expertise; service delivery capabilities including best practices, focus on continuous improvement, and delivery footprint.
- **Relationship management**—Single face to the customer, formal relationship and governance structure, client centricity.

**Innovation capability**
- **Industry vision and refinement of go-to-market strategy**—Including vision and credibility of strategy, strong understanding of industry trends, and refinement of capabilities to address industry-specific challenges.
- **Transformation enabled by technology change agents**—Deployment of intelligent automation, development of internal IP, and strong partnership ecosystem for best of breed capabilities.
- **Co-innovation and collaboration**—Co-development with clients, creative commercial models.

**Voice of the customer**
- **Direct feedback from enterprise clients**—via reference checks, surveys, and case studies critiquing provider performance and capabilities.
The manufacturing 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.
- The industry value chain for manufacturing operations provides a comprehensive overview of services for the manufacturing industry, focused on sales and marketing, manufacturing support, supply chain, aftermarket services, and sustainability services. The manufacturing value chain includes the following industry-specific processes:
  - **Sales and marketing**—Processes focused on sales operations, marketing operations, and associated analytics services;
  - **Supply chain**—Processes focused on demand planning and forecasting, order processing and fulfillment, transportation and logistics, and inventory management and optimization, as well as associated analytics services and master data management;
  - **Manufacturing support**—This value chain segment focuses on product creation support, product realization support, and product sustenance support;
  - **Aftermarket services**—Processes in scope of aftermarket services include parts management, technical support, warranty management, returns management, and field service;
  - **Sustainability services**—Processes focused on the management of carbon footprints; environmental, health, and safety management (EHS); and sustainable supply chain management;
  - Our research will evaluate the depth and breadth of service providers offering manufacturing-specific services in these categories and the impact of critical change agents such as Internet of Things (IoT) and intelligent automation.
● **Enabling technologies**—Enabling technologies are those that are acting as change agents in the manufacturing landscape to help optimize critical operations and enable new revenue streams. They include elements such as RPA and AI, IoT, and smart analytics. We view them as horizontal as they can be used across manufacturing enterprises and leveraged for both horizontal and industry-specific processes. Our research on these topics will focus on how they are being utilized within manufacturing firms, 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 that are essential to running their businesses but are executed similarly regardless of industry. We refer to these as horizontal processes and have segmented them by IT and business functions. Horizontal business processes include elements such as customer engagement and HR. IT processes include functions such as application development and maintenance and infrastructure management. Our industry-specific coverage of these areas will focus on instances where something unique has been developed for the manufacturing industry, such as IoT-based spare parts management or cognitive agents supporting B2B technical support. In addition to industry coverage of these horizontal topics, they will also be well covered as part of our functional research dimension.

● Our coverage of the manufacturing sector will examine core value chain processes across industry-specific and horizontal functions with an emphasis on the impact of critical change agents. The engineering services part of manufacturing is addressed in our coverage of industry 4.0.
<table>
<thead>
<tr>
<th>Industry Specific</th>
<th>Sales and marketing</th>
<th>Supply chain</th>
<th>Manufacturing support</th>
<th>Aftermarket services</th>
<th>Sustainability services</th>
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<tr>
<td></td>
<td>• Sales operations</td>
<td>• Order processing and fulfillment</td>
<td>• Transactional services supporting engineering:</td>
<td>• Technical support and triage</td>
<td>• Carbon footprint management</td>
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<td></td>
<td>• Marketing operations</td>
<td>• Demand planning and forecasting</td>
<td>• Product creation support</td>
<td>• Warranty management</td>
<td>• Green supply chain management</td>
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<td></td>
<td>• Analytics</td>
<td>• Inventory management and optimization</td>
<td>• Product realization support</td>
<td>• Parts management</td>
<td>• Environmental, health, and safety administration</td>
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<td>• Transportation and logistics</td>
<td>• Product sustenance support</td>
<td>• Returns management</td>
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<td>• Master data management</td>
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<td>• Service contract management</td>
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<td>• Aftermarket analytics</td>
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### Horizontal business processes

- Customer engagement | Human resources | Procurement | Finance and accounting | Payroll | Legal and compliance

### Horizontal IT processes

- Planning, design, and implementation • Application development and maintenance • Infrastructure management • Security

### Enabling technologies

- RPA • Artificial intelligence • Smart analytics • Blockchain • IoT • Cloud • Mobility • Social media • Augmented/virtual reality
Executive summary
Executive summary (1 of 2)

- A first-of-its-kind comprehensive study of 16 service providers serving the manufacturing sector: The HFS Top 10 Manufacturing Service Providers 2019 report is a first-of-its-kind study in which we rate 16 service providers across elements of service execution, innovation, and voice of the customer.

- All study participants are following a business outcomes-focused approach: Most of the manufacturing service providers covered in this study are capable of meeting clients’ broad needs linked to business outcomes such as cost optimization, streamlining manufacturing, predictive maintenance, and faster time-to-market, among others. We have also observed several non-linear pricing models in manufacturing services engagements.

- The Top 10 leaders in manufacturing services are Accenture, Atos, Capgemini, TCS, Infosys, HCL, Cognizant, Tech Mahindra, Genpact, and Wipro. These firms exhibited a strong mix of service execution excellence, applied innovation, and vision, and verified customer satisfaction to rise to the top of our manufacturing study.

- Service providers are following consulting-focused delivery approach for manufacturing services: We assessed providers’ depth of capabilities across our manufacturing value chain. Consulting-based as-a-service business enablement is becoming popular in manufacturing services engagements. With the advent of emerging technologies, manufacturing industry is going through a digital transformation related to connectivity, data-based decision making, efficiency improvement, production optimization, etc. Clients are asking for guidance to leverage technologies (IoT, AI, cloud) to realize these business benefits over time. As a result, transformational approaches are increasingly being used in most of the projects.
Executive summary (2 of 2)

- **Manufacturing customers are very happy with their providers’ relationship management capabilities**: Reference clients interviewed for this study rated relationship management as the area in which they are most satisfied with their service providers. Regular interaction and proximity to the clients are the key factors for this.

- **Manufacturing customers are least satisfied with their providers’ partnership capabilities**: Clients have mentioned that service providers need to expand their partnership ecosystem and collaborate more with different partners for both capability development and new solutions development. Though we have observed joint go-to-market approach by several service providers in collaboration with enterprise companies, partnership with start-up companies can also be handy for the service providers to fulfil the client expectations.

- **Digital manufacturing is the need of the hour**: The manufacturing industry has been a laggard in digital technology adoption. Manufacturers across industries have started to believe in the benefits of the digital technologies that can improve both the top and bottom lines for their organizations. We have observed increasing implementation of IoT, AI, ML, predictive analytics, cloud, and other digital technologies like AR-VR across the manufacturing value chain.

- **Supply chain is the most focused area of the clients**: Aiming to provide better customer experience, demand planning, and operations streamlining, supply chain remains a critical area for manufacturers. For a long time, the supply chain lacked visibility, resulting in in-transit losses and increased business risks. Real time connectivity is the key factor to manage the transportation, and data analytics enables efficient supply chain planning and management.

- **North America remains the largest client base**: Though Europe and Asia Pacific have significant number of clients in manufacturing services, North America remains the biggest market for the service providers. Overall, we have observed a high number of projects from the automotive domain, which is among the top three verticals for several participants of this study in terms of revenue.
The HFS Top 10 manufacturing service providers results
HFS top five manufacturing service providers by individual assessment criteria

<table>
<thead>
<tr>
<th>HFS ranking</th>
<th>Depth and breadth industry-specific service offerings</th>
<th>Ability to execute</th>
<th>Relationship management</th>
<th>Industry vision and refinement of go-to-market strategy</th>
<th>Innovation capability</th>
<th>Co-innovation and collaboration</th>
<th>Voice of the customer</th>
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<tr>
<td>#1</td>
<td>Atos</td>
<td>accenture</td>
<td>Atos</td>
<td>accenture</td>
<td>accenture</td>
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<td>Infosys</td>
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<td>#2</td>
<td>accenture</td>
<td>Atos</td>
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<td>Capgemini♣</td>
<td>tcs 50</td>
<td>Capgemini♣</td>
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<td>tcs 50</td>
<td>Capgemini♣</td>
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<td>#4</td>
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<td>Tech Mahindra</td>
<td>Cognizant</td>
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<td>#5</td>
<td>Capgemini♣</td>
<td>tcs 50</td>
<td>HCL</td>
<td>Infosys♣</td>
<td>HCL</td>
<td>Cognizant</td>
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Source: HFS Research 2019
### HFS Top 10 manufacturing sector service providers, 2019

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Execution</th>
<th>Innovation</th>
<th>Voice of customer</th>
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<td>#1.</td>
<td>Accenture</td>
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<td>#2.</td>
<td>Atos</td>
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<tr>
<td>#3.</td>
<td>Capgemini</td>
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<td>#5.</td>
<td>Infosys</td>
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<td>#6.</td>
<td>HCL</td>
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<td>#7.</td>
<td>Cognizant</td>
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<td>#8.</td>
<td>Tech Mahindra</td>
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<td>#9.</td>
<td>Genpact</td>
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<td>#10.</td>
<td>Wipro</td>
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<td>#11.</td>
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<td>#15.</td>
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<td>#16.</td>
<td>OnProcess</td>
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**#1. Accenture**

A consulting powerhouse with industry X.0 vision and strong investment commitment in manufacturing.

**#2. Atos**

An European manufacturing services provider with strong Industry 4.0 expertise and innovation credential.

**#3. Capgemini**

End-to-end manufacturing service provider with strong consulting capability and focused go-to-market strategy.

**#4. TCS**

Enabling client digital transformation journey in manufacturing through its Business 4.0 framework, service delivery capability, and client relationship management.

**#5. Infosys**

Trusted transformation partner with integrated service delivery and strong partnership ecosystem.

**#6. HCL**

Exhaustive solutions portfolio across the manufacturing value chain and driven by mode 1-2-3 strategy.

**#7. Cognizant**

Business outcome-focused service provider with strong vision and digital capabilities.

**#8. Tech Mahindra**

Leveraging telecom operations learning and start-up association in manufacturing services.

**#9. Genpact**

Expertise in process management and data analytics to support its manufacturing client engagements.

**#10. Wipro**

An emerging market-focused manufacturing service provider with innovation mindset and co-innovation with its partners.

**#11. DXC**

Expanding manufacturing business portfolio through smart acquisitions and industry-focused solutions portfolio.

**#12. LTI**

Leveraging L&T group heritage and its in-house MOSAIC platform to drive the manufacturing engagements.

**#13. WNS**

Customer-centric focus and expertise in automation and analytics for manufacturing clients.

**#14. Hexaware**

Building capabilities in emerging technologies to fulfill its manufacturing growth ambition.

**#15. Cyient**

A fast-growing manufacturing service provider with defense and telecom sector expertise and physical manufacturing facility.

**#16. OnProcess**

Supply chain and post sales focused manufacturing service provider.

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* Profile represents Arvato capabilities pre-merger.
We asked leaders within manufacturing to identify the strengths of service providers across the manufacturing value chain.

We then asked service providers to rate their manufacturing-specific offerings on a maturity scale.

**Sales and marketing and supply chain** are the most mature segments of manufacturing offerings. These include services such as sales operations, marketing operations, analytics, order processing and fulfilment, demand planning and forecasting, inventory management and optimization, transportation and logistics, and master data management.

**Sustainability service** is the least mature segment of offerings. These include services such as carbon footprint management, green supply chain management, and environmental, health, and safety administration.

Please refer to our Manufacturing value chain for more detail on the offerings in each segment.
Manufacturing service provider profiles
A consulting powerhouse with industry X.0 vision and strong investment commitment in manufacturing

**Strengths**

- **Strong thought leadership and disruptive innovation ideas**: Accenture has an integrated business consulting services that enables clients to challenge their own assumptions and unleash their full potential. Accenture has shown strong thought leadership in Industry X.0 and has published many books that have disrupted the industry, such as *INDUSTRY 4.0 Realizing digital value in industrial sector*, *HUMAN + MACHINE Reimagine work in age of AI*, and *REINVENTING THE PRODUCT*.
- **Deep domain expertise**: Accenture has deep understanding of the manufacturing sector and has a strong network of delivery capabilities for industry X.0. It has an extremely large and diverse delivery network.
- **Innovative yet process driven culture**: Accenture has large number of innovation hubs all around the globe and helps clients to innovate. The Accenture Innovation Architecture supports clients with research, prototyping, development, and implementation.
- **Continued investment in industry X.0**: A recent investment in Upskill and the acquisitions of Mackevision, Designaffairs, MindTribe, and Pillar Technology have been aligned to focus on expertise of Industry 4.0, thus helping the manufacturing sector.
- **Industry-oriented go-to-market allows Accenture to understand clients’ businesses in-depth, develop keen insights, and create impactful business solutions with the help of technology, analytics, and process rigor.**

**Development opportunities**

- **Price challenge**: Accenture wins as it can demonstrate value, but it continues to be premium priced when compared to its peers.

<table>
<thead>
<tr>
<th>Dimension</th>
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<th>#1</th>
<th>Ability to execute</th>
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<tbody>
<tr>
<td>Industry vision and GTM strategy</td>
<td>#1</td>
<td></td>
<td></td>
<td>Technology-enabled transformation</td>
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<td>Co-innovation and collaboration</td>
<td>#1</td>
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<td>Voice of the customer</td>
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<table>
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<th>IT vs BPS</th>
<th>Revenue breakdown</th>
<th>Capabilities across manufacturing value chain</th>
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<tr>
<td>IT vs BPS Client mix</td>
<td>Revenue breakdown by line of business</td>
<td>Manufacturing support</td>
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<tr>
<td>Not disclosed</td>
<td>Not disclosed</td>
<td>Aftermarket services</td>
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**Relevant acquisitions and partnerships**

- **Recent acquisitions**:
  - **Enterprise System Partners**: To expand its capabilities in life sciences manufacturing
  - **Intrigo Systems**: To expand its capabilities in digital supply chains (November 2018)
  - **Designaffairs, Mindtribe, and Pillar Technology**: To expand its Industry X.0 product and service development capabilities (August 2018)

- **Partnerships**:
  - **PLX Platforms**: Dassault Systems, PTC, SAP, Siemens
  - **Industrial**: ABB, GE, Rockwell Automation, Schneider Electric
  - **Cloud**: AWS, Google, Microsoft

**Key clients**

- **Number of manufacturing clients**:
  - 1,200

- **Client mix**:
  - North America: 37%
  - Europe: 30%
  - Middle East, Africa, Asia Pacific, Latin America: 30%

- **Key clients**:
  - Daimler
  - Fiat Group
  - 3M
  - Caterpillar
  - Dow
  - BASF

**Global spread and resources**

- **Headcount**: 20,000
- **Locations (selection)**:
  - North America: Atlanta, Chicago, Dallas, Detroit, Houston, New York, San Francisco, Montreal
  - LATAM: Argentina, Brazil
  - UK: Dublin, London
  - EMEA: France, Germany, Iberia, Italy, Netherlands, Nordics, UAE
  - India: Bangalore, Chennai, Hyderabad, Pune, Mumbai
  - Other APAC: Australia, China, Japan, Philippines, Singapore

**Recent developments in support of manufacturing sectors**

- **November 2018**: Accenture formed a strategic alliance and invested in data analytics firm Quantexa.
- **November 2018**: Accenture opened new R&D lab in Shenzhen, China, with a focus on artificial intelligence, robotics, and Industry X.0.
- **August 2018**: Accenture formed a strategic alliance and invested in Chinese AI start-up Malong Technologies.
- **July 2018**: Accenture formed a strategic alliance and invested in data intelligence company Ripjar.
About the authors
Tapati Bandopadhyay is Vice President, Research at HFS. She has over 20 years of experience in technology strategy, consulting, and advisory on artificial intelligence, analytics, automation, DevOps, and services management. She is based in the HFS India office in Bangalore.

Prior to HFS, Tapati set up the AI and automation practice at Wipro and contributed to the growth and success of the firm’s HOLMES initiative. She began her analyst career with Gartner, where she handled ITScore, ITSM, and AI and automation across all regions for seven years. She received Gartner business awards and was recognized among top-rated analysts globally. She is a Ph.D. in AI, a gold medallist in engineering, and a DFID scholar at Strathclyde.

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Tanmoy Mondal is a Senior Research Analyst at HFS Research, identifying global trends in engineering services from both industry & technology perspectives, tracking global outsourcing deals & investments including partnership agreements & R&D announcements in the sector and supporting the domain leads in secondary research, data analysis, PoVs and research writing.

Tanmoy has over 5 years of research, pre-sales and market intelligence experience in TCS, HCL and Tracxn. At his TCS and HCL role, he worked on preparing RFP responses including solution construct and commercial proposition. He was responsible for analyzing the business scenario for ERP implementation for different industry verticals and participated in several Enterprise Transformation projects across domains to optimize the IT landscape, increasing IT integration among client business verticals, improving productivity and reducing business incidents. At Tracxn, he was part of the emerging technology team that helped finding companies (start-ups) specializing in upcoming technologies (virtual/augmented reality, drone etc.) for acquisition and portfolio investments for PE and VC firms.

Tanmoy holds a Master’s in Business Administration from IIFT (Indian Institute of Foreign Trade), and Bachelor of Engineering from Jadavpur University, Kolkata.
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Tanmoy holds a Master’s in Business Administration from IIFT (Indian Institute of Foreign Trade), and Bachelor of Engineering from Jadavpur University, Kolkata.
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Mayank Madhur is a Knowledge Analyst at HFS Research, supporting different practice leads in area of Industry Research, IoT and Blockchain by working on secondary research, data analysis, PoVs and research writing.

Mayank has over 3.5 years of research, pre-sales and software development experience. Prior to HFS he was part of business strategy and pre sales in Altimetrik supporting vertical heads, sales and marketing team. Before it in his HCL Tech role, he worked in the delivery team of a large medical device client for R&D project.

He holds blockchain certification by IIT & IBM on "Blockchain Architecture Design and Use Cases". His other certification include certification on Google analytics, Scrum, Six Sigma etc. to name a few. Mayank holds Master’s in Business Administration from Birla Institute of Technology and Science College, Pilani (BITS, Pilani University) and a Bachelor of Engineering in Electrical and Electronics from Jawaharlal Nehru National College of Engineering (Visvesvaraya Technological University), Karnataka.

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Defining future business operations

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