



IDC MARKETSCAPE

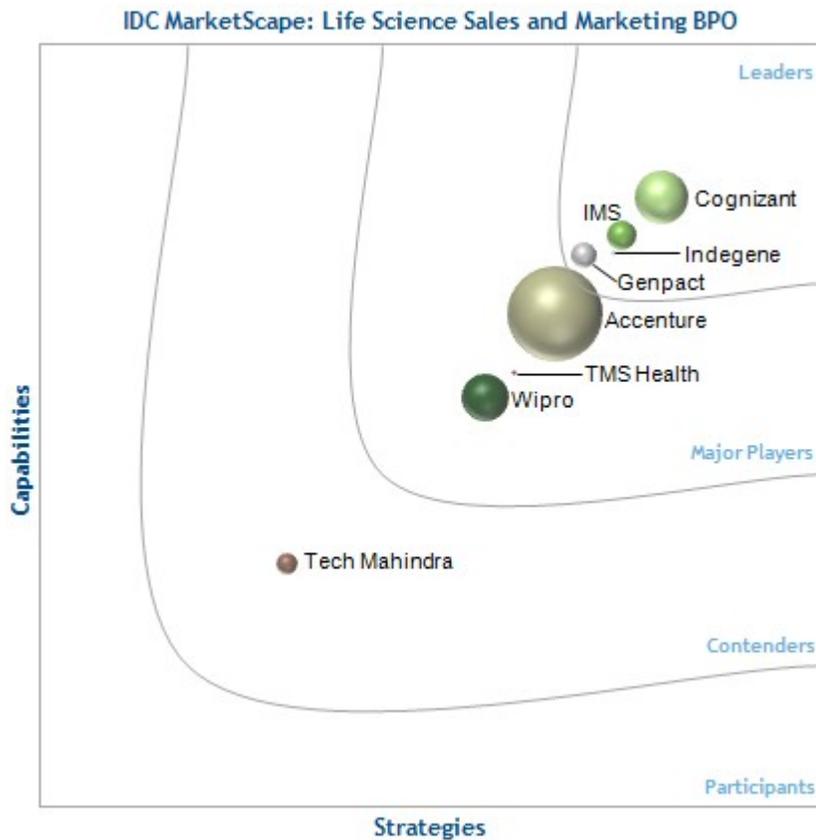
# IDC MarketScape: Worldwide Life Science Sales and Marketing BPO 2013 Vendor Assessment

Eric Newmark

IDC MARKETSCAPE FIGURE

FIGURE 1

## IDC MarketScape Worldwide Life Science Sales and Marketing BPO Vendor Assessment



Source: IDC Health Insights, 2013

Please see the Appendix for detailed methodology, market definition, and scoring criteria.



## IDC OPINION

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Sixty-eight percent of life science companies are expected to increase overall sales and marketing IT spending this year, with just 10% expected to experience a decrease. IT services in particular are expected to account for the largest portion of spending (45%) relative to software (21%) and hardware (34%). As such, there is strong demand for skilled IT outsourcing partners that can reduce costs, improve process efficiency, and provide strong life science-specific industry expertise.

With total IT spend in the sales and marketing space now exceeding \$3 billion, companies are being driven toward sales and marketing IT outsourcing by several business needs, including the need to automate and optimize reoccurring sales activities, consolidate disparate information sources, and optimize multichannel sales and marketing operations. Companies are also striving to improve sales force effectiveness and efficiency and broaden their adoption and utilization of mobile platforms. Regulation compliance pressure, and its associated costs, also continues to impact organizations. Aggregate spend compliance, for example, remains one of the most significant drivers of sales and marketing IT services spend and is expected to stimulate further spending on data integration services, business intelligence (BI), business process management (BPM), master data management (MDM), and analytics applications. In addition, gift ban laws, increased public transparency to sales and marketing operations, and diminishing physician availability are driving investments in sales force automation (SFA), customer relationship management (CRM), and CLM as companies strategize and invest to best position themselves for the next phase of pharma-to-physician relationships, which are likely to increasingly shift toward electronic mediums over the coming years.

While all three faces of IT-related outsourcing – IT outsourcing (ITO), business process outsourcing (BPO), and strategic consulting services – continue to grow, which vendors are best suited to deliver these services to life science companies can vary greatly, depending on a company's situation-specific needs and each vendor's respective strengths and weaknesses. To help life science companies better evaluate the vendors servicing this space, this report evaluates eight of the leading large BPO vendors that serve the life science sales and marketing space. For the purposes of this report, BPO includes outsourcing of all services like call center, customer support, and any other ongoing repetitive processes, such as report generation or ongoing monthly/weekly/quarterly data analysis.

When evaluating vendors, the key criteria companies should consider (all of which are discussed in this report) include:

- Breadth of life science sales and marketing services offered, depth of related project experience, and number of customers the vendor has served
- Geographical footprint and global delivery capabilities, level of priority and focus by the vendor on the life science sales and marketing sector, and the vendor's pace of investment in related life science capabilities
- Life sciences' industry expertise, corporate financial stability, and willingness to contract with clients under a risk/profit-sharing contract model
- Diligent vetting of customer references to examine vendor capabilities surrounding project management, IT technical skills, account management, and overall value delivery to clients

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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IDC frequently has unique visibility into vendor selection processes within life science companies through clients and contacts in the industry. For a vendor to be considered for inclusion in this study, the vendor's services must have been significantly evaluated for purchase within a recent deal with which IDC is familiar. Further research and due diligence were then conducted to narrow the list of vendors to only those that had won deals and that IDC viewed as legitimate contenders for future deals within the pharmaceutical sales and marketing space. While many smaller firms and niche BPO vendors serve the life sciences, this study focuses on the largest firms offering the broadest array of services. Ultimately, eight vendors were invited to participate in this study:

- Accenture
- Cognizant
- Genpact
- IMS Health
- Indegene
- Tech Mahindra
- TMS Health
- Wipro

## ESSENTIAL BUYER GUIDANCE

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Outsourcing in the life sciences continues to expand as what is considered "core" to business slowly shrinks and more of everyday operations become fair game for externalization. Many companies are now expanding BPO beyond traditional barriers and expanding into knowledge-based areas that have traditionally been less outsourced. Knowledge process outsourcing (KPO) such as analytics, business intelligence, and predictive modeling are all examples of new areas of increasing interest for life science companies. Likewise, several IT service firms have recently expanded their KPO offerings to better service these newer industry needs. Life science companies that have not explored these offerings should, at minimum, increase their familiarity. These services can help companies obtain increased insight in a quicker fashion from big data that has traditionally been underutilized.

However, conversely, while outsourcing continues to expand, the number of vendors that life science companies are contracting with is slowly decreasing. Companies are increasingly looking to consolidate vendors down from traditional levels of four or five firms to two or three vendors in a given area that have deeper industry expertise and greater potential for a closer-knit longer-term partnership status.

Life science companies are interested in vendors with several specific proven attributes, including:

- Deep, proven industry-specific expertise, with a strong book of references

- Willingness to provide dedicated resources on an ongoing basis across sequential projects to maintain acquired best practices
- Capability to provide onshore/onsite resources
- Proven understanding of industry regulations and compliance initiatives

Additionally, when engaging with an IT outsourcing partner, items life science companies should keep in mind include:

- Observe whether vendors are vertically organized internally. This helps ensure their leadership is more in tune with industry-specific needs and increases the likelihood that future development will be closer aligned with your needs.
- Consider each vendor's breadth of services offered (for future relationship expansion), depth of experience within the sales and marketing space in particular, pricing model flexibility (willingness to share risk), and whether the vendor's culture will be a good match for your company's societal order.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

### Accenture

Established in 1989, Accenture has been serving the life science industry for nearly 30 years. The company, headquartered out of Dublin, Ireland, has offices in more than 120 countries and most recently attained annual net revenue of nearly \$28 billion. IDC estimates that Accenture derives roughly 5% of its revenue from the life sciences, and we estimate that 30-35% of this comes from the sales and marketing space. After a close evaluation of Accenture's offerings and capabilities, IDC has positioned the company in the Major Players category within this IDC MarketScape.

#### *Strengths*

Accenture has extensive experience working with life science companies across all three sections of the industry: pharmaceutical, biotech, and medical devices. Nearly all of Accenture's life science customers are large corporations with revenue over \$1 billion, with a significant base of customers spread across North America, Europe, and Asia/Pacific. Accenture also has a considerable number of delivery centers located across these three regions as well as in Latin America. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, Accenture scored the highest among all vendors in technical skills, and it received high marks for its account management and project management capabilities.

#### *Opportunities*

Accenture has a strong track record of engaging with its clients under flexible pricing contracts (i.e., profit or risk sharing), which should provide the company increasing opportunities going forward as the

life science industry continues to become more interested in these types of arrangements and migrate toward this model. Further harnessing its delivery centers in Latin America should help Accenture expand its Latin American customer base in the coming years as well. At the functional category level, call center and predictive modeling both represent strong growth opportunities for further development by Accenture.

## Cognizant

Established in 1994, Cognizant has been serving the life science industry for almost 20 years. The company, headquartered out of Teaneck, New Jersey, has over 50 delivery and operations centers globally and most recently announced expected annual revenue to exceed \$8.7 billion in 2013. IDC estimates that Cognizant derives roughly 13% of its revenue from the life sciences, and we estimate that 40-45% of this comes from the sales and marketing space. After a close evaluation of Cognizant's offerings and capabilities, IDC has positioned the company in the Leaders category within this IDC MarketScape.

### *Strengths*

Cognizant has extensive experience working with life science companies across all three sections of the industry: pharmaceutical, biotech, and medical devices. Roughly 90% of Cognizant's life science customers are large corporations with revenue over \$1 billion, with the remaining 10% being primarily midsize companies. The majority of Cognizant's customer base is spread across North America and Europe, and the company has a considerable number of delivery and operations centers located across both of these regions as well in Asia and Latin America. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, Cognizant received high marks for account management, technical skills, and overall value delivered to its clients.

### *Opportunities*

With the life science industry becoming increasingly interested in risk-sharing and profit-sharing type contract models, further promoting its newer pricing model should serve as a nice opportunity for Cognizant to expand business both outside and within its existing customer base. At the functional category level, call center and campaign planning and execution both represent strong growth opportunities for further development by Cognizant.

## Genpact

Established in 1997, Genpact has been serving the life science industry for over 15 years. The company, headquartered out of New York City, New York, has 10 delivery centers serving the life sciences spread across most regions of the world, and most recently announced annual revenue exceeding \$1.9 billion in 2012. IDC estimates that Genpact derives roughly 10% of its revenue from the life sciences, and we estimate that roughly 20% of this comes from the sales and marketing space. After a close evaluation of Genpact's offerings and capabilities, IDC has positioned the company in the Leaders category within this IDC MarketScape.

## ***Strengths***

Genpact has extensive experience working with life science companies across the pharmaceutical and medical device industries. Mostly all of Genpact's life science customers are large corporations with revenue over \$1 billion, and the majority of the customer base is spread across North America and Europe, with a small customer base in Asia as well. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, Genpact received high marks for account management, technical skills, and overall value delivered to its clients.

## ***Opportunities***

With the life science industry becoming increasingly interested in risk-sharing and profit-sharing type contract models, further promoting its newer pricing model should serve as a nice opportunity for Genpact to expand business both outside and within its existing customer base. At the functional category level, physician targeting and digital asset management services both represent strong growth opportunities for further development by Genpact.

## **IMS Health**

Established in 1954, IMS Health has been serving the life science industry for nearly 60 years. The company, headquartered out of Danbury, Connecticut, has more than 8,000 employees globally, with over 3,500 dedicated to the delivery of services to the life sciences, and although the company is privately held, IDC estimates its revenue to be roughly \$2.5 billion. IDC estimates that IMS Health derives more than 50% of its revenue from the life sciences, with most of it coming from the sales and marketing space. After a close evaluation of IMS' offerings and capabilities, IDC has positioned the company in the Leaders category within this IDC MarketScape.

## ***Strengths***

IMS Health has experience working with life science companies across all three sections of the industry: pharmaceutical, biotech, and medical devices. Its customers range from multibillion-dollar global companies down to multimillion-dollar regional organizations and span over 100 countries around the world. IMS Health has a small set of delivery centers spread across North America, Europe, Asia, and Latin America. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, IMS Health received high marks for its life science account management and technical skills.

## ***Opportunities***

With the life science industry becoming increasingly interested in risk-sharing and profit-sharing type contract models, further exploring pricing model flexibility in this direction could serve as a nice opportunity for IMS Health to expand business both outside and within its existing customer base. At the functional category level, knowledge management and digital asset management services both represent strong growth opportunities for further development by IMS Health.

## Indegene

Established in 1998, Indegene has been serving the life science industry for the past 14 years. The company, headquartered out of Bangalore, India, has more than 800 employees dedicated specifically to the life sciences. Though Indegene is privately held, IDC estimates its revenue to be \$10 million to \$50 million. IDC estimates that Indegene derives 100% of its revenue from the life sciences, and we estimate that 80% of this comes from the sales and marketing space. After a close evaluation of Indegene's offerings and capabilities, IDC has positioned the company in the Leaders category within this IDC MarketScape.

### *Strengths*

Though a large majority of Indegene's customers are pharmaceutical companies, Indegene works with life science companies across all three sections of the industry: pharmaceutical, biotech, and medical devices. All of Indegene's life science customers are large corporations with revenue over \$1 billion, with a significant base of customers spread across North America, Europe, and Asia/Pacific. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, Indegene received high marks in life science industry expertise and the overall level of value delivered to its clients.

### *Opportunities*

Indegene has a strong track record of engaging with its clients under flexible pricing contracts (i.e., profit or risk sharing), which should provide it increasing opportunities going forward as the life science industry continues to become more interested in these types of arrangements and migrate toward this model. At the functional category level, multichannel sales and marketing offerings represent a strong growth opportunity for further development by Indegene.

## Tech Mahindra

Founded in 1986, Tech Mahindra has been serving the life science industry for the past 14 years. The company, headquartered out of Hinjewadi, India, has over 1,800 employees dedicated to the life sciences and most recently attained annual revenue exceeding \$1 billion. IDC estimates that Tech Mahindra derives roughly 3% of its revenue from the life sciences, 53% of which comes from the sales and marketing space. After a close evaluation of Tech Mahindra's offerings and capabilities, IDC has positioned the company in the Contenders category within this IDC MarketScape.

### *Strengths*

Tech Mahindra has experience working with life science companies across all three sections of the industry: pharmaceutical, biotech, and medical devices. Roughly 90% of Tech Mahindra's life science customers are large corporations with revenue over \$1 billion, with a significant base of customers spread across North America and Europe and a small number in Asia/Pacific. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, Tech Mahindra received high marks for its account management capabilities.

## *Opportunities*

Tech Mahindra has a growing track record of engaging with its clients under flexible pricing contracts (i.e., profit or risk sharing), which should provide it increasing opportunities going forward as the life science industry continues to become more interested in these types of arrangements and migrate toward this model. At the functional category level, digital asset management and call center offerings represent strong growth opportunities for further development by Tech Mahindra.

## **TMS Health**

Established in 1992, TMS Health (a Xerox company) has been serving the life science industry for over 20 years. The company, headquartered out of Boca Raton, Florida, has more than 800 employees focused solely on the life sciences. IDC estimates that TMS Health has annual revenue of roughly \$55 million and derives 100% of its revenue from the life sciences, a slight majority of which comes from the sales and marketing space. After a close evaluation of TMS Health's offerings and capabilities, IDC has positioned the company in the Major Players category within this IDC MarketScape.

## *Strengths*

TMS Health has extensive experience working with pharmaceutical companies as well as some biotech and medical device companies. TMS Health works with both large and small life science customers, all of which are based in North America, though several customers have international extensions. TMS Health has a considerable number of delivery centers located across North America, Europe, and Asia and in Latin America. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, TMS Health received high marks for project management capabilities, technical skills, and overall value delivered to its clients.

## *Opportunities*

With the life science industry becoming increasingly interested in risk-sharing and profit-sharing type contract models, further exploring and promoting pricing model flexibility in this direction could serve as a nice opportunity for TMS Health to expand business both outside and within its existing customer base. At the functional category level, call center and customer support offerings represent strong growth opportunities for further development by TMS Health.

## **Wipro**

Founded in 1945, Wipro has been serving the life science industry for the past 10 years. The company, headquartered out of Bangalore, India, has offices in 57 countries and most recently attained annual revenue approaching \$7 billion. Wipro derives roughly 10% of its revenue from its health and life science business unit (half of which IDC estimates comes from life sciences), 40% of which comes from the sales and marketing space. After a close evaluation of Wipro's offerings and capabilities, IDC has positioned the company in the Major Players category within this IDC MarketScape.

## Strengths

Wipro has extensive experience working with medical device companies, complemented by midlevel experience with pharmaceutical and biotech companies as well. The vast majority of Wipro's life science customers are large corporations with revenue over \$1 billion, with a smaller portion spread across midsize and small firms. While more than half of its client base is North America based, Wipro does have a significant client base across all regions of the world, including Europe, Asia, and Latin America, with multiple delivery centers in each region as well. Relative to other vendors discussed in this report, and based on feedback from multiple customer references, Wipro received high marks for its technical skill set and account management capabilities.

## Opportunities

Wipro is willing to engage with its clients under flexible pricing contracts (i.e., profit or risk sharing) and has previously executed some deals under this type of model. Further exploring and promoting these types of engagements should provide Wipro increasing opportunities as the life science industry continues to become more interested in these types of arrangements and migrate toward this model. At the functional category level, social media analytics as a service and predictive modeling both represent strong growth opportunities for further development by Wipro.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in

an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

For the purposes of this report, BPO includes outsourcing of all services like call center, customer support, and any other ongoing repetitive processes, such as report generation or ongoing monthly/weekly/quarterly data analysis. The scope of this report examines BPO within the life science sales and marketing sector and is not limited to a specific subset of tasks for business process outsourcing. However, the most commonly cited areas include call center, customer support, data analysis, report generation, marketing operations, sales operations, predictive modeling, training services, content creation, opportunity assessment, competitive intelligence, KOL services, knowledge management services, social media analytics as a service, research services, and forecasting as a service.

## Market Overview

Life science companies are undergoing a technical paradigm shift that has been long in the making. Cloud technology, tablet-driven mobile capabilities, actionable analytics, and growing social media importance are four technological pillars of change that are influencing significant strategic and operational overhauls across the commercial life science landscape. While many of these technologies have existed for several years, various catalysts have caused each of these areas to "tip" only in the past few years.

Industry comfort with the security of data living in the cloud has for the most part now been achieved. The advent of the tablet has completely revolutionized what companies refer to as a "mobile strategy." Making analytics more actionable has reinvigorated companies' appetite for further investment in analytics. And although social media is still very much in its infancy, pilot adoption and expanded interest are mounting. All of these advancements, coupled with continually growing government regulation and the compliance challenges that life science companies face, make the current industry environment ripe for expanded IT investment.

The life science sales and marketing space in particular continues to evolve and change as widespread adoption of cloud technology and significant regulatory pressure in recent years (gift ban laws, aggregated spend compliance, etc.) have caused most pharmaceutical companies to reevaluate and reinvent their go-to-market sales and marketing strategies. Increased focus on electronic HCP interactions, greater reliance on mobile capabilities, and stronger emphasis on multichannel marketing optimization are just a few of the areas currently top of mind for life science organizations. Growing importance of "actionable" analytics and social media analytics pilot activity in the sales and marketing space are also worth noting as significant trends.

To manage all of these growing difficulties, companies are looking to increasingly externalize many business processes to reduce overhead, shift fixed costs to variable models, and gain access to deeper skill sets that are available from third-party firms that specialize in optimizing particular business processes.

## Strategies and Capabilities Criteria

Tables 1 and 2 provide key strategy and capability measures for the success of life science sales and marketing BPO vendors.

**TABLE 1**

### Key Strategy Measures for Success: Life Science Sales and Marketing BPO Vendors

Strategies Criteria	Criteria Definition	Criteria Weighting
<b>Offering strategy</b>	The vendor's current development of offerings will be relevant and attractive to customers over the next three to five years.	
Offering road map	Current offerings are expected to match directly to current customer needs to deliver maximum customer benefit over the next three to five years.	3.00
Delivery	Vendors are expected to have deep experience in each of the areas in which customers are currently seeking sales and marketing-related offerings over the next three to five years.	3.75
Portfolio strategy	The vendor is expected to attribute a significant priority level to its focus on the life science sales and marketing segment over the next three to five years.	0.75
Customer base	The company is expected to have a substantial customer base over the next three to five years.	2.50
Offering strategy total		10.00
<b>Go-to-market strategy</b>	The vendor's capabilities maximize the connection between offerings and customers, such as delivery, partnerships, pricing, distribution, marketing, sales, and service.	
Pricing model	The vendor will be willing to demonstrate value through flexible pricing mechanisms, including profit sharing-based relationships, over the next three to five years.	0.75
Sales/distribution strategy	Over the next three to five years, the vendor's sales/distribution structure will be aligned with the way customers, especially those in high-growth market segments, want to buy.	2.75
Marketing strategy	The vendor's marketing organization is expected to be aligned with the priority customer segments and executing well over the next three to five years.	1.75
Engagement capabilities	The vendor's customer-facing delivery skills and capabilities are expected to satisfy market wants and needs over the next three to five years.	4.75
Go-to-market strategy total		10.00

**TABLE 1**

**Key Strategy Measures for Success: Life Science Sales and Marketing BPO Vendors**

Strategies Criteria	Criteria Definition	Criteria Weighting
<b>Business strategy</b>	Strategies to grow the business are aligned with market trends and future opportunities over the next three to five years.	
Growth strategy	The company is knowledgeable on the life sciences and will be heavily focused on the sales and marketing sector over the next three to five years.	4.75
Innovation/R&D pace and productivity	The pace of continued investment is expanding the company's life science sales and marketing offerings over the next three to five years.	2.00
Financial/funding model	The company will generate, attract, and manage capital well over the next three to five years to create market value.	1.50
Employee strategy	The company is expected to hire employees and organize itself optimally to create market value for customers over the next three to five years.	1.75
Business strategy total		10.00

Source: IDC Health Insights, 2013

**TABLE 2**

**Key Capability Measures for Success: Life Science Sales and Marketing BPO Vendors**

Capabilities Criteria	Criteria Definition	Criteria Weighting
<b>Offering capabilities</b>	The offering's capabilities align well with current market needs and demands.	
Offering road map	The vendor's current offerings match directly to current customer needs to deliver maximum customer benefit.	3.00
Delivery	Vendors have deep experience in each of the areas in which customers are currently seeking sales and marketing-related offerings.	3.75
Portfolio strategy	The vendor attributes a significant priority level to its focus on the life science sales and marketing segment.	0.75
Customer base	The company has a substantial customer base.	2.50
Offering capabilities total		10.00

**TABLE 2**

**Key Capability Measures for Success: Life Science Sales and Marketing BPO Vendors**

Capabilities Criteria	Criteria Definition	Criteria Weighting
<b>Go-to-market capabilities</b>	The vendor's capabilities maximize the connection between offerings and customers, such as delivery, partnerships, pricing, distribution, marketing, sales, and service.	
Pricing model	The vendor is willing to demonstrate value through flexible pricing mechanisms, including profit sharing–based relationships.	0.75
Sales/distribution strategy	The current sales/distribution structure is aligned with the way customers, especially those in high-growth market segments, want to buy.	2.75
Marketing strategy	The vendor's marketing organization is aligned with the priority customer segments and is executing well.	1.75
Engagement capabilities	The vendor's customer-facing delivery skills and capabilities satisfy market wants and needs.	4.75
Go-to-market capabilities total		10.00
<b>Business capabilities</b>	Financial, employee, partner, and R&D management, among other capabilities, are in agreement with current market opportunities.	
Growth strategy	The company is knowledgeable on the life sciences and is heavily focused on the sales and marketing sector.	4.75
Innovation/R&D pace and productivity	The pace of continued investment is expanding the company's life science sales and marketing offerings.	2.00
Financial/funding model	The company is generating, attracting, and managing capital to create market value.	1.50
Employee strategy	The company hires employees and organizes itself optimally to create market value for customers.	1.75
Business capabilities total		10.00

Source: IDC Health Insights, 2013

## LEARN MORE

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### Related Research

- *IDC MarketScape: Worldwide Life Science CRM Software 2013 Vendor Assessment* (IDC Health Insights #HI242172, July 2013)

### Synopsis

This IDC Health Insights report provides an assessment of where the life science sales and marketing business process outsourcing (BPO) market is going, how the major vendors compare with each other, and what criteria are most important for life science companies to consider when selecting a BPO provider.

With total IT spend in the sales and marketing space now exceeding \$3 billion, companies are being driven toward sales and marketing BPO from several angles, including the need to reduce costs, increase process automation, access resources with higher specialized skill sets, and improve process efficiency and standardization.

Eric Newmark, program director of IDC Health Insights' Commercial Life Science research, noted, "Many companies are now expanding BPO beyond traditional barriers and expanding into knowledge-based areas that have traditionally been less outsourced. Knowledge process outsourcing (KPO) such as analytics, business intelligence, and predictive modeling are all examples of new areas of increasing interest for life science companies. Likewise, several IT service firms have recently expanded their KPO offerings to better service these newer industry needs. Life science companies that have not explored these offerings should, at minimum, increase their familiarity. These services can help companies obtain increased insight in a quicker fashion from big data that has traditionally been underutilized. If you are looking for assistance in selecting a third-party service provider for sales and marketing BPO, the guidance provided in this IDC MarketScape is a great place to start."



## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1000 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For more than 48 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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