

Indian Enterprise Software Products **On Accelerated Growth Path**

Enterprise Software Product
Excellence Matrix



NASSCOM®

F R O S T & S U L L I V A N

Indian Enterprise Software Products On Accelerated Growth Path

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Excellence Matrix**



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Published by

NASSCOM, New Delhi

Designed & Produced by

CREATIVE INC.

Phone: 91-11-41634301

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Executive Summary

Global enterprise applications – Market trends

- Global enterprise applications market continues to grow rapidly with small and medium size enterprises now adopting enterprise-class software and large enterprises upgrading solutions for greater integration of business processes
- Enterprise suites from leading software vendors such as Oracle, SAP and Microsoft continue to dominate the large enterprise segment
- Emerging players globally have successfully identified white spaces to address and conduct line-of-business operations needs offering a significant addressable market opportunity
- Global software vendors (large and emerging) are increasingly segmenting the markets and offering industry-specific solutions developed on core products to accelerate sales
- Cloud-based models are transforming business models enabling vendors to cater to broader market segments and offer modules at relevant price points

Indian software product landscape

- Enterprise applications forms the highest concentration segment for Indian firms with over 300 Indian software products
- Domain knowledge is the key differentiator being leveraged to drive growth in Indian and global markets
- Niche offerings and innovative business models has aided products to achieve Y-o-Y growth rates of over 30-40 per cent
- The last few years have witnessed a significant broadening of industry base by software products being developed and monetised across multiple market segments and micro verticals
- Drivers include focus on greater customer services, cost savings and incorporation of emerging technologies into solutions, such as mobility, social, cloud and information management
- Analytics is rapidly emerging as the core value proposition for most software products with enhanced big data capabilities, predictive analytics and intuitive dashboards

Product Excellence Matrix (PEM) assessment – About

- NASSCOM has partnered with Frost & Sullivan, to drive a nomination-led initiative – The Product Excellence Matrix recognises Indian software products across defined categories which have achieved strategic approach and excellence to growth



- The programme provides (a) platform for the software product firms to gain visibility with the end-user segment as well as (b) insights into the competitive scenario and relative positioning in the target market segment
- Enterprise applications is the third in the horizontal segment category series post the successful completion of analytics and mobility segments

Product Excellence Matrix assessment – Enterprise applications

- 250+ nominations relevant to enterprise software category were received
- More than 70 per cent of firms incorporated post 2010 indicating the rapid increase in entrepreneurship and focus on the segment
- Almost one-third of these firms are already scaled up with employee base of more than 100
- Tier II locations are also emerging in the enterprise software products landscape with 33 per cent of representation
- ~62 per cent of the product vendors focus on global markets
- ~29 per cent of shortlisted products representation in customer management category highlighting the high focus of Indian providers on customer-centric products. The products ranged from integrated CRM suites to market and sales functional products
- ERP formed another major segment with ~23 per cent nominations with a broad spectrum of applications catering to diverse industries
- ~21 per cent of the nominations were received from a diverse set of business software products ranging from productivity management products, compliance management software and planning solutions



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45 Way
Forward

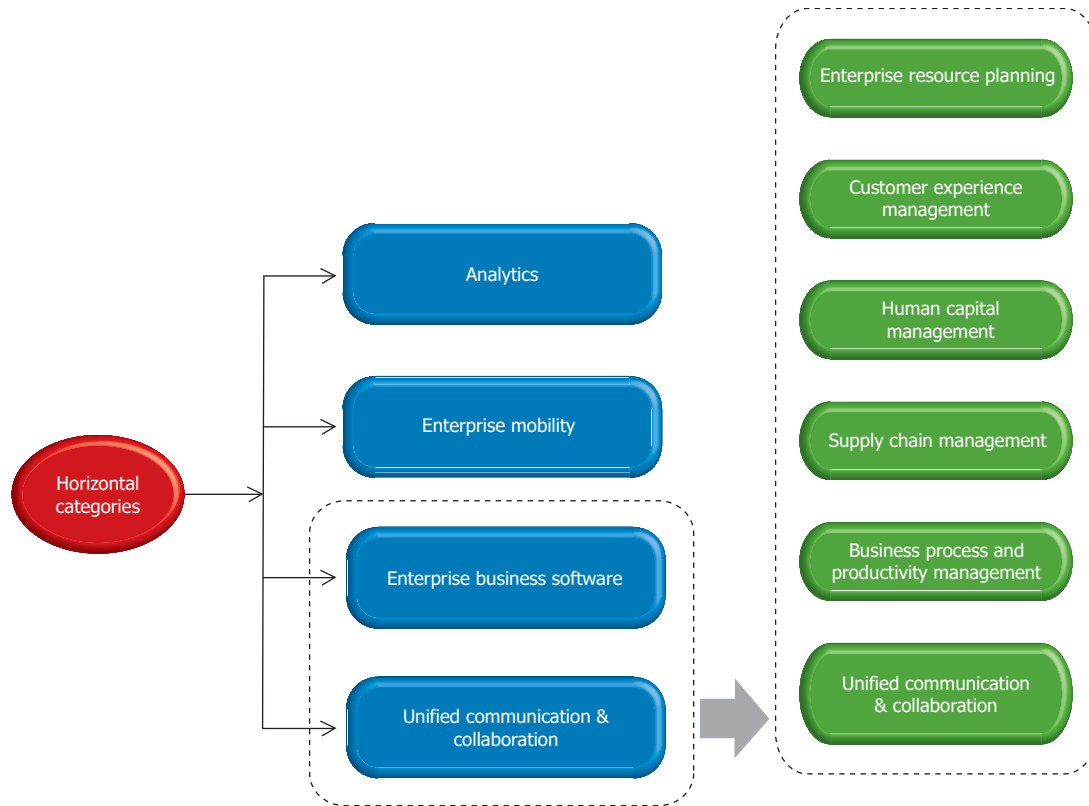


The NASSCOM PEM initiative

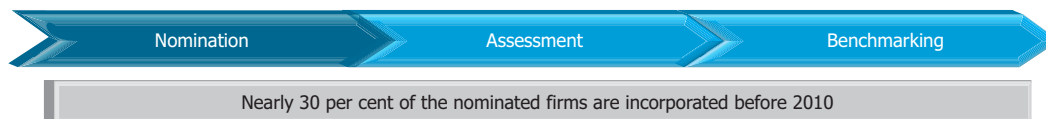




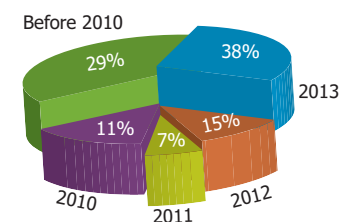
Covers four segments – This report combines enterprise software and unified communication & collaboration together



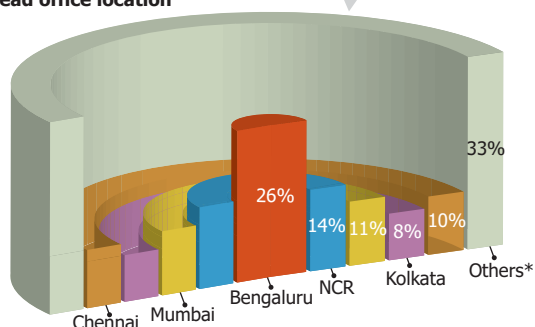
~252 products nominated in this category



Year of incorporation



Head office location

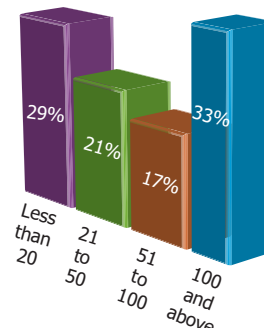


*Others include cities like Hyderabad, Thiruvananthapuram, Pune, Visakhapatnam, Raipur, Nagpur

While a majority of the enterprise software product firms are based out of Bengaluru, a substantial presence in Tier II cities

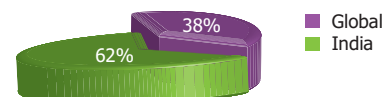
Base (n) = 252

Employee breakdown



Offshore markets continue to attract Indian product vendors

Market focus

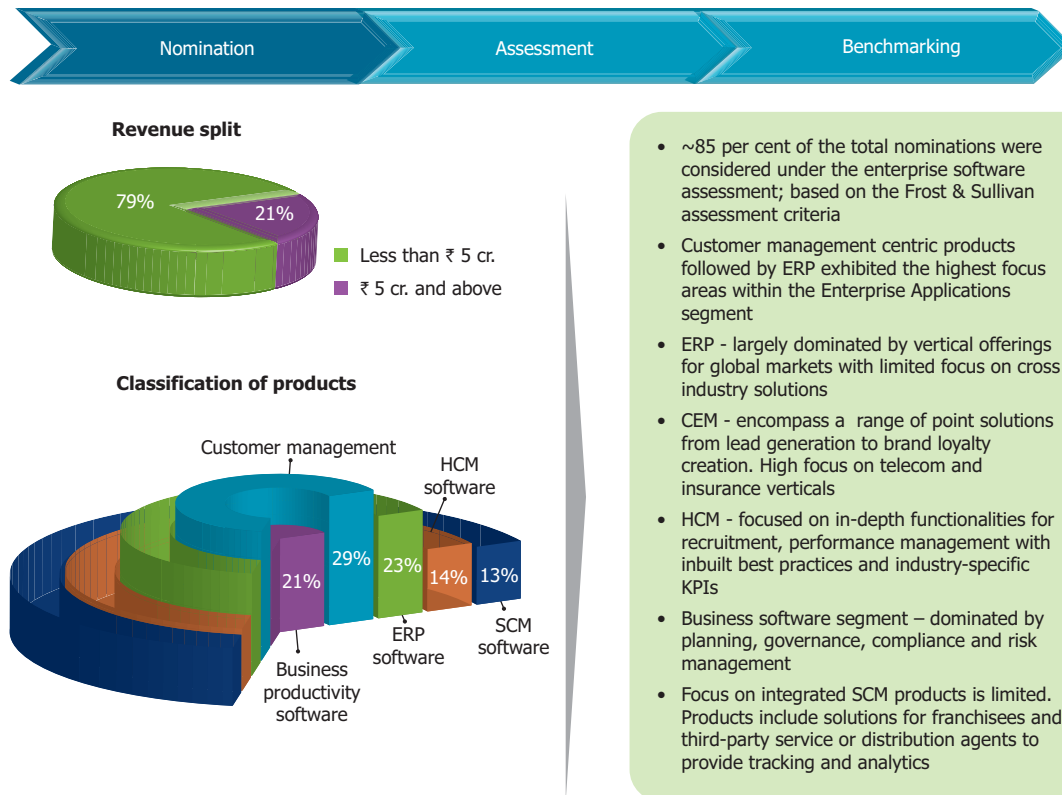


The entire assessment and benchmarking exercise has been carried out in a 3-step process. As the first step, an aggressive campaign to drive nominations for the enterprise applications was carried out by NASSCOM reaching out to software product firms pan India.

Over 250 nominations were received for the category. However, given the definition of the category under consideration for assessment, certain nominations were found to be more relevant for other categories, hence, 213 software products qualified for further process post validation.

Over 53 per cent of the software products were launched post 2012 and have achieved a substantial revenue and customer base, clearly highlighting the strategic excellence and acceptance of Indian software products in domestic and global markets. Although a majority of providers are based out of Bengaluru, there is a remarkable representation of firms based out of non-metro and Tier II cities emphasising the increasing competitiveness in the space.

~29 per cent of the products focus on customer-centric applications



Based on the nominations received, the products were bucketed into categories to create further parity in relative benchmarking. Nearly 23 per cent of the software products were applications focused on Enterprise Resource Planning (ERP) while 14 per cent were focused to Human Resources (HR) functionalities and another 29 per cent focused on customer-centric applications. The other nominations included Supply Chain Management (SCM) and Business Process Management (BPM) software. Although the products can be classified under the segments above, there is a clear convergence amongst technologies. Software products are increasingly focused on addressing business needs and leverage functionalities as well as best practices that may cut across traditional software package landscape. The assessment also underlined the trend of high disparity within the same category of software products given the scope to create differentiation built on emerging mobility, collaboration and analytics technologies. Software product vendors are also utilising innovative business models to identify white spaces built on cloud models, price point variations and inventive services engagements.

Exhaustive assessment of nominated products to get featured on the GRID



Dark horses

- Strong value proposition, differentiation and well-articulated growth strategy
- Possess high potential to achieve accelerated growth

Exemplars

- Well-defined growth strategy and successful execution
- Compelling value proposition aligned to target market needs to be backed by strong execution capabilities

Scouts

- Successfully identified market opportunities and developed innovative solutions aligned to target market needs
- Relatively weak in strategic approach and execution capabilities

Achievers

- Formulated and implemented strong go-to-market initiatives in line with the present vision
- Demonstrated excellence in market expansion monetisation capabilities

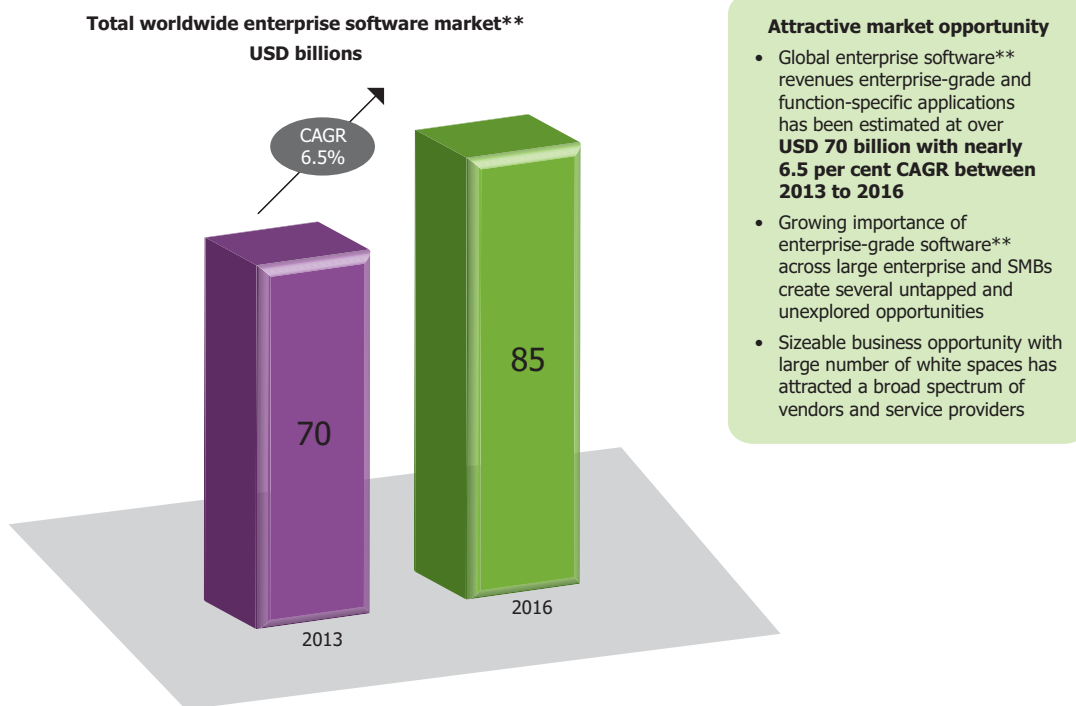
Frost & Sullivan's team of consultants, analysts and domain experts conducted in-depth assessments of the qualified nominations. Detailed calls were held with several nominees to get a better understanding and perspective of the data sent across in the nomination phase. Nominations were grouped in accordance to sub categories and relatively benchmarked on strategic and implementation excellence demonstrated in the last Financial Year. The Product Excellence Metrics have been carefully designed to recognise software products that have demonstrated excellence in the relevant space of offering.

Products benchmarked on strategic Excellence Vs Execution Excellence



The Product Excellence Matrix benchmarks firms on strategic excellence and execution excellence. A number of parameters have been considered to relatively assess and rank products. The definition of parameters and weightages assigned depends on the category/sub category to ensure parity and relevance of the model. Furthermore, the assessment model ensures minimisation of subjectivity in relative ranking and is based purely on the data provided in the nomination process.

Mobility, analytics and cloud adoption alter the enterprise applications offerings and drive market growth



**ERP, CRM, SCM, HCM
Source: Frost & Sullivan research

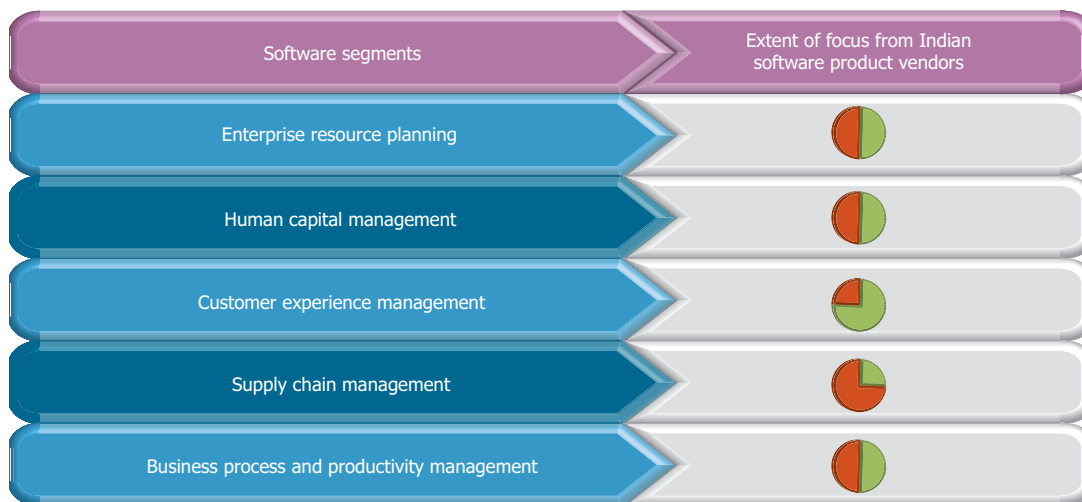
A significant change has been witnessed over the last 3-4 years in the global enterprise applications and business software markets. A number of disruptive forces contribute to this rapid change, impacting the suite of offerings, services as well as delivery ecosystem.

The increasing awareness and adoption of enterprise mobility is having a direct and visible impact on the software product offerings in terms of the value proposition as well as the architectural design. Parallely, analytics is now the key driver to software adoption and forms the most critical capability component of the product suite. Further, cloud computing has gained significant maturity and SaaS offerings have witnessed traction across geographies and industry segments.

All of the above forces have pushed product vendors to redesign their product strategy. At the same time it has created new markets and increased scope of differentiation in the otherwise saturating enterprise segment.

Although, global players like SAP, Oracle and Microsoft continue to be key market players, emergence of new market segments like small and medium businesses coupled with need for solutions in line with global mega trends have created market entry and growth opportunities for Indian software product vendors.

Customer-centric offerings have witnessed high growth and interest amongst Indian SME/start-ups



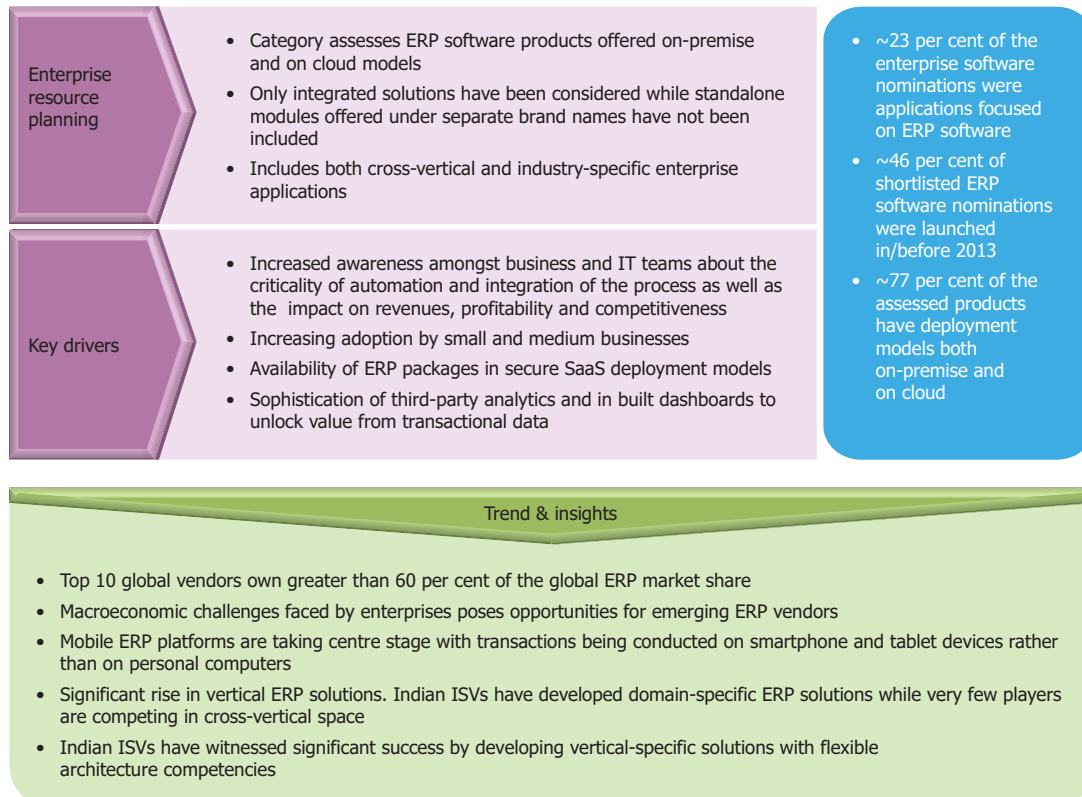
- Highly dynamic business environments being faced by organisations globally, has created significant opportunity for software products that can assist in market analysis, reduce customer acquisition cycle and create greater loyalty/reduce churn rates
- Verticalised value proposition developed over horizontal solutions marks one of the key trends altering the sales and marketing approach of software products
- Despite the increasing adoption of integrated packaged software, point solutions catering to niche business solutions continue to offer an attractive opportunity

As the market opportunity for enterprise software products continues to expand globally, across large and emerging enterprise segments, it has opened up several white spaces for the software provider ecosystem. The transforming ecosystem in India for software product start-ups, a more conducive environment to raise seed money and growing confidence amongst angels and VCs has resulted in hundreds of Indian ISVs developing innovative solutions.

Enterprise applications (ERP, CRM, HCM, SCM) and functional business software has been one of the highest activity segments amongst the overall enterprise software category. The capacity to incorporate greater domain knowledge and industry vertical expertise in the offerings is one of the key drivers for the enhanced focus on the segment.

Growing interest amongst CMOs, CIOs and CEOs on ways to leverage social media, mobility and analytics to strengthen customer offerings and support sales teams has directly translated to CRM and CEM segments witnessing heightened focus and considerable success for Indian product vendors. Although, very few Indian players are offering cross-vertical ERP solutions, a large number of verticalised integrated offerings have been launched in the last few years. HCM, SCM and business software segment offerings are characterised by standalone point solutions developed to address niche end-user business concerns and challenges.

Enterprise resource planning software



Enterprise business decision-makers are now well aware of the criticality of integrated solutions and the core ERP functionalities are rapidly getting commoditised. SaaS models have made it possible for small and mid-sized businesses to adopt the integrated enterprise applications and significant growth has been witnessed over the last 2-3 years in the market segment. As organisations gain more trust in environment to handle critical data, there is a clear transition towards varied types of software deployment models on third-party infrastructure. Cloud is clearly enabling overcome the concerns around IT infrastructure faster with roll outs through IaaS, PaaS and SaaS. As firms seek ways to maximise ERP benefits, higher investments are expected in mobile solutions and business intelligence. Investments in decision-making tools and dashboards designed to support leadership need for information and real-time collaboration will govern the market over the next few years.

Amongst the provider ecosystem, SAP continues to retain the worldwide market share leadership while other key players include SAP, Oracle, Sage, Infor, Microsoft and Kronos. The ISVs are focusing on aligning products to changing technology trends and continue to develop a stronger value proposition around social mobile, cloud, real time data analytics capabilities.

Indian players have capitalised on the shift in fixed to variable cost structure by offering highly verticalised applications in SaaS model. High degree of vertical-specific process capabilities and best



practices are enabling the players to identify and monetise opportunities in global and domestic markets. While, the Indian software vendors offer simplicity, pervasiveness and the scalability with a plug-in architecture, a key trend is the high focus on enabling mass & easy customisation. Built-in frameworks, industry templates, customisable dashboards form a core component of the value proposition centred around high level of customisation capabilities of their ERP applications. Players are also exploring developing mobility-centric ERP based on comprehensive suite of apps to penetrate new market segments than rather conventional enterprise packages.

PEM: Product excellence ERP



Product Excellence Matrix – ERP software products



Firm highlights – Enterprise resource planning software

Cross-Vertical

IBS ERP (KVN Software Pvt. Ltd.)	<ul style="list-style-type: none"> Vertical and device-agnostic ERP software that integrates processes like business development, operations (services or manufacturing), material management, despatch, accounts and finance, payroll & HR management Consists of development framework ELIT (Easy Logic Implementation Tool) and business process logics which reduces source coding writing and hence the development time Can connect to various devices like biometrics, weigh bridges and mobile devices Targeted across diversified vertical industries like manufacturing, projects based firms (infrastructure firms, EPC contractors etc.), shipping, fashion, education, etc. and to small to medium and large sized firms. 	
	<ul style="list-style-type: none"> End-to-end ERP software that equates for the complete lifecycle of business requirements with a unique three-click result orientation for any desired transaction or output Is cross-platform, device-independent, cloud-based, highly robust and comprehensive that scales easily across the needs of small businesses and large enterprises 	KenCloud ERP (SWASH Convergence Technologies Ltd.)
PlumERP (Plumsoft)	<ul style="list-style-type: none"> Comprehensive and integrated suite of cloud ERP that runs all key back-office operations and financial business processes Offers robust framework enables rapid web application development Is highly extensible, browser and platform-agnostic with design enabling the product to perform well in low bandwidth situations 	
	<ul style="list-style-type: none"> An enterprise-grade ERP product suite that addresses business needs of manufacturing, energy, EPC, infrastructure and banking industries Built on Ramco VirtualWorks®, an enterprise cloud computing platform that enables development of multi-tenant, robust and scalable web-enabled solutions Accessible over the Internet, is device, platform and technology-agnostic Integrates with multiple external partner systems, enterprise applications and EDI/e-commerce interfaces Deployed on private, public cloud and on-premise Available on-premise, on cloud and on device as a downloadable app on Android and iOS platforms, ensuring integration and interoperability on various devices and across platforms 	Ramco ERP on Cloud (Ramco Systems Ltd.)



Firm highlights – Enterprise resource planning software (contd.)

Media

CLEAR for Broadcast (Prime Focus Technologies Pvt. Ltd. (PFT))

- Enterprise-wide hybrid cloud-enabled media ERP platform targeted at broadcasters, channel operations, PPV/VOD, new media and library operations
- Digitises enterprise processes and manages content operations in one technology platform
- Has a business applications layer driving programming and content analytics, production support and contextual advertising
- Enables broadcasters to manage the business of content by enhancing agility, unlocking new revenue streams, enabling creativity, cutting costs, and driving efficiencies – delivered via a flexible business model
- Designed with multi-level security, seamless plug-and-play ecosystem, modular functionality and distributed workflows to accommodate regional operations and scale-out architecture

Process manufacturing

- End-to-end ERP software to address the needs of process manufacturing firms
- Offers features of reporting, customisable GUIs
- Caters to business requirements of small and medium scale enterprises

Exactly ERP (La Exactly Software Pvt. Ltd.)

Construction

FARVISION (GAMUT INFOSYSTEMS LTD.)

- Enterprise resource planning software for construction and real estate verticals
- Device agnostic, and available on various app stores
- Integrates with various third-party software and other platforms (biometric integration, weighbridge, bar code, EPABX integration, other third-party software, etc.) to address business needs of the target verticals

Retail

- Ready-to-use retail software that provides point-of-sale billing, inventory control, financial accounting, payroll and customer loyalty programme to retailers of standalone retail store or a chain
- Based on OPOS and ESC/POS standards that allow it to integrate and work with most of point-of-sale hardware
- Integrated real-time accounting, customer relationship management and payroll
- Device and platform-agnostic value proposition

FusionRetail (Rance Computer Pvt. Ltd.)



Firm highlights – Enterprise resource planning software (contd.)

Education

GEMS – Governing Education Management System (Juno Software Systems)

- Education ERP that caters to every aspect of education, research, academics and related areas in a simple interactive user interface
- Currently used by reputed academic institutions
- Supports regulatory compliance and consists of 40 modules integrated to manage complex institutional processes

- Multipurpose school management software that has modules for all administration, management and learning related activities efficiently
- Has a collaboration tool using its task, discussion, poll, blog and video conference plugins
- Has an internal messaging system which can be integrated with external communication tools like email and SMS
- Basic version available as free and open source

Fedena (Foradian Technologies)

ace™ (Entlogics Technologies Pvt. Ltd.)

- Comprehensive suite of apps which address various aspects of school management including communication, collaboration, documenting and tracking required in administrative, finance, academics and assessment systems
- Built on global web services standards for interoperability, is device and platform-agnostic

- Education ERP that helps educational institutions to automate their processes
- Equipped with 16 seamlessly integrated modules & 5 comprehensive dashboards that ensure efficient education delivery for the entire educational enterprise – back-office, academics, classrooms and the library
- Is deployed on Google cloud and supports multi-tenant architecture
- Focus on improved and intuitive user interface along with addition of features

Applane Education (Daffodil Software Ltd.)



Firm highlights – Enterprise resource planning software (contd.)

Healthcare

PARAS

(Srishti Software Applications Pvt. Ltd.)

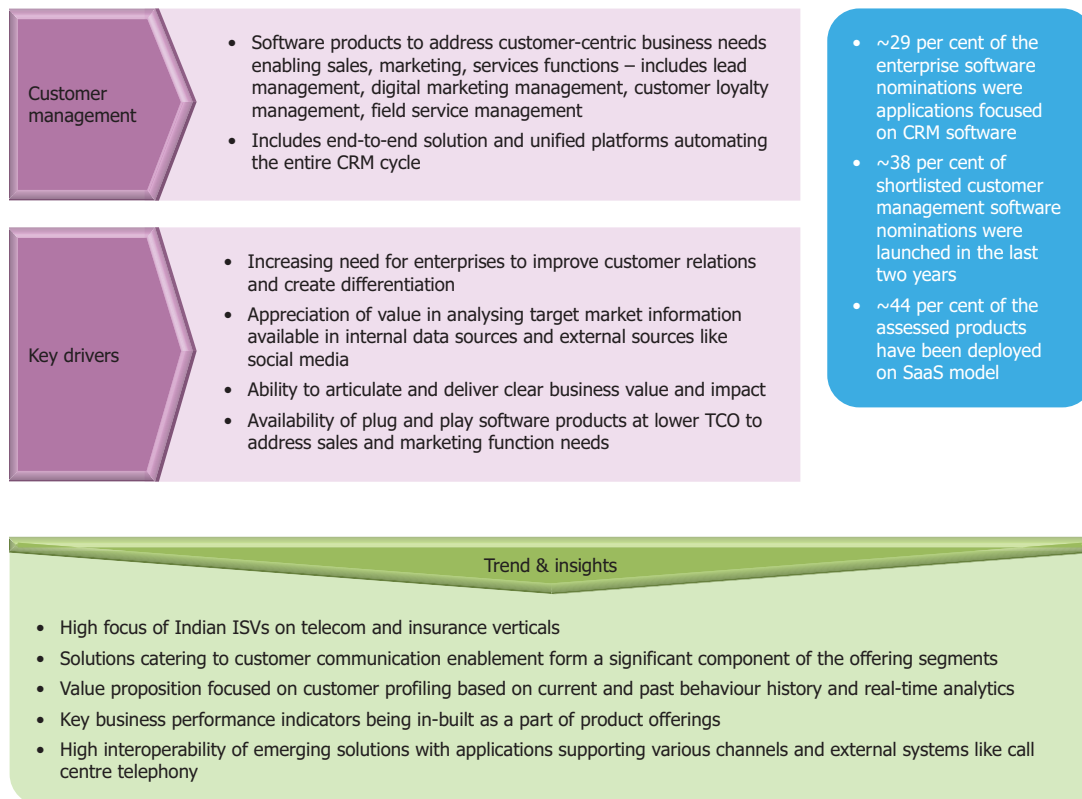
- Enterprise-class hospital management information system that provides proactive patient care, helping greater customer experience, customer walk-ins and hospital branding
- Addresses the business challenges of governance, inventory optimisation and revenue secularisation across locations
- Activity-based costing module helps healthcare institutions in profitability management and intelligent decision-making

Insta HMS

(Insta Health Solutions Pvt. Ltd.)

- Enterprise-grade hospital management software that addresses automation of all processes of hospitals, diagnostic centres, labs and clinics, covering financial, operational and clinical
- Addresses needs of small and medium hospitals to large tertiary, multi-centre and chain of hospitals
- Addresses special needs of practices like dental, ophthalmology, IVF, Dialys, etc.
- Complies with standards for CPT codes, LOINC codes, E&M Codes, ICD

Customer management software



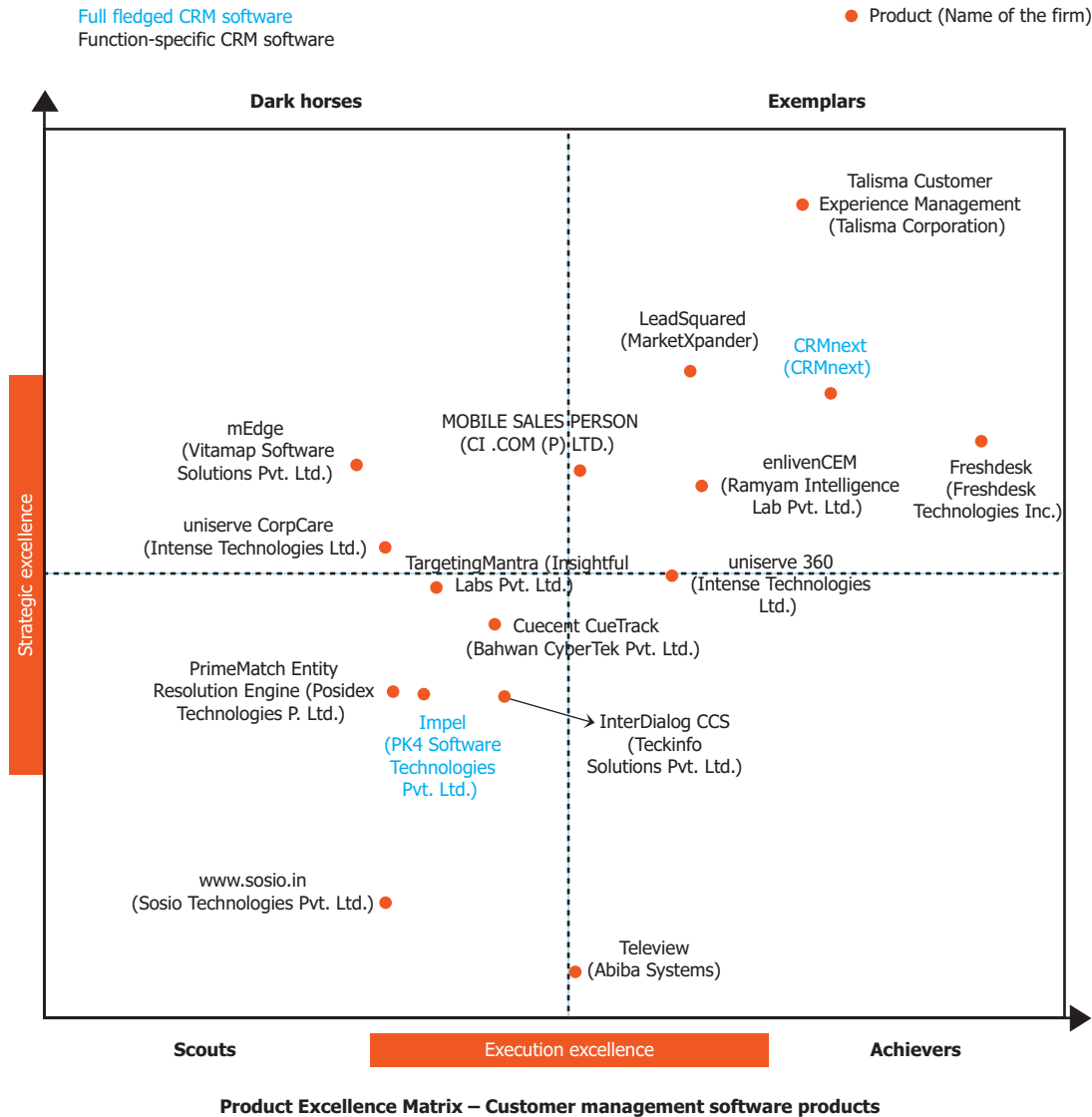
The need for customer management has been ever-increasing irrespective of industry and scale of operations. Developing effective marketing strategies, delivering consistent world-class service, reducing customer churn and adopting best practices is no longer a matter of choice for businesses. Further, the availability of insightful structured and unstructured data across multiple information channels is altering the approach to customer analysis and engagement.

Indian ISVs have been very successful in identifying these opportunities and developing innovative software products with well-defined Return on Investments (ROIs) for their customers. Host of product being developed are concentrated on providing efficient method to reach out to customers and customer communications like statements, newsletters, notifications across multiple channels of delivery like print, email, mobile, web and social mediums.

The other segment of software products are offering a single platform to manage and improve all customer-related processes including sales, marketing & customer service for improved service (speed/efficiency) – Meet and Improve Turnaround Times (TAT), Customer Satisfaction (CSAT).

Irrespective of the breadth and depth of functionality, most software products provide real-time insight and analysis using interactive dashboards and reporting coupled with functional capabilities on mobile devices like smartphones and tablets.

PEM: Product excellence CRM





Firm highlights – Customer management software

CRM

CRMnext (CRMnext)

- Enterprise-wide CRM application for all customer-related processes including sales, marketing & customer services
- Provides integrated reporting and analytical capabilities
- Provides customer information and documents in a single view, manages geographically diversified teams and operations and thus helps in improving pipeline visibility and sales effectiveness, reducing lead conversion cycle time and improving customer acquisition, get real-time insight and analysis using interactive dashboards & reporting

Impel (PK4 Software Technologies Pvt. Ltd.)

- End-to-end customer relation management software that is device and platform independent
Enables customer engagement via SMS and email
Geo-tracking integrated with transactional data

Customer experience management

- Customer experience management software that maps customer profiles, transaction and various cross domain interactions in a streamlined approach with a high processing engine to deliver Next Best Actions (NBAs) directly at customer touch points and take business actions
- Focus on addressing business needs of customer engagement, personalisation, campaigning, solving shocks and difficulties, addressing service issues effectively, cross sell and up sell

enlivenCEM (Ramyam Intelligence Lab Pvt Ltd)

- SaaS based personalisation and analytics platform for e-Commerce, media and other online businesses that learns the behaviour of users in real-time & shows items to the right person at the right time in a meaningful relevant manner
- Roadmap: plan to build plug-ins with multiple platforms such as Magento, Shopify etc.
- Marketing strategy includes partnering with firms offering complementary technologies in other regions to market its product on a commission basis

TargetingMantra (Insightful Labs Pvt. Ltd.)

Talisma Customer Experience Management (Talisma Corporation)

- Customer experience management software that enables businesses to deliver highly personalised customer experience for their customers across channels/transactions/relationships/geographies
- Incorporated megatrends of cloud, mobility and social media.
- Vertical and device-agnostic, intuitive, scalable and configurable to suit various business needs



Firm highlights – Customer management software (contd.)

Customer experience management

uniserve CorpCare
(Intense Technologies Ltd.)

- Platform for enterprise customer experience that enables enterprise customers to control their telecom expenses while providing them with better understanding of their telecom usage and spend
- Scalable, flexible and distributed processing architecture, supports multi-tenancy, has plug-in connectors and adapters, is platform and device-agnostic and is cloud-enabled thus enabling SMBs to leverage enterprise-grade application and features at a competitive price

TeleView
(Abiba Systems Pvt. Ltd.)

- A telecom sector focused customer experience management tool with dashboards, reports and other visualisation tools and drawing upon data from diverse data sources like MSC, billing, CDRs, prepaid systems, CRM

Customer support

- Cloud-based customer support solution that offers that multi-channel support – allowing agents to track, assign and resolve customer queries coming in via Twitter, Facebook, email, chat, phone and forums
- Customisable and offers all the tools for robust multi-channel capability, integrated game mechanics to supercharge agent productivity, smart automations, reporting suite, etc.
- Brings in conversations happening across the web and social media under a single dashboard
- Integrated with 30+ popular CRM, live chat, and email marketing tools, including Salesforce, SugarCRM, FreshBooks, and Google Apps
- Pricing model: Free forever for the first three agents

Freshdesk
(Freshdesk Technologies Inc.)

Case management

Cuecent CueTrack
(Bahwan CyberTek Pvt. Ltd.)

- Workflow-based case management system that manages, assigns, and tracks cases to closure and helps organisations in managing Service Level Agreements (SLAs) for these cases
- Can integrate with various channels and external systems
- Addresses business needs of managing interactions with stakeholders, enabling interactions through multiple channels (call centre; IVR; online; mobile; social media), managing rule based assignment of tasks depending on the type of product, region and priority, managing assignment of cases to the workforce based on the availability, skills, type of product, region and priority



Firm highlights – Customer management software (contd.)

Marketing automation

LeadSquared (MarketXpander)

- Cloud-based marketing automation software that makes digital marketing easy, measurable and revenue focused for small businesses
- Connects all digital marketing campaigns, provides actionable insight into campaign mediums, captures all leads from web, phone, social media, chat, blogs, ads & lead selling platforms, and using automated drip marketing in converting the leads
- Customisable and integrable with third-party applications
- Built using component based open architecture

Community management

- Community management software that helps in social media management, internal task management, bulk mailing, accept donations, event creation, IVRS support
- Creates, manages, and grows interest based focused groups, invites them to events, creates campaigns, promotes it and accepts funds

www.sosio.in
(Sosio Technologies Pvt. Ltd.)

Entity resolution

PrimeMatch Entity Resolution Engine (Posidex Technologies P. Ltd.)

- Provides single view of organisation's customer across all their lines of business or products by matching credentials of the customer (entity resolution) on the basis of the demographic information provided by the customer
- Used for creating unique customer master, one time identification of duplicate customer records and tagging on the entire customer data, clustering and grouping of common customers, house-holding, allotment of unique customer identity etc.
- Addresses business needs of front line staff who deal with client facing applications like CRM, etc.
- Portable across databases, operating systems and hardware architecture; SOA based to support integration with core business systems



Firm highlights – Customer management software (contd.)

Customer communication management

uniserve 360 (Intense Technologies Ltd.)

- Customer Communications Management (CCM) software that unifies the business process of customer communication to enable organisations to send personalised communication to their customers in a most cost-effective way
- Acts as a unified platform for sending all types (statements, welcome kits, notices, receipts, dunning letters, etc.) of customer communications across various customer touch points (print, email, mobile, self-service)
- SOA-based semantic grid architecture for supporting huge volumes of transactional data

InterDialog CCS (Teckinfo Solutions Pvt. Ltd.)

- Computer Telephony application that comprises of Telephony (switching), CTI Engine, Interactive Voice Response System, Voice Recording, Automatic Call Distribution and Dialer and also interfaces with 3rd party applications like ERP / CRM through Web API's for a seamless user experience
- Uses a modular approach and user has the flexibility of buying modules as per exact business requirements and purchase additional modules with incremental investments.

Field force management

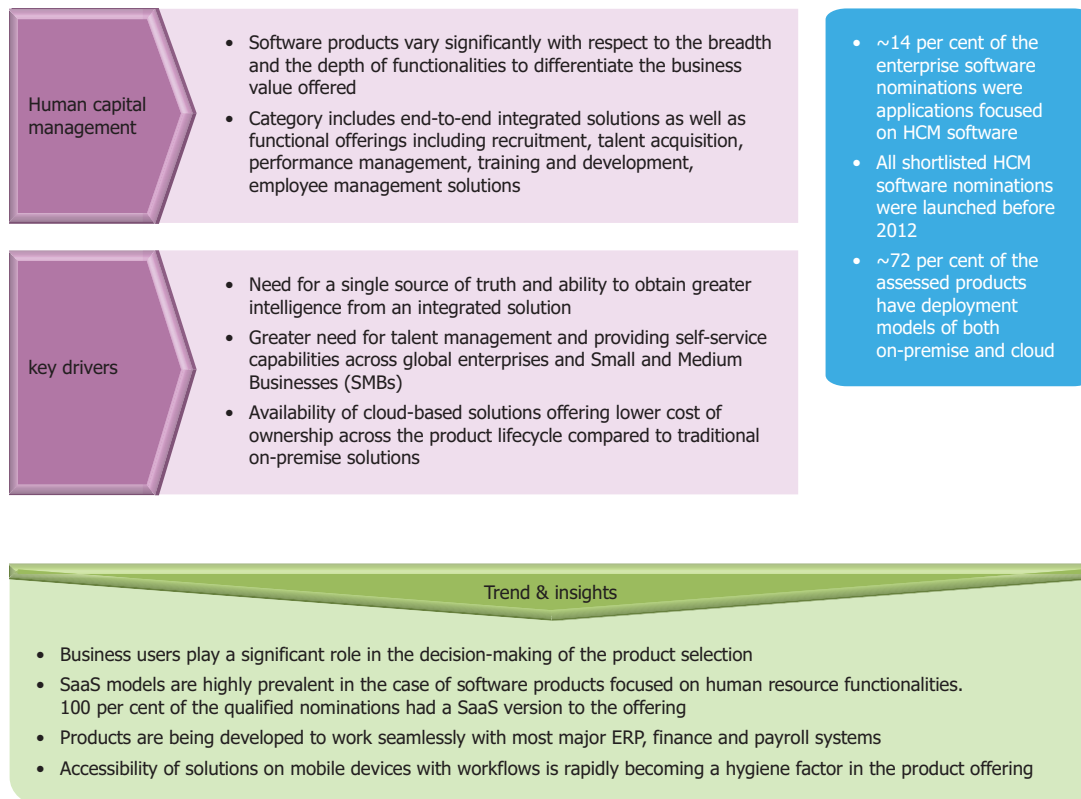
- Field service management software that provides last mile connectivity and visibility of field operations
- Addresses the need of enterprises of improving workforce productivity through training, engagement, motivation and work-life balance of employees/partners/vendors geographically distributed customer premises
- Results in improved customer service (speed/efficiency), Turnaround Times (TAT)
- Device and platform-agnostic, and is deployed on SaaS

mEdge (Vitamap Software Solutions Pvt. Ltd.)

- End-to-end mobile order management and fulfillment system for sales, service and delivery persons working from remote location
- Salespersons are enabled to view customer information, stock information, past financial credentials, take orders, generate invoice, print receipts, add new customers and transfer data back to HQ through wireless, email and cable sync
- Comes with a middleware which can add on to any predefined ERP and any front end handheld devices with mobile o/s

MOBILE SALES PERSON (CI .COM (P) LTD.)

Human capital management software



Perspective of enterprises across the world (large and small) towards HRM/HCM software products has changed significantly over the last decade. Enterprises are continuously evolving and driving initiatives to align their workforce goals and business objectives. Further, increasing organic and inorganic growth, scarcity of skills and competitive pressures are compelling businesses to develop a holistic and strategic approach for skill management.

The shift in business need has had direct reflection on the software products being developed and adopted. The solutions no longer focus on automation of transactions and record keeping functionalities but provide a business-centric value enabling businesses to hire the right talent, know their people better and operate in a highly collaborative environment.

Indian software product vendors have capitalised on the cloud and mobility trends to develop best-in-class solutions. The offerings vary from point solutions to end-to-end solutions with in-built analytics and open standards for greater integration capabilities. While the standalone talent management vendors face competition from global ERP vendors, several ISVs have successfully achieved growth rates of over 40 per cent over the last few years.

PEM: Product excellence HCM





Firm highlights – Human capital management software

Customer communication management

Adrenalin (Adrenalin esystems Ltd.)

- Enterprise-wide HCM software that is modular, available to all employees of an organisation and has self-service features for all strategic, financial and administrative employee-to-business processes
- Integrable to most ERPs, finance and payroll system and social, mobile, analytics and cloud-ready

- Web-based human capital management software that manages all aspects of employee life cycle from recruitment to retirement and provides a unified platform for all employee-centric activities across HR, accounts, admin, and payroll
- Modular and scalable with feature being configured and provided based on the requirements of the firm
- Integration with external systems is done through web services and connector
- Typical RoI of EazeHR is 300 per cent

EazeHR (EazeWork (Mobius Solutions Pvt. Ltd.))

EmployWise (Global Groupware Solutions Ltd.)

- Enterprise-grade human capital management software that covers entire employee life cycle of an organisation
- Easy to integrate with third-party applications through excel upload/download and web services
- Provides single sign on capabilities, configurable workflows, web-based self-service model of customer activation
- Deployed on multi-tenant SaaS model

- Full featured HRMS solution available on the cloud that automates strategic, tactical and operational HR functions
- Provides multiple modules that can be added individually or in sets that cover the HR requirements of any global organisation
- Can suit the needs of large to small and medium organisations
- Also available as a self-enrollment plug-and-play product

EmpXtrack (Saugun Technologies Pvt. Ltd.)

Greytip Online (Greytip Software Pvt. Ltd.)

- Enables organisations to deliver a wide range of employee services accurately, effectively and quickly
- Ensures that organisations have a well-structured and easy way to maintain employee data, accurately calculate payroll and enable statutory compliances. With the employee self-service features, information available to all stakeholders – CEO, employees and managers anytime and anywhere
- Bundled with insightful functionality and a wide range of features catering to the management of all aspects of human capital management

- Enterprise-grade people management software that, through an easy-to-use interface, captures the functions of the HR department and processes the same into a workflow
- Fully web-based software

HumaNET (Blue Chip Computer Consultant (P) Ltd.)



Firm highlights – Human capital management software

HCM

KServeHRMS (Kallos Solutions Pvt. Ltd.)

- HR and payroll software that has modules covering all aspects of HCM, with role based dashboards, automated self-service features
- Affordable to mid and small sized firms, with support for India statutory needs (PF, ESI, income tax, lwf, leave reports, gratuity, professional tax)
- Available on the cloud and in-premise

- Comprehensive and global HR & talent management solution that caters to industry verticals like caters to the needs of diverse industry segments that include retail, IT-BPM, consumer products, banking, staffing, facilities management, construction and real estate
- Deployed on-premise, cloud and as managed services
- Offers extension kits to customers to extend the functionality of existing features, based on specific needs
- Offers integration framework for providing connectivity to other legacy applications for data exchange
- Availability of GPS (Global Positioning System) and NFC (Near Field Communication) based time & attendance as a part of Ramco HCM on cloud enables customers to record NFC based time and attendance to authenticate, trace, and interact with employees at various levels, manage multiple small office set-ups across locations, or track employee movements in highly secure work environments
- Smart attendance enables seamless integration and accounting of time & attendance data for processing payroll
- Incorporates mega trends of mobility, in-memory analytics, cloud, social media, user experience

Ramco HCM (Ramco Systems Ltd.)

Performance management

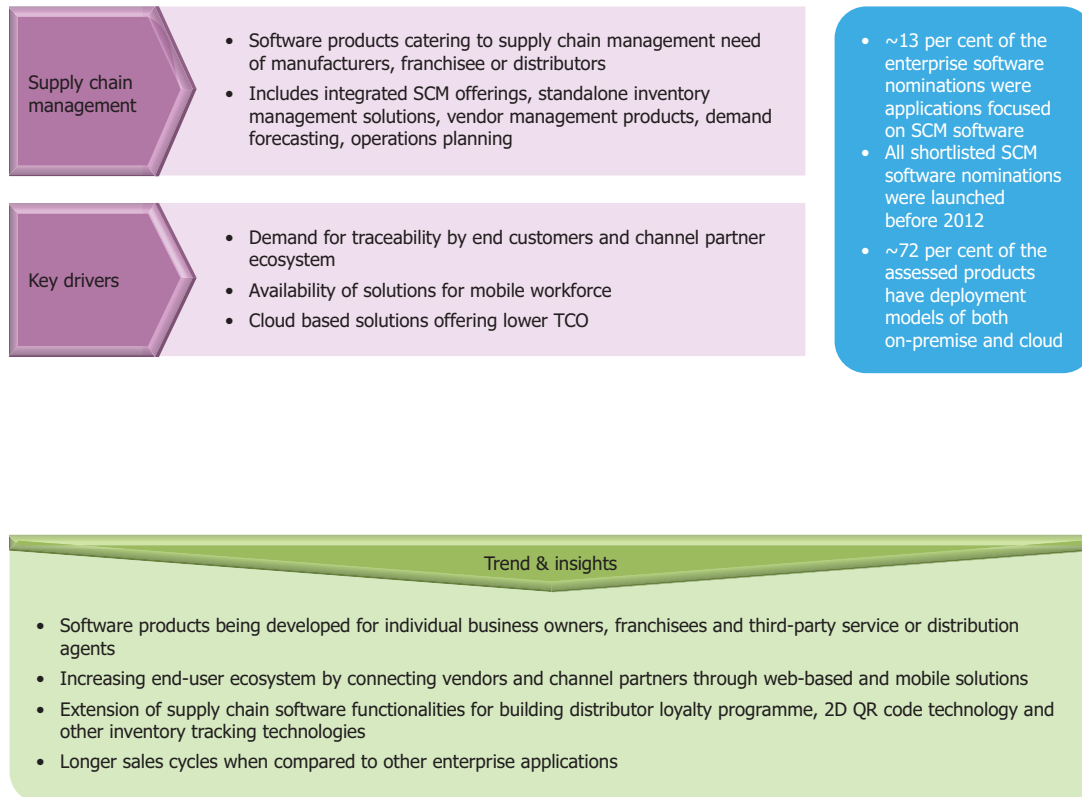
- Addresses the business challenges in policy deployment and performance management
- Provides execution plan of business objectives along with performance benchmarks and measurable metrics, enables reviewing performance in a structured manner, and reducing time spent in preparing for reviews, recording decisions and action points; implementing an objective methodology of appraisals ensuring employee retention and contribution
- Device and platform-agnostic
- Provides integration capability with all platforms that can provide access through file-based, SQL scripts and web services, supports a large number of protocols/ middleware and data sources

IbharCPM (IBHAR TECHNOLOGIES PVT. LTD.)

Recruitment Solution (eSoft Consulting Ltd.)

- Recruitment application for para military forces and state police organisations
- Addresses business needs of creating a transparent recruitment process, shortening the recruitment cycle, preparing and streamlining of the MIS data to be sent to Ministry of Home, Government of India

Supply chain management software



Enterprises today regard supply chain as one of the most critical aspects to create competitive differentiation. Enterprises are continuously looking for means to better estimate channel inventory, track products in real-time and reduce risks of fraud, loss and inefficient decisions in the sourcing function. Apart from driving operational excellence, streamlined processes and greater transparency, it also helps organisations to provide improved better service to their end consumers.

Globally, a number of software products are available that cut across business needs like providing POS data analysis, demand forecasting, operations planning, supply chain network optimisation, MRP planning and warehouse management. Indian software product vendors face stiff competition in the space with competitive pricing being one of the major challenges for many.

Despite cloud-based solutions witnessing traction, data security concerns from customers hinders rapid adoption. Vendors have devised innovative business models to drive sales. This includes solutions that will integrate with existing ERP solutions and partner ecosystem systems to provide better tracking and analysis maximising customer's return from existing investments in applications.

PEM: Product excellence SCM





Firm highlights – Supply chain management software

Supply chain management & planning



Dealer & service management





Firm highlights – Supply chain management software

Inventory management

mLiquidate
(iConcept Software
Services Pvt. Ltd.)

- Estimates and tracks channel inventory of the enterprise's products in the supply chain
- Identifies infiltration and its eradication from the supply chain, able to build loyalty programme with all its channel partners
- Device and platform-agnostic

Lead management

LeadEnrich
(LeadEnrich)

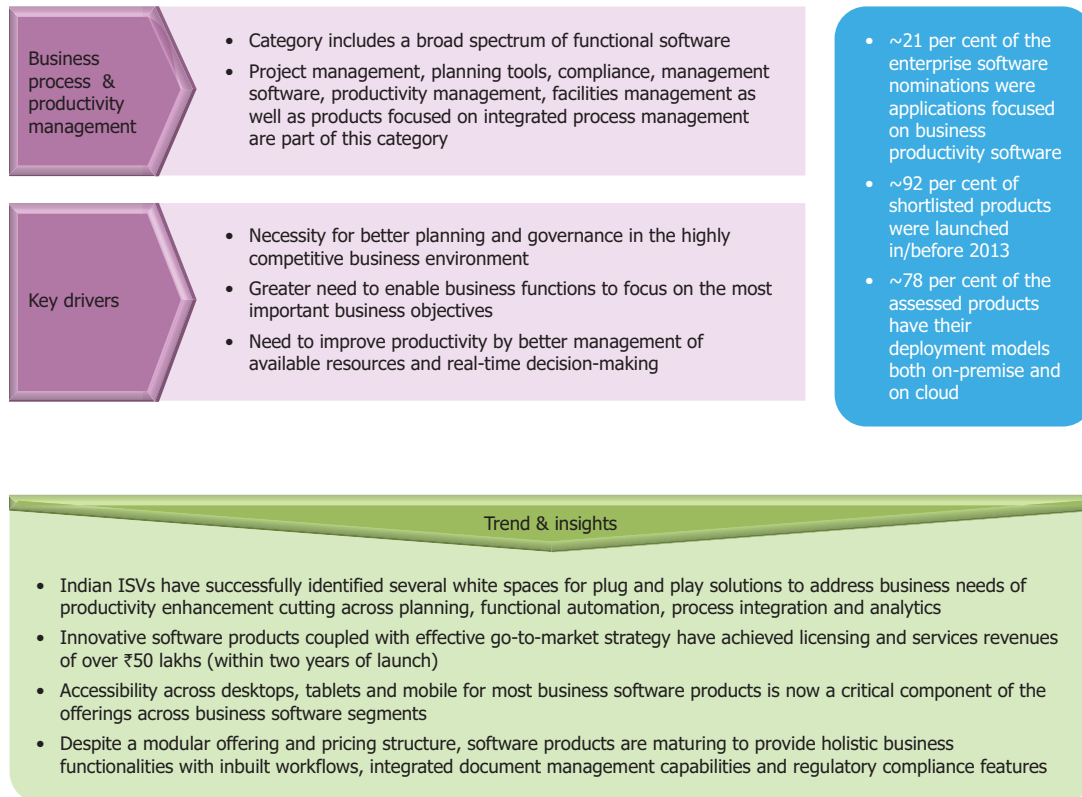
- Lead management software that addresses B2B marketer's challenges
- Built to integrate and work with CRMs, marketing automation platforms, content management systems, lead management systems and other marketing technology tools to enable B2B marketers achieve data/lead enrichment, web form optimisation, data health overview via enterprise wide marketing data dashboard, lead generation/lead analytics, targeted content
- Its proprietary knowledge-base, self-learning engine from real time data and large pool of partner data sources along with organisation's own house repository with text analytics capabilities make the platform more self-service oriented. It can analyse past campaign trends and help organisations to optimise their ongoing & future campaigns, and provide the most accurate results with a 360° view of each prospect to organisations

Sales planning

**Secondary Sales
Data Analysis**
(Arteria Technologies
Pvt. Ltd.)

- Enterprise application for secondary sales information capture and reporting
- Addresses business need to improve the supply chain-related business analytics and enable the senior management to make strategic sales and marketing related decisions for achieving better sales and performance results for the firm
- Reduces reporting time on secondary sales information capture besides information consolidation and reports generation on such data
- Can be accessed by the distribution network of the organisation. The data captured from the distribution network is centrally available in SAP NetWeaver BW and dashboards are made available

Business process and productivity management software



In today's volatile economic environment, firms are continuously exploring ways to achieve higher productivity, better cost control, and improved risk management. Efficiency is the cornerstone metric of successful businesses. Driving process improvements and gaining operational efficiencies requires tools and solutions that can help automate business activities, provide greater centralised view and control as well as manage functional activities at lower cost and with limited resources.

The business needs have thus resulted in a surge in demand for a broad spectrum of business software ranging from project management, planning tools, compliance management and governance software to niche business solutions that help functions operate more effectively-through holistic and real-time visibility to operations.

While standalone software solutions today provide best-in-class practices, organisations also need to orchestrate, design, deploy, execute, monitor and optimise the activities to provide for a seamlessly integrated standardisation and standardised process environment. BPMS solutions have gained significant maturity in integrating the silos of disparate information pools for large and emerging enterprises.



Several global software product vendors have launched suite of products over the last few years that cater to business needs, industry vertical-specific requirements and enhanced process management demand. Indian players will face stiff competition from the rapidly growing integrated and standalone products in the market demanding greater depth in functionality and interoperability for scalable growth.



Firm highlights – Business process and productivity management software

Business process management

Agilewiz BPMS/BPaaS

(iWeb Technology Solutions Pvt. Ltd.)

- Workflow, rule engine based technology platform that provides drag and drop end-to-end business application creation utility using which business applications can be designed in minutes
- Enables users to define their own metadata and tables, create their own form, UI pattern, etc.
- Has built-in vertical and horizontal-wise repository of business domains and functions
- Interoperable with most platforms

Lead management

Cuecent BPMS

(Bahwan CyberTek Pvt. Ltd.)

- Enterprise-wide BPM solution that enables organisations to orchestrate, design, integrate, deploy, execute, monitor and optimise their critical business processes and operations
- Consists of an integrated development environment, a process execution engine to execute the business processes and services, BPMS Admin for administration of processes, services and participants and real-time process analytics and performance measurement for decision-making
- Addresses business needs of lowering TOC, reducing errors in manual operations and performance improvements of processes and people involved

Sales planning

Intelligent Business Process Management Suite (iBPMS)-OmniFlow

(Newgen Software Technologies Ltd.)

- End-to-end BPM suite with user-friendly drag & drop modelling tool, role-based user access, function and domain-agnostic self-service design, real-time participation in design process
- Process designing platform provides user-friendly change management capabilities
- Pre-configured, industry best practice reports including KPIs, SLAs and TAT and productivity for different user group



Firm highlights – Business process and productivity management software

Project management

Agilewiz BPMS/BPaaS (iWeb Technology Solutions Pvt. Ltd.)

- Project management software meant for automation of work processes for mega projects in infrastructure (power plants, refineries, LNG terminals, townships, steel plants, etc.)
- Facilitates collaboration & control for tracking of records while they flow in between various organisations in compliance with project rules
- Offers RoBOTic Document Control Assistants that process the data using computer vision & artificial intelligence & decision-making algorithms to identify relevant data points from received scanned docs and update the enterprise document control application with minimal human intervention

Exactly ERP (La Exactly Software Pvt. Ltd.)

- Project life cycle management solution for project based enterprises in different vertical industries such as professional services, pharmaceutical & lifesciences, EPC and engineering & manufacturing
- Built on Service Oriented Architecture (SOA), functional modules are integrated in a seamless manner to provide industry-specific solution
- J2EE compliant and device and browser-agnostic

- Technology platform customised to EPC industry for executing turnkey projects integrating project shareholders in a single platform
- Enables sharing project information across multiple locations, maintain up-to-date project data and documents; standardise the project information
- Reduces project, material and manpower costs by ensuring total quality management throughout the project lifecycle
- Integrates with most Windows based applications and also enterprise applications, platform and device-agnostic

FARVISION (GAMUT INFOSYSTEMS LTD.)

Planning and management

a-mantra (SatNav Technologies Pvt. Ltd.)

- Web-enabled Computer Aided Facilities Management (CAFM) software that can enables property management, space management, facilities management, maintenance management, asset management, and seat utilisation, etc. of an organisation and thus ensure a complete infrastructure control
- Integrates data from different sources such as ERP or other in-house applications and generates reports dynamically
- Provides thematic maps that enhance spatial analysis; allows modification of spaces and assets configuration (locations, buildings, wings and floors) with ease, manages utilities within an organisation, and monitors the frequency of equipment breakdowns and useful life of assets



Firm highlights – Business process and productivity management software

Planning and management

Enterprise Content Management Suite-OmniDocs

(Newgen Software Technologies Ltd.)

- End-to-end ECM suite that is scalable, unified repository for securely storing and managing enterprise content
- Supports policy-based upload and distributed capture through web-scanning
- Deployable on public/private or hybrid model of cloud
- Targets mostly large enterprises. SMBs are also serviced through its cloud deployment and channel partners

- Centralised and access controlled application designed to automate execution of regulatory compliances across the various operating units of an organisation and facilitate real-time birds' eye view of the compliance levels of the organisation for senior management personnel
- Associated database is centrally hosted on the cloud and users are able to access the content over a thin client or a web browser
- Supports role-based access and supports multiple user roles

Komrisk
(Lexplasion Solutions Pvt. Ltd.)

MarketPulse

(Lepton Software Export & Research Pvt. Ltd.)

- Business-centric location intelligence software application that can plug in valuable geo-spatial insights into business analysis to drive informed decision-making for various business functions
- Provides visualisation of business data on Google Maps and helps in critical business decision-making through analysis with external data (demographic data, boundaries, POIs, competitor data, etc.)

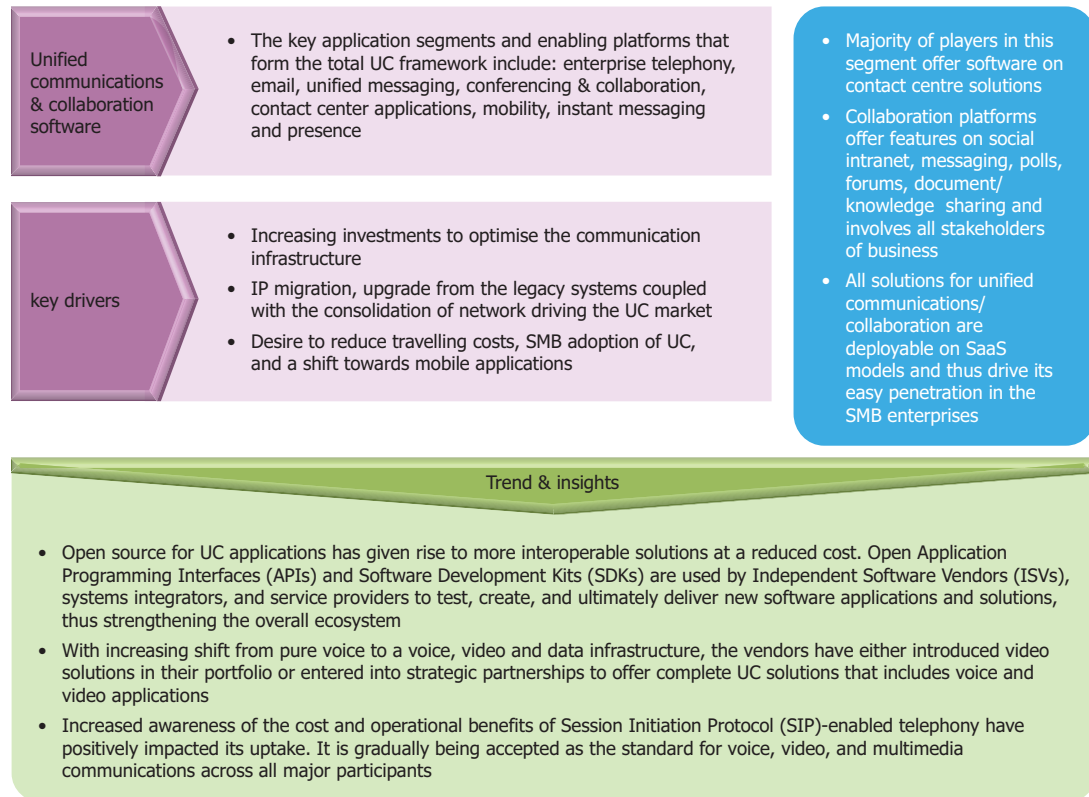
- Enterprise effort management software that sources work patterns in an automated manner, with virtually no manual intervention. It captures employee work patterns to provide insights into 'Time/Effort' at work in real-time based on information collected automatically from every employee and dashboards made available to individual users, while long-term analysis/reporting at business level available to managers
- Patent-pending 'anonymous mode' delivers organization level effort analytics without any access to individual data, thereby assuring complete privacy. Helps CXOs to get insights into capacity utilization and efficiency trends across different business dimensions. Managers can gauge their team's effort, thereby being able to guide their teams to work in a more planned manner
- Proposes a 20+ percentage increase in organisation at productivity, without requiring any change in existing process

Sapience
(Sapience Analytics Pvt. Ltd.)

www.a2zapps.com
(A2Z Applications)

- Unification platform that primarily has two roles:
 - Workspace-as-a-Service (WAAS): A suite of interconnected business apps deployed over a browser-based platform that is device-agnostic
 - Social-network-in-a-box: A full-feature and scaled enterprise social network that is plug-&-play, and can be white-labeled
- Device and platform-agnostic
- Provides nearly 100 REST API, to provide a seamless integration experience with other third-party software product environments

Unified communication and collaboration



Today's workforce is highly distributed and mobile, and the tools and devices that they seek are further driven by the consumerisation of IT. Collaboration needs to extend not only to employees at headquarters, but also to the enterprise ecosystem inclusive of supply chain, service providers, channels, and customers.

UC aims to link together the various business communication channels that normally exist in silos across most enterprises. This could include any mixture of telephony, conferencing, contact centre, email, voice mail, unified messaging, instant messaging, video, call recording, mobile phone usage, presence management and collaboration across a variety of user interfaces and devices, including mobile. The main purpose of UC is that it allows employees to communicate more quickly and easily thereby increasing productivity. Firms can gain significant advantage and improve customer service through improved productivity and the collaborative capabilities derived from UC.

Gradually, UC applications are being perceived as a strategic investment rather than just a cost centre. End-users are increasingly demanding advanced applications and more customised solutions from vendors and their partners. The availability of real-time, multi-media collaboration services anywhere, has provided enormous potential for firms to do business. It has the potential to bring enterprises closer to their customers, suppliers and partners simultaneously supporting new business processes and



practices. Improved collaboration through virtual meetings also reduces travel costs, thus enhancing efficiency and productivity. Replacing separate voice and data networks with a single merged IP network results in a lower Total Cost of Ownership (TCO), enabling location-independent business processes on any device, network anywhere around the globe.

New delivery models such as public, private and hybrid cloud, are likely to drive the market in the short to medium-term. These solutions are gaining high enterprise mindshare, mainly due to significant cost benefit, scalability and flexibility. Vendors are innovating their UC strategies around the changing market dynamics and migration options of existing customers.



Firm highlights – Unified communication and collaboration

Contact centre





Firm highlights – Unified communication and collaboration

Collaboration

Kreeo (i-nable solutions Pvt. Ltd.)

- Unified SMAC (Social, Mobile, Analytics and Cloud) platform for sharing information in various forms – blogs, bookmarks, questions and polls
- Unifies various types of content contributed by various users under the concept it relates to
- Combines social computing (Web 2.0), PaaS and big data to enable creation of knowledge and productivity solutions for enterprise
- Supports multi tenancy, deployable both on premise or cloud models, has lean and scalable architecture to support high level of load and big data storage, transport layer for interoperability/EAI

uKnowva (Convergence IT Services Pvt. Ltd.)

- Extensible enterprise collaboration platform that provides functionalities for social internet, information and document sharing through forums, blogs, instant messaging, polls/surveys
- Device and platform-agnostic, easily extensible and linked to third-party applications, deployed both on-premise and cloud models
- Successfully acquiring customers across industry verticals leveraging collaboration platform in innovative forms to achieve business objectives

Communications

- Inbound communication platform that connects through browsers
- Widgets act as an online hotline for businesses that provides free voice communication
- Provides detailed analytics, customer behaviour analysis, customisable call to action, live agent report, voice analysis, and cloud PBX
- Integrable with all web channels like emails, websites, landing pages, online advertisements, Google PPCs, social media campaigns, and other online marketing initiatives

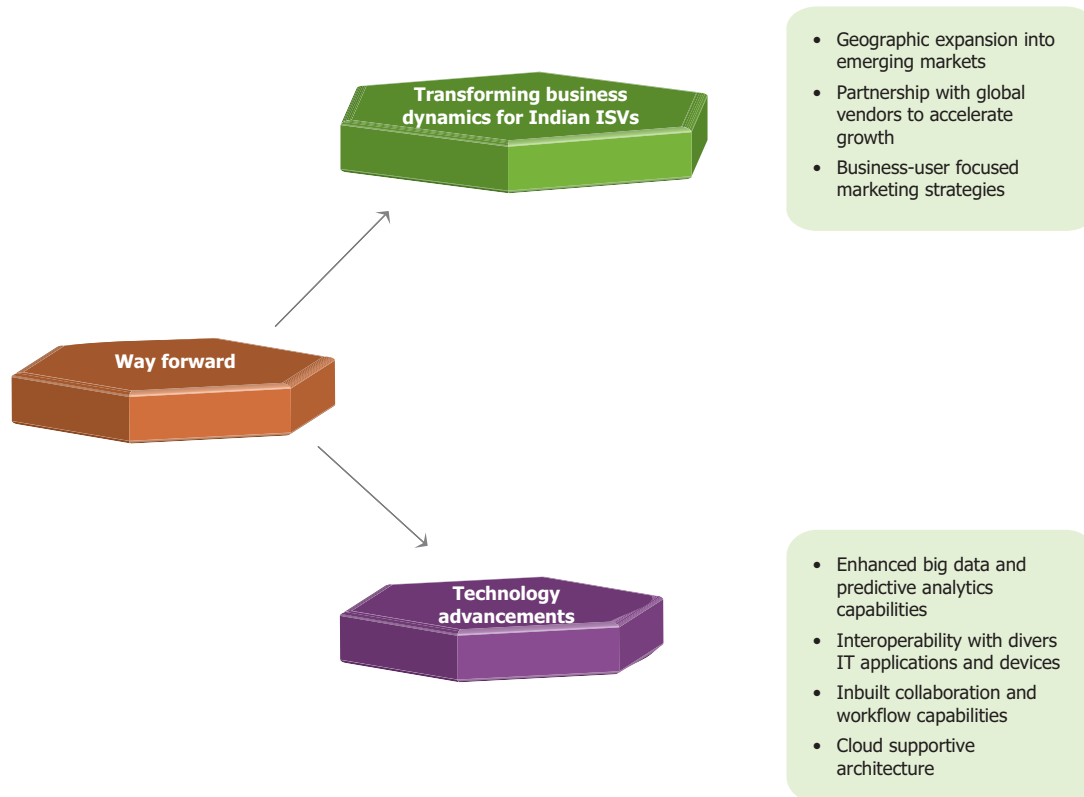
BounzD (Waybeo Technology Solutions)

- Communications integration platform that integrates CRM with various telephony systems with intuitive UI for smooth handling of inbound and outbound calls and dashboard to critically analyse various parameters
- Integrates reporting solution and social media integration
- Offers both on-premise and cloud deployment models

UniAgent (Consilium Software Pvt. Ltd.)



Continuous innovation and channelled marketing efforts will be imperative for scalable growth



Indian ISVs have been successful in understanding market trends, potential opportunities, developing innovative solutions and successfully gaining initial success. The following initiatives have been identified by most start-ups as a part of their growth plan in the short-term:

- Maturing product innovation for filing patents
- Aligning with device manufacturers – tablets and smartphone OEMs
- Developing joint go-to-market programmes with partners
- Establishing domain Centres of Excellence (CoEs)

However, achieving sustainable growth will be very challenging in the years to come. Indian players will face stiff competition from global entrepreneurs and established vendors. With increased acquisitions by market leaders, finding niche opportunities could be an uphill task. Indian products vendors will have to be back the product and technology by inculcating an innovation culture within the organisation, implementing a robust go-to-market strategy and forming valuable alliances.



Disclaimer

- The PEM grids are a result of a benchmarking exercise done by Frost & Sullivan for NASSCOM
- The benchmarking exercise was carried out only on firms that sent in their nominations, not on the entire Indian products industry
- The position of a firm on the grid was determined through an understanding of their growth trends, capabilities, strength of their offerings, and achieved business success
- While Frost & Sullivan did get a very good understanding of the quality and effectiveness of the products, they did not conduct a product evaluation involving onsite product audits
- The decision to feature any firm, along with their position in the grid remains at the sole discretion of Frost & Sullivan
- NASSCOM and Frost & Sullivan reserves to the right to change the approach to future iterations of this exercise

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