

TECH MAHINDRA RECEIVES THE 2023 ENABLING TECHNOLOGY LEADERSHIP AWARD

*Identified as best in class in the global cognitive field
service management industry*

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Tech Mahindra excels in many of the criteria in the cognitive field service management space.

AWARD CRITERIA	
<i>Technology Leverage</i>	<i>Customer Impact</i>
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

Transforming Field Service Management through Cognitive Artificial Intelligence Solutions

Tech Mahindra is an India-based digital transformation solutions company with more than three decades of extensive experience and domain expertise in networking, engineering, security, digital marketing, cloud, business process, customer experience (CX), and digital consulting services. The company is the technology subsidiary of Mahindra Group, a multinational company with leadership positions in farm equipment, utility vehicles, information technology (IT), and financial services industries.

Field service management is critical for organizations that have field resources, remote work components, and moving parts in their field operations. This function is at the core of any organization that services customers, including retail chains, restaurants, construction, repair of utility infrastructure, mining, industrial and heavy engineering, manufacturing, and gas utilities. Delivering cost-effective and customer-focused services while keeping field service engineers/technicians engaged and motivated is vital.

Field service management encompasses every aspect of service delivery, including scheduling work orders, dispatching service technicians, automating scheduling and dispatching, keeping track of service and repair tasks, communicating with employees in the field, tracking labor hours and job statuses, and invoicing the completed job. An effective field service management solution integrates data from enterprise management systems with remote data from the field to help organizations deliver exceptional customer experiences (CX) as well as manage employees and resources efficiently. Artificial intelligence (AI), machine learning (ML), analytics, automation, natural language understanding (NLU), internet of things (IoT), augmented reality (AR), and virtual reality (VR) are impacting all aspects of customer service. These technologies enable improved CX and employee experience (EX) while reducing costs.

Tech Mahindra is capitalizing on the global field service management market, which will be valued at \$30 billion by 2030. Given this growth potential, the company offers a full spectrum of field service management future-proof planning services and solutions—Yantr.AI, which includes workforce

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Industry Principal, ICT Research

management and optimization, scheduling and dispatching, route planning and optimization, strategic planning and scenario modeling, demand and capacity forecasting, field service transformation consulting, implementation and integration services, managed services for field operations, and network rollout, assurance, and activation services. Launched in September 2022, Yantr.AI is a cognitive AI solution that optimizes field services through deep analytical insights, decision-making support, and future-proof strategic planning. The platform combines technology, data, and people to automate, optimize, and improve experiences for field service operations. It helps clients identify lags and create a flawless field ecosystem through actionable insights and recommendations.

Frost & Sullivan notes that Tech Mahindra nurtures innovation culture by investing in incubation hubs to address industry-specific challenges and deliver on the future of industries. Based on its digital-first philosophy, the company has built comprehensive industry-specific solutions formulated on digital era needs and challenges. The company’s culture of innovation and technology development allows it to stay ahead of the competition by launching solutions efficiently to address client requirements. Yantr.AI is the first home-grown business process as a service (BPaaS) solution from Tech Mahindra Business Process Services (BPS) division. The key digital technology capabilities that power Yantr.AI include: ML and AI for forecasting, optimization, and actionable insights helping to proactively solve issues versus reactive problem-solving by competitors; embedding intelligent automation capability into the execution layer to drive efficiency; data integration using REST APIs to pull in data from multiple existing systems like Salesforce, ServiceNow, IFS, isMobile, and Celonis; cloud-based SaaS platform for scalability and flexibility; use of large language models for more accurate forecasting and optimization; digital twin capabilities for scenario modeling and risk assessment go beyond traditional optimization tools; advanced optimization algorithms like a solver for scheduling and routing as compared to rule-based assignments by other service providers; analytics dashboards and reporting for end-to-end visibility; and intelligent decision support recommendation (DSR) for on-the-day risk mitigation and routing optimization.

Tech Mahindra is the first service provider in the industry to build a planning engine and control tower for organizations in the field services industry. The control tower strategy enables Yantr.AI to provide end-to-end visibility and strategic decision-making capabilities for field service operations. Its true control tower approach integrated with AI and ML capabilities is unique compared to other platforms focusing only on dispatch and scheduling activities. The key elements of the control tower strategy include integrating data from multiple sources to provide a single view of operations; enabling strategic planning through scenario

modeling, risk assessment, and cross-skilling recommendations; optimizing resources in real-time through demand and supply balancing; proactively managing disruptions and ensuring business continuity, driving operational and strategic decisions through data-driven insights; and continuous learning from execution to further optimize processes.

Frost & Sullivan recognizes that Yantr.AI enables clients to address the full spectrum of field services needs, including strengthening field workforce planning, increasing operational efficiency, streamlining workflows, enhancing technician productivity, improving SLAs, and reducing unmet demands across vertical sectors such as telecom, utilities, oil and gas, and retail.

Delivering a Value-based, Flexible Pricing Strategy

Tech Mahindra has structured Yantr.AI to maximize value capture as the solution scales across geographies and operations. With a client-centric philosophy, Tech Mahindra offers Yantr.AI at a flexible pricing strategy with modular functionality deployment options. It includes multiple license options to enable clients to select the right set of features and capabilities for their needs. This modular nature supports ease of deployment and integration with the client ecosystem. Clients can select features according to their 'must-have, should-have, and good-to-have' needs while optimally managing their budgets.

Yantr.AI has a one-time implementation cost and ongoing support cost per annum based on number of workflows that the system supports, the number of users or planners accessing and utilizing the system, metrics such as the number of technicians, tickets, or jobs handled annually, the infrastructure deployed, and consulting support utilized. The pricing is customized for each client based on a combination of these factors rather than a one-size-fits-all or per-user model. Larger clients with higher volumes, in general, enjoy favorable pricing due to economies of scale.

The company's higher focus on the value and benefits delivered rather than just license fees alone sets it apart in the industry. The service offers flexible options to utilize the company's resources and developers in a flexible manner so that clients can utilize their internal resources and Tech Mahindra's teams optimally as per their requirements. It also offers managed service support options to enable end-to-end field service management utilizing a robust resource pool and expertise. Investing in Yantr.ai enables organizations to reduce costs associated with hardware maintenance and upgrades, decrease administrative tasks required to manage physical infrastructure, and improve resource utilization. The time required to implement Yantr.AI in a typical mid-sized organization can vary depending on several factors. However, based on experience, it is estimated that the implementation process takes around 6 to 9 months. With Yantr.AI, the price-performance value goes beyond cost savings as some of the key tangible benefits reaped by clients include approximately 2% to 5% reduction in operational expenditure, 4% SLA improvement, 3% to 5% impact on the NPS, 25% to 40% effort in reduction on field workflow operators, 7% to 10% drop in truck roll expenses, and 7% to 9% increase in technician productivity.

A Customer-centric Approach Driving Unmatched Client Experience

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Tech Mahindra aims to create differentiated value for its clients through a consultative approach and industry-specific solutions. Yantr.AI has propelled field service operations to the next level by addressing clients' most pressing challenges. Through a deep understanding of its clients' operating environment and domain expertise, Tech Mahindra has identified specific pain points in visibility, productivity, and cost optimization. Organizations with field services operations face challenges such as high operating costs, manual and disparate workflows, fragmented and manual planning, rudimentary dispatch systems, multiple enterprise management systems, and decentralized data. Tech Mahindra employs a holistic

go-to-market approach for Yantr.AI by leveraging its strong ecosystem of partners as well as direct sales engagement.

From the outset, Tech Mahindra adopts a consultative sales process focused on understanding unique operational challenges and desired outcomes. The company first initiates its network of channel partners to introduce the solution and qualify leads according to industry expertise. Simultaneously, its sales team proactively engages with C-level stakeholders through customized briefings highlighting the return on investment (ROI) potential. Once interest is established, Tech Mahindra's domain consultants conduct joint workshops to understand specific pain points and constraints. It structures tailored proof-of-concept deployments that showcase Yantr.AI's capabilities based on the pilot data from marquee clients. The company partners and works closely with its clients to structure pilots that demonstrate how Yantr.AI can optimize scheduling, streamline workflows, and deliver actionable insights.

Throughout the implementation stage, the company employs agile methodologies with frequent stakeholder alignment to prioritize value delivery. A dedicated success team oversees change management, training, and integration support to drive adoption. By integrating disparate data systems and applying advanced analytics, Tech Mahindra helps clients achieve end-to-end transparency and realize significant benefits around the achievement of key performance indicators (KPIs). Through an iterative implementation roadmap and change management programs, as well as the achievement of tangible SLAs during the pilot stage, the company validates the value proposition and builds confidence in clients to deploy Yantr.AI across their global operations. The company focuses on modular deployments that deliver rapid and measurable ROI. As set SLAs are met, Tech Mahindra upsells additional modules like strategic planning and digital twin capabilities. Furthermore, client feedback is extremely vital, and the company constantly integrates the feedback for system and implementation process improvements. This client-centric approach ensures that its systems and implementation process stay aligned with the client's evolving needs. Tech Mahindra's relationship with clients continues post-implementation as it aids clients through consulting and technical support, deriving maximum value with its Yantr.AI deployment.

Furthermore, Tech Mahindra works closely with industry partners to foster mutual growth and cross-organization innovation, create new joint opportunities, and expand technology capabilities and geographical footprint. The company's strong network of partners and their solutions strengthen its position as a leading field service management services provider. The company also partnered with Tech Mahindra Network Services, a subsidiary of Mahindra & Mahindra Limited, for integrated field service capabilities in network rollout deals; enterprise resource planning/dispatch system vendors like IFS, ServiceNow, and Microsoft Dynamics for integration and data exchange; system integrators for implementation support across regions; and data and analytics partners like NVIDIA for leveraging advanced technologies like large language models. Additionally, in a rapidly evolving technology landscape, Tech Mahindra is committed to regular system updates, integration with the latest AI and ML platforms, and advanced capabilities from ecosystem partners.

Frost & Sullivan acknowledges that Tech Mahindra strives to become a strategic partner empowering clients with data-driven decision-making for superior service delivery and competitive advantage. The company has successfully partnered with leading conglomerates across domains and geographical locations, helping them manage their field services to serve their customers better and build and support their field operations. Through the company's consultative and value-driven approach, Yantr.AI is set to become a mission-critical system permitting digital-first field service operations at scale.

Conclusion

With more than 16 years of experience in delivering field service management solutions across industry verticals, Tech Mahindra has developed deep industry knowledge and strong technical knowledge. Through a deep understanding of field service gleaned from years of domain expertise, Yantr.AI has propelled field service operations to the next level by addressing its clients' most pressing challenges. Through its value-driven consultative approach, Tech Mahindra has cemented its position as a strategic partner driving digital transformation through Yantr.AI, its innovative cognitive AI field service management solution. Yantr.AI brings AI into the process management of field services and bridges the technology gap by actively analyzing data points to offer actionable insights and recommendations, leading to higher efficiency.

With its strong overall performance, Tech Mahindra earns Frost & Sullivan's 2023 Global Enabling Technology Leadership Award in the cognitive field services management industry.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Award recognizes the company that applies its technology in new ways to improve existing products and services and elevate the customer experience.

Best Practices Award Analysis

For the Enabling Technology Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization Success: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

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- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
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- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

