



# **Digital Services – PEAK Matrix Assessment and Market Trends 2017: “Redefining Customer Experience with Digital”**

Digital Services

Market Report – September 2017: Complimentary Abstract / Table of Contents

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## Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

## Subscription information

- The full report is included in the following subscription(s)
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# Background of the research

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## Background of the research

- Enterprises are increasingly adopting digital technologies for achieving organization goals such as driving customer loyalty, improving brand image, combating competition, and staying relevant in the market
- As digital adoption is becoming a mandate rather than an option, enterprises are stepping up their digital investments and the IT and business teams are coming together to define the overarching digital goals and value being sought from the investments
- In this research, we present assessment and detailed profiles of 22 digital service providers featured on the digital services PEAK Matrix. Each digital service provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and recent developments
- The assessment is based on Everest Group's annual RFI process for the calendar year 2017, interactions with leading digital services providers (including product development specialists), client reference checks, and analysis of the digital services market

## Scope of this report

- **Services:** Digital services
- **Geography:** Global
- **Service providers:** 22 leading digital service providers

## This report includes the profiles of the following 22 digital service providers featured on the digital services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Deloitte Digital, IBM, TCS, and Wipro
- **Major Contenders:** Atos, Capgemini, CGI, Genpact, HCL Technologies, Infosys, LTI, NIIT Technologies, NTT Data, PwC Digital, Tech Mahindra, and Virtusa
- **Aspirants:** CSS Corp, EPAM, Luxoft, and Syntel

# Overview and abbreviated summary of key messages (page 1 of 2)

This report examines the emerging trends in digital services, changing market dynamics, shift in enterprise's digital investment priorities, and its impact on the service providers. It provides a comprehensive analysis of key service providers and consulting firms offering digital services and calibrates them on their delivery capabilities and resultant market success. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, among others, are:

## Emerging digital trends

- Unlike earlier years, 64% of the digital funding is now business-driven, funded by the individual business units, which indicates the growing importance of digital adoption across the organization and the blurring of lines between the IT and business teams to deliver digital
- The adoption level of digital technologies such as cloud, mobility, and social is already reaching maturity and the enterprises have now started looking at next-gen technologies such as IoT, AI, and RPA to further their digital agenda

## Shift in enterprise investment priorities

- Enhancing customer experience is the key value sought by enterprises from their digital investments to drive customer loyalty and create brand differentiation and 89% of the enterprises are adopting digital technologies to redefine their customer engagement strategy
- Enterprises are investing in redesigning customer journey by creating unmatched experiences across various touchpoints and revisiting their channel strategy to break-into new customer segments

Source: Everest Group 2017

# Overview and abbreviated summary of key messages (page 2 of 2)

## Emerging service provider trends

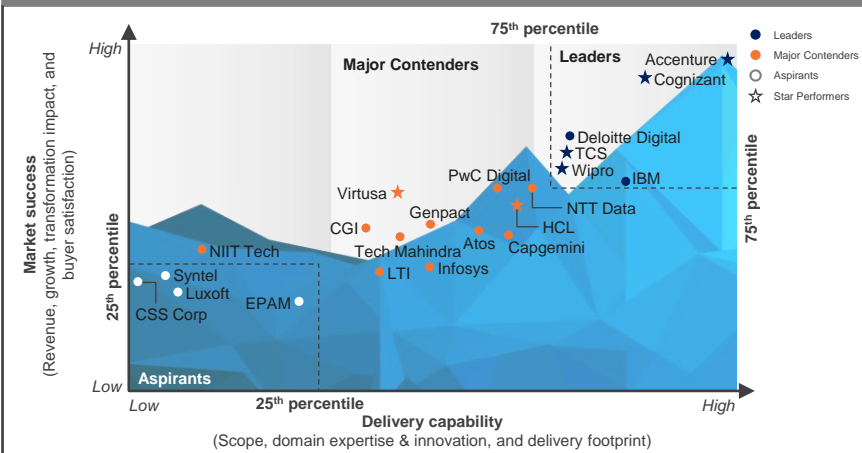
- Service providers are ramping up their customer experience design capabilities and adopting various innovative methodologies to keep pace with the enterprise demand
- They are also investing in acquisitions to augment their design talent and bring in creative culture

## Service provider delivery capability

- Accenture, Cognizant, Deloitte Digital, IBM, TCS, and Wipro are the current leaders in the digital services area. However, several service providers are emerging as major contenders and have developed the capabilities to deliver large digital engagements
- Leaders have design- and consulting-led transformation as the core of their value proposition, and they are continuously striving to build end-to-end digital capabilities

# This study offers a deep dive of digital services market; below are four charts to illustrate the depth of the report

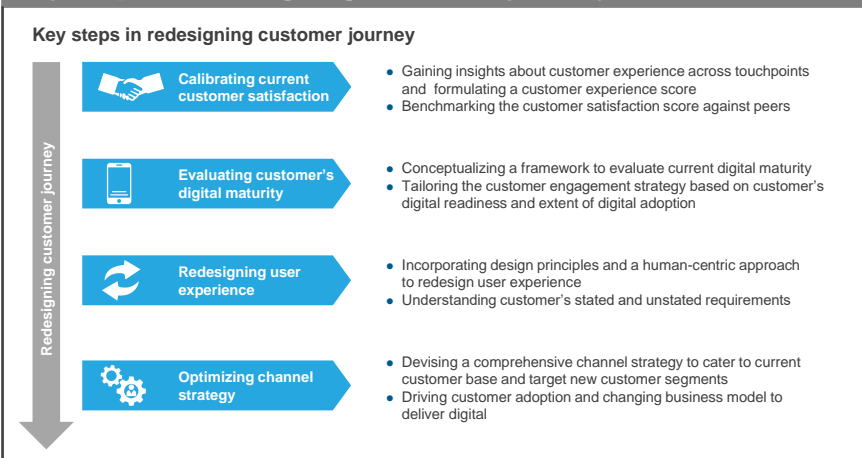
## Everest Group PEAK Matrix™ for digital services



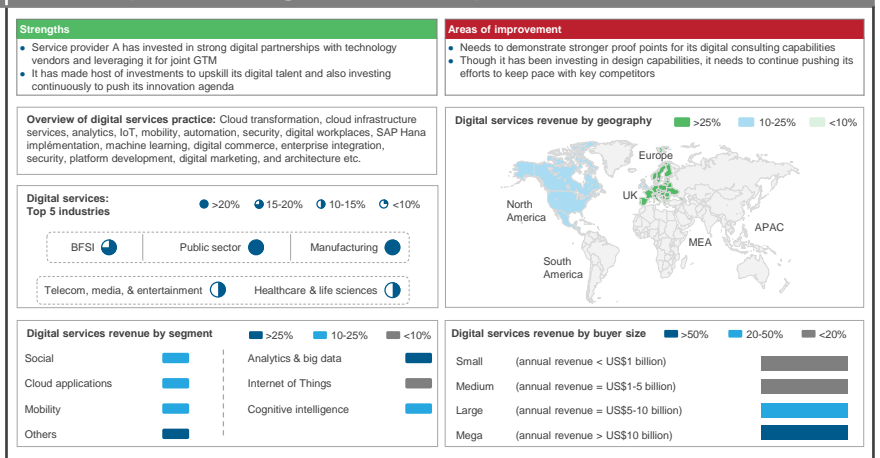
## Key digital drivers for enterprises



## Key steps in redesigning customer journey



## Service provider digital services profile



Source: Everest Group 2017



# Digital services research calendar

Published
  Planned
  Current release

Flagship Digital Services reports	Release date
<b>Digital Services – PEAK Matrix™ Assessment: Redefining customer experience with digital</b>	<b>Q3 2017</b>
Digital Services Annual Report	Q4 2017
Digital Interactive Services PEAK™ Matrix Assessment	Q4 2017
IoT Services PEAK™ Matrix Assessment	Q4 2017

Thematic Digital Services reports	Release date
Customer (Dis)Satisfaction: Why Are Enterprises Unhappy with Their Service Providers?	January 2017
Internet of Things (IoT) in Medical Devices	March 2017
Top 20 IoT Trailblazers: Startups Crossing the Chasm	May 2017
Betting Big: Amazon Leveraging Digital to Transform the Grocery Industry	June 2017
Quality Orchestration: QA in the Digital Era	July 2017
Design Thinking: Innovation Catalyst for Digital Transformation	July 2017
Enterprise Bots Adoption	July 2017
DevOps Best Practices	Q4 2017

Note: For a list of all digital services reports published by us, please refer to our [website page](#)

# Additional research references

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The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest:

1. **Design Thinking: Innovation Catalyst for Digital Transformation** ([EGR-2017-4-R-2242](#)); 2017. In this research, we delve deeper into design thinking and its implications on various industries. We also deep dive into how service providers can inculcate a design-driven culture across the organization so that it is reflected in their service delivery. We further look at recent investments and acquisitions of services providers and consulting firms to grow their design-driven digital capabilities. There is also a dedicated enterprise section that details enterprise design maturity model and how new roles (such as Chief Design Officer(CDO)) are enabling organizations to be more design-focused
2. **Internet of Things Services – PEAK Matrix™ Assessment and Market Trends – IoT: Bigger than the Hype:** ([EGR-2016-4-R-2025](#)); 2016. Internet of Things (IoT) is being rapidly adopted by enterprises across industries to achieve higher efficiency, enable data-driven decision making, and explore new revenue opportunities. Technology vendors and service providers play a significant role in helping enterprises explore and invest in IoT technology. In this research, we discuss the latest IoT market trends and present the assessment and detailed profiles of 16 IT service providers featured on the IOT services PEAK Matrix

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