



## **Managed Service Providers (MSP) in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019**

Managed Service Provider (MSP)

Market Report – September 2019: Complimentary Abstract / Table of Contents

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## Membership information

- This report is included in the following research program(s)
  - [Managed Service Provider \(MSP\)](#)
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- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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# Overview and abbreviated summary of key messages

This report examines the dynamics of the Managed Service Provider (MSP) market in North America. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and delivery capability in North America. Based on the comprehensive Everest Group PEAK Matrix, 22 MSP service providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and areas of improvement.

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

## North America MSP PEAK Matrix 2019

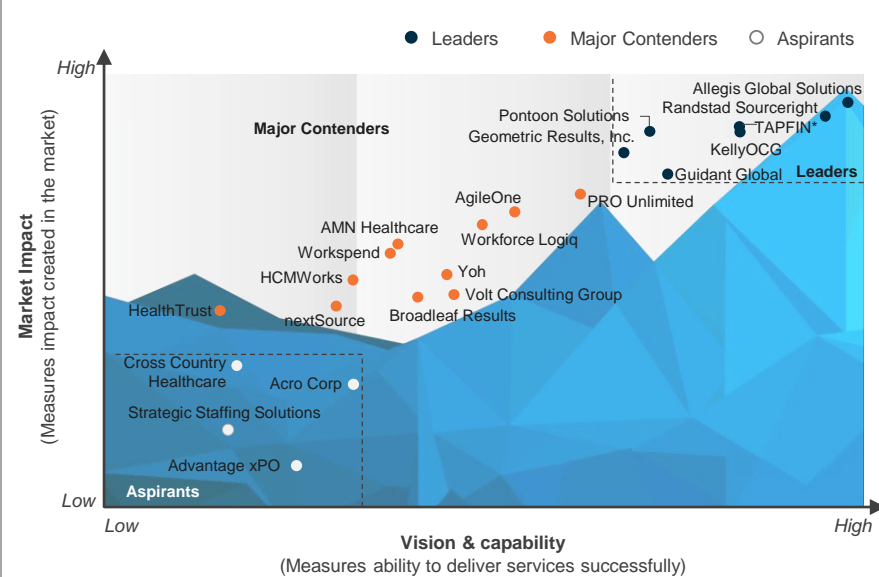
- Everest Group classifies MSP service providers in North America based on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 22 established MSP service providers evaluated are segmented into three categories (in alphabetical order within each category):
  - **Leaders:** Allegis Global Solutions, Geometric Results, Inc., Guidant Global, KellyOCG, ManpowerGroup Solutions TAPFIN, Pontoon Solutions, and Randstad Sourceright
  - **Major Contenders:** AgileOne, AMN Healthcare, Broadleaf Results, HCMWorks, HealthTrust, nextSource, PRO Unlimited, Volt Consulting Group, Workforce Logiq, Workspend, and Yoh
  - **Aspirants:** Acro Corp, Advantage xPO, Cross Country Healthcare, and Strategic Staffing Solutions

## MSP in North America service provider commentary

Everest Group delineates each of the 22 service providers' strengths and areas of improvement. The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape in North America.

# This study offers two distinct chapters providing a deep dive into key aspects of MSP market; below are three charts to illustrate the depth of the report

## MSP Service Providers PEAK Matrix™ Assessment 2019



\* ManpowerGroup Solutions TAPFIN  
 Note: Among Major Contenders AMN Healthcare, Volt Consulting Group, Workspend, and Yoh participated. Among Leaders and Aspirants Acro Corp, Advantage xPO, Cross Country Healthcare, Geometric Results, Inc., and Strategic Staffing Solutions have not participated in the research. Assessment for non-participants is based on Everest Group estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete  
 Source: Everest Group (2019)

## Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1	High	High	High	High	High	High	High	High	High
Service provider 2	Low	High	High	High	High	High	High	High	High
Service provider 3	Low	High	High	High	High	High	High	High	High
Service provider 4	Low	High	High	High	High	High	High	High	High
Service provider 5	High	High	High	High	High	High	High	High	High
Service provider 6	High	High	High	High	High	High	High	High	High
Service provider 7	High	High	High	High	High	High	High	High	High
Service provider 8	High	High	High	High	High	High	High	High	High
Service provider 9	High	High	High	High	High	High	High	High	High

## Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
High	High	High	High	High	High	High	High	High

### Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

### Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

# Research calendar – Managed Service Provider (MSP)

■ Published   ■ Planned   ▭ Current release

## Flagship MSP reports

### Release date

Managed Service Provider (MSP) Annual Report 2016 – Embracing the New Talent Landscape .....	June 2017
Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2017 .....	September 2017
Managed Service Provider (MSP) Service Provider Profile Compendium 2017 .....	October 2017
Managed Service Provider (MSP) Annual Report 2018 – Towards the Next Frontier – Boldly Going Where Few Have Gone Before .....	December 2017
Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2018 – Asia Pacific .....	December 2017
Managed Service Provider (MSP) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018 .....	September 2018
Managed Service Provider (MSP) Service Provider Profile Compendium 2018 .....	August 2018
<b>Managed Service Providers (MSP) in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019 .....</b>	<b>September 2019</b>
Managed Service Provider (MSP) Annual Report 2019 .....	Q4 2019

## Thematic MSP reports

Offshoring in MSP: A Scenario-based Analysis of Potential Savings .....	October 2016
Managed Service Provider (MSP): A Peek into the Buyer’s Mind – Continuous Innovation is the Key to Buyer Delight .....	February 2017
Enterprise Total Talent Acquisition (ETTA) – The Future-ready Talent Approach .....	May 2017
Managed Service Provider (MSP): A Peek into the Buyer’s Mind – Digital and Futuristic Outlook is the Key to Buyer Delight .....	August 2018
The Clash of MSP & PO .....	March 2019

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



# Additional MSP research references

The following documents are recommended for additional insights into 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. **The Clash of Contingent Workforce MSPs and Procurement Outsourcing (PO) BPOs** ([EGR-2019-25-V-3100](#)); 2019. Organizations' spend on third-party services is huge and expected to grow in the coming years. Two distinct sets of service providers are vying for a share of this market – MSPs and Procurement Outsourcing BPOs. Procurement Outsourcing BPOs, which are already managing enterprises' indirect procurement spend are the natural choice; however, MSPs are also offering SOW management services to their existing contingent workforce clients
2. **Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2019** ([EGR-2019-25-R-3207](#)); 2019. The global Managed Service Provider (MSP) market is undergoing tremendous change owing to buyer requirements for more strategic solutions. In addition to the traditional temporary labor, buyers are increasingly relying on their service providers to manage additional types of labor including services procurement/ SOW, independent contractor (IC), and permanent labor. In order to service these additional requirements of buyers, service providers are continuously investing to expand their capabilities in these new areas. They are gradually increasing their technology leverage in analytics, SOW management, and IC management areas to optimize the contingent workforce programs of their clients. The leaders in the MSP space have developed a unique vision for their clients and themselves to act as a differentiator going forward
3. **Managed Service Provider (MSP) – Service Provider Compendium 2019** ([EGR-2019-25-R-3295](#)); 2019. The Managed Service Provider (MSP) – Service Provider Profile Compendium 2019 provides accurate, comprehensive, and fact-based snapshots of service providers in the MSP market. The study provides a detailed profile of each MSP service provider assessed, with a comprehensive picture of their service suite, scale of operations, recent developments & investments, technology solutions, and delivery locations

For more information on this and other research published by Everest Group, please contact us:

**Arkadev Basak**, Vice President: [arkadev.basak@everestgrp.com](mailto:arkadev.basak@everestgrp.com)

**Vishal Gupta**, Practice Director: [vishal.gupta@everestgrp.com](mailto:vishal.gupta@everestgrp.com)

**Ankaj Mohindroo**, Senior Analyst: [ankaj.mohindroo@everestgrp.com](mailto:ankaj.mohindroo@everestgrp.com)

**Karneek Patel**, Senior Analyst: [karneek.patel@everestgrp.com](mailto:karneek.patel@everestgrp.com)

Website: [www.everestgrp.com](http://www.everestgrp.com) | Phone: +1-214-451-3000 | Email: [info@everestgrp.com](mailto:info@everestgrp.com)





## About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

### Dallas (Headquarters)

info@everestgrp.com  
+1-214-451-3000

### Bangalore

india@everestgrp.com  
+91-80-61463500

### Delhi

india@everestgrp.com  
+91-124-496-1000

### London

unitedkingdom@everestgrp.com  
+44-207-129-1318

### New York

info@everestgrp.com  
+1-646-805-4000

### Toronto

canada@everestgrp.com  
+1-416-388-6765

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