ServiceNow Services PEAK Matrix® Assessment 2021

October 2020: Complimentary Abstract / Table of Contents

Everest Group PEAK MATRIX®

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Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

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- This report is included in the following research program(s)
  – Enterprise Platform Services
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at **info@everestgrp.com**

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

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

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Background of the research

- A decade ago, enterprises expected ServiceNow to help them manage digital workflows such as IT Service Management (ITSM) and IT Operations Management (ITOM). With time, enterprises are now looking for stakeholder-centric, automation-focused, data-/outcome-driven integrated solutions with emphasis on stakeholder experience even in a multi-channel, complex portfolio

- In response to the changing market landscape, ServiceNow has expanded its portfolio to deliver enterprise solutions including IT, employee, and customer workflows to help clients drive business growth, increase resilience, and enhance employee productivity. It has forayed into emerging areas such as CSM, HCM, DevOps, FinOps, SecOps, GRC, and Security – It has invested in building industry solutions to provide out-of-the-box solutions and expedite time-to-market for enterprises

- With changing client expectations and evolving ServiceNow landscape, service providers are investing in building strong talent in emerging areas, co-developing industry-specific solutions with ServiceNow, developing in-house accelerators and frameworks, and taking a strong inorganic approach with niche acquisitions to fill gaps across their ServiceNow services portfolio to further enhance their geographic footprint

- In this research, we present an assessment of 20 service providers featured on the ServiceNow services PEAK Matrix®

The assessment is based on Everest Group's annual Request For Information (RFI) process considering investments made till May 2020, interactions with leading ServiceNow service providers, client reference checks, and an ongoing analysis of the ServiceNow services market

This report includes the profiles of the following 20 leading ServiceNow service providers featured on the ServiceNow services PEAK Matrix:

- **Leaders:** Accenture, Atos, Cognizant, Deloitte, DXC Technology, and Infosys
- **Major Contenders:** Cask, Capgemini, Crossfuze, EY, HCL Technologies, IBM, KPMG, LTI, TCS, and Wipro
- **Aspirants:** Mphasis, Tech Mahindra, Trianz, and Softtek

Scope of this report:

Geography
Global

Service providers
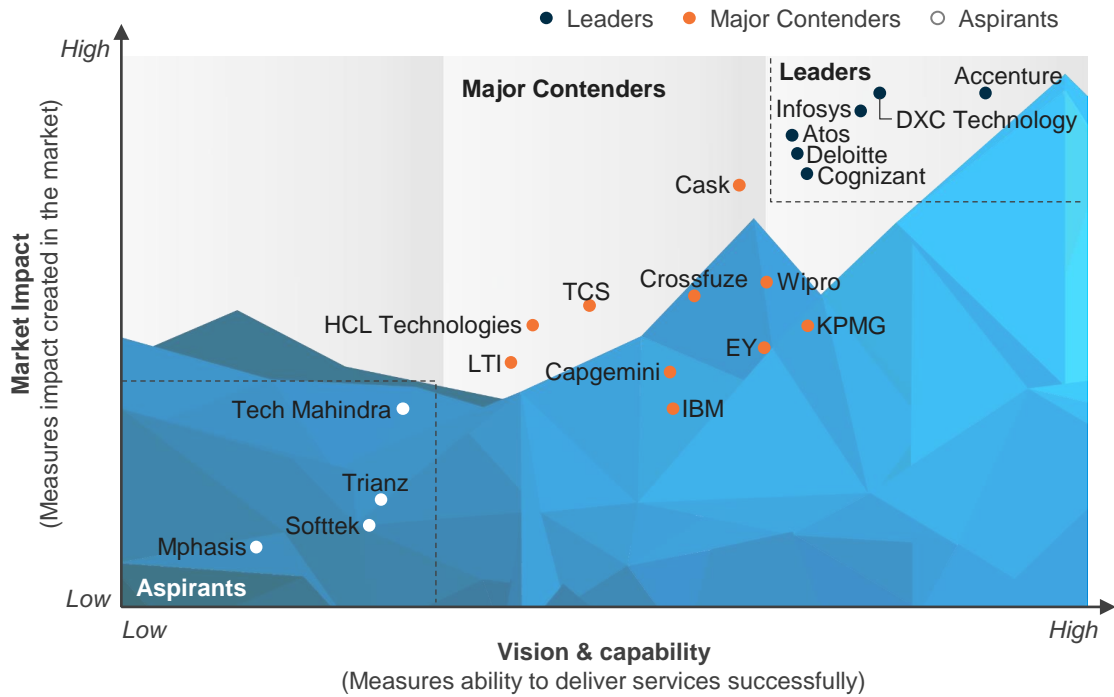20 leading ServiceNow service providers

Services
ServiceNow services

Everest Group® RESEARCH

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

ServiceNow Services PEAK Matrix® Assessment 2021[1,2]

Illustrative example

● Leaders   ● Major Contenders   ○ Aspirants

Market Impact (Measures impact created in the market)

High / Low

Vision & capability (Measures ability to deliver services successfully)

Low / High

Leaders
- Accenture
- Infosys
- DXC Technology
- Atos
- Deloitte
- Cognizant

Major Contenders
- Cask
- Crossfuze
- Wipro
- TCS
- KPMG
- HCL Technologies
- EY
- LTI
- Capgemini
- IBM

Aspirants
- Tech Mahindra
- Trianz
- Softtek
- Mphasis

1. Assessments for Deloitte, EY, IBM, and KPMG exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers. Assessment for Crossfuze is based on service provider inputs and Everest Group's estimates
2. This assessment exclude LTI's recent update of ServiceNow partnership to Elite status and Infosys' ongoing acquisition of GuideVision

Source: Inputs from market players, recruitment firms, and investment agencies

Capability assessment

Illustrative example

Measure of capability: ● High ◐ Low

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

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	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths
- Service provider 1 has credible proof-points in executing transformational ServiceNow projects across ITSM and Non-ITSM areas with relatively higher focus on BFSI, HLS, manufacturing, and the public sector
- Its global footprint and strong onshore-centric delivery model can benefit clients looking for a business partner with whom they can work in proximity

Areas of improvement
- Though service provider 1 has the largest pool of certified talent, a few clients have highlighted that the company can further improve its talent management practices by ensuring on-time availability and high-quality talent across different phases of the engagement
- Buyers perceive it as a premium-priced player in the ServiceNow services market, which may not be a right fit for cost-conscious clients

Research calendar
Enterprise Platform Services

| | Published | Planned | Current release |

Flagship EPS reports	Release date
Workday Human Capital Management (HCM) IT Services – PEAK Matrix™ Assessment and Market Trends 2019	July 2019
Services for Cloud ERP – PEAK Matrix™ Assessment 2020: The Market is Growing but Not Fast Enough	November 2019
Salesforce Services PEAK Matrix® Assessment 2020	May 2020
Salesforce Services – Solving for the Missing Link	June 2020
Salesforce Marketing and Commerce Cloud Services PEAK Matrix® Assessment 2020	July 2020
Salesforce Marketing and Commerce Cloud Services Provider Compendium 2020	August 2020
ServiceNow Services PEAK Matrix® Assessment 2021	**October 2020**
ServiceNow Service Provider Compendium 2021	Q4 2020
ServiceNow Services – State of the Market Report 2021	Q4 2020
Pega Services PEAK Matrix® Assessment 2021	Q4 2020

Thematic EPS reports	Release date
BigTech Battle: Digital Experience Platforms (DXP) Assessment – Rise of the Digital Experience Platform	June 2019
Cloud Management Platform Trailblazers: Top 10 Start-ups Creating Buzz in the Market	October 2020
Rebooting your SaaS Adoption Strategy	Q4 2020
Platform Businesses: Orchestrating the Internal and External Ecosystem	Q4 2020
S/4HANA: Learnings from Current Adoption	Q4 2020

Note: For a list of all our published EPS reports, please refer to our website page

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