

ServiceNow Service Provider Compendium 2021

October 2020: Complimentary Abstract / Table of Contents



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

Yugal Joshi, Vice President

Alisha Mittal, Practice Director

Abhishek Mundra, Senior Analyst

AS Yamohiadeen, Senior Analyst

Sangamesh Kadagad, Senior Analyst

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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:** Capgemini, Cask, Crossfuzze, EY, HCL Technologies, IBM, KPMG, LTI, TCS, and Wipro
- **Aspirants:** Mphasis, Softek, Tech Mahindra, and Trianz

Scope of this report:



Geography
Global



Service providers
20 leading ServiceNow
service providers



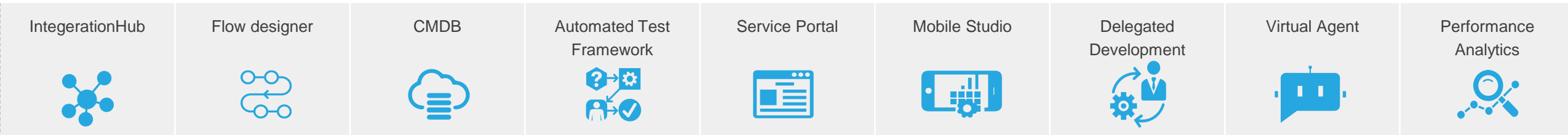
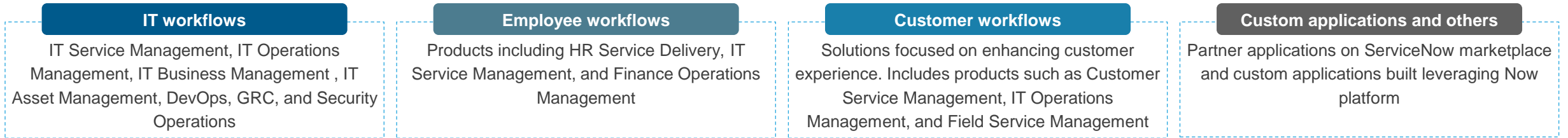
Services
ServiceNow services


Everest Group's definition of scope of ServiceNow services

 Key ServiceNow solutions  Now Platform


The assessment includes professional and management services around the entire suite of ServiceNow products except for infrastructure services

NOT EXHAUSTIVE



 **Consulting services**
 Now platform strategy and roadmap formulation, mapping of existing technology landscape, product(s) selection, feasibility and readiness assessments, security assessment, integration strategy, Governance, Risk Management, and Compliance (GRC) assessment and roadmap, and organization change management

 **Implementation services**
 Requirements gathering, technical and functional design, system and process configurations, custom application development, integration, Now Platform setup, data migration, testing, deployment, cut-over and go-live, and implementation hand-off

 **Maintenance and support services**
 Help desk management, monitoring, incident management, issue resolution, emergency fixes, ongoing customizations and integrations, update support, new feature addition, minor and major usability enhancements, and product enhancements

Exclusion from this assessment: Infrastructure services offered as a part of the engagement to run applications

The ServiceNow service provider compendium report has profiles and buyer case studies for 20 leading service providers

ServiceNow Services PEAK Matrix® Assessment 2021

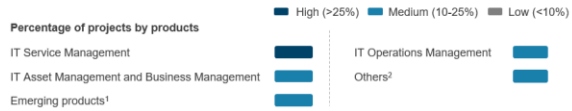
Service provider | ServiceNow services profile (page 1 of 2)

Provider overview

Vision for ServiceNow services: Service provider's vision is to maintain and grow its position as ServiceNow's partner to help clients achieve transformative innovation and business value. The firm aims to help its clients leverage ServiceNow to accelerate transformational impact, increase business value and outcomes, and ensure that their business remains relevant in a constantly evolving world.

Current partnership status with ServiceNow: Global Elite

Percentage of projects by products



Proportion of ServiceNow services revenue by business function



Percentage of projects by buyer size (annual revenue)

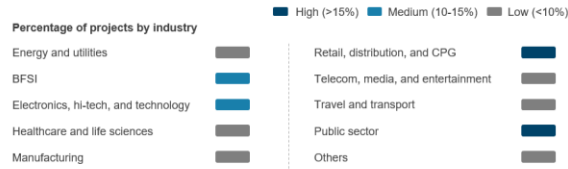


ServiceNow Customer Satisfaction Rating (CSAT): 4.3 / 5 (Current), 9.3 / 10 (Legacy)

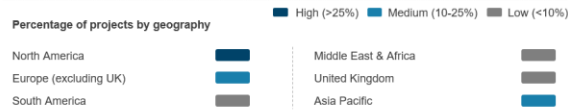
Projects completed: 900-1,000

ServiceNow certified experts: 1,300-1,400

Percentage of projects by industry



Percentage of projects by geography



¹ Emerging products include CSM, HRSD, FSM, and industry solutions

² Others include custom applications, partner applications, etc.

³ Current CSAT score represents feedback from customers effective April 1, 2020. Legacy CSAT score represents feedback from engagements prior to April 1, 2020

ServiceNow Services PEAK Matrix® Assessment 2021

Service provider | ServiceNow services profile (page 2 of 2)

Case studies, solutions, and investments

Case study 1

Client: Siemens Healthineers

Business challenge: To make online interaction the customer's first choice, while reducing complexity as well as costs; and retiring outdated legacy technology

Solution:

- Developed a new customer service platform based on ServiceNow Customer Workflows technology
- The platform will serve as the company's system of engagement, automating customer service workflows, and integrating customer records and analytics tools

Impact:

- Customers, business partners, and employees were able to interact on the new platform using automated processes
- Over 1,000 service agents worldwide use this platform for their daily work. The solution helped the firm to conceive, develop, and roll out new solutions and services quickly

Case study 2

Client: HSBC

Business challenge: To digitize legacy employee experience processes and systems across different countries and make them simpler for employees

Solution:

- Service provider leveraged its experience in HR technology, change management, and digital transformation for financial services to help the bank revamp its employee experiences. HSBC's legacy HR systems and processes got replaced with SAP SuccessFactors
- ServiceNow added an employee engagement layer including a portal, knowledge management, and case management; and MuleSoft provided a secure and agile solution to seamlessly integrate global and regional HSBC applications, data, and devices

Impact:

- Digital HR services made it easier for employees to make data-driven decisions and access HR content, services, and support
- All services including core services and new capabilities have been improved to enable the bank to better manage talent, succession, career development, and performance

Proprietary solutions (representative list)

Solution name	Focused ServiceNow product	Details
Service provider Cloud Management Platform for Government	ITx workflows	Offers unified view into both cloud and on-premise estate for executives. This platform supports with proactive actions to promote business service health and increase service availability
Service provider ServiceNow Implementation Methodology (ASIM)	All products	Provides clients with best practices and agile-based implementation methodologies, which further align to NOW's "NowCreate" own implementation methodology. The solution supports client implementation, resource management, and story/sprints leveraging the NOW Agile 2.0
Intelligent Automation Platform myWizard	Employee workflows	An automation platform used to implement and measure an enterprise's automation strategy. The solution helps disrupt every aspect of the application life cycle to drive improved business value

Key Investments (representative list)

Investment theme	Focused ServiceNow product	Details
Investment theme 1	IRM (GRC, SecOps, and vendor risk management)	In 2019, acquired Sargon Solutions, a ServiceNow consulting and implementation services partner for risk technology focusing on GRC, SecOps, VRM, and audit management
Investment theme 2	All products	<ul style="list-style-type: none"> Service provider has earned over 300 NOWCreator superbadges, over 3x that of the nearest partner As of July 1, 2020, service provider had 6,800 active ServiceNow technical and sales certifications globally to ensure delivery of quality solutions to its 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	October 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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DigitalReallTy



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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