

Sustaining Client Satisfaction: Pivot from Implementation to Transformation Partner

February 2022: Complimentary Abstract / Table of Contents



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custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

PEAK Matrix®, market maturity, and technology adoption/investment

02

Primary sources of information

Annual contractual and operational RFIs, technology vendor briefings and buyer interviews, and web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and technology vendors

Proprietary contractual database of over 500 buyer interviews (updated annually)

Year-round tracking of 60+ IT technology vendors

Large repository of existing research in IT services

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, technology vendors, technology providers, and industry associations

Background of the research

- As the world adapts to the new reality pushed by the pandemic, enterprises globally are moving ahead with accelerated digital transformation with a focus on the consolidation of disparate technologies and a renewed push for process transformation over the lift and shift approach
- Service providers and product vendors had emerged as strategic partners during the peak of the pandemic. However, as enterprises expectations have moved beyond just IT, service providers have not been able to keep to the expectation levels in terms of the consulting and advisory services they provide
- Everest Group believes that it is imperative to understand the true picture around enterprises' experience in working with various platforms, product vendors, and service providers
- In this research, we present:
 - A summary of enterprises' views on the capabilities of various enterprise platforms and the expectations from product vendors as they look to scale up the investments
 - Enterprises' views on the service provider's strengths and areas of improvements
- The assessment is based on 150+ unique interviews (not a survey) conducted in 2021 with enterprises globally as a part of enterprise platform services. These enterprises were nominated as reference clients by different service providers and product vendors studied across Everest Group's multiple PEAK Matrix® evaluations

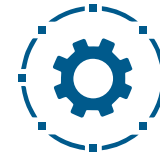
Scope of this report



Geography
Global



Industry
Market activity and investments of leading service providers and tech vendors across industries



Services
Enterprise platform services

Research methodology | enterprise pulse study



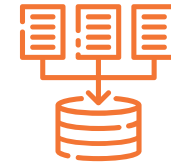
Enterprise reach-out

Conducted 150+ enterprise interviews in 2021 as part of the PEAK Matrix® assessments across Enterprise Platform Services (EPS), spanning multiple industries and geographies; the service providers assessed in these reports shared the enterprise references



Data synthesis and analysis

Assessed performance themes, conducted gap analysis, and analyzed the future market potential of technology vendors



Data collection

Structured interviews (~15 questions) with each enterprise, capturing quantitative and qualitative insights across technology priorities, digital agendas, outsourcing strategies, and perceptions about technology vendors

We conducted interviews with enterprises that technology vendors nominated as reference checks for the various PEAK Matrix® assessment projects. Each enterprise was asked multiple questions regarding their experience of working with specific technology vendors and their investment priorities.



Research methodology | scope of services

Services



Advisory/consulting services

Platform strategy and roadmap formulation, mapping of the existing technology landscape, product(s) selection, feasibility and readiness assessments, security assessment, integration strategy, governance, program management, change management, and the CoE setup advisory



Implementation services

Requirements gathering, technical and functional design, configuration design, workload migration, platform setup, customizations, application development and testing, integration, and deployment



Maintenance and support services

Help desk management, monitoring, incident management, issue resolution, emergency fixes, environment management, ongoing customizations and integrations, compliance and regulatory support, new feature addition, minor and major usability enhancements, and ongoing application reengineering

Across both cloud and on-premise deployment options



Platforms covered



Executive summary



Enterprises are expecting platforms to have licensing models that are flexible, client-focused, and consumption-based, with seamless integration capabilities as they look to scale up the adoption.



Enterprises are satisfied with their service providers in terms of technical and domain expertise, flexibility and responsiveness of engagement, and commercial constructs.



Enterprises are dissatisfied with the lack of innovation and project management. They want better advisory capabilities, change management, and talent management across long-term projects.



The proportion of satisfied customers has decreased by 15% over 2020-21, as opposed to a 27% increase in satisfaction levels over 2019-20.



Although the satisfaction levels do not measure up to the expectation levels of enterprises, the enterprises appreciated the responsiveness of the providers in managing attrition and for their flexible pricing models, while pointing out the need to evolve from a vendor approach to a partner approach.

Overview and abbreviated summary of key messages

- Service providers have failed to meet the increasing expectations of enterprises, as they look to transform their business processes in the post-pandemic world. The proportion of satisfied customers has decreased by 15% over 2020-21, as opposed to a 27% increase in satisfaction levels over 2019-20.
- The report discusses service providers' inability to sustain high client satisfaction during 2020-2021 and enterprises' shift in expectations. It also talks about enterprises' pain points and expectations from tech vendors as they look to scale up the adoption.

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

Enterprises' priorities

- Enterprises are looking for products with modular & flexible licensing models, seamless integration capabilities, and stable functionalities, which makes adoption easier as enterprises look to scale up.
- As tech vendors push ahead with new platforms and offerings, the importance of experienced talent, support, and user adoption has gone up significantly.

Sustaining client satisfaction

- Service providers could not sustain the high level of satisfaction in the face of increased expectations from enterprises in the post-pandemic world.
- Enterprise feel that service providers need to evolve their positioning from being implementation specialists to becoming transformation partners.

Service provider performance

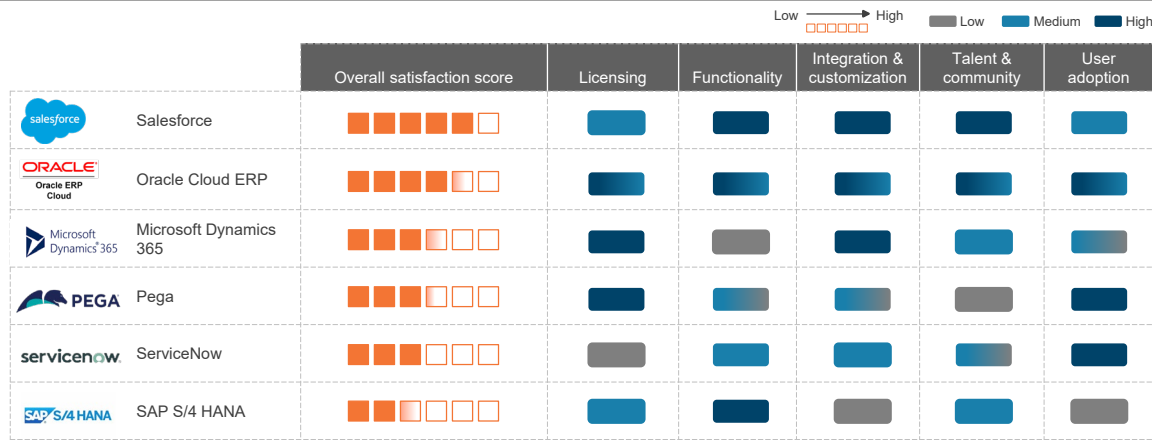
- Industry expertise and consulting and advisory capabilities are the areas where service providers are not able to meet enterprise expectations.
- Enterprises are satisfied with their service providers in terms of technical and domain expertise, and commercial constructs. Enterprises largely appreciate the responsiveness of the service providers in addressing talent issues

Enterprises' expectations

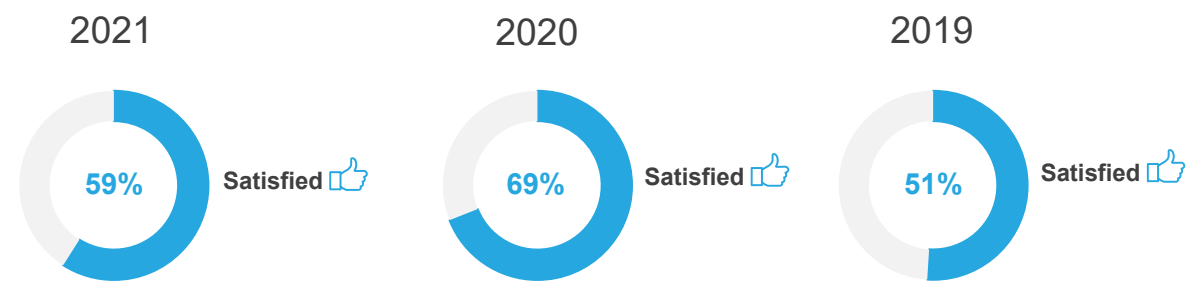
- Enterprises want service providers to have strong consulting capabilities and be proactive in bringing best practices to the table during engagement.
- Enterprises want service providers to keep up with the evolving product portfolios and build strong industry-specific capabilities so that they can help enterprises in deriving more value for end customers and transforming the business function.

This study analyzes enterprises' expectations from tech vendors and service providers; their satisfaction levels across years, and their perceptions of individual service providers

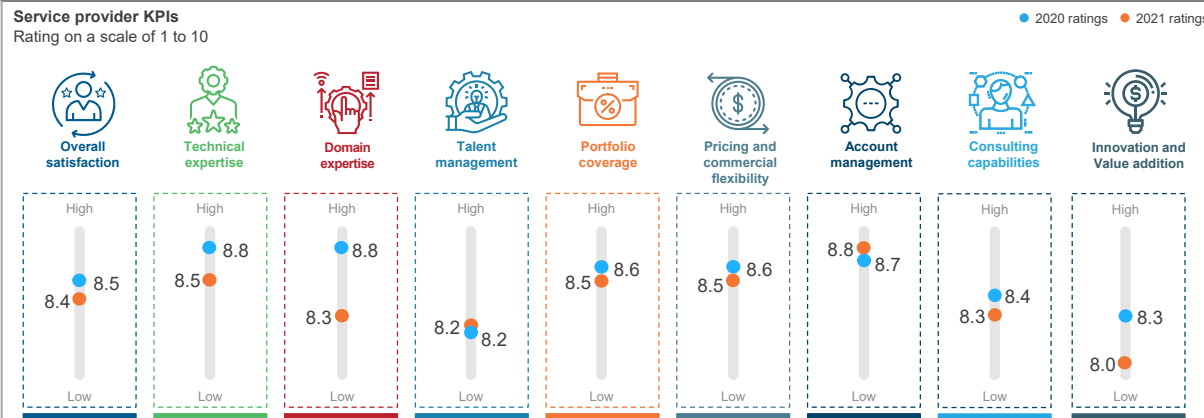
Enterprises' satisfaction level with various enterprise platforms



Service providers have failed to meet the increasing expectations of enterprises



Service providers' need to improve their consulting and advisory capabilities



Service providers' strengths and areas of improvement



Research calendar

Enterprise Platform Services

■ Published
 ■ Planned
 ■ Current release

Flagship reports

	Release date
ServiceNow Services – the Uberization of IT, HR, and Employee Workflows	February 2021
Enterprise Platform Services – Renewal Opportunity for Service Providers	February 2021
Salesforce Healthcare Services – State of the Market 2021	March 2021
SAP S/4HANA Services PEAK Matrix® Assessment 2021	May 2021
SAP S/4HANA Service Provider Compendium 2021	June 2021
Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2021	September 2021
Microsoft Dynamics 365 Service Provider Compendium 2021	September 2021
SAP S/4HANA Services – Rise with Industry Transformations	November 2021
Microsoft Dynamics 365 – Digitizing Customer Experience	November 2021
Oracle Cloud Application Services PEAK Matrix® Assessment 2022	Q1 2022
Oracle Cloud Application Services – State of the Market 2022	Q1 2022

Thematic reports

	Release date
Cloud Management Platform Trailblazers: Top 10 Start-ups Creating Buzz in the Market	October 2020
Assessment of the Niche ServiceNow Services Partner Ecosystem	May 2021
Sustaining Client Satisfaction: Pivot from Implementation to Transformation Partner	February 2022

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