ServiceNow Services PEAK Matrix® Assessment 2022

August 2022: Complimentary Abstract / Table of Contents

EGR-2022-50-CA-5318

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- Talent Excellence ITS
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Benchmarking

Contract assessment

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Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Background of the research

Few years back, 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, and data-/outcome-driven integrated solutions with an emphasis on stakeholder experience, even in a multi-channel, complex portfolio. Enterprises are deriving higher business value by reimagining processes and integrating ServiceNow with existing systems of record, systems of engagement, and systems of intelligence.

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, GRC, and security. It has empowered enterprises to build custom apps on its low-code-powered app engine. It has invested in building industry solutions to provide out-of-the-box resolutions and expedite time-to-market for enterprises.

In this research, we present an assessment and detailed profiles of 25 Service providers featured on the ServiceNow services PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading ServiceNow providers, client reference checks, and ongoing analysis of the Enterprise Platform Services market.

This report includes the profiles of the following 25 leading service providers featured on the ServiceNow services PEAK Matrix®:

- **Leaders:** Accenture, Cognizant, Deloitte, DXC Technology, EY, and Infosys
- **Major Contenders:** Atos, Capgemini, Cask, Enable Professional Services, HCL Technologies, IBM, KPMG, LTI, NTT DATA, Plat4mation, TCS, Thirdera, Tech Mahindra, and Wipro
- **Aspirants:** CloudGo, Mindtree, Mphasis, Stefanini, and Volteo Digital

Scope of this report

Geography
Global

Providers
25 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

IT workflows

IT Service Management, IT Operations Management, IT Business Management , IT Asset Management, DevOps, GRC, and Security Operations

Employee workflows

Products including HR Service Delivery, IT Service Management, and Finance Operations Management

Customer workflows

Solutions focused on enhancing customer experience. Includes products such as Customer Service Management, IT Operations Management, and Field Service Management

Custom applications and others

Partner applications on ServiceNow marketplace and custom applications built leveraging Now Platform

| Integration Hub | Flow designer | CMDB | Automated Test Framework | Service Portal | Mobile Studio | Delegated Development | Virtual Agent | Performance Analytics |

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

Overview and abbreviated summary of key messages

This report examines the global 2022 ServiceNow services provider landscape and its impact on the ServiceNow services market. It focuses on provider position and growth in the ServiceNow services market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key ServiceNow service provider profiles. It also identifies the key implications of the research findings for buyers and providers.

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

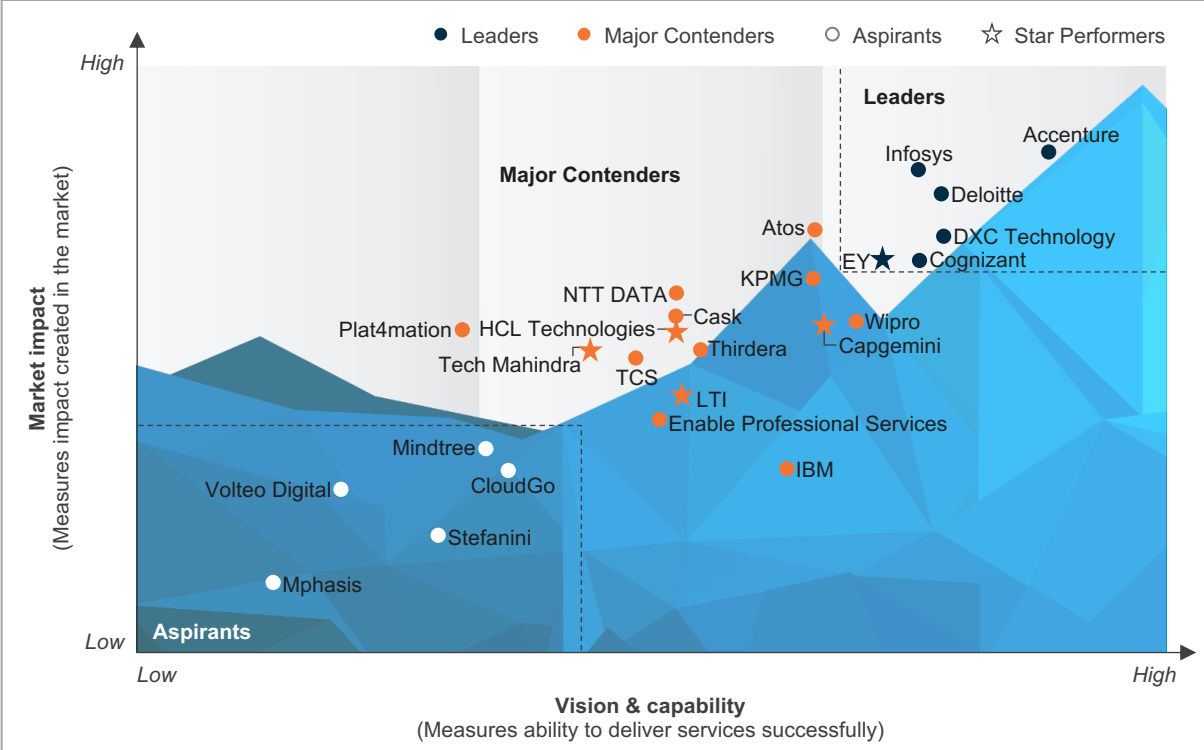|	
ServiceNow service provider capability	• ServiceNow service providers can be classified into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix • Accenture, Cognizant, Deloitte, DXC Technology, EY and Infosys are the Leaders in this ServiceNow services PEAK Matrix assessment with several IT service providers emerging as Major Contenders
Star Performers characteristics	We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with: • The maximum number of top-quartile performance improvements across all of the above parameters AND • At least one area of top-quartile improvement performance in both market success and capability advancement • Capgemini, HCL Technologies, EY, LTI and Tech Mahindra are the Star Performers in this ServiceNow services PEAK Matrix assessment
Service Provider Characteristics	• Leaders have a balanced portfolio of projects that cover the entire product spectrum of ServiceNow across diverse industries • Leaders have invested both in inorganic and organic growth. Their investments are across new acquisitions and building innovation centres, CoEs, etc. to further their ServiceNow capabilities • Major Contenders stand out with their delivery model, which is better distributed globally and has onshore presence • Major Contenders' focus on emerging products, such as HRSD and CSM, is visible by the improved number of certifications in the modules • Aspirants are largely focused on small and midsized buyers and have credible proof points in areas such as ITSM and ITOM • Aspirants offer relatively low-priced engagements compared to Leaders or Major Contenders

Everest Group®

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

Everest Group ServiceNow Services PEAK Matrix® Assessment 2022[1,2]

Illustrative example

● Leaders   ● Major Contenders   ○ Aspirants   ☆ Star Performers

High

Market impact
(Measures impact created in the market)

Leaders

Accenture
Infosys
Deloitte
Atos
DXC Technology
EY ★ Cognizant
KPMG
Major Contenders
NTT DATA
Cask
Plat4mation   HCL Technologies
Wipro
Thirdera
Capgemini
Tech Mahindra
TCS
LTI
Enable Professional Services
Mindtree
Volteo Digital   CloudGo
IBM
Stefanini
Mphasis
Aspirants

Low

Low ——————————————— **High**

Vision & capability
(Measures ability to deliver services successfully)

Capability assessment

Illustrative example

Measure of capability: ◔ Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	◕	◕	◕	◕	◕	◑	◔	◑	◑
Provider 2	◔	◑	◑	◔	◔	◑	◕	◑	◔
Provider 3	◕	◑	◑	◕	◕	◑	◑	◑	◑
Provider 4	◔	◑	◕	◑	●	●	◕	◑	◕
Provider 5	◑	◑	◑	◑	◑	◑	◑	◑	◑
Provider 6	◑	◑	◑	◑	◑	◑	◕	◑	◑
Provider 7	◑	◑	◑	◑	◑	◑	●	◑	◑
Provider 8	◑	◑	◑	◑	◑	◑	◑	◑	◑
Provider 9	◔	◔	◑	◑	◕	◔	◑	◑	◔

Everest Group's remarks on providers

Illustrative example

Measure of capability: ◔ Low ● High

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

● Provider 1 has one of the highest number of ServiceNow-certified talent and its total workforce of ServiceNow-ready professionals is higher than its peers

● Provider 1 has invested heavily in building frameworks and accelerators that expedite time-to-market

Limitations

● Provider 1 has an onshore-heavy delivery model that may prevent its clients from capturing labor arbitrage opportunities

● Provider 1 is positioned as a premium-priced player in the market, which becomes a deterrent for cost-conscious clients

1   Assessments for Atos, Deloitte, EY, 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

2   Analysis for Mindtree and LTI, are based on capabilities before their merger. Analysis for Enable Professional Services, is based on their capabilities before its acquisition by Fujitsu

Source: Everest Group (2022)

Research calendar
Enterprise Platform Services (EPS)

Reports title	Release date
Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2021	September 2021
SAP S/4HANA Services – Rise with Industry Transformations	November 2021
Microsoft Dynamics 365 – Digitizing Customer Experience	November 2021
Collapsing the Supply Chain: Top 14 Start-ups Redefining Real-time Transportation Visibility	January 2022
Oracle Cloud Application (OCA) Services PEAK Matrix® Assessment 2022 – Global	March 2022
Sustaining Client Satisfaction: Pivot from Implementation to Transformation Partner	March 2022
Oracle Cloud Applications (OCA) Services PEAK Matrix® Assessment 2022 – Europe	April 2022
Oracle Cloud Applications Service Provider Compendium 2022	April 2022
Oracle Cloud Applications – Systemize Innovation to Drive Business Value	July 2022
ServiceNow Services PEAK Matrix® Assessment 2022	**August 2022**
ServiceNow Services Provider Compendium 2022	Q3 2022
Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022	Q3 2022
Salesforce Industry Cloud Services Provider Compendium 2022	Q3 2022
SAP Business Application Services PEAK Matrix® Assessment 2022	Q3 2022
SAP Business Application Services Provider Compendium	Q3 2022

Note:　Click to see a list of all of our published EPS reports

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