

Digital Interactive Experience (IX) Services in North America – Provider Compendium 2023

November 2023: Complimentary Abstract / Table of Contents



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- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
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Locations: costs, skills,
sustainability, portfolios

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Background of the research

In North America, enterprises are tightly interweaving the growing importance of experience design with their investments in emerging technologies such as generative AI, metaverse, and blockchain. Customers no longer view a captivating and well-tailored experience as a mere luxury; it has become imperative. North American consumers are not only demanding top-notch services but also craving seamless, personalized, and ethically conscious interactions with enterprises. In parallel, businesses are recognizing that, in their quest to attract and retain top talent, creating a thoughtfully designed employee experience across the interaction touchpoints of the employee lifecycle has become vital. Moreover, experience design is extending its influence to partners, as efficient and user-friendly interfaces are becoming the linchpin for successful collaboration and mutual growth. As the narrative evolves, North American society itself is placing a premium on sustainability and ethical business practices. In summary, experience design, bolstered by investments in cutting-edge technologies, is not just a trend but a fundamental driver for business growth and social responsibility in North America. It profoundly shapes the future and impact of enterprises in the region, aligning their operations with the values and aspirations of a rapidly changing market.

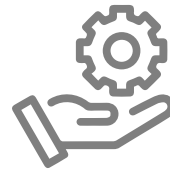
In this research, we present an assessment of 26 service providers featured on the [Digital Interactive Experience \(IX\) Services PEAK Matrix® Assessment 2023 – North America](#), a comprehensive matrix that evaluates and categorizes service providers in terms of their capabilities in the space.

The assessment is based on Everest Group’s annual Request for Information (RFI) process for calendar year 2023, interactions with leading IX service providers, client reference checks, and an ongoing analysis of the IX services market.

Scope of this report



Geography
North America



Providers
26



Services
Digital Interactive
Experience (IX) services

Scope: Digital Interactive Experience (IX) service providers

IX strategy and consulting services

Stakeholder experience transformation consulting across IX solution segments includes experience design strategy, commerce strategy, digital product envisioning, campaign and marketing communication strategy, market research planning, content strategy, and return-on-investment (RoI) model design.

Design services

Design services include user experience research and design, customer journey and persona mapping, wireframing and prototyping, creative audit, and validation and testing.

IX technology services segments

Content services	Data-driven marketing	Commerce services	Campaigns, promotions, loyalty	Media services
<ul style="list-style-type: none"> • Content generation • Content optimization • Content management • Content analytics 	<ul style="list-style-type: none"> • Segmentation and personalization • Marketing attribution • Marketing automation • Predictive analytics 	<ul style="list-style-type: none"> • Business-to-consumer (B2C) and Business-to-business (B2B) commerce • Social commerce • Emerging commerce constructs 	<ul style="list-style-type: none"> • Campaign execution • Promotions management • Loyalty programs 	<ul style="list-style-type: none"> • Channel selection • Channel optimization • Media planning and buying • Media measurement

Platform services

Platform services include implementation, migration, and upgrade of digital experience platforms, Customer Relationship Management (CRM) platforms, customer data platforms (CDP), hyper-personalization engines, AdTech platforms, commerce platforms, design management systems, conversational marketing platforms, workflow automation solutions, and social media marketing/listening tools across above mentioned technology services.

Product development

Digital product development includes user experience-driven application development aligned to existing, new, or disruptive business models. Services include agile development, testing, and DevSecOps to rapidly build and scale minimum viable products (MVP).

Enabling layers

Data and analytics services

Infrastructure services

Critical capabilities such as OCM, talent, and skills

Overview and abbreviated summary of key messages

This report examines 26 IT service providers/design agencies in delivering Digital Interactive Experience (IX) Services. It focuses on service provider position and growth, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key service provider profiles.

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

Service provider delivery capability

- Digital Interactive Experience (IX) service providers can be categorized into leaders, major contenders, and aspirants
- Accenture Song, Deloitte Digital, IBM iX, Merkle, Publicis Sapient, and TCS Interactive are the current leaders in the space

Emerging service provider trends

- Leaders display strong ability to deliver end-to-end experience transformation engagements with robust offerings and market proof points across design, strategy, and technology services in the North America region
- Leaders have made strong investments in carving out a well-defined internal strategy, which is also reflected in external branding to enhance “permission to play” in the experience ecosystem
- Leaders have strong value proposition messaging centered around designing sustainable, responsible, and ethical experiences

Changing market dynamics

- The definition of experience design is evolving with an extended focus on customers, employees, partners, and environment
- Service providers are building novel design capabilities whereas design agencies are expanding operations in implementation and support services

The way forward

- Service providers who are building end to end capabilities across creatives and technology services in the experience space will sustain the growing competition in the ecosystem
- AI investments across the stakeholder experience value chain will drive future growth for both service providers and design agencies in the Interactive Experience space

The report includes detailed profiles of 26 digital IX services providers in North America, including their strengths and limitations

Digital Interactive Experience (IX) Services in North America – Provider Compendium 2023

Provider 1 profile (page 1 of 5)

Overview

Vision for DIX services
 Provider's vision is to support its clients in delivering digital experience that drive business growth and value.

Percentage of projects in the North American region

Region	Percentage
US	Low (10%)
Canada	Low (10%)

Delivery footprint

Footprint	Percentage
Onshore ¹	Very Low (<10%)
Offshore ²	Low (10%)

1 Onshore – Mexico and LATAM
 2 Offshore – India, Poland, Romania, and the Philippines

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Digital Interactive Experience (IX) Services in North America – Provider Compendium 2023

Provider 1 profile (page 2 of 5)

Case study

Case study 1 Launched a third-party marketplace for products from merchants and brand partners.

Business challenge
 The client wanted to enhance its e-commerce capabilities and categories to its website.

Solution
 Provider launched a third-party marketplace on the website to offer products from merchants and brand partners. It created a B2B and processes across the company to provide omnichannel experience.

Impact

- Increased efficiency
- Provided customers with access to 400 brands and 20 products

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Digital Interactive Experience (IX) Services in North America – Provider Compendium 2023

Provider 1 profile (page 3 of 5)

Solutions

Proprietary solutions (representative list)

Product	Details
Solution 1	This solution that allow te
Solution 2	This solution data. It utiliz validation to
Solution 3	This solution security and
Solution 4	This solution that they ca
Solution 5	This solution
Solution 6	This solution governance
Solution 7	This solution the ability to

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Provider 1 profile (page 4 of 5)

Investments

Key investment (representative list)

Investment theme	Details
Acquisition	<ul style="list-style-type: none"> Acquired Acquired Acquired
Innovations	<ul style="list-style-type: none"> Launched Establish
Service offerings	<ul style="list-style-type: none"> Launched MACH an Launched
Partnership	<ul style="list-style-type: none"> Partnered generativ Partnered platform, Partnered

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Digital Interactive Experience (IX) Services in North America – Provider Compendium 2023

Provider 1 profile (page 5 of 5)

Everest Group assessment – Leader

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
Low	Low	Low	Low	Low	Low	Low	High	Low

Strengths

- Provider has a significant presence in the North American market, and its joint data-led GTM strategy with partner 1 is driving strong revenue growth across its experience transformation engagements
- It has further enhanced its play in the commerce space through the acquisition of company 1, an e-commerce leader, recognized by partner 2 as one of the top commerce consulting firms in North America
- It has a sharp focus on emerging constructs such as generative AI, metaverse, and content supply chain through partnerships, acquisitions, solutions, and talent investments
- It has deepened partnerships with leading MarTech providers such as partner 2 and partner 3 through joint development of solutions
- It is undertaking strong market evangelization efforts for digital commerce, CDP, and its broad offerings in the customer experience through industry events and thought leadership

Limitations

- Though provider has continued to add credibility in the technology services space, its technology narrative continues to lag the global system integrators (GSI)
- Its portfolio is skewed toward clients with annual revenue greater than US\$X billion, this might deter smaller firms from engaging with it
- It needs to further focus on winning MarTech partner awards from players such as partner 1 and partner 2

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Research calendar

Interactive Experience (IX) Services

Published Planned Current release

Reports title	Release date
Adobe Services PEAK Matrix® Assessment 2022	September 2022
Digital Commerce Platform PEAK Matrix® Assessment 2023	March 2023
Digital Commerce Platform Provider Compendium 2023	March 2023
Customer Data Platform (CDP) Products PEAK Matrix® Assessment 2023	May 2023
Customer Data Platform (CDP) Products Provider Compendium 2023	June 2023
Generative AI - Revolutionizing the Creative Design and Development Process	May 2023
Customer Journey Orchestration :Empowering Personalized CX Across Touchpoints	July 2023
Digital Commerce Platform State of the Market 2023	August 2023
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment – North America 2023	November 2023
Digital Interactive Experience (IX) Services in North America – Provider Compendium 2023	November 2023
Digital Interactive Experience (IX) Services PEAK Matrix® Assessment – Europe 2023	Q4 2023
Digital Interactive Experience (IX) Services Provider Compendium – Europe 2023	Q4 2023
Customer Data Platform (CDP) State of the Market 2023	Q4 2023
Voice of Stakeholder (VoS) Compendium Report 2023	Q4 2023
Digital Experience Platform PEAK Matrix® Assessment 2023	Q4 2023

Note: [Click](#) to see a list of all of our published Interactive Experience (IX) Services reports



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