

Digital Workplace Enterprise Pulse 2023: from Provider to True Partner – the Road not Taken

March 2023: Complimentary Abstract / Table of Contents



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Contents

1. Introduction and overview	4
• Research methodology	5
• Background of the research	7
• Focus of the research	8
• Demographics of the research	9
2. Enterprises' assessment of providers' capabilities	10
• Executive summary	11
• What do enterprises look for in a provider?	12
• Overall and region-specific enterprises' satisfaction trends	13
• Category wise deep-dive into enterprises' satisfaction trends for Europe	14
• Category wise deep-dive into enterprises' satisfaction trends for North America	15
• Enterprises' future technology priorities	16
• Provider's strength and limitations	17
3. Appendix	23
• Research methodology – questions asked to enterprises	24
• Glossary	25
• Research Calendar	26

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Introduction

The past two decades have been monumental for the digital workplaces, as we saw massive evolution of this space. With the workplace fundamentally changing over the years, many different trends shaped up the digital workplaces, and it underwent multiple waves of transformation, which consequentially effected both the core pillars of this eco-system: the enterprises and the providers.

While the providers fared well in terms of adapting to the shifts in enterprise demands with each wave by demonstrating flexibility and responsiveness in handling client situations, they somewhere failed to catch the pulse of the enterprises. It is time that providers become cognizant of what the true picture is of enterprises' experience in working with them and decipher the reasons behind the prevailing dissatisfaction. Elevating and transforming into a true business partner is the need of the hour for providers.

In this research, we present:

- A summary of various enterprises' views on the capabilities of providers they engage with across digital workplace services
- Enterprises' views about their key investment priorities in digital workplace services in 2023

The assessment is based on **56** unique interviews (not a survey), conducted in 2022, with enterprises globally across digital workplace services across industries with 16 providers in focus. These enterprises were nominated as reference clients by different providers studied across Everest Group's Digital Workplace Services PEAK Matrix® evaluations.

Scope of this report



Geography

North America and Europe



Interviews

56 interviews



Services

Digital workplace services



Provider

16 global providers

Overview and abbreviated summary of key messages

This report examines enterprise views on the capabilities of their providers across digital workplace services and the reasons for their satisfaction and dissatisfaction. It also looks at enterprises' future technology mandates and priorities.

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

Reasons for satisfaction and dissatisfaction

- Providers' focus on client management and commercial flexibility is being greatly received by enterprises in both North America and Europe
- The major pain points for enterprises were challenges related to value-add, innovation, talent management, and technical & domain expertise of the resources

Regional insights

- Enterprises in Europe were more satisfied than those in North America, mainly because service providers in the region delivered resources with good technical and domain expertise and ensured superior client management
- Additionally, enterprises in North America expressed dissatisfaction with their technology service providers' lack of innovation, knowledge management, and talent management. Enterprises in both Europe and North America opine that its time providers move up on the partnership ladder and become strategic partners by pro-actively identifying problem areas as well as suggesting remedial mechanisms

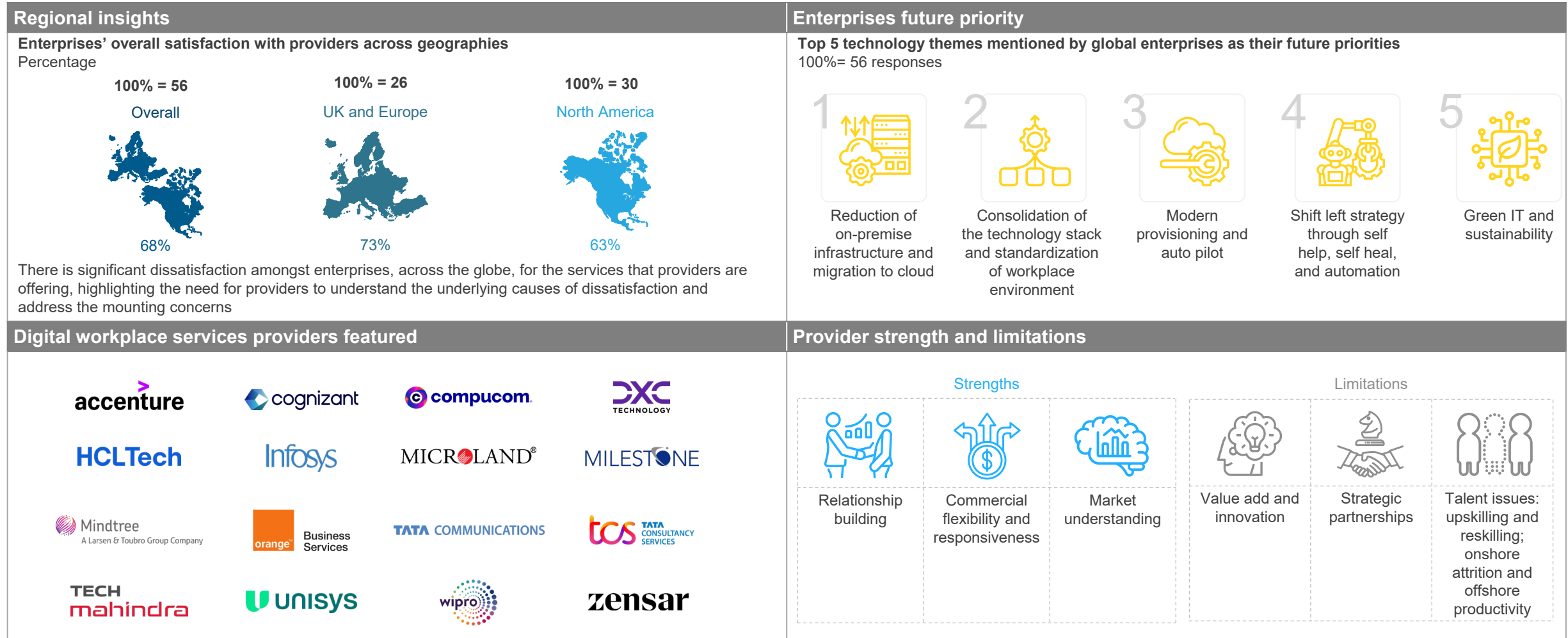
Service provider performance

- Overall, providers fared well in terms of adapting to the shifts in enterprise demands with each wave by demonstrating flexibility and responsiveness in handling client situations, they somewhere failed to catch the pulse of the enterprises.
- Providers have realized the importance of being a true partner and have undertaken some initiatives to improve in this area; however, a lot more needs to be done

Enterprises future technology priorities

- Creating cloud-based workspaces, technology stack consolidation, and automation have emerged as the top enterprise priorities in 2023
- Enterprises plan on reducing the on-premise infrastructure by investing in various cloud-based technologies in the upcoming years

This study analyzes enterprises' expectations from providers and provides a deep dive into their reasons for satisfaction and dissatisfaction from providers; below are four charts to illustrate the depth of the report



Research calendar

Digital Workplace

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Codifying Sustainable Workplaces: Journey to a Better Future	December 2022
Workplace Communication and Collaboration (WCC) Services PEAK Matrix® Assessment 2023	December 2022
Workplace Communication and Collaboration (WCC) Services – Provider Compendium 2023	January 2023
Workplace Communication and Collaboration (WCC): Enabling Employee Engagement and Belongingness with Metaverse Adoption	March 2023
Digital Workplace Enterprise Pulse 2023: from Provider to True Partner – the Road not Taken	March 2023
Workplace Employee Experience Management (WEEM) Platforms PEAK Matrix® Assessment 2023	Q2 2023
Workplace Employee Experience Management (WEEM) Platforms – Provider Compendium 2023	Q2 2023
Digital Workplace State of the Market Report	Q2 2023
Moving from SLAs to XLAs: Market Report	Q2 2023
Digital Workplace Services PEAK Matrix® Assessment 2023 – North America	Q2 2023
Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe	Q2 2023
Digital Workplace Services Provider Compendium 2023 – North America	Q3 2023
Digital Workplace Services Provider Compendium 2023 – Europe	Q3 2023
Exploring the Business Case for Workplace Transformation	Q3 2023
Cognitive Service Desk Specialist PEAK Matrix® Assessment 2023	Q4 2023

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