

Digital Workplace Services PEAK Matrix® Assessment 2023 – North America

September 2023: Complimentary Abstract / Table of Contents



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- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ 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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Background of the research

- With the ongoing changes in the workplace, various trends have driven transformations. The upcoming years are poised to be remarkable for the digital workplace, marked by the third wave of value-centric transformation. This phase will see enterprises adopting a fully digital future of work, prioritizing improved employee experience, value realization, productivity, cost efficiency, and workplace cohesion. Realizing this goal would require collaboration with suitable Service Providers (SPs)
- In North America, existing economic headwinds such as increasing inflation, banking crisis, a steep rise in interest rates, and intense competition for talent have prompted enterprises to scrutinize their spend and intensify their focus on business value outcomes and value creation throughout their workplace transformation journey. At the same time, there is a growing interest in industry-specific workplace solutions, AI-driven innovations, and product-oriented approaches. SPs are focusing on strengthening their capabilities to aid enterprises in their workplace engagements
- In this research, we present an assessment of 26 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® – North America

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

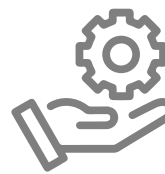
This report includes the profiles of the following 26 leading digital workplace providers featured on Digital Workplace Services PEAK Matrix – North America:

- **Leaders:** Cognizant, HCLTech, Infosys, NTT DATA, TCS, and Wipro
- **Major Contenders:** Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones
- **Aspirants:** Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

Scope of this report



Geography
North America



Providers
26 leading digital
workplace service
providers



Services
Digital workplace
services

Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 26 SPs featured on the [Digital Workplace Services PEAK Matrix® Assessment 2023 – North America](#). The assessment is based on Everest Group’s annual RFI process for calendar year 2023, interactions with leading SPs, client reference checks, and an ongoing analysis of the digital workplace services market.

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

Everest Group Digital Workplace Services PEAK Matrix Assessment

This report includes the profiles of the following 26 leading SIs featured on the Digital Workplace Services PEAK Matrix:

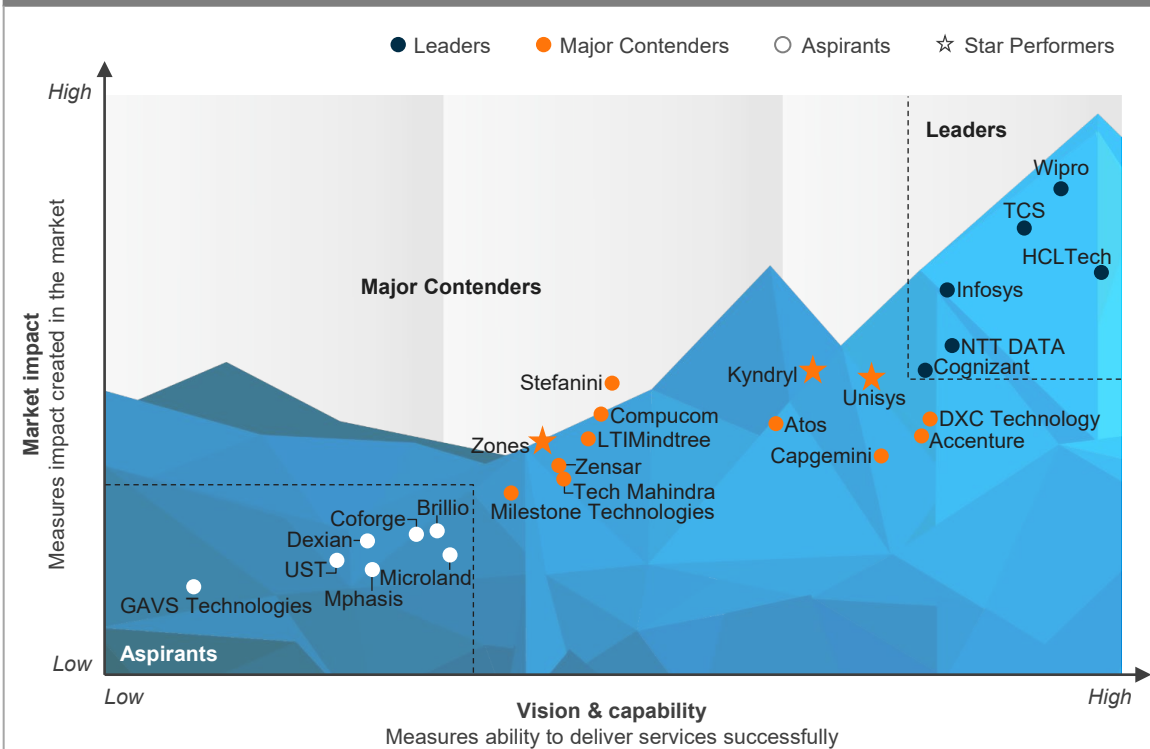
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Service provider characteristics

- Leaders continue to showcase expertise in end-to-end integrated digital workplace transformation engagements with credible suite of IPs and solutions including industry-specific solutions and AI-enabled offerings. They have a highly balanced portfolio, display coherent vision, and continue to invest in technology and services capability development (internal IP/tools, partnerships, acquisitions, etc.)
- Major Contenders have built meaningful capabilities to deliver workplace services; however, their service portfolios are not as balanced and comprehensive as those of Leaders – this is also reflected in the scale of market success achieved by these providers (vis-a-vis Leaders)
- Aspirants are approaching the market with a higher focus on certain segments of workplace services rather than a balanced portfolio, limited vertical focus, and restricted delivery footprint
- Star Performers have demonstrated the most improvement over time, based on their relative YoY improvement, on the PEAK Matrix

This study offers four distinct chapters providing a deep dive into key aspects of digital workplace services market in North America; below are three charts to illustrate the depth of the report

Digital Workplace Services PEAK Matrix® Assessment 2023 – North America^{1,2,3,4}



1 Assessments for Tech Mahindra and UST excludes 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 LTIMindtree is based on capabilities after the merger of LTI and Mindtree
 3 Analysis for Kyndryl is based on capabilities after the split into IBM and Kyndryl
 4 We have not considered LTIMindtree for Star Performer title since erstwhile Mindtree participated as a separate entity in the 2022 refresh of the assessment

Source: Everest Group (2023)

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 a robust delivery presence in North America with multiple delivery centers in US, Canada, and Mexico enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Limitations

- Enterprises seeking mature industry-contextual and verticalized solutions or use cases, may not find Service Provider 1 to be a suitable partner
- It should try to expand into larger multi-country deals and scout for engagements in other North American markets to strengthen its presence in the region

Research calendar

Digital Workplace

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
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	April 2023
Workplace Employee Experience Management (WEEM) Platforms – Provider Compendium 2023	July 2023
Digital Workplace State of the Market: Are Value Leakages Sinking Your Workplace Strategy?	July 2023
Empowering the Future Workforce: The Transformative Impact of Generative AI	August 2023
Digital Workplace Services PEAK Matrix® Assessment 2023 – North America	September 2023
Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe	Q3 2023
Digital Workplace Services Provider Compendium 2023 – North America	Q3 2023
Digital Workplace Services Provider Compendium 2023 – Europe	Q3 2023
Moving from SLAs to XLAs: Market Report	Q4 2023
Exploring the Business Case for Workplace Transformation	Q4 2023
Unified Communication & Collaboration (UCC) Specialist Services PEAK Matrix® Assessment 2023	Q4 2023

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