

Digital Workplace Services in North America – Provider Compendium 2023

October 2023 : Complimentary Abstract / Table of Contents



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- ▶ Life Sciences Business Process
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- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ 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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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® Assessment 2023 - 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 assess 26 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® Assessment – North America and highlight the strengths and limitations of each service provider. Each profile offers a comprehensive picture of the digital workplace service provider’s vision and strategy, scope of services offered, digital workplace offerings, innovation and investments, partner network, and strengths and limitations.

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

Digital Workplace Services – Provider Compendium 2023 – North America

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

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- **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

Service Provider Characteristics

- **Leaders** have a highly balanced portfolio, display coherent vision, and continue to invest in technology and services capability development (internal IP/tools, partnerships, acquisitions, etc.). They are also focused on talent empowerment, solution contextualization, and sales and marketing enablement
- **Major Contenders** have built meaningful capabilities to deliver workplace services by making continued investments in developing internal IP and tools, as well as expanding their service and technology partnership networks in order to plug their capability gaps, however, their service portfolios are not as balanced and comprehensive as those of Leaders
- **Aspirants** are at a relatively nascent stage and is not a leading revenue generator for such service providers, but they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their mindshare and positioning in the market
- **Star performers** are based on Year-on-Year (YOY) movement of different service providers on the PEAK Matrix®. Everest Group identified three service providers as the “2023 Digital Workplace Services market Star Performers for North America”

The digital workplace service provider compendium report has over 26 service provider profiles

Digital Workplace Services in North America – Provider Compendium 2023

Provider 1 profile (page 1 of 4) Overview

Digital workplace services vision

XYZ's digital workplace services portfolio focuses on helping organizations humanize their employees' workplace experiences and build a resilient and sentient enterprise by digitizing hybrid workplaces, redesigning physical workspaces, and prioritizing organizational well-being. XYZ envisions a digital workplace that is experience-led, persona-based, and industry-aligned. It is also focused on enabling a collaborative hybrid workplace that continuously evolves to deliver proactive analytics and insights, shift from the traditional Service Level Agreements (SLAs) to Experience Level Agreements (XLA/ELA), and provide an automatic first secure mobility experience anytime, anywhere, and on any device.

Digital workplace services revenue (2022)



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Provider 1 profile (page 2 of 4) Solutions

Proprietary digital solutions (representative list)

Solution name	Details
XYZ	The system provides visual comparisons between target and actual service forecasts, service desk costs and resourcing.
XYZ	Converses with end users using natural language to enable self-service and situational awareness.
XYZ	Web-based automated data entry tool to assist in proper ticket management (ITSM) ticket data entry, report and track ticket progress.
XYZ	Automates assignment of field service technicians to client sites by location.
XYZ	Artificial intelligence that can naturally simulate human conversations.

Digital Workplace Services in North America – Provider Compendium 2023

Provider 1 profile (page 3 of 4) Partnerships, Investments and recent activities

Partnerships (representative list)

Partner name	Details
XYZ	<ul style="list-style-type: none"> Premier professional services partner, elite technology alliance partner Leverages unified workplace services that includes identity, virtual desktop, and cloud solutions
XYZ	Partnered with XYZ for unified workplace services that includes identity, virtual desktop, and cloud solutions.
XYZ	<ul style="list-style-type: none"> Provider 1 is an advanced XYZ premier consulting partner, channel partner, and digital agency partner with XYZ. Leverages XYZ for cloud solutions (XYZ Workspace) and enterprise services.
XYZ	<ul style="list-style-type: none"> It is a part of the global strategic partner organization with XYZ and leverages the XYZ partnership for telephony and unified communications.
XYZ	Partnered with these solution providers for end-user analytics, user experience, and digital workplace services.

Investments (representative list)

Investment name	Details
Innovation and Investments	<ul style="list-style-type: none"> Invested in setting up and launching the Experience Studio in Munich. Invested in elevating use cases and demos with strategic partners. Invested in training resources for GenAI, Microsoft, Google, Intel, AI.
Acquisitions	<ul style="list-style-type: none"> Acquired XYZ for consulting and human capital management capabilities. Acquired XYZ for AI-powered data fabric for manufacturing customers.

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Provider 1 profile (page 4 of 4) Everest Group assessment – Leader

Measure of capability:

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

- XYZ has undergone organization restructuring with the aim of focusing on high-growth segments, and is trying to build an app and cloud-led workplace narrative to position itself as a strategic partner of choice for cloud-led workplaces.
- XYZ has bolstered its workplace consulting expertise through strategic acquisitions and investments. As a result of these moves, the company has achieved tangible success, particularly in the area of experience transformation services.
- Enterprises would benefit from its strong focus on delivering value via total experience management, augmented through offerings such as XYZ and XYZ.
- XYZ has built a generative AI foundry to enable it to build business solutions specific to workplace services.

Limitations

- XYZ IP and solutioning approach lacks robustness and expertise. While a lot of solutioning and IP may work in specific scenarios with less than expected benefits in other cases.
- XYZ has a greater focus on large deals which might not resonate well with the small and midsize enterprises.
- Enterprises from the telecom, media and entertainment, public sector, and travel and transport verticals should carefully evaluate XYZ's capabilities and market impact in their respective verticals.
- Some clients have highlighted staffing issues such as retention and lack of backfill resources, as some of the key areas of improvement.

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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	September 2023
Digital Workplace Services Provider Compendium 2023 – Europe	October 2023
Digital Workplace Services in North America – Provider Compendium 2023	October 2023
Moving from SLAs to XLAs	Q4 2023
Exploring the Business Case for Workplace Transformation	Q4 2023
Unified Communication and Collaboration (UCC) Specialists PEAK Matrix® Assessment 2023	Q4 2023
Unified Communication and Collaboration (UCC) Specialists Provider Compendium 2023	Q4 2023

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