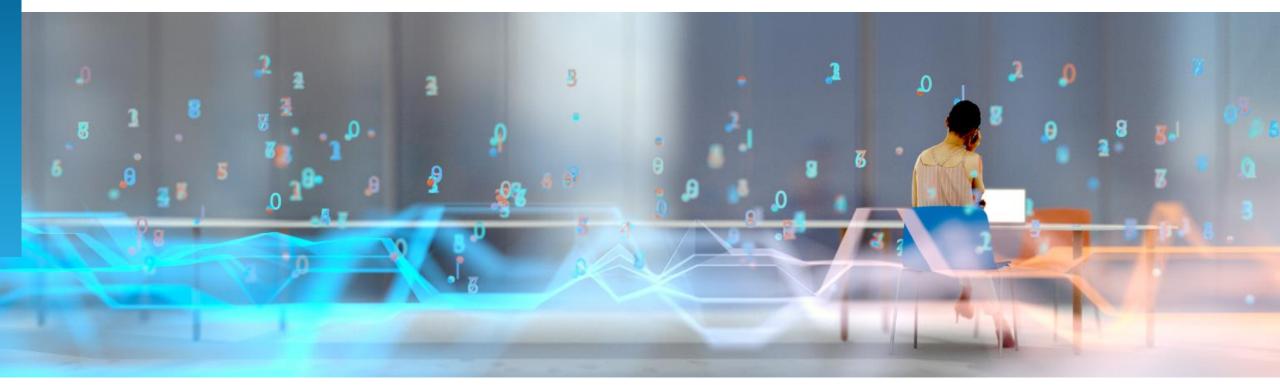# Digital Workplace Services in North America – Provider Compendium 2023

## October 2023 : Complimentary Abstract / Table of Contents

# Our research offerings

This report is included in the following research program(s):
Digital Workplace

- Amazon Web Services (AWS)
- Application Services
- Artificial Intelligence (AI)
- Asset and Wealth Management
- Banking and Financial Services Business Process
- Banking and Financial Services Information Technology
- Catalyst™
- Clinical Development Technology
- Cloud and Infrastructure
- Contingent Staffing
- Contingent Workforce Management
- Customer Experience Management Services
- CX Excellence
- CXM Technology
- Cybersecurity
- Data and Analytics
- Digital Adoption Platforms
- Digital Services
- Digital Workplace
- Employee Experience Management (EXM) Platforms
- Employer of Record (EOR)
- Engineering Research and Development
- Enterprise Platform Services
- Exponential Technologies
- Finance and Accounting

- Financial Services Technology (FinTech)
- GBS Talent Excellence
- Global Business Services
- Google Cloud
- Healthcare Business Process
- Healthcare Information Technology
- HealthTech
- Human Resources
- Insurance Business Process
- Insurance Information Technology
- Insurance Technology (InsurTech)
- Insurance Third-Party Administration (TPA) Services
- Intelligent Document Processing
- Interactive Experience (IX) Services
- IT Services Excellence
- IT Services Executive Insights™
- IT Talent Excellence
- Life Sciences Business Process
- Life Sciences Commercial Technologies
- Life Sciences Information Technology
- Locations Insider™
- Marketing Services
- Market Vista™
- Microsoft Azure
- Microsoft Business Application Services

- Modern Application Development (MAD)
- Mortgage Operations
- Multi-country Payroll
- Network Services and 5G
- Oracle Services
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- 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™
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Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

# Contents

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# Contents

# 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:

- **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

**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"

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# 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/BLA), and provide an automation-first secure mobility experience anytime, anywhere, and on any device.

**Digital workplace services revenue** (2022)

| <US$200 million | US$200-US$500 million | US$500 million-US$1 billion | >US$1 billion |

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Digital Workplace Services in North America – Provider Compendium 2023

**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 and forecasts service desk costs and resourcing |
| XYZ | Converses with end users using natural language to enable self-service situational awareness |
| XYZ | Web based automated data entry tool to assist in proper ticket management, Management (ITSM) ticket data entry, report and track ticket progress |
| XYZ | Automates assignment of field service technicians to client sites by sc... |
| XYZ | Artificial intelligence that can naturally simulate human conversations |

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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 | • Premier professional services partner, elite technology alliance part...<br>• Leverages unified workplace services that includes identity, virtual d... |
| XYZ | Partnered with XYZ for unified workplace services that includes identi... |
| XYZ | • Provider 1 is an advanced XYZ premier consulting partner, channel...<br>digital agency partner with XYZ<br>• Leverages XYZ for cloud solutions (XYZ Workspace) and enterprise... |
| XYZ | • It is a part of the global strategic partner organization with XYZ and...<br>• Leverages the XYZ partnership for telephony and unified communic... |
| XYZ | Partnered with these solution providers for end-user analytics, user se... |

**Investments** (representative list)

| Investment name | Details |
|---|---|
| Innovation and Investments | • Invested in setting up and launching the Experience Studio in Munic...<br>• Invested in elevating use cases and demos with strategic partners i...<br>• Invested in training resources for GenAI, Microsoft, Google, Intel, A... |
| Acquisitions | • Acquired XYZ for consulting, and human capital management capa...<br>• Acquired XYZ for AI-powered data fabric for manufacturing custom... |

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Digital Workplace Services in North America – Provider Compendium 2023

**Provider 1 profile** (page 4 of 4)
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 |
| ● | ● | ● | ● | ● | ◕ | ● | ◑ | ◕ |

**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 |

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

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