



Digital Transformation Consulting Services PEAK Matrix® Assessment 2024 – North America

September 2024: Complimentary Abstract / Table of Contents

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- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG
- ▶ 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
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- ▶ Technology Skills and Talent
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For more information on this and other research published by Everest Group, please contact us:

Alisha Mittal, Vice President

Parul Trivedi, Practice Director

Sandeep P, Senior Analyst

Swagata Sarkar, Senior Analyst

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Introduction

Enterprises in North America are investing heavily to drive customer experience, process and cost optimization, growth, and sustainability across organizations. Historically, enterprises have received subdued returns from digital transformation initiatives. Consulting emerged as a key aspect of the digital transformation value chain as enterprises understood that a clear vision and strategy are quintessential for the success of digital transformation initiatives. Amid huge demand and the involvement of technology in the transformation journey, North American enterprises have started looking beyond traditional consulting offerings. Now, enterprises are searching for service providers that can guide them to outline a digital vision and roadmap along with being able to drive innovation with actual value realization.

In this research, we present an assessment of 18 service providers featured on the Digital Transformation Consulting Services PEAK Matrix® North America provides comprehensive matrix that evaluates and categorizes service providers in terms of their capabilities.

The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2024, interactions with leading digital transformation consulting service providers, client reference checks, and an ongoing analysis of the digital consulting services market.

This report includes the profiles of the following 18 leading digital transformation consulting service providers in North America featured on the Digital Transformation Consulting Services PEAK Matrix®:

- **Leaders:** Accenture, Deloitte, EY, IBM, Infosys, and TCS
- **Major Contenders:** BCG, Cognizant, HCLTech, LTIMindtree, McKinsey, Mphasis, NTT DATA, Persistent Systems, and Tech Mahindra
- **Aspirants:** Birlasoft, SoftServe, and TELUS Digital

Scope of this report

Geography: North America

Industry: 18 leading digital transformation consulting services providers

Services: digital services

Overview and abbreviated summary of key messages

This report examines the state of the digital transformation consulting services market in North America, where enterprises are heavily investing in customer experience, process and cost optimization, growth, and sustainability. Historically, returns from digital transformation initiatives have been mixed, but consulting has become critical in helping enterprises develop clear visions and strategies to achieve success. As digital transformation demand grows, North American enterprises are seeking service providers that offer more than traditional consulting, including digital vision creation, innovation, and actual value realization.

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

Leaders

- Leaders have a strong delivery footprint in North America, with consulting capabilities to manage complex transformations across industries
- They are heavily invested in talent development and offer a diverse range of solutions, IP, and frameworks to help clients accelerate time-to-market

Major Contenders

- Major contenders are focused on building proprietary tools, solutions, and accelerators to enhance their consulting service delivery across the region
- They employ a combination of organic and inorganic strategies to bridge gaps in their service portfolios and strengthen their North American presence

Aspirants

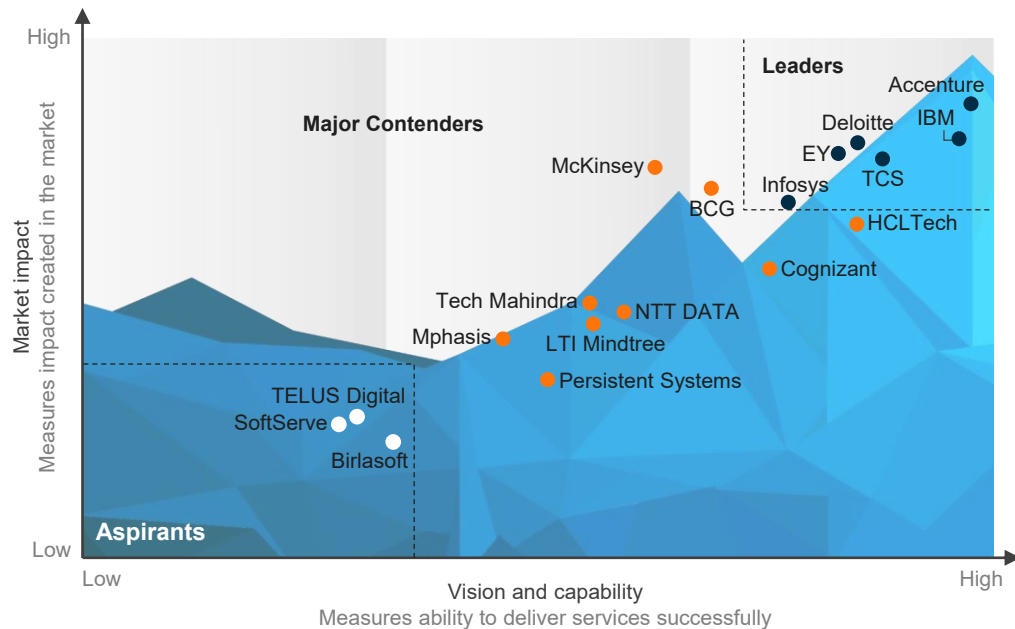
- Aspirants are focused on specific industries or operate smaller digital transformation consulting practices in North America
- They are investing in talent upskilling and organic growth, establishing new practice lines, Centers of Excellence (CoEs), and innovation labs to enhance their consulting capabilities

This study offers 18 distinct chapters providing a deep dive into key aspects of Digital transformation consulting market; below are three charts to illustrate the depth of the report

Everest Group PEAK Matrix® Assessment 2024

Everest Group Digital Transformation Consulting Services PEAK Matrix® Assessment 2024 – North America^{1,2}

● Leaders ● Major Contenders ○ Aspirants



1 Assessments for Deloitte, McKinsey, EY, BCG, SoftServe, NTT DATA, Accenture, Infosys of service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with insurance buyers
 2 Assessment of IBM and TELUS Digital includes partial inputs from the service provider and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, service providers' public disclosure, and interaction with buyers
 Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and 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	○	○	●	○	●	○	○	●	○

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	○	●	●	●	●	○	○	○	●

Strengths

- Provider 1 has significantly strengthened its consulting capabilities in North America through strategic acquisitions in key areas such as cloud computing and cybersecurity
- Provider 1 has strong market proof points in BFSI and healthcare, making it a highly relevant partner for enterprises in these sectors

Limitations

- Provider 1 premium pricing positioning and relatively lower engagement flexibility, compared with peers of similar scale, make it less suitable for cost-conscious clients
- It can further enhance its capability around Geto capture a greater market share

Research calendar

Digital Services

	Published	Current release	Planned
Reports title	Release date		
Exponential Technology Radar 2024: Filtering Through the Noise			April 2024
Modern Infrastructure – Review of Google Next '24 Product Launch			April 2024
Generative AI – Review of Adobe Summit 2024			May 2024
AI-led Business Transformation – Review of PegaWorld iNspire 2024			June 2024
Enterprise Immersive Experience Services – Provider Compendium 2024			July 2024
Digital Transformation Consulting Services PEAK Matrix® Assessment 2024 – North America			September 2024
Digital Transformation Services for Mid-market Enterprises PEAK Matrix® Assessment 2024			Q3 2024
Digital Transformation Services for Mid-market Enterprises – Provider Compendium 2024			Q4 2024
Digital Transformation Consulting Services PEAK Matrix® Assessment 2024 – Europe			Q4 2024
Digital Transformation Consulting Services PEAK Matrix® Assessment 2024 – Change Management			Q4 2024

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Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-214-451-3000

Website
everestgrp.com

Blog
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