

# Digital Workplace Enterprise Pulse 2024 – Top 5 Service Providers Delivering Superior Value across North America and Europe

February 2024: Complimentary Abstract / Table of Contents



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- ▶ Oracle Services
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- ▶ 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 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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## Introduction

Despite global economic challenges, political changes, trade wars, and increased RoI scrutiny, enterprises portray a positive outlook on 2024, intensifying their focus on value creation and employee experience. Enterprises rely on service providers to guide them in the evolution and adoption of new technologies and provide them with a competitive moat against their peers. Service providers are also actively exploring ways to satisfy these enterprises.

Enterprises have started demanding more from the service providers and want them to act as their true strategic partners. While providers have found the right mix to satisfy client management and provide innovative commercial constructs, concerns regarding innovation, value addition, and technical expertise of resources remain prevalent. While enterprises clearly anticipate higher value from their providers, achieving true enterprise satisfaction within the resource constraints is a challenge for providers, which they need to navigate.

In this research, we present:

- A summary of various enterprises' views on the capabilities of service providers and an assessment of the level of satisfaction among enterprises regarding their digital workplace service providers
- Outlining enterprises' future priorities in the digital workplace and detailing the solutions or technologies that enterprises plan to invest in
- Analysis of the top five digital workplace service providers delivering superior value across North America and Europe

### Scope of this report



**Geography**  
North America and Europe



**Interviews**  
60+ interviews






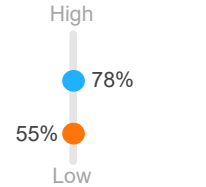
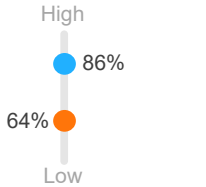
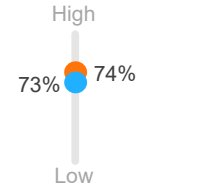
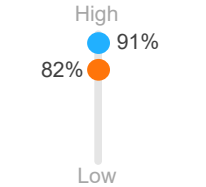





**Services**  
Digital workplace services



**Providers**  
14 global providers

# This report reflects enterprise's view on the value delivered by service providers and outlines their future priorities ; below are four snippets to illustrate the depth of the report

North America vs Europe value delivered comparison				Vertical-wise satisfaction levels					
Technical expertise	Domain expertise	Talent management	Pricing and commercial flexibility						
				<b>+15%</b>	<b>-1%</b>	<b>+6%</b>	<b>-8%</b>	<b>+12%</b>	
<ul style="list-style-type: none"> <li>North American enterprises are more satisfied with their service providers compared to their European counterparts, with technical and domain expertise being the major pain point for Europe</li> <li>European enterprises expressed dissatisfaction regarding onboarding of newer resources who have little or no technical expertise into ongoing projects. Concerns have been raised regarding the provider's inability in understanding the customer landscape and the absence of contextualization in proposed solutions</li> <li>Enterprises in North America are undergoing a shift toward the third wave of workplace transformation and are emphasizing value creation, while expecting providers to act as strategic partners, capable of meeting diverse workplace requirements. As the market becomes more mature, enterprises strive for efficiency and flexibility in their existing solutions and operations</li> </ul>				<b>BFSI</b> <b>Manufacturing</b> <b>Electronics and hi-tech</b> <b>Healthcare and life science</b> <b>Retail, distribution, and CPG</b>					
Service providers' strengths and limitations				Enterprise future priorities					
Providers	Strengths	Limitations		<b>1</b> 	<b>2</b> 	<b>3</b> 			
<b>brillio</b>	<ul style="list-style-type: none"> <li>Resource expertise</li> <li>Strong leadership</li> </ul>	<ul style="list-style-type: none"> <li>Value add and innovation</li> <li>Process improvement/Change management</li> </ul>		Efficiency-led optimization and value realization	Scaling cloud-based workplace technologies – UCaaS and UEM taking the spotlight		Improving employee experience		
<b>Coforge</b>	<ul style="list-style-type: none"> <li>Commercial flexibility</li> <li>Talent management</li> </ul>	<ul style="list-style-type: none"> <li>Client management</li> <li>Innovation and proactiveness</li> </ul>		<b>Top drivers/initiatives</b>					
<b>dexian</b>	<ul style="list-style-type: none"> <li>Proactive support</li> <li>Client management</li> </ul>	<ul style="list-style-type: none"> <li>Global presence</li> <li>Talent management</li> </ul>		Cut operational costs	Simplify end-user support	Increased employee productivity and satisfaction			
<b>DXC TECHNOLOGY</b>	<ul style="list-style-type: none"> <li>Responsiveness and commercial flexibility</li> <li>Global presence</li> </ul>	<ul style="list-style-type: none"> <li>Proactiveness</li> <li>Value add and innovation</li> </ul>		Simplify business complexity	Prioritizing Opex models	Enhanced business performance			
				Focus on value creation	Optimize device lifecycle	Cost savings			

# Research calendar

## Digital Workplace

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Digital Workplace Services PEAK Matrix® Assessment 2023 – North America	September 2023
Digital Workplace Services PEAK Matrix® Assessment 2023 – Europe	September 2023
Shifting Gears: Embracing Experience Level Agreements (XLAs) for Experience Excellence	December 2023
<b>Digital Workplace Enterprise Pulse 2024 – Top 5 Service Providers Delivering Superior Value across North America and Europe</b>	<b>February 2024</b>
Unified Communication & Collaboration (UCC) Specialist Services Peak Matrix® Assessment 2024	Q1 2024
Unified Communication & Collaboration (UCC) Specialist Services Provider Compendium 2024	Q1 2024
Digital Workplace State of the Market 2024	Q1 2024
Conversational AI Platforms for IT Management PEAK Matrix® Assessment 2024	Q2 2024
Conversational AI Platforms for IT Management – Provider Compendium 2024	Q2 2024
Conversational AI Platforms for IT Management State of the Market 2024	Q2 2024
Specialized Workplace Transformations Report	Q2 2024
Digital Workplace Services PEAK Matrix® Assessment 2024 – North America	Q3 2024
Digital Workplace Services PEAK Matrix® Assessment 2024 – Europe	Q3 2024
Digital Workplace Services for Mid-market Enterprises PEAK Matrix® Assessment 2024	Q3 2024
Digital Workplace Services – Provider Compendium 2024	Q3 2024

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