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Everest Group PEAK Matrix® for ServiceNow Service Provider 2022

Focus on Accenture
August 2022

Everest Group
PEΛK MATRIX®

Background of the research

Few years back, enterprises expected ServiceNow to help them manage digital workflows such as IT Service Management (ITSM) and IT Operations Management (ITOM). With time, enterprises are now looking for stakeholder-centric, automation-focused, and data-/outcome-driven integrated solutions with an emphasis on stakeholder experience, even in a multi-channel, complex portfolio. Enterprises are deriving higher business value by reimagining processes and integrating ServiceNow with existing systems of record, systems of engagement, and systems of intelligence

In response to the changing market landscape, ServiceNow has expanded its portfolio to deliver enterprise solutions including IT, employee, and customer workflows to help clients drive business growth, increase resilience, and enhance employee productivity. It has forayed into emerging areas such as CSM, HCM, DevOps, GRC, and security. It has empowered enterprises to build custom apps on its low-code-powered app engine. It has invested in building industry solutions to provide out-of-the-box resolutions and expedite time-to-market for enterprises

In this research, we present an assessment and detailed profiles of 25 Service providers featured on the ServiceNow Services PEAK Matrix® Assessment 2022. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading ServiceNow providers, client reference checks, and ongoing analysis of the Enterprise Platform Services market.

The full report includes the profiles of the following 25 leading service providers featured on the ServiceNow services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Deloitte, DXC Technology, EY, and Infosys
- **Major Contenders:** Atos, Capgemini, Cask, Enable Professional Services, HCL Technologies, IBM, KPMG, LTI, NTT DATA, Plat4mation, TCS, Thirdera, Tech Mahindra, and Wipro
- **Aspirants:** CloudGo, Mindtree, Mphasis, Stefanini, and Volteo Digital

Scope of this report

Geography
Global

Providers
25 leading ServiceNow service providers

Services
ServiceNow services

Introduction and scope

Everest Group recently released its report titled "ServiceNow Services PEAK Matrix® Assessment 2022". This report analyzes the changing dynamics of the ServiceNow services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 25 service providers on the Everest Group PEAK Matrix® for ServiceNow services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of ServiceNow service providers based on their absolute market success and delivery capability.

Based on the analysis, **Accenture emerged as a Leader.** This document focuses on **Accenture's** ServiceNow services experience and capabilities and includes:

- Accenture's position on the ServiceNow services PEAK Matrix
- Detailed ServiceNow services profile of Accenture

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Source: Everest Group (2022)

ServiceNow services PEAK Matrix® characteristics

Leaders:

Accenture, Cognizant, Deloitte, DXC Technology, EY, and Infosys

- Leaders have a balanced portfolio of projects that cover the entire product spectrum of ServiceNow across diverse industries
- They have invested heavily in building frameworks and solutions that expedite time-to-market. Their solutions are mainly co-developed with ServiceNow and are widely recognizable They have a host of solutions built inhouse that have been deployed across engagements
- Their focus on talent has prompted them to a significant increase in YoY certified resources. Their focus on emerging products like HRSD and CSM is visible by their increased number of certifications. They have a higher upskilling and cross-skilling ratio among their peers
- They have been recognised by industry with global and regional awards and buyers attest to their domain and technical expertise
- Leaders have invested both in inorganic and organic growth. Their investments are across new acquisitions and building innovation centres, CoEs, etc. to further their ServiceNow capabilities

Major Contenders:

Atos, Capgemini, Cask, Enable Professional Services, HCL Technologies, IBM, KPMG, LTI, NTT DATA, Plat4mation, TCS, Thirdera, Tech Mahindra, and Wipro

- Major Contenders stand out with their delivery model, which is better distributed globally and has onshore presence
- They cater to buyers across the small to mega-buyer spectrum, highlighting their ability to deliver end-to-end ServiceNow engagements for buyers of any size
- They have invested in building innovation centres and CoEs to further their ServiceNow capability
- Their focus on emerging products, such as HRSD and CSM, is visible by the improved number of certifications in the modules

Aspirants:

CloudGo, Mindtree, Mphasis, Stefanini, and Volteo Digital

- They offer relatively low-priced engagements compared to Leaders or Major Contenders
- Their global delivery model is well distributed with some Aspirants performing well regionally
- Aspirants are largely focused on small and midsized buyers and have credible proof points in areas such as ITSM and ITOM

Everest Group PEAK Matrix®

ServiceNow Services PEAK Matrix® Assessment 2022 | Accenture positioned as a Leader

Everest Group ServiceNow Services PEAK Matrix® Assessment 2022[1,2]
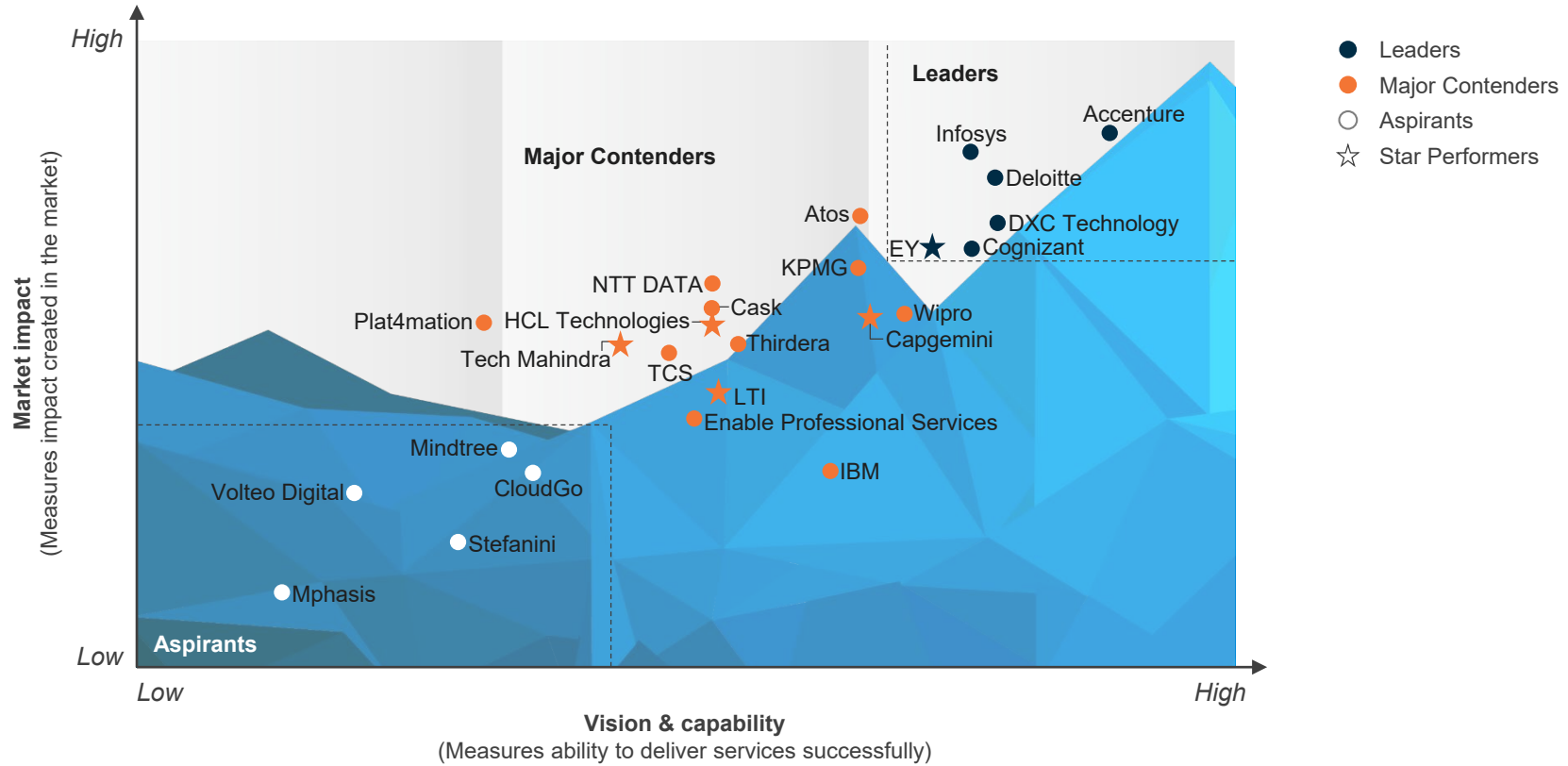
1 Assessments for Atos, Deloitte, EY, and KPMG exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

2 Analysis for Mindtree and LTI, are based on capabilities before their merger. Analysis for Enable Professional Services, is based on their capabilities before its acquisition by Fujitsu

Source: Everest Group (2022)

Accenture | ServiceNow services profile (page 1 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	Innovation & investments	Delivery footprint	Overall
●	◕	◕	◕	●	◕	●	◑	◕

Strengths

- Accenture has one of the highest number of ServiceNow-certified talent and its total workforce of ServiceNow-ready professionals is higher than its peers

- It has invested heavily in building frameworks and accelerators, such as Telco, ACP4Gov, ASIM, and Continuum Control Plane, that expedite time-to-market

- Accenture is a ServiceNow Global Elite Partner and has regional awards for Americas and EMEA. The YoY awards attest to its deep industry knowledge, digital transformation initiatives, and global delivery capabilities

- While Accenture serves clients across sectors, it has a higher focus on BFSI, public sector, utilities, and telco

- Clients have highlighted Accenture's capabilities in CSM and UX Design as one of its key strengths

Limitations

- Accenture has lesser focus on ITSM engagements compared to its peers of similar scale

- It is positioned as a premium-priced partner in ServiceNow services space. It becomes a deterrent for cost-conscious clients

- Accenture has seen high attrition in its offshore resources and hence clients mentioned difficulties with transition
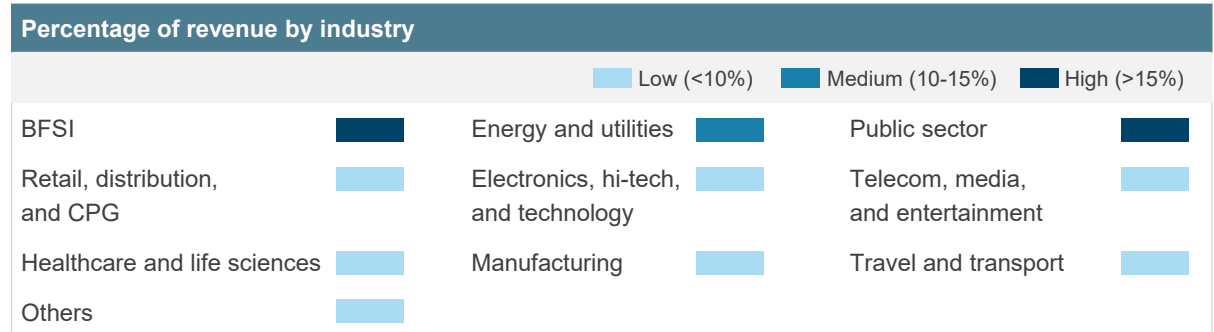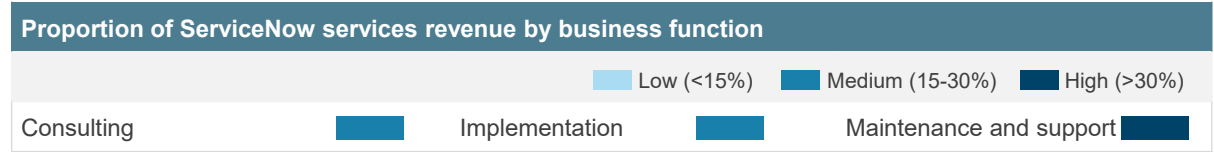
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Accenture | ServiceNow services profile (page 2 of 4)
Provider overview

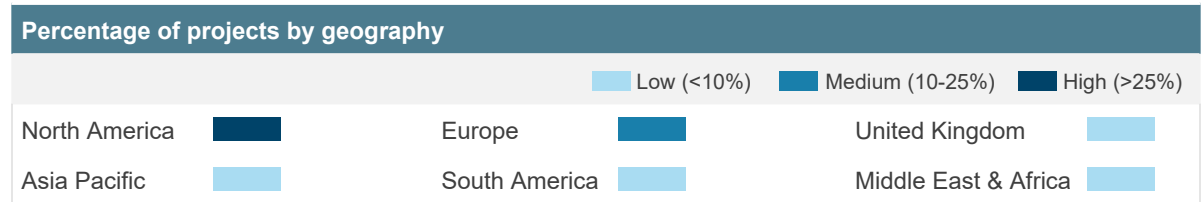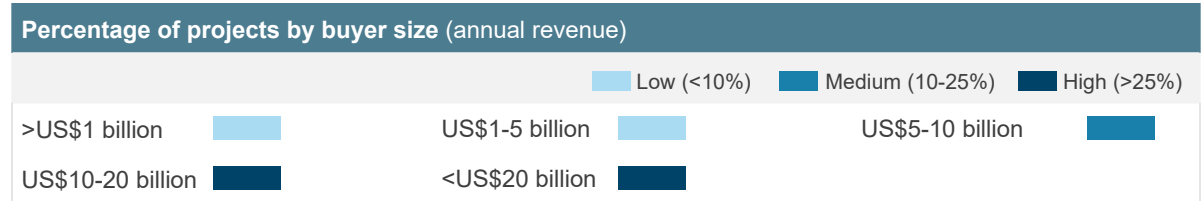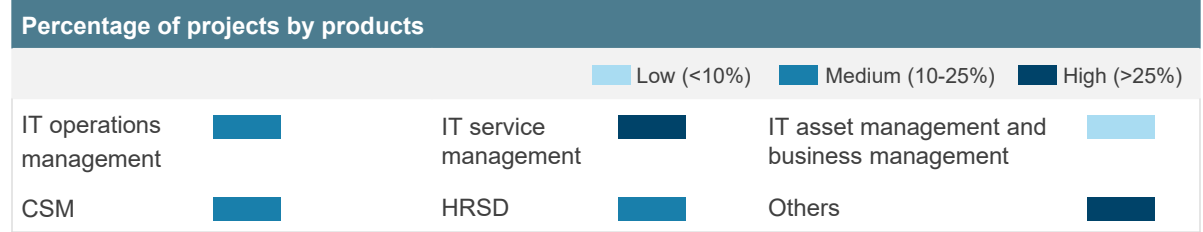**Vision for ServiceNow services**

Accenture's vision is to be the defining partner in the ServiceNow ecosystem. The Accenture ServiceNow Business Group brings global scale to help its clients thrive in the cloud continuum, reimagine service and customer operations, and modernize the work experience for employees. Accenture's platform-led approach unites the industry and transformation expertise of One Accenture with ServiceNow to deliver on the promise of digital business for its clients across industries and on compressed timelines.

Current partnership status with ServiceNow:	Global Elite
ServiceNow Customer Satisfaction Rating (CSAT):	4.18
# Projects completed:	1,800+
#ServiceNow certified experts:	3,000+

Proportion of ServiceNow services revenue by business function

Low (<15%) | Medium (15-30%) | High (>30%)

Consulting	Medium	Implementation	Medium	Maintenance and support	High

Percentage of revenue by industry

Low (<10%) | Medium (10-15%) | High (>15%)

BFSI	High	Energy and utilities	Medium	Public sector	High
Retail, distribution, and CPG	Low	Electronics, hi-tech, and technology	Low	Telecom, media, and entertainment	Low
Healthcare and life sciences	Low	Manufacturing	Low	Travel and transport	Low
Others	Low				

Percentage of projects by products

Low (<10%) | Medium (10-25%) | High (>25%)

IT operations management	Medium	IT service management	High	IT asset management and business management	Low
CSM	Medium	HRSD	Medium	Others	High

Percentage of projects by buyer size (annual revenue)

Low (<10%) | Medium (10-25%) | High (>25%)

>US$1 billion	Low	US$1-5 billion	Medium	US$5-10 billion	Medium
US$10-20 billion	High	<US$20 billion	High		

Percentage of projects by geography

Low (<10%) | Medium (10-25%) | High (>25%)

North America	High	Europe	Medium	United Kingdom	Low
Asia Pacific	Low	South America	Low	Middle East & Africa	Low

1   Others include FSM, industry solutions, and custom applications

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Accenture | ServiceNow services profile (page 3 of 4)
Solutions and investments

Proprietary solutions (representative list)		
Solution name	**Focused ServiceNow product**	**Details**
myWizard – Intelligent Automation Platform	Across all ServiceNow products	Platform used to implement and measure an enterprise automation strategy. It helps disrupt the application lifecycle to drive greater business value
DevOps for ServiceNow	ITx Workflows	It is used to control the change process that improves the velocity and quality of the release process.
Employee Experience Platform	Employee Workflows	Consumer-oriented operating model that enhances the satisfaction and productivity of employees, contingent workers, candidates, managers, and HRs
Telco Solution for ServiceNow	TSM, TNPM, CSM, ITOM, CMDB, OM, and ITSM	It redefines the core of how the telecom clients provide service to their end customers, resulting in dramatic CSAT and OPEX reduction gains.

Key investments (representative list)		
Solution name	**Focused ServiceNow product**	**Details**
Organize Cloud Labs	Across all ServiceNow products	It acquired a Brazil-based company, which is ServiceNow's first Elite partner in Latin America, to strengthen Accenture's ServiceNow capabilities and industry experience in cloud strategy, migration, implementation, and management.
Celonis Partnership	Creator Workflows and all other ServiceNow products	As a ServiceNow partner and Celonis titanium partner, they are working together to develop a unified GTM offering.

# Accenture | ServiceNow services profile (page 4 of 4)
Case studies

Case study 1	Client: Federal nonprofit organization

Business challenge
Needed an approach that could securely leverage an applicant's eligibility status in other state and federal government systems, and help qualify applicants for enrollment in this program

Solution
- Developed a unified system for determining eligibility for the nonprofit's program leveraging DevSecOps
- Built a modern UI interface for numerous users to interact with the E2E process

Impact
- Shortens the timeline
- Checks state eligibility databases for residents in 56 states and territories, automates connections to 19 states and two federal data sources
- Supports eligibility checks for over 2.4 million users within the first two weeks of launch

Case study 2	Client: the State of Tennessee

Business challenge
Due to the pandemic, the state had to reroute citizen interactions such as requests for health information, veteran services, building permits, and sporting licenses to an efficient online venue.

Solution
- ServiceNow Customer Service Management
- Citizen Scheduling Platform
- Amazon Connect contact center solution with an AI-powered chatbot

Impact
- Around 6,000 employees have self-service online access
- Reporting capabilities provide insight into chatbot conversations
- Chatbot handled 375,000 conversations and around 1 million messages across multiple channels

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix
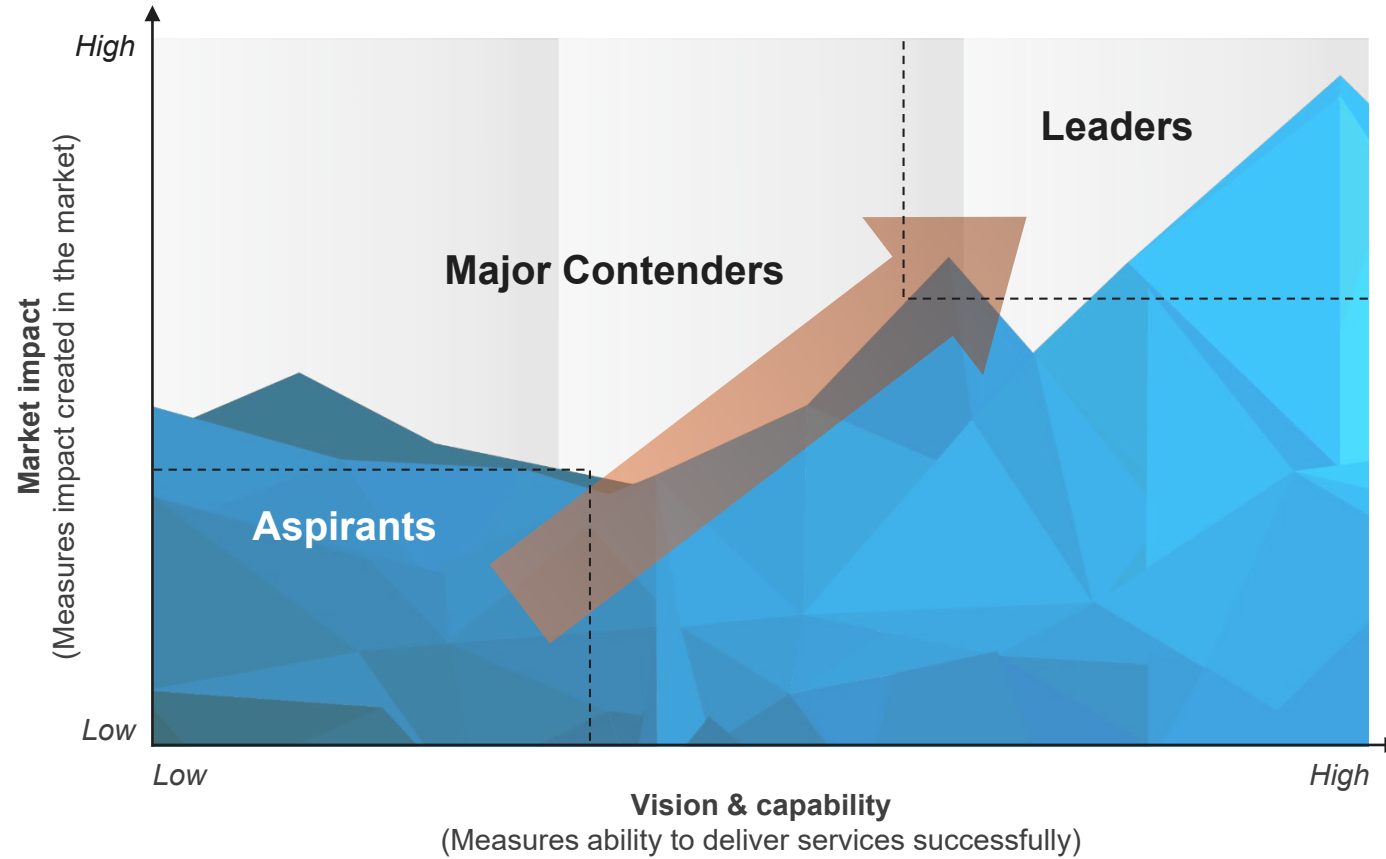
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact

Market impact

Leaders
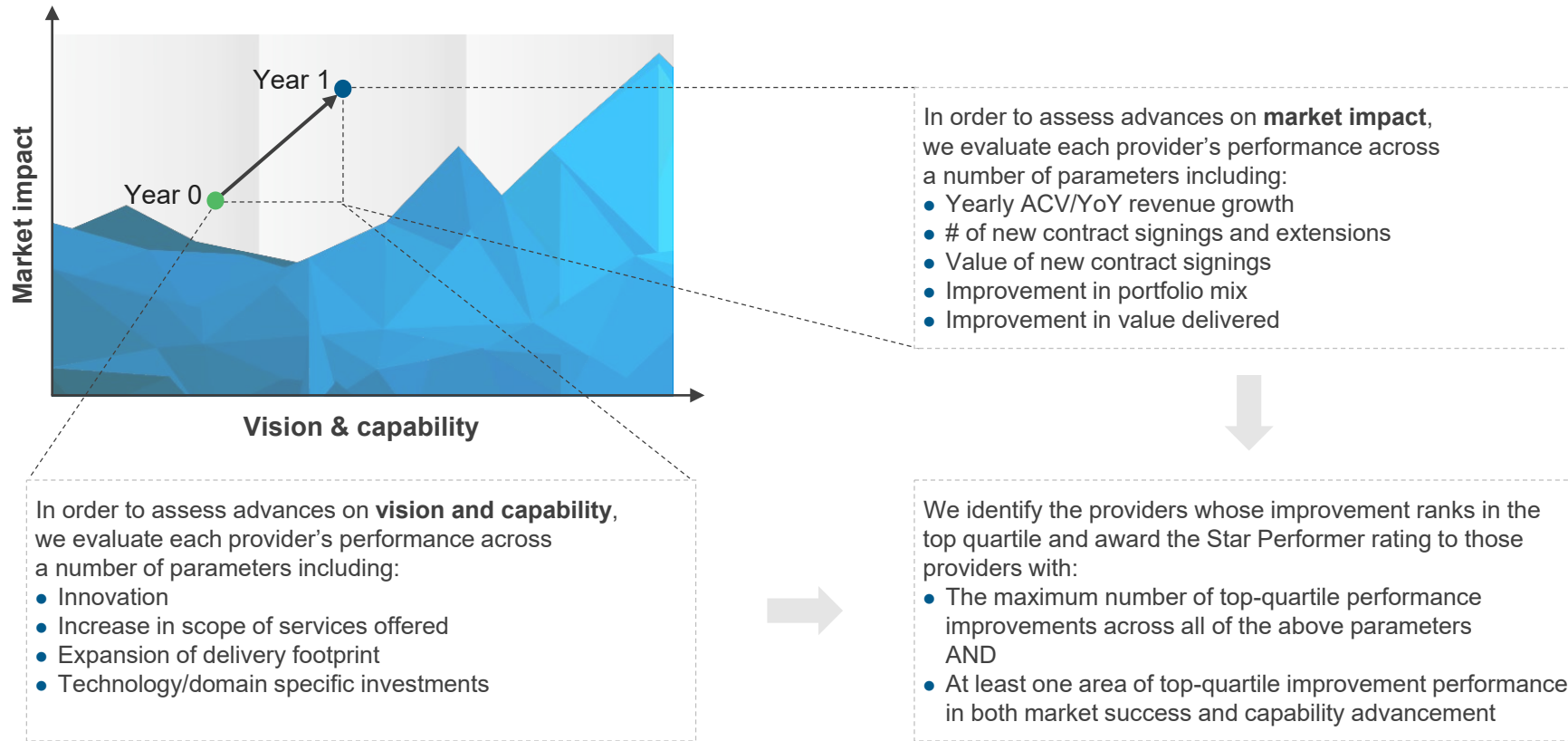
Major Contenders

Aspirants

Vision & capability
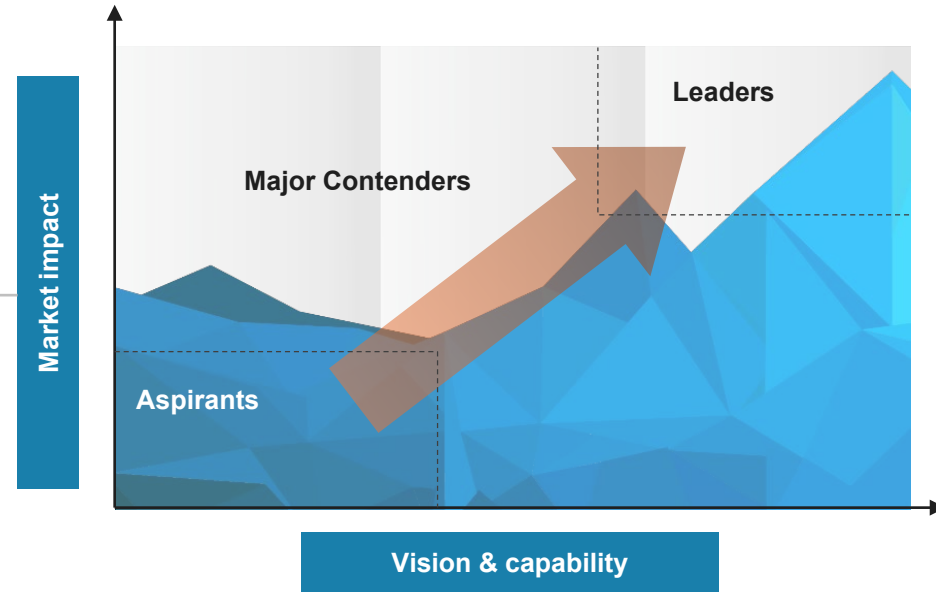
Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology
Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix

In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:
- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:
- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:
- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  – Issue a press release declaring their positioning. See citation policies
  – Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  – Quotes from Everest Group analysts could be disseminated to the media
  – Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

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With you on the journey

Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our research also covers the technologies that power those processes and functions and the related talent trends and strategies. Our clients include leading global companies, service and technology providers, and investors. Clients use our services to guide their journeys to maximize operational and financial performance, transform experiences, and realize high-impact business outcomes. Details and in-depth content are available at **www.everestgrp.com**.

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