



Everest Group PEAK Matrix[®] for Pega Service Providers 2021

Focus on Accenture
December 2020



Background of the research

- The early adopters of Pega were looking to adopt its core solutions to help them streamline and automate tedious and recurring back-end manual processes. However, enterprise expectations have evolved, and they are now looking to effectively connect the back-end and client-centric operations to offer better stakeholder experience
- In response to the changing market landscape, Pega's product portfolio has expanded from core Robotic Process Automation (RPA), Business Process Management (BPM), case management, and low-code platform to customer engagement / CRM solutions – including customer service, sales automation, marketing, field service management, Customer Decision Hub (CDH), and co-browse – with deep industry contextualization.
- With changing client expectations and evolving Pega landscape, service providers are investing in building strong talent pool, creating horizontal and industry-specific solutions, establishing an innovation ecosystem, and are ramping up their domain capabilities to complement the industry functionalities/frameworks offered by Pega across key verticals such as BFSI, healthcare and life sciences, telecom, and public sector
- In this research, we present an assessment of 16 service providers featured on the Pega services PEAK Matrix®

The assessment is based on Everest Group's annual Request For Information (RFI) process considering investments made till September 2020, interactions with leading Pega service providers, client reference checks, and an ongoing analysis of the Pega services market

This report includes the profiles of the following 16 leading Pega service providers featured on the Pega services PEAK Matrix® :

- **Leaders:** Accenture, Capgemini, Cognizant, TCS, and Virtusa
- **Major Contenders:** Aaseya, Atos, Coforge, HCL Technologies, Infosys, Mphasis, Tech Mahindra, and Wipro
- **Aspirants:** Areteans, TTEC, and Zensar

Scope of this report:



Geography
Global



Service providers
16 leading Pega
service providers



Services
Pega services

Introduction and scope

Everest Group recently released its report titled “[Pega Services PEAK Matrix® Assessment 2021](#)”. This report analyzes the changing dynamics of the Pega services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 16 service providers on the Everest Group PEAK Matrix® for Pega services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of Pega 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** Pega services experience and capabilities and includes:

- Accenture’s position on the Pega services PEAK Matrix
- Detailed Pega 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.

Pega services PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, TCS, and Virtusa

- Leaders are characterized by the ability to offer large-scale, multi-country, multi-product Pega transformation, leveraging their strong services delivery capabilities
- They have showcased high levels of proactiveness in taking their innovations and offerings to clients
- They have displayed a holistic vision for Pega and tend to be the providers of choice for large firms looking for partners with a similar global footprint
- That said, the current Leaders face a stiff challenge from progressive Major Contenders in terms of both Pega services capabilities and commercials. Hence, they need to focus on building differentiated solutions that leverage next-generation technology such as AI/ML as well as address the cost-takeout mandate

Major Contenders:

Aaseya, Atos, Coforge, HCL Technologies, Infosys, Mphasis, Tech Mahindra, and Wipro

- Major Contenders include a mix of global and pure-play players who have built meaningful capabilities in creating pockets of sustainable differentiation
- They have created differentiated capabilities across established areas such as BPM, case management, customer service, and low-code platform. They are highly flexible in solutioning and engagement – which reaps them a relatively higher buyer satisfaction score for Pega engagements
- Major Contenders are making continued investments to augment their capabilities in emerging areas such as Customer Decision Hub (CDH), marketing, and field service management to position themselves as a transformational partners with end-to-end capabilities
- Infosys, Coforge, and Tech Mahindra stand out among Major Contenders due to the breadth and depth of their Pega solutions portfolio, IP assets, and credibility in the market – in terms of awards & recognitions

Aspirants:

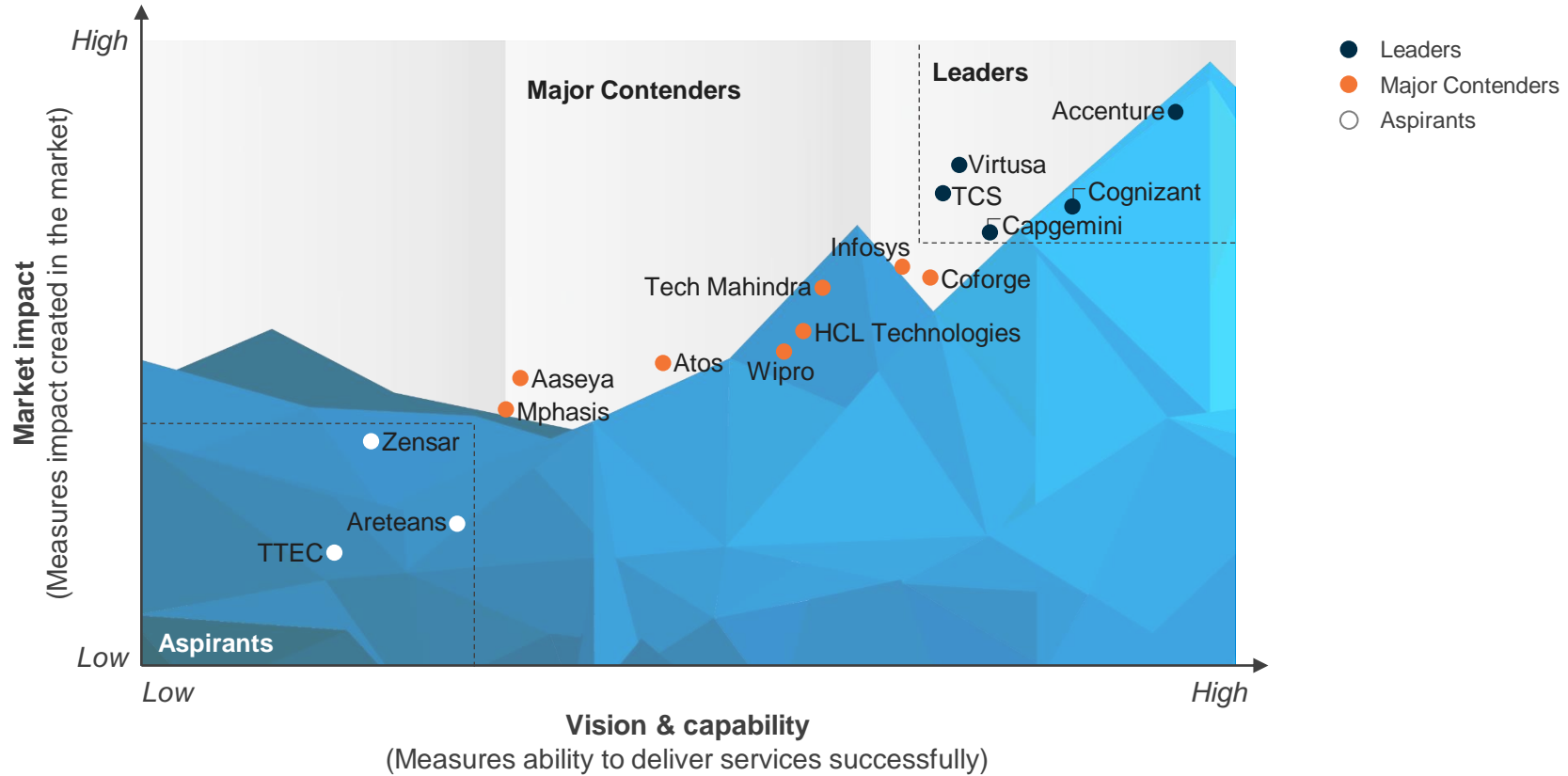
Areteans, TTEC, and Zensar

- Aspirants are primarily small-scale providers with limited services/geographic presence. They leverage their niche capabilities and flexibility in commercials to win small end-to-end Pega engagements
- Aspirants have demonstrable proof points in select areas, such as low-code platform, BPM, and case management

Everest Group PEAK Matrix®

Pega Services PEAK Matrix® Assessment 2021 | Accenture positioned as Leader

Everest Group Pega Services PEAK Matrix® Assessment 2021












Note: Assessments for Areteans, Atos, and Infosys 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
 Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information will be presented back to the industry only in an aggregated fashion

Accenture | Pega services profile (page 1 of 5)

Everest Group assessment – Leader

Measure of capability:  High  Low

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 credible proof points in executing consulting-led, end-to-end transformational Pega projects around the entire suite of products – BPM (Business Process Management), Pega platform, and customer engagement / CRM
- Clients can benefit from their investments in building horizontal and vertical IP solutions such as Accenture System Diagnostics Tool, Accenture Rule Reviewer, Patient Care Management, and Intelligent KYC to expedite time-to-market
- It has a strong vision encompassing Pega transformation, innovation, and business outcomes, which helps it align investments to drive value for clients










Areas of improvement

- Most of Accenture's clients are companies with >US\$10 billion revenue. Therefore, its ability to successfully cater to Small to Mid-sized Buyers (SMBs) for Pega services is still somewhat untested
- Clients have consistently highlighted that Accenture could further improve its talent management capabilities – specifically around retaining the experienced talent in the project
- While it has the largest pool of resources for Pega services, it needs to further focus on certifying them as the ratio of certified to skilled resources is below the industry benchmark

Accenture | Pega services profile (page 2 of 5)

Everest Group assessment – Leader

Measure of capability:  High  Low

Market impact				Vision & capability				
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery Footprint	Overall
								

Strengths

- Accenture is the only SI partner to have won the Pega Partner of the Year Award for eight consecutive years; this strengthens its credibility in the market and helps it position itself as one of the preferred Pega transformation partners
- It has heavily invested in building a robust talent base for Pega services and has the largest pool of resources among all service providers
- Buyers appreciate its extensive delivery network, account management, and proactive contribution from senior leadership for Pega services engagements

Areas of improvement

- Clients have highlighted that the premium commanded by Accenture for Pega services, in some cases, is not commensurate with the innovation and value addition provided
- While clients see Accenture as a strategic partner, they expect it to show more flexibility in contracting as the scope evolves

Accenture | Pega services profile (page 3 of 5)

Provider overview

Vision for Pega services

Accenture aims to lead its clients in designing, implementing, and driving transformational experience using Pega solutions. The company's strategy and industry expertise, combined with AI, digital process automation, and global delivery capabilities provides the means to create end-to-end transformations, solving the clients' most complex business problems.

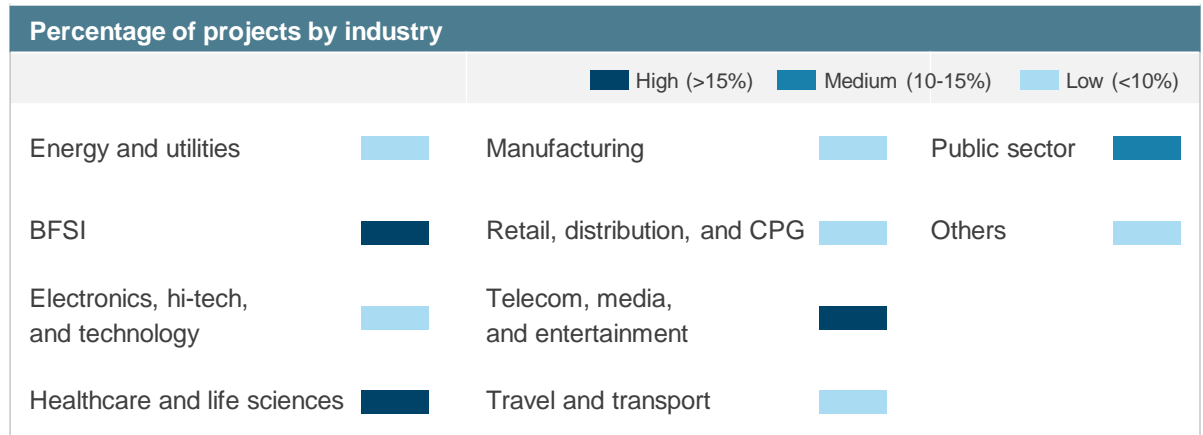
Current partnership status with Pega: Platinum

Projects completed (in 2019): 260-270

Pega certified experts: 1,500-1,700



¹ Includes marketing, sales automation, customer service, field service, customer decision hub, and co-browse products
² Includes custom applications and partner applications



Accenture | Pega services profile (page 4 of 5)

Case studies, solutions, and investments

Proprietary solutions (representative list)

Solution name	Focused industry/product	Details
Next Best Experience for Pharma	Pega Customer Decision Hub	A centralized brain for the organization that converts data insights into personalized suggestions in the context of the health care provider, representative, and channel for engaged and timely interactions
Ion Design System	Pega platform	A collection of reusable UI components guided by standards that can be used to build any number of applications. It accelerates time-to-market and provides enhanced UI experience for the customer
Patient Care Management	Pega platform and Customer Service for Healthcare	The platform helps to manage a patient's medical treatment journey. It provides a digital experience and self-service for healthcare organizations
Vendor Master Authentication & Fraud Mitigation	Pega platform	The tool uses a combination of vendor file information and authentication technology to provide an automated vendor process that allows to mitigate fraud exposure by authenticating the requestor
Accenture myWizard	Pega platform	An integrated automation platform that helps organizations create, implement, and measure enterprise-wide automation strategies and reimagine their information technology systems for efficiency and performance
Accenture myNav	Pega platform	A cloud assessment platform designed to assess, architect, and simulate cloud solutions to determine the best fit as per business requirements

Proprietary solutions (representative list)

Investment theme	Focused Pega product	Details
Acquisition	Across products	SolutionsIQ: Acquired in 2017, to strengthen Accenture's Agile coaching capabilities, and apply lean and agile principles and practices to achieve performance improvements including product and service innovation, digital capabilities, high-quality software delivery, and responsiveness to business needs
Acquisition	Across products	Aspire: Acquired in 2017 to enable the understanding of unstructured data and poly-structured data which, when combined with structured data, provides rich context, thereby improving the accuracy and commercial value of analytics
Liquid Studio for Pega	Across products	Launched in collaboration with Pega in September 2019 and located in Accenture Innovation Centers in North America, Europe, and Asia Pacific, Accenture and Pega consultants work side by side to help clients envision the art of the possible with Pega technology
Certifications	Across products	Trained 3,576+ resources for Pega certifications

Accenture | Pega services profile (page 5 of 5)

Case studies, solutions, and investments

Case study 1

Client: A leading provider of subscription television services across Australia

Business challenge

The client faced increasing competition as other players in market providing low-cost video streaming on demand services such as Netflix and digital media companies such as Google and Facebook were contending for share in the advertisement market. The key challenges included an increase in customer churn and changing customer demands. In addition, the client's diversification into broadband services necessitated the capability to offer customers bundled offers while providing consistent user experience across channels.

Solution

Accenture transformed the client's retention and upsell approach using Pega NBA in order to redefine customer conversations. The solution leveraged customer attributes, including revenue per user, current packages, payment habits, and interaction history, to derive optimal offers for the customer. It ensured a value-driven adaptation by reducing offer costs, repeat offers, and burden on team members, and optimizing save rate that led to increased revenue. The company also provided a more conversation-based approach in dealing with prospective customers in the inbound channel.

Impact

- The client optimized US\$600,000 worth of retention offers and US\$5.5 million cross-sell/upsell offers per year
- Cost reductions achieved: 29% in average offer costs, 20% in repeat offer costs and 8% for retention offers
- Achieved 70% save rate with substantial improvement in high lifetime value customers through AI-powered marketing platform

Case study 2

Client: Multinational banking and financial services company headquartered in The Netherlands

Business challenge

The client's vision was to provide customers with relevant, real time, data-driven offers across multiple channels using Machine Learning and AI capabilities. They also wanted to accelerate the workflow of paper-based processes for faster onboarding of customers while remaining compliant with regulatory rules.

Solution

Accenture designed and rolled-out a modern omni-channel Customer Decision Hub that transformed the client's marketing and offers strategy. As part of the solution, Accenture also implemented an AI powered, unified Customer Process Management Platform to improve processing times and efficiency. This led to reduced call volume, efficient compliance processes, faster product roll-out and improved overall customer experience.

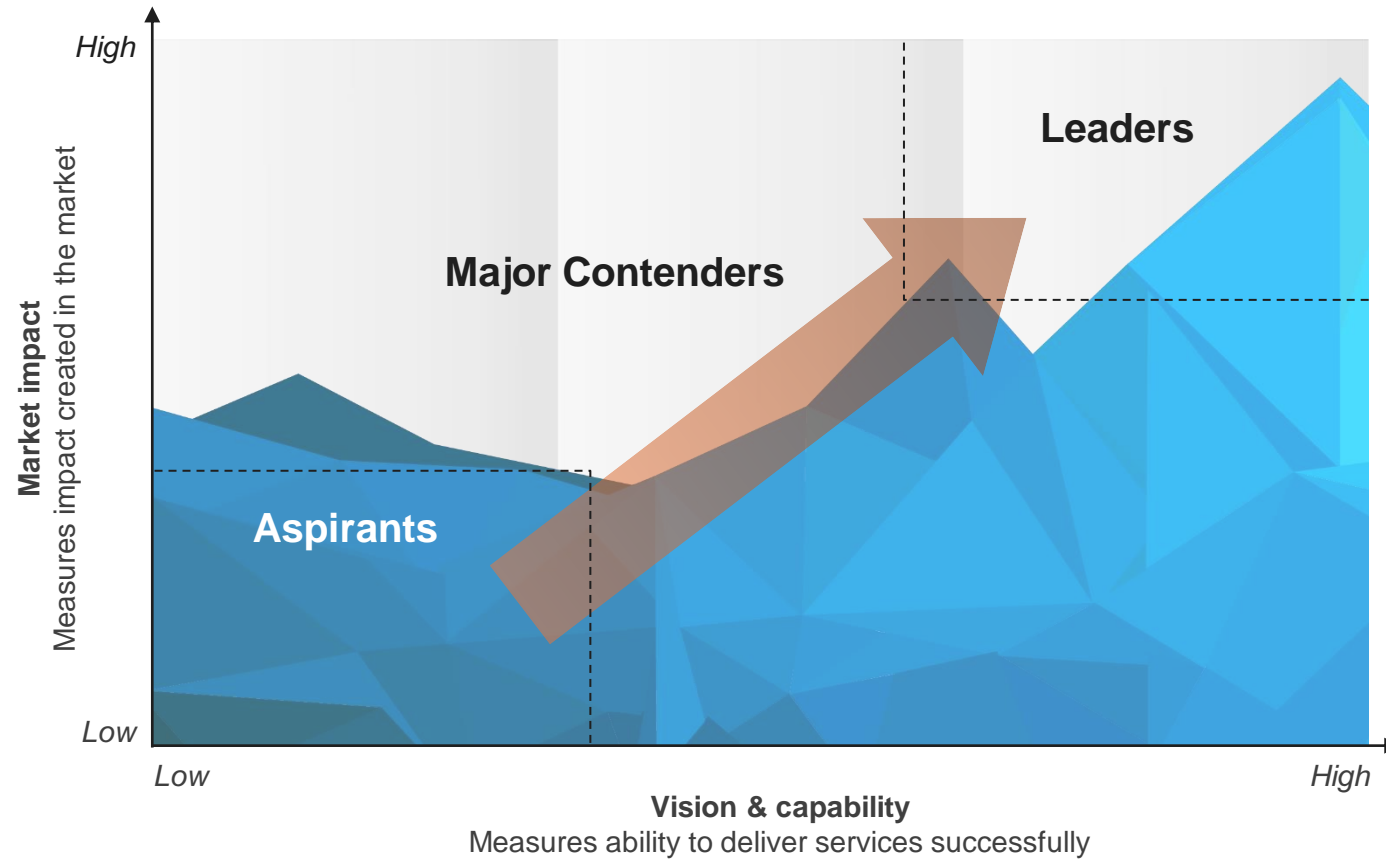
Impact

- Dramatic increases in offer relevancy leading to increases in sales opportunities as evidenced by doubling of click ratios by the customers
- Live on web and mobile channels for entire customer base (8–10 million customers)
- Serving Real Time Next Best Action direction within SLA of 200ms for Web and Mobile
- Leveraging Accenture Pega Customer Decision Hub expertise for faster time to market (Go-Live with first MVP in less than 3 months)
- Efficient processes to contact 300 thousand non-KYC compliant customers was achieved in just 3 months with Accenture's Design Thinking methodology and DevOps know-how
- Custom dashboards and reports provide visibility into offer relevance and acceptance rates, and support business in offer administration
- Achieved a 100% automated code test with the best practices of Pega and Accenture

Appendix

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

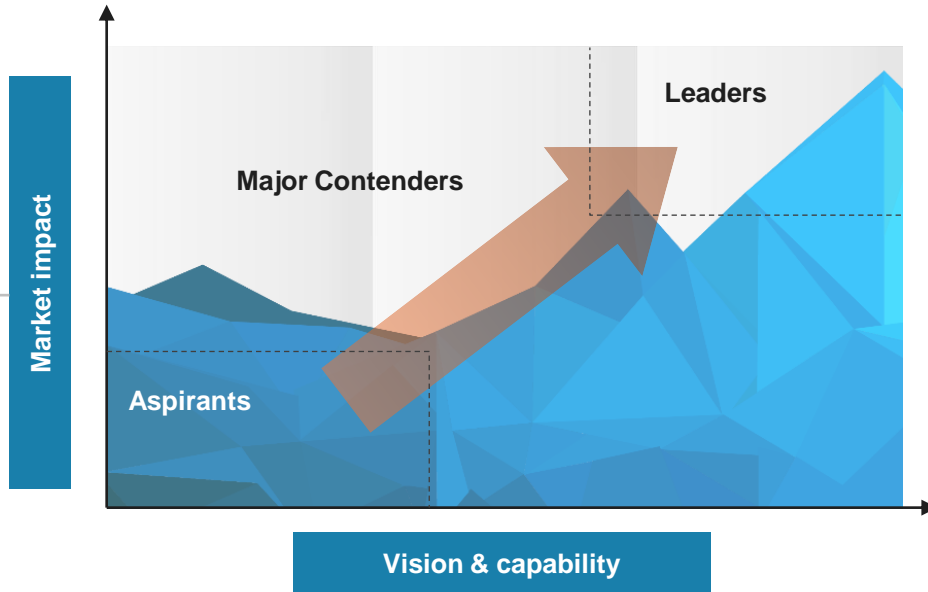
Everest Group PEAK Matrix



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



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

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service 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 service 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 service 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



With you on the journey

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