Everest Group PEAK Matrix® for ServiceNow Service Provider 2022

Focus on DXC Technology
August 2022

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
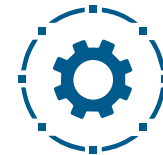- **Aspirants:** CloudGo, Mindtree, Mphasis, Stefanini, and Volteo Digital

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, **DXC Technology emerged as a Leader.** This document focuses on **DXC Technology's** ServiceNow services experience and capabilities and includes:

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

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:

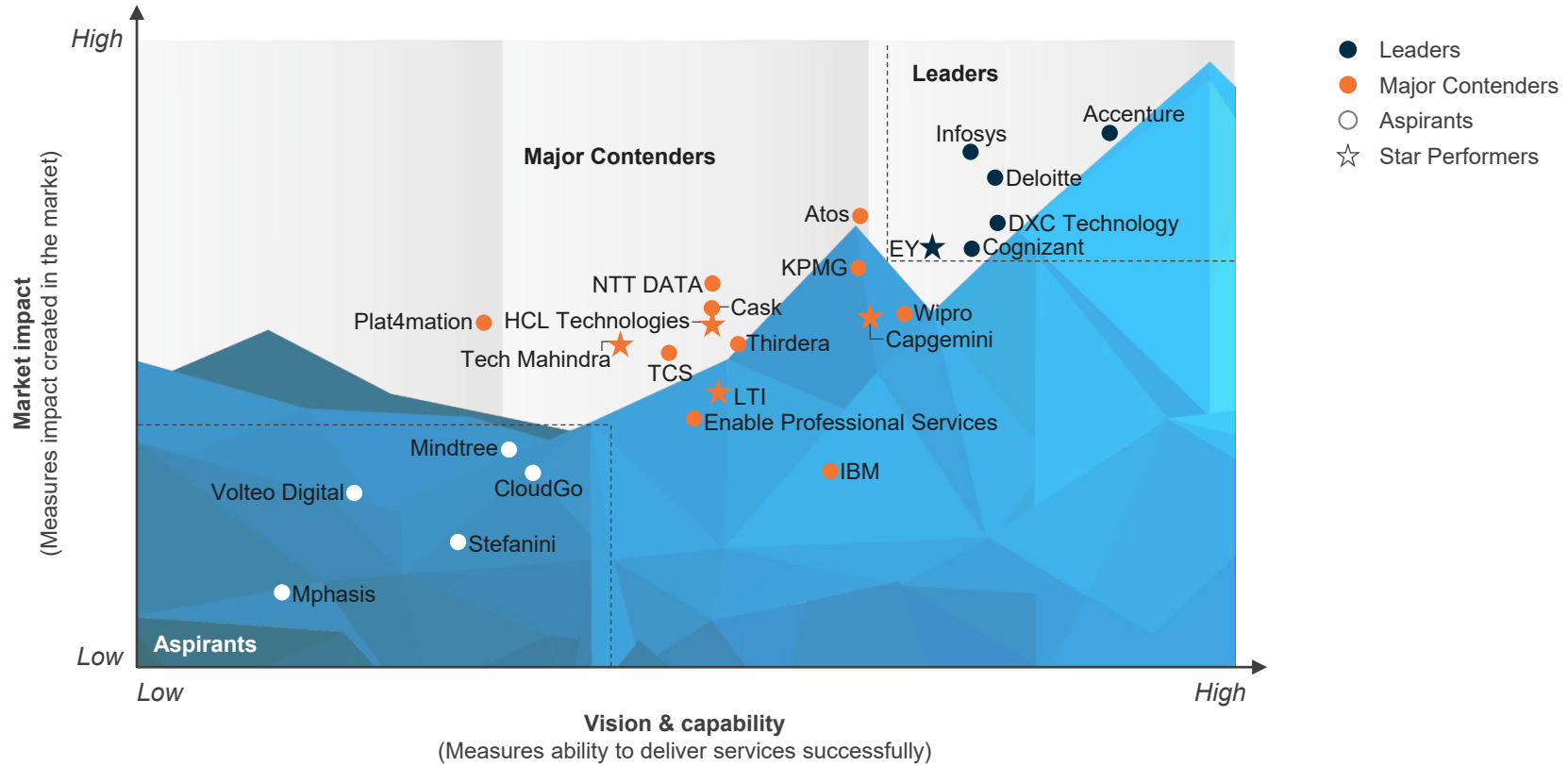CloudGo, Mindtree, Mphasis, Stefanini, and Volteo Digital

- 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 | DXC Technology positioned as a Leader

Everest Group PEAK Matrix®

Everest Group ServiceNow Services PEAK Matrix® Assessment 2022[1,2]

Legend:
- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers

Axes:
- Market impact (Measures impact created in the market) — Low to High
- Vision & capability (Measures ability to deliver services successfully) — Low to High

Categories: Leaders, Major Contenders, Aspirants

Plotted providers: Accenture, Infosys, Deloitte, DXC Technology, Cognizant, EY, Atos, KPMG, Wipro, Capgemini, NTT DATA, Cask, Thirdera, HCL Technologies, Plat4mation, Tech Mahindra, TCS, LTI, Enable Professional Services, IBM, Mindtree, CloudGo, Volteo Digital, Stefanini, Mphasis

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)

DXC Technology | 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

- DXC Technology is a ServiceNow Global Elite Partner. The YoY awards attest to its deep industry knowledge, digital transformation initiatives, and global delivery capabilities

- Clients can benefit from its strong investments in upskilling to enhance resource quality and capabilities

- While it has credible proof points of ServiceNow executions across sectors, BFSI, manufacturing, technology and retail remain in focus.

- It has invested heavily in building frameworks and accelerators that expedite speed-to-market. DXC Platform XTM and Operation Resilience Framework stand out

- Its buyers are spread across the buyer spectrum, which attests to its ability to serve clients of any size

Limitations

- Clients have highlighted account management as an area of improvement

- Its services are heavily skewed toward pure-play implementation and has lesser focus on advisory engagements

- The majority of its operations and proof-points are focused on the European region. Clients in the other key geographies may find it to be a bottleneck to partnership
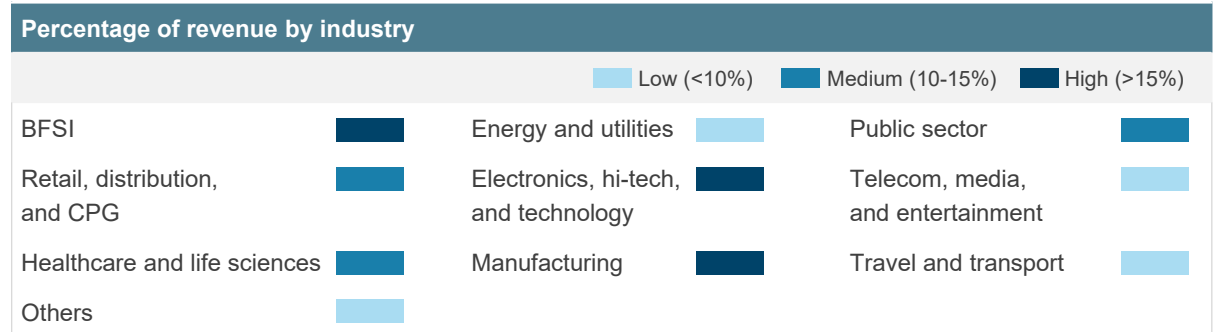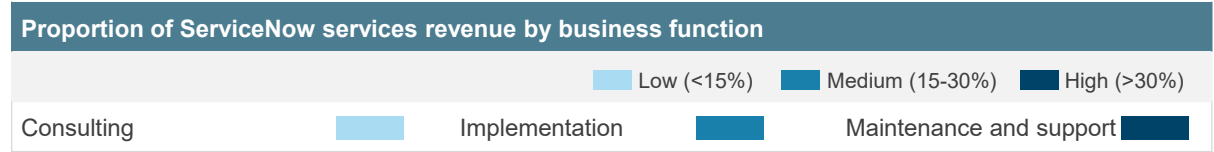
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DXC Technology | ServiceNow services profile (page 2 of 4)
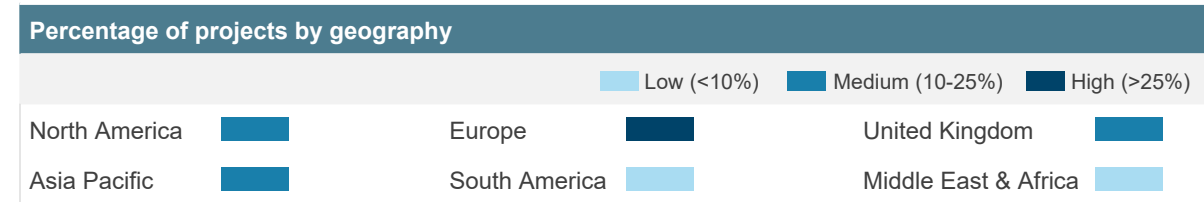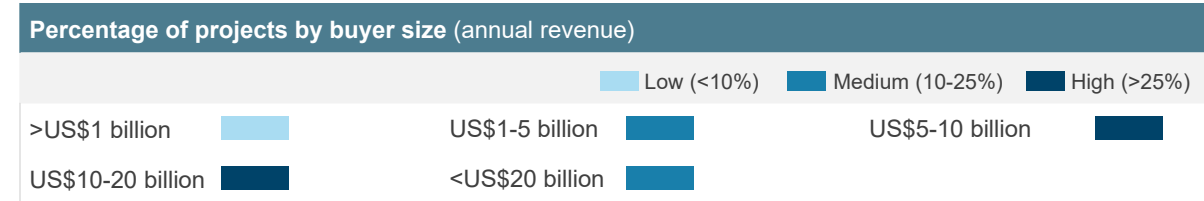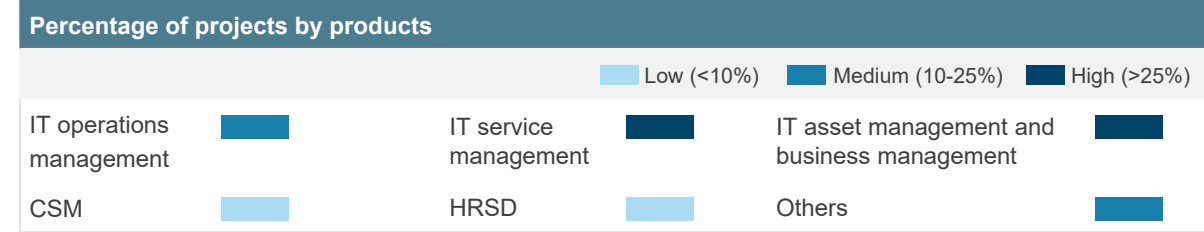## Provider overview

Vision for ServiceNow services

DXC Technology aspires to be the leading ServiceNow Partner in the ecosystem, with 2,500+ consultancy resources by 2025, focusing on delivering customer business value with its core focus on innovation through investment in operational technology, observability, and ESG to deliver Green Ops solutions to help its clients meet their strategic ambitions. To achieve this, it has consolidated its acquisitions with its Platform X team to create a single ServiceNow business group to accelerate digital transformation for its clients.

Current partnership status with ServiceNow:	Global Elite
ServiceNow Customer Satisfaction Rating (CSAT):	4.25
# Projects completed:	1,400+
#ServiceNow certified experts:	1,700+

Proportion of ServiceNow services revenue by business function

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

Consulting	Low	Implementation	Medium	Maintenance and support	High

Percentage of revenue by industry

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

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

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 | High |
| US$10-20 billion | High | <US$20 billion | Medium | | |

Percentage of projects by geography

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

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

1 Others include FSM, industry solutions, and custom applications

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

Proprietary solutions (representative list)		
Solution name	**Focused ServiceNow product**	**Details**
Integrated digital employee experience framework	Service Portal, HR, CSM, and Integration Hub & AppEngine (NC/LC)	It enables an integrated digital employee experience that also increases cross-workforce efficiencies by digitizing workflows that drive engagement and productivity across the organization.
Optimizing IT operations in a cloud-based world	ITOM	It is an outcome-based journey that enables the adoption of cloud services (Azure, AWS, Google, and VMWare) and protects operational resilience by providing the necessary controls for cloud operations. It increases business and IT agility and maintains operational and commercial integrity as well as supports DevOps practice as part of new Agile delivery methods.
Ask James - the DXC solution for facilities management		This mobile-first user portal provides a single, unified experience that supports all employee and customer needs like end-to-end facilities management capability from planning a trip to the office, parking, meeting, and socializing.
Delivery Assurance		It measures a customer's instance to drive rapid, high quality, feature throughput and ensure long-term value from the platform. It is powered by Quality Clouds.

Key investments (representative list)		
Solution name	**Focused ServiceNow product**	**Details**
Business Group Formed	All ServiceNow capabilities / MSP instance Platform X	Merged and transformed acquisitions into a global business group establishing a new culture, best practices, talent academy, and leadership
Talent	All ServiceNow products across DXC Technology stack	CEO sponsorship with a commitment to double consultancy resources by 2025 and expand the use of ServiceNow capabilities to run DXC
Innovation	OT, ESG, and Observability	Innovation funding to develop new offerings beyond IT that complement ServiceNow products

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

Case study 1	Client: a European transportation company

Business challenge
Customer service portal needed by 250+ transportation companies for requesting, validating, and issuing ticket refunds to the public through a fully automated, secure, and simple process

Solution
- Based on customer service management, DXC provided a solution that required numerous interfaces into back-end systems for integration with back office, travel and accounting teams, connections to third-party timetables, and automated ticket checks
- To protect against fraud, DXC developed sophisticated analytics and intelligence capabilities to perform complex claim entitlement verifications and enhanced checks

Impact
- 80% of requests fully automated. Delivered silent operations
- Operational efficiency and client experience significantly improved

Case study 2	Client: an international bank

Business challenge
Client needed a single platform to manage global facility and security processes. Legacy system was manual, lacked mobile capabilities, and provided a poor user experience.

Solution
- Developed custom application to quickly and proactively identify, address, and manage important non-IT corporate incidents, such as those related to facilities, physical security, environment, and health and safety
- Management of coordinated development and successful release programs
- Consolidation of security and facility management processes to one platform

Impact
- 18% improvement in crisis notification times
- 27% improvement in crisis response reaction

Appendix

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

Everest Group PEAK Matrix
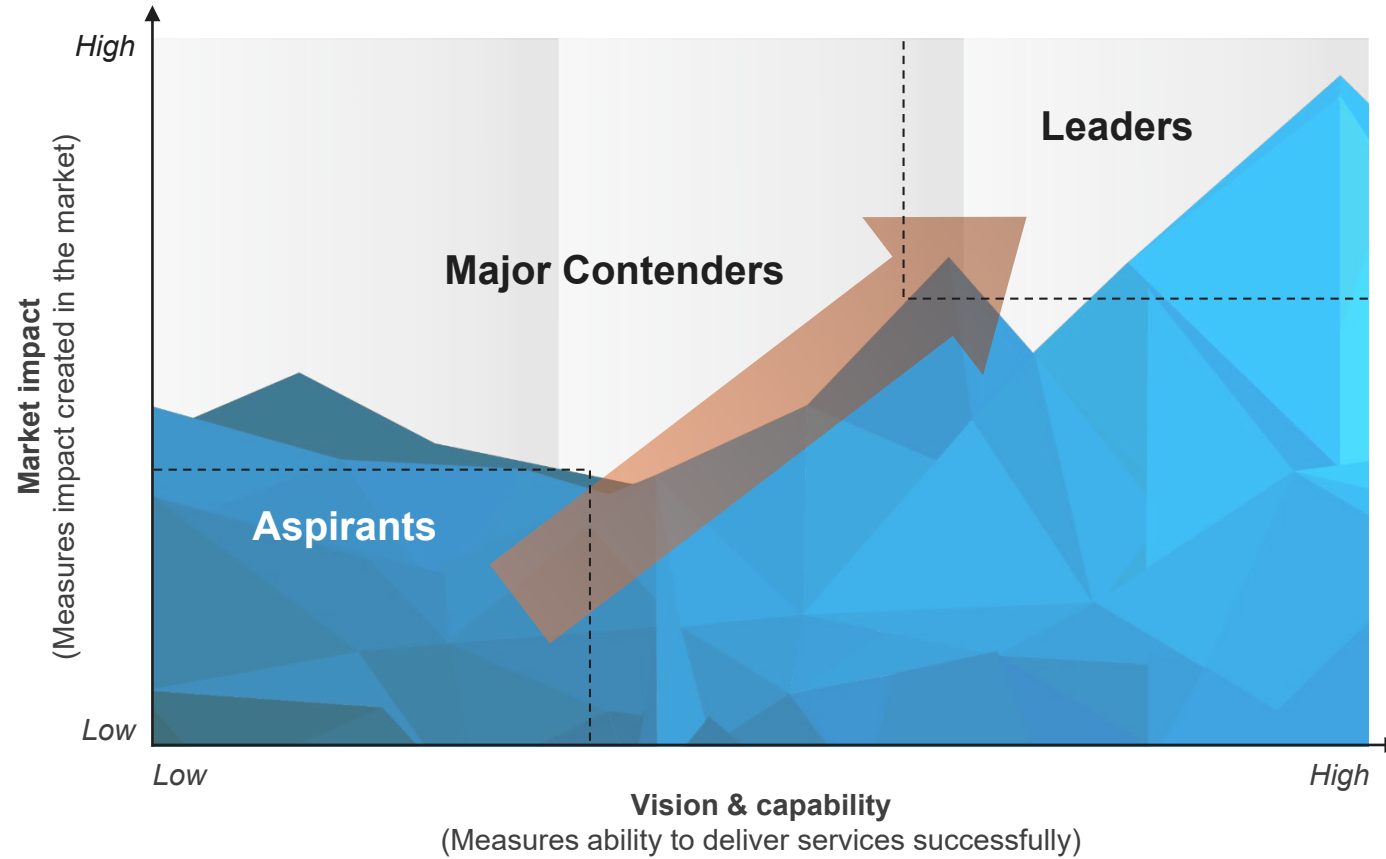
Services PEAK Matrix® evaluation dimensions

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

Vision & capability

Leaders

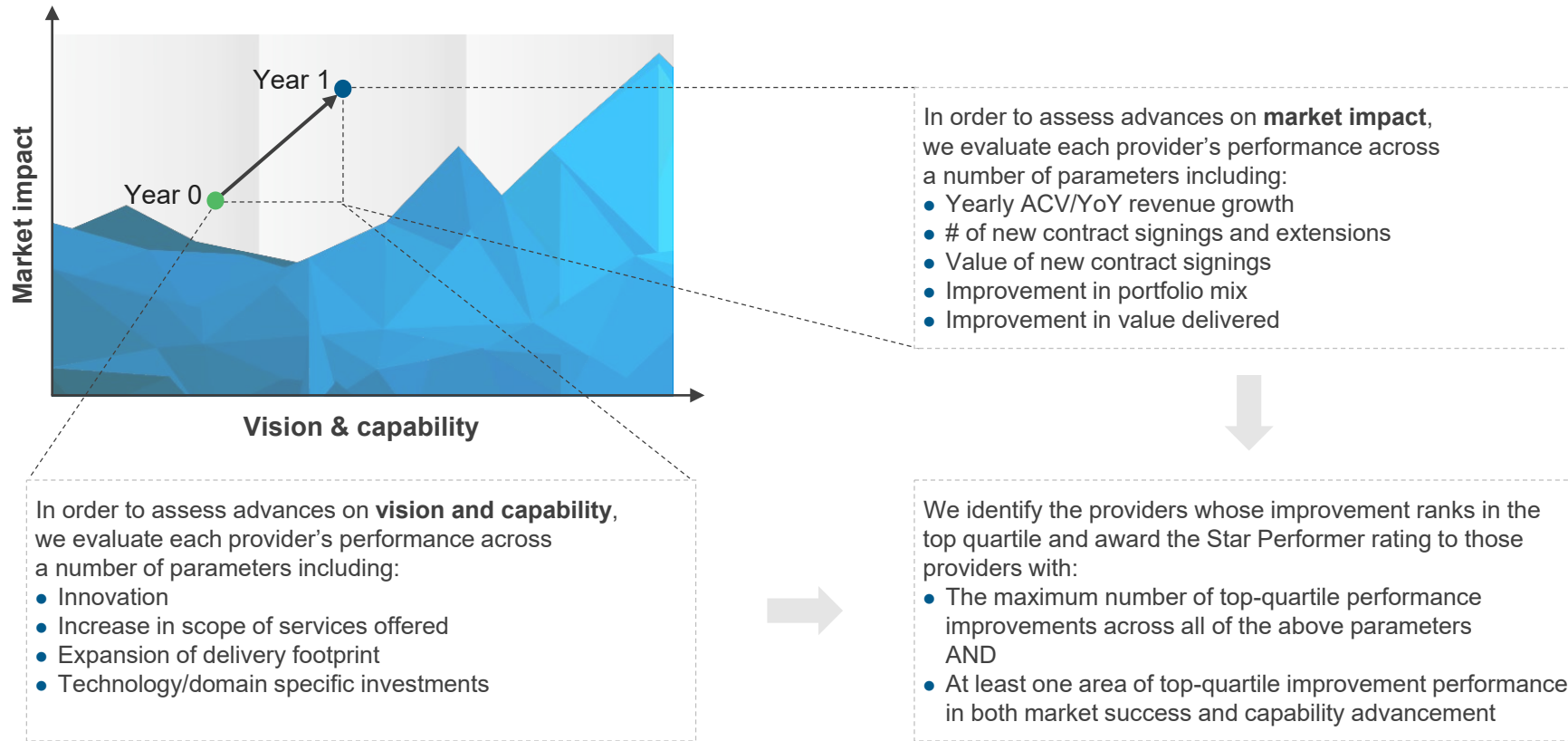Major Contenders

Aspirants
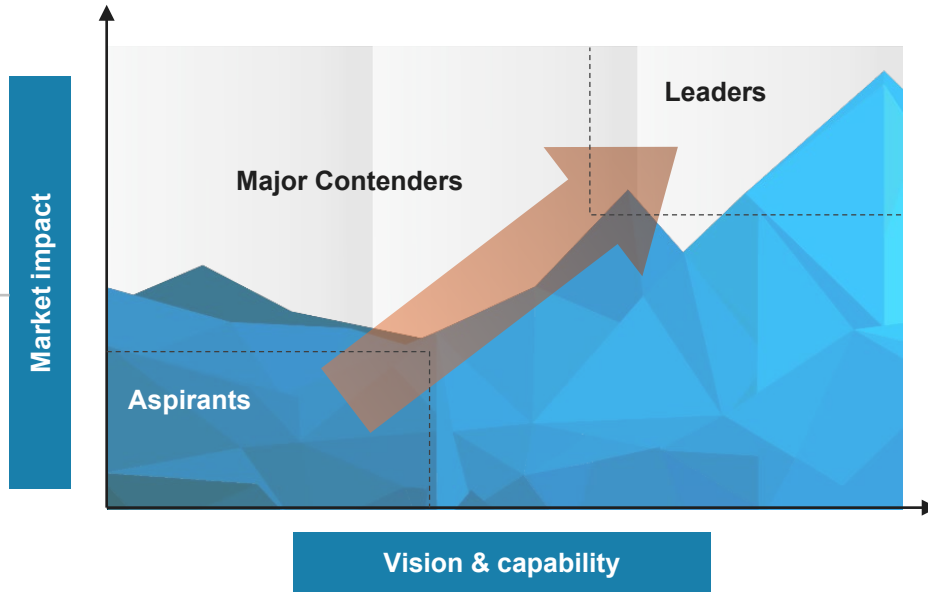
Measures ability to deliver services successfully. This is captured through four subdimensions

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

Everest Group®

With you on the journey

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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
+1-647-557-3475