Everest Group PEAK Matrix® for ServiceNow Service Providers 2021

Focus on Infosys
October 2020

Background of the research

- A decade ago, 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, data-/outcome-driven integrated solutions with emphasis on stakeholder experience even in a multi-channel, complex portfolio

- 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, FinOps, SecOps, GRC, and Security – It has invested in building industry solutions to provide out-of-the-box solutions and expedite time-to-market for enterprises

- With changing client expectations and evolving ServiceNow landscape, service providers are investing in building strong talent in emerging areas, co-developing industry-specific solutions with ServiceNow, developing in-house accelerators and frameworks, and taking a strong inorganic approach with niche acquisitions to fill gaps across their ServiceNow services portfolio to further enhance their geographic footprint

- In this research, we present an assessment of 20 service providers featured on the ServiceNow services PEAK Matrix®

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

This report includes the profiles of the following 20 leading ServiceNow service providers featured on the ServiceNow services PEAK Matrix:

- **Leaders:** Accenture, Atos, Cognizant, Deloitte, DXC Technology, and Infosys
- **Major Contenders:** Cask, Capgemini, Crossfuze, EY, HCL Technologies, IBM, KPMG, LTI, TCS, and Wipro
- **Aspirants:** Mphasis, Tech Mahindra, Trianz, and Softtek

Scope of this report:

Geography
Global

Service providers
20 leading ServiceNow service providers

Services
ServiceNow services

Introduction and scope

Everest Group recently released its report titled "ServiceNow Services PEAK Matrix® Assessment 2021." 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 20 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, **Infosys emerged as a Leader.** This document focuses on **Infosys'** ServiceNow services experience and capabilities and includes:

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

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 (2020)

ServiceNow services PEAK Matrix® characteristics

Leaders:

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

- Leaders have a strong focus on talent – are heavily invested in upskilling and cross-skilling resources across multiple ServiceNow certification streams; they focus on certifying their developers who are core to the implementation and on building competency beyond ITSM to deliver enterprise solutions
- They have demonstrated the ability to carry out large-scale transformational engagements covering the entire portfolio of ServiceNow offerings; they guide enterprises with ServiceNow adoption as an enterprise platform while minimizing customization
- They have heavily invested in ServiceNow partnership and are co-developing industry- and/or function-specific solutions with ServiceNow
- They have invested in acquiring niche ServiceNow partners to strengthen their ServiceNow capabilities and expand their global footprint
- They have been recognized by the industry with global and regional awards and have higher buyer satisfaction for delivering ServiceNow engagements

Major Contenders:

Cask, Capgemini, Crossfuze, EY, HCL Technologies, IBM, KPMG, LTI, TCS, and Wipro

- Major Contenders have invested in building accelerators, solutions, and frameworks to expedite time-to-market for their clients
- They have a better global delivery network and onshore presence, which has helped them win end-to-end ServiceNow services deals
- They have a reasonable spread of ServiceNow services across buyer segments, which emphasizes their ability to effectively cater to clients across the entire buyer spectrum
- Major Contenders such as Crossfuze, LTI, and KPMG have taken an inorganic approach to plug gaps across their ServiceNow services portfolios and improve their global footprints
- They have invested in developing meaningful capabilities to deliver end-to-end ServiceNow services (including management/run capabilities) and build long-term client relationships

Aspirants:

Mphasis, Tech Mahindra, Trianz, and Softtek

- Aspirants have credible proof-points in select areas, such as ITSM and ITOM, and are largely focused on small/mid-sized buyer segments
- Their onshore and offshore delivery capabilities are well-established to capture benefits of both labor arbitrage and client proximity; and they are investing in building solutions to expedite time-to-market for clients
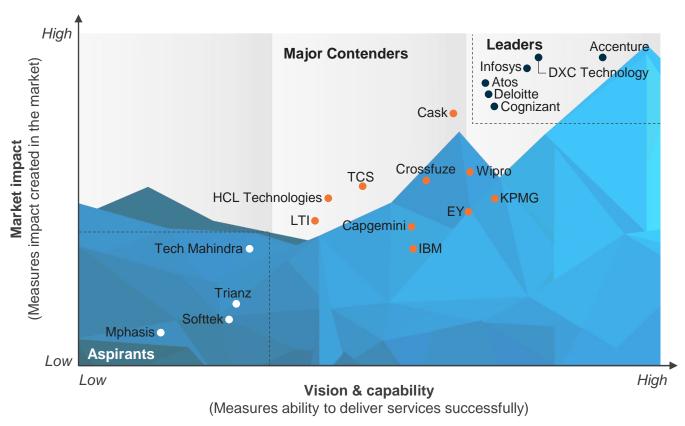
Everest Group PEAK Matrix®
ServiceNow Services PEAK Matrix® Assessment 2021

Everest Group ServiceNow Services PEAK Matrix® Assessment 2021

Note 1: Assessments for Deloitte, EY, IBM, 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. Assessment for Crossfuze is based on service provider inputs and Everest Group's estimates

Note 2: This assessment exclude LTI's recent update of ServiceNow partnership to Elite status and Infosys' ongoing acquisition of GuideVision

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

Infosys | ServiceNow services profile (page 1 of 3)
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 offered	Innovation and investments	Delivery footprint	Overall
●	◕	◔	◔	●	●	◔	◔	◕

Strengths

- Infosys has built a strong suite of IP tools and accelerators, such as Enterprise Service Management (ESM) Café, on ServiceNow platform to expedite time-to-market

- It is a ServiceNow Elite Partner; its global award and regional award for Americas from ServiceNow highlight its global delivery capabilities with focus toward the North American region

- Infosys has credible end-to-end transformational proof-points for ServiceNow services across the entire product portfolio focused on telecom and food & beverage industries

- Clients can benefit from Infosys' proven track record of delivery excellence reflected in Its relatively higher CSAT score than peers for the last one year

- The market acknowledges technical and domain expertise – broad understanding of the IT landscape, expertise in ServiceNow and BMC Remedy, and business-specific understanding – as its key strengths

- Infosys has a reasonable spread of ServiceNow services across buyer segments, which emphasizes its ability to effectively cater to clients across the entire buyer spectrum
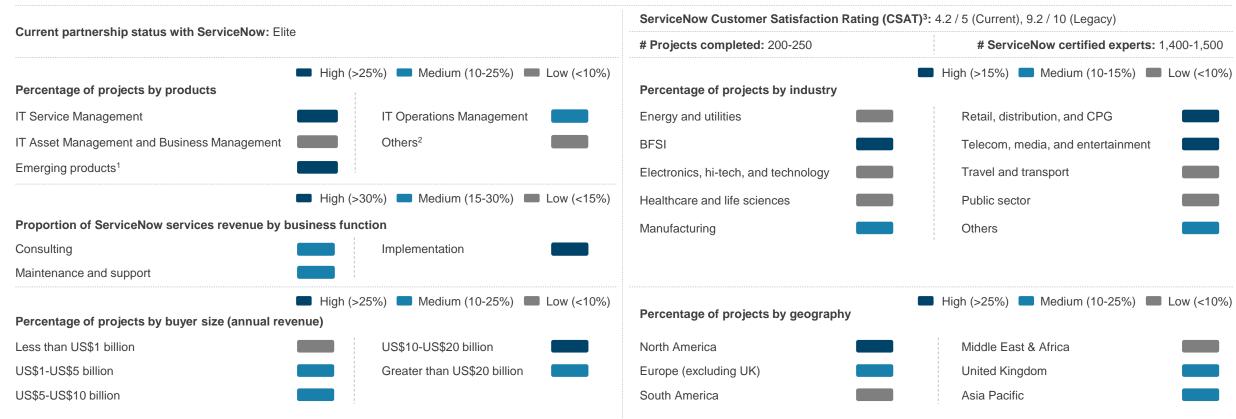
Areas of improvement

- It has a balanced portfolio across consulting, implementation, and managed services; however, a few clients have highlighted that the company can further improve its advisory capabilities – focus on the ability to drive strategic roadmap, guide clients on the emerging ServiceNow modules – for better customer experience

- The majority of its resources are in offshore areas, and few clients have highlighted that it could evolve its client proximity to better cater to upstream services

- A few clients have highlighted that Infosys should further improve its talent management capabilities – specifically around retaining key resources during peak implementation

- It should invest more in certifying its resources in emerging areas such as HRSD and CSM to better position itself to serve evolving market demands

Infosys | ServiceNow services profile (page 2 of 3)
Provider overview

Vision for ServiceNow services: Infosys' vision for ServiceNow services is to continue to be ServiceNow's global service provider partner for strategy, consulting, and execution and to be recognized as the partner of choice. The firm aims to help clients in their digital transformation journey by delivering value from its proprietary solution, Infosys Enterprise Service Management (ESM) Café, and to continue building vertical-specific solutions on ServiceNow that solve unique customer problems.

Current partnership status with ServiceNow: Elite

ServiceNow Customer Satisfaction Rating (CSAT)[3]: 4.2 / 5 (Current), 9.2 / 10 (Legacy)

 # Projects completed: 200-250   **# ServiceNow certified experts:** 1,400-1,500

■ High (>25%)   ■ Medium (10-25%)   ■ Low (<10%)   ■ High (>15%)   ■ Medium (10-15%)   ■ Low (<10%)

Percentage of projects by products

IT Service Management	■ High	IT Operations Management	■ Medium
IT Asset Management and Business Management	■ Low	Others[2]	■ Low
Emerging products[1]	■ High		

Percentage of projects by industry

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

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

Proportion of ServiceNow services revenue by business function

Consulting	■ Medium	Implementation	■ High
Maintenance and support	■ Medium		

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

Percentage of projects by buyer size (annual revenue)

Less than US$1 billion	■ Low	US$10-US$20 billion	■ High
US$1-US$5 billion	■ Medium	Greater than US$20 billion	■ Medium
US$5-US$10 billion	■ Medium		

Percentage of projects by geography

North America	■ High	Middle East & Africa	■ Low
Europe (excluding UK)	■ Medium	United Kingdom	■ Medium
South America	■ Low	Asia Pacific	■ Medium

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

1   Emerging products include CSM, HRSD, FSM, and industry solutions
2   Others include custom applications, partner applications, etc.
3   Current CSAT score represents feedback from customers effective April 1, 2020. Legacy CSAT score represents feedback from engagements prior to April 1, 2020

Infosys | ServiceNow services profile (page 3 of 3)
Case studies, solutions, and investments

Case study 1	
Client: A global food, snack, and beverage corporation	
Business challenge	To make its service management processes easier to use; modernize its legacy HPSM platform, which was unable to provide modern and relevant services to end-users, leading to dissatisfaction; increase transparency and visibility into service management operations; and stabilize its infrastructure and application ecosystem by reducing ticket resolution timelines.
Solution	• Decommissioned and replaced 35+ legacy tools with ServiceNow to elevate user experience and save cost • Transformed the ITSM processes to the latest industry standards as per ITIL guidelines. Infosys leveraged its Enterprise Service Management Café for ITSM, ITOM, HRSD, CSM, and security operations
Impact	• Resulted in retirement of 35 applications • Reduced 60% steps and resulted in 50% less events

Case study 2	
Client: A large North American bank	
Business challenge	To provide self-service capability to client's employees to reduce call volume at the service desk; provide an IT asset inventory; and reduce the time taken to fulfill the IT and business service requests in the current ITSM system.
Solution	• Leveraged ITSM, ITOM, and CSM to provide a self-service portal that transformed the way employees contacted the helpdesk and improved productivity and user experience • Mitigated the federal audit risks on the assets by implementing robust ITOM and CMDB solution. Infosys managed to reduce the call volume at the helpdesk, allowing time for continual improvement
Impact	• Resulted in 18% tickets being reported via portal and chat; month on month, reduction in call volume, and 97% completeness of the CIs in the CMDB • In all, 50 applications mapped using Service Maps, resulting in efficient change and incident management

Proprietary solutions (representative list)

Solution name	Focused ServiceNow product	Details
Enterprise Service Management (ESM) Café for ITSM	ITSM	Pre-configured ITSM core modules including self-service portal and comprehensive catalog items, PA dashboards, ATF, and guided tour that helps clients accelerate time-to-market
ESM Café for ITOM	ITOM	Pre-configured solutions for discovery, event management, service mapping, cloud management, and orchestration
Digital Experience Index	ITSM, CSM, HR, and ITBM	A framework to measure user experience, platform adoption, technical health, business outcomes, and process inefficiency

Key Investments (representative list)

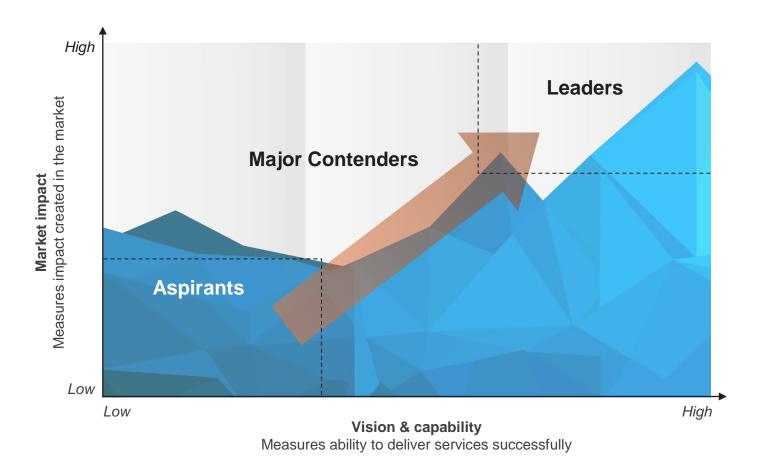| Investment theme	Focused ServiceNow product	Details
Training & certification	ITSM, ITOM, HR Service Delivery, CSM, Security Operations, Integrated Risk Management, and Now Engine	Invested ~US$0.5 million each year to encourage employees to get certified on emerging products, train them on ServiceNow products, and create dedicated internal team and certifications for ServiceNow
CoE and IP development	All products	Invested in setting up dedicated ServiceNow CoEs in Europe, the US, and Australia; onboarded 150+ ServiceNow SMEs in these hubs and ~5% of the practice focuses on the ESM Café and solution development
Acquisitions	All products	Decided to acquire GuideVision, one of the large ServiceNow Elite Partners in Europe, to strengthen nearshore delivery presence

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
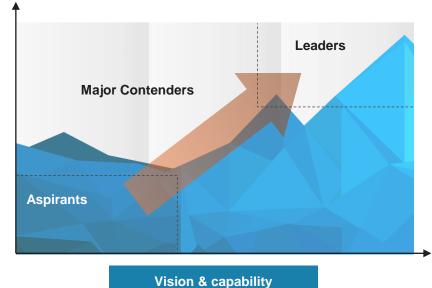
Market adoption

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

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

Everest Group®

With you on the journey

Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at **everestgrp.com**.

Stay connected

Website
everestgrp.com

Social Media

🐦 @EverestGroup

in @Everest Group

f @Everest Group

▶ @Everest Group

Blog
everestgrp.com/blog

Podcast
DigitalReal**IT**y

Listen on Apple Podcasts   Google Play   STITCHER   TUNE IN

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

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-416-388-6765