



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

Focus on Accenture
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, Crossfuzze, 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, **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.

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

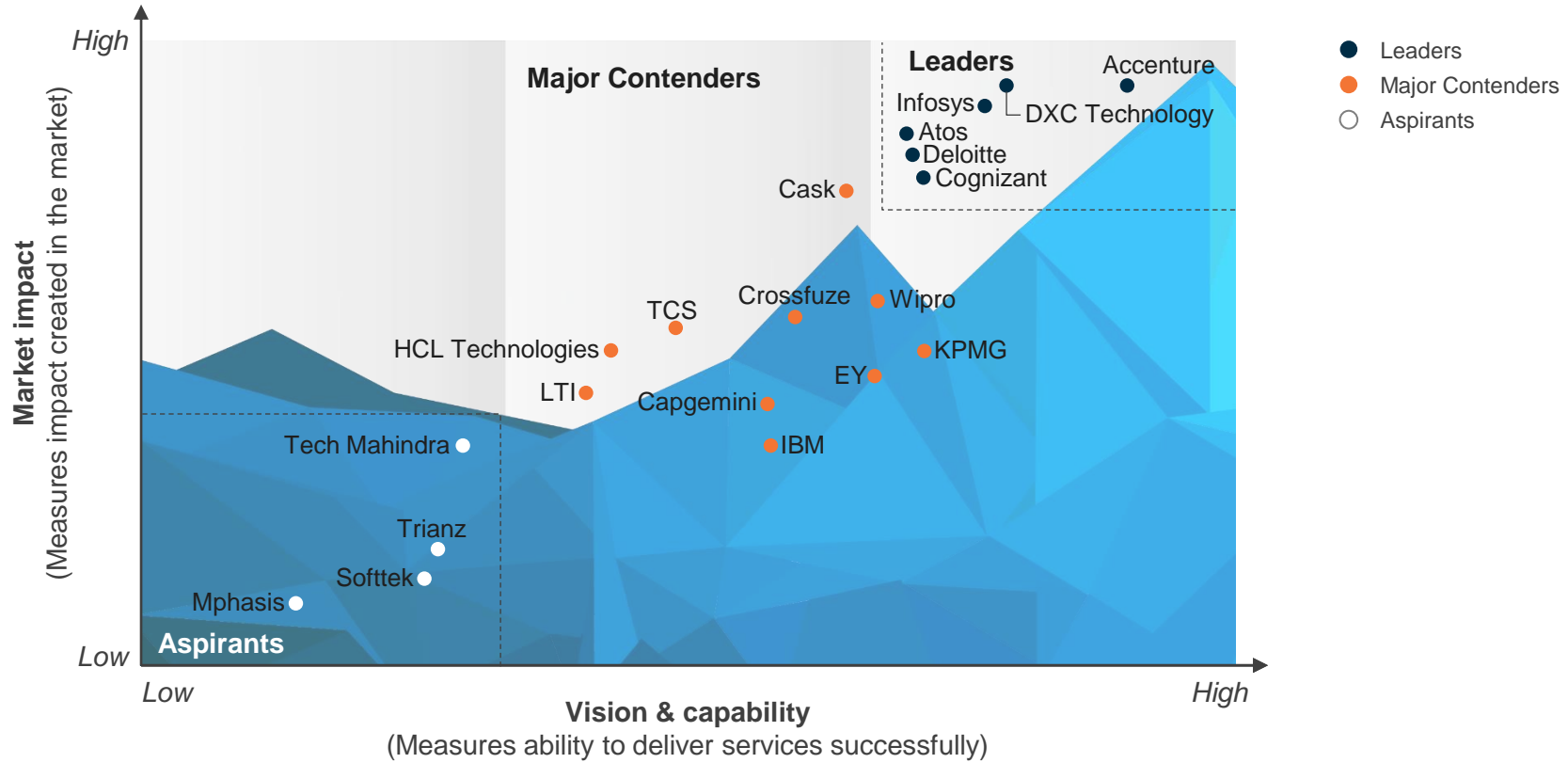
- Aspirants have credible proof-points in select areas, such as ITSM and ITOM, and are largely focused on small/mid-sized buyer segments
- Their onshore and offshore delivery capabilities are well-established to capture benefits of both labor arbitrage and client proximity; and they are investing in 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

Accenture | ServiceNow services profile (page 1 of 4)

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

- Accenture has credible proof-points in executing transformational ServiceNow projects across ITSM and Non-ITSM areas with relatively higher focus on BFSI, HLS, manufacturing, and the public sector
- Accenture is a ServiceNow Global Elite Partner; its global award and regional awards for Americas and EMEA from ServiceNow highlight its global delivery capabilities with focus toward North America and EMEA regions
- It has invested heavily to build frameworks and accelerators such as ACV4GOV (cloud management platform), industry-aligned frameworks, and center of excellence framework to expedite time-to-market
- It has heavily invested in building a robust talent base for ServiceNow services. It has the largest pool of certified resources among all service providers, a good spread of certifications across all certification streams, and has cross-skilled resources above the industry average

Areas of improvement

- Though Accenture has the largest pool of certified talent, a few clients have highlighted that the company can further improve its talent management practices by ensuring on-time availability and high-quality talent across different phases of the engagement
- Buyers perceive it as a premium-priced player in the ServiceNow services market, which may not be a right fit for cost-conscious clients

Accenture | ServiceNow services profile (page 2 of 4)

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

- Its advisory services – in guiding clients for creating transformational roadmap, building strategy, and shaping the business case with their expertise across ServiceNow and BMC Remedy – are well acknowledged by clients
- It has relatively higher customer satisfaction (CSAT) score than peers for the last one year with a greater number of responses, which showcases its strong credibility to deliver end-to-end engagements
- In comparison to other service providers that pursue niche acquisitions, clients can expect a smoother transition and minimal disruption in their engagement with the acquired firm
- Accenture has built verticalized solution for the telecommunications industry, bringing in its domain expertise and speed-to-market for clients
- Accenture’s global footprint and strong onshore-centric delivery model can benefit clients looking for a business partner with whom they can work in proximity

Areas of improvement

- Accenture’s portfolio is skewed toward clients looking for strong consulting-led engagements; however, the company has a lower focus on clients looking for pure-play implementation or managed services
- Most of Accenture’s clients are companies with >US\$10 billion revenues. Therefore, its ability to successfully cater to Small to Mid-sized Buyers (SMBs) is still somewhat untested

Accenture | ServiceNow services profile (page 3 of 4)

Provider overview

Vision for ServiceNow services: Accenture’s vision is to maintain and grow its position as ServiceNow’s partner to help clients achieve transformative innovation and business value. The firm aims to help its clients leverage ServiceNow to accelerate transformational impact, increase business value and outcomes, and ensure that their business remains relevant in a constantly evolving world.

Current partnership status with ServiceNow: Elite

Percentage of projects by products

Legend: High (>25%) (Dark Blue), Medium (10-25%) (Light Blue), Low (<10%) (Grey)



Proportion of ServiceNow services revenue by business function

Legend: High (>30%) (Dark Blue), Medium (15-30%) (Light Blue), Low (<15%) (Grey)



Percentage of projects by buyer size (annual revenue)

Legend: High (>25%) (Dark Blue), Medium (10-25%) (Light Blue), Low (<10%) (Grey)



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

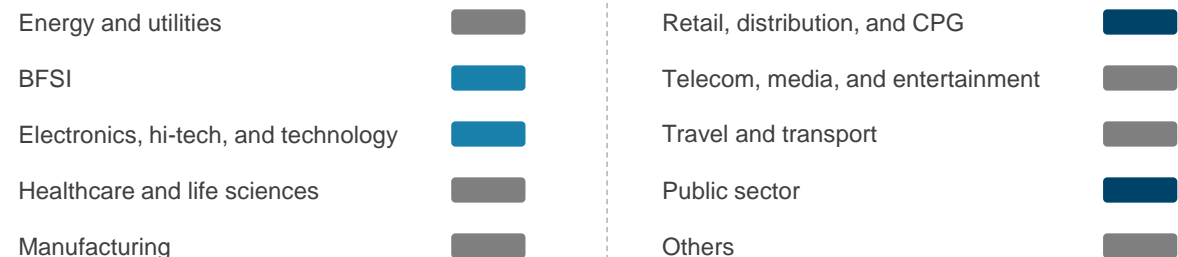
ServiceNow Customer Satisfaction Rating (CSAT)³: 4.3 / 5 (Current), 9.3 / 10 (Legacy)

Projects completed: 900-1,000

ServiceNow certified experts: 1,300-1,400

Percentage of projects by industry

Legend: High (>15%) (Dark Blue), Medium (10-15%) (Light Blue), Low (<10%) (Grey)



Percentage of projects by geography

Legend: High (>25%) (Dark Blue), Medium (10-25%) (Light Blue), Low (<10%) (Grey)



Accenture | ServiceNow services profile (page 4 of 4)

Case studies, solutions, and investments

Case study 1

Client: Siemens Healthineers

Business challenge	To make online interaction the customer's first choice, while reducing complexity as well as costs; and retiring outdated legacy technology
Solution	<ul style="list-style-type: none"> Developed a new customer service platform based on ServiceNow Customer Workflows technology The platform will serve as the company's system of engagement, automating customer service workflows, and integrating customer records and analytics tools
Impact	<ul style="list-style-type: none"> Customers, business partners, and employees were able to interact on the new platform using automated processes Over 1,000 service agents worldwide use this platform for their daily work. The solution helped the firm to conceive, develop, and roll out new solutions and services quickly

Case study 2

Client: HSBC

Business challenge	To digitize legacy employee experience processes and systems across different countries and make them simpler for employees
Solution	<ul style="list-style-type: none"> Accenture leveraged its experience in HR technology, change management, and digital transformation for financial services to help the bank revamp its employee experiences. HSBC's legacy HR systems and processes got replaced with SAP SuccessFactors ServiceNow added an employee engagement layer including a portal, knowledge management, and case management; and MuleSoft provided a secure and agile solution to seamlessly integrate global and regional HSBC applications, data, and devices
Impact	<ul style="list-style-type: none"> Digital HR services made it easier for employees to make data-driven decisions and access HR content, services, and support All services including core services and new capabilities have been improved to enable the bank to better manage talent, succession, career development, and performance

Proprietary solutions (representative list)

Solution name	Focused ServiceNow product	Details
Accenture Cloud Management Platform for Government	ITx workflows	Offers unified view into both cloud and on-premise estate for executives. This platform supports with proactive actions to promote business service health and increase service availability
Accenture ServiceNow Implementation Methodology (ASIM)	All products	Provides clients with best practices and agile-based implementation methodologies, which further align to NOW's "NowCreate" own implementation methodology. The solution supports client implementation, resource management, and story/sprints leveraging the NOW Agile 2.0
Intelligent Automation Platform myWizard	Employee workflows	An automation platform used to implement and measure an enterprise's automation strategy. The solution helps disrupt every aspect of the application life cycle to drive improved business value

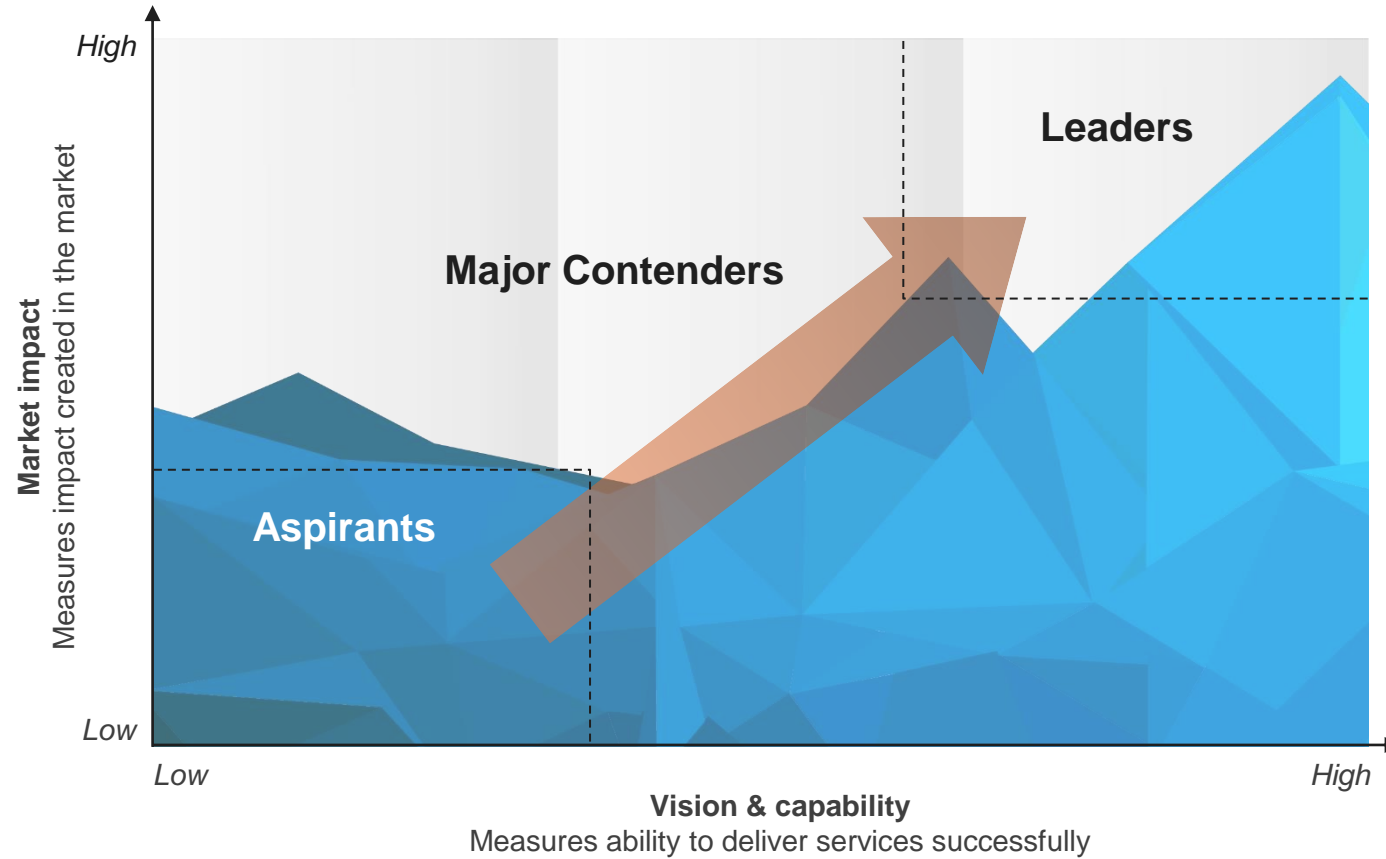
Key Investments (representative list)

Investment theme	Focused ServiceNow product	Details
Acquisition	IRM (GRC, SecOps, and vendor risk management)	In 2019, acquired Sargon Solutions, a ServiceNow consulting and implementation services partner for risk technology focusing on GRC, SecOps, VRM, and audit management
Certifications	All products	<ul style="list-style-type: none"> Accenture has earned over 300 NOWCreator superbadges, over 3x that of the nearest partner As of July 1, 2020, Accenture had 6,800 active ServiceNow technical and sales certifications globally to ensure delivery of quality solutions to its clients

Appendix

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

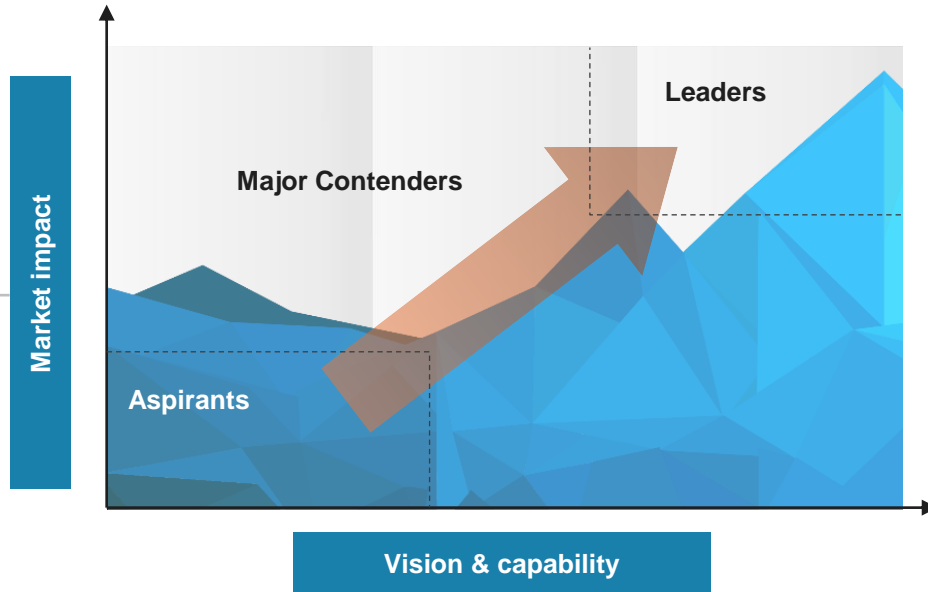
Everest Group PEAK Matrix



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



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