

Everest Group PEAK Matrix™ for Life Sciences Digital in North America Service Providers

Focus on Cognizant
June 2018



Introduction and scope

Everest Group recently released its report titled “[Life Sciences Digital in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018](#).” This report analyzes the changing dynamics of the life sciences digital services landscape in North America and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 23 service providers on the Everest Group PEAK Matrix™ for Life Sciences Digital in North America into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of Life Sciences Digital service providers based on their absolute market success and delivery capability in North America.

Based on the analysis, **Cognizant emerged as a Leader**. This document focuses on **Cognizant's** Life Sciences digital services in North America experience and capabilities, and includes:

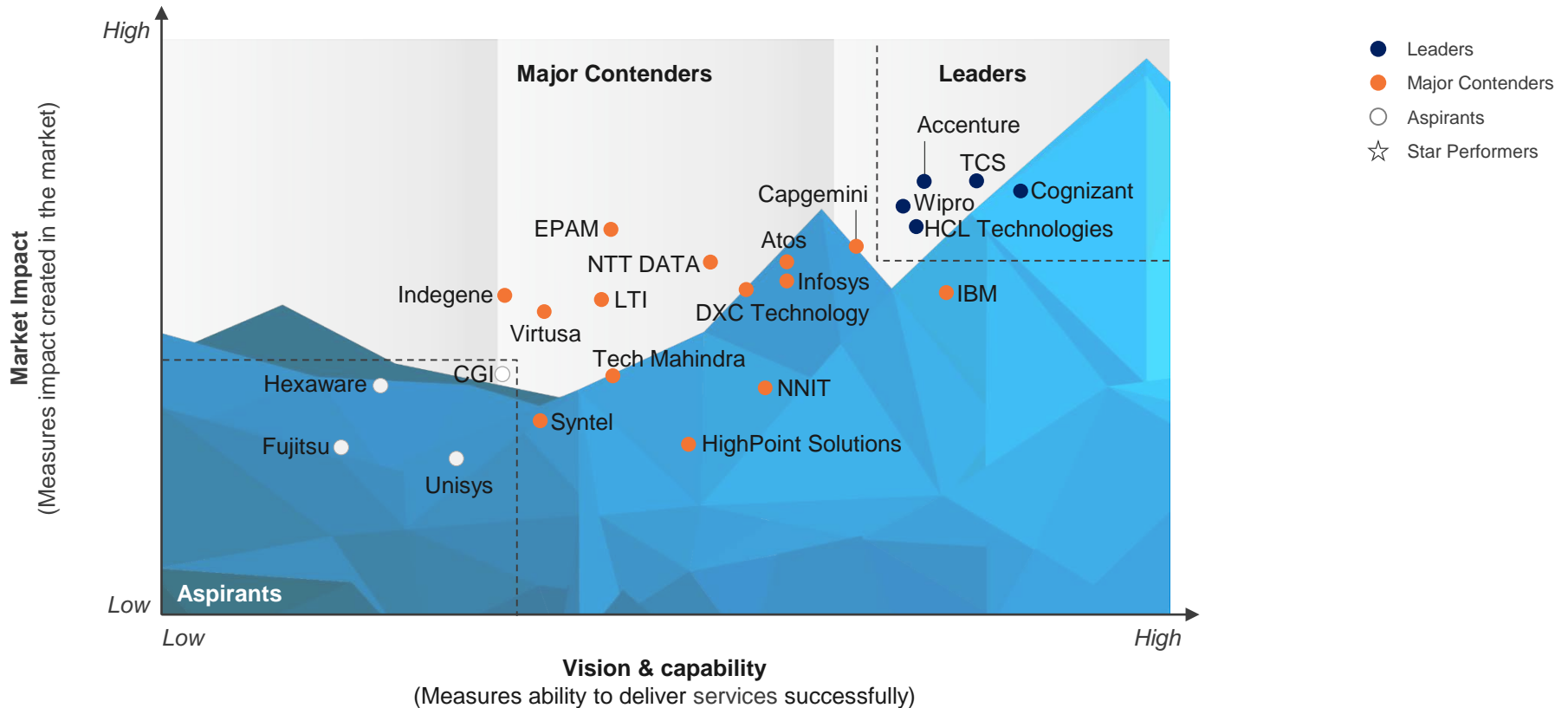
- Cognizant's position on the Life Sciences Digital in North America PEAK Matrix
- Detailed life sciences digital services in North America profile of Cognizant

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.

Everest Group PEAK Matrix™

Life Sciences Digital in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018

Everest Group Life Sciences Digital in North America – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018



Notes PEAK Matrix specific to life sciences digital services in North America
 Assessments for Accenture, CGI, Fujitsu, HighPoint Solutions, IBM, Indegene, Infosys and Unisys 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 life sciences firms that are buyers of digital services

Cognizant | North America life sciences digital services profile (page 1 of 2)

Areas of strengths

- Ability to go deeper into entrenched accounts and establish forward-looking strategy
- Ability to stitch together large end-to-end deals to optimize “run” spend

LS line of business coverage*

High (>20%) Medium (10-20%) Low (<10%)

Medical devices	Medium	Pharmaceuticals	High
Biotechnology	Medium	Others	Low

LS value chain coverage*

High (>20%) Medium (10-20%) Low (<10%)

Drug discovery and research	Medium		
Clinical and pre-clinical trials	Medium	Sales and marketing	High
Manufacturing operations	Medium	Supply chain and distribution	Low

LS digital services in North America revenue

<US\$50 million	US\$150-250 million
US\$50-150 million	>US\$250 million

LS digital services in North America buyer focus segments*

High (>20%) Medium (10-20%) Low (<10%)

Small (annual revenue < US\$1 billion)	Low
Medium (annual revenue = US\$1-5 billion)	Low
Large (annual revenue > US\$5 billion)	High

Vision and strategy

- Enabling clients advance science, improve patient lives and transform enterprise workings through strategic consulting, digital solutions, process expertise and operations. The goal is realized by focusing on four key areas – Pivoting to Digital, Delivering Experiences, Operational Resilience, and Strengthening the Core
- Supporting a 360° continuum of collaboration across global payer, provider, pharma, and patient ecosystems to deliver transformation

Areas of improvements

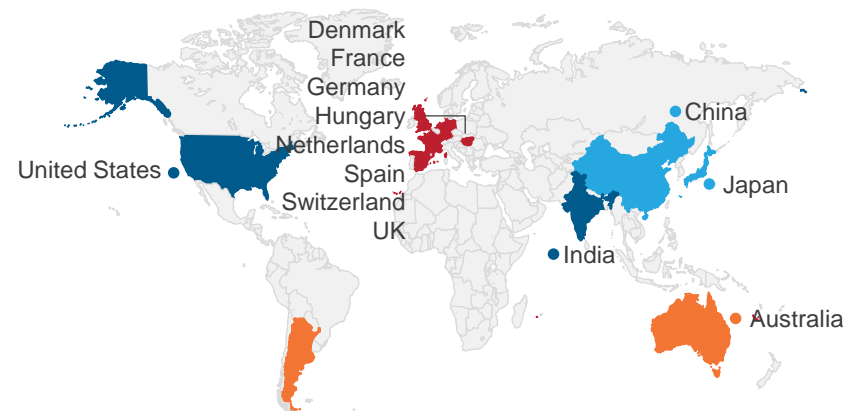
- Becoming true “innovation-orchestrators” for clients looking to scale digital programs
- Serving the life sciences mid-market

Scope of digital services for LS

Analytics, AR/VR, blockchain, cloud, digital marketing, IoT, machine learning/AI, mobility, process automation, and social

LS digital services delivery map

>1,000 FTEs 500-1,000 FTEs 100-500 FTEs <100 FTEs



* Classified as high/medium/low, based on contribution to revenue

Cognizant | North America life sciences digital services profile

(page 2 of 2)

Offerings and recent developments

Proprietary digital solutions (representative list)	
Solution	Details
R&D: Shared Investigator Platform (SIP)	A cross-industry solution designed to enhance efficiency during clinical trial planning and execution. SIP increases engagement with investigative sites and eliminates the need to develop and maintain company-specific portals. Additionally, it increases efficiency and reduces administrative burden due to centralized point of access more unified experience, harmonized content and services; resulting in reduction in study startup time and redundant training
R&D: SmartTrials	An industry ready solution providing real-time risk assessment and global clinical trial oversight to help companies reduce risk and improve collaboration, quality and regulatory-compliance. With automated workflows, alerts, escalations and audit trails, customer can ensure “actionable outcomes” that lower risk while improving quality and compliance
Medical Devices: MedVantage	An integrated sales, service and complaints management solution specifically for the medical devices industry for enhancing customer reach, customer satisfaction and ensuring regulatory compliance
S&M: Eagle	A unified commercial operations self-service platform enabling collaboration between sales operation and sales forces through a rich user interface and industry best practices. Achieving business process integration, improved flexibility, greater productivity, innovation, predictable costs and reduced TCO for end-to-end commercial operations process
M&S: OnePlant	A proprietary framework that helps define digital transformation maturity goals, select right technology and process blueprint for a Manufacturing Plant across MES, QMS, EMI, EAM, LIMS, Historian, SCADA, HMI

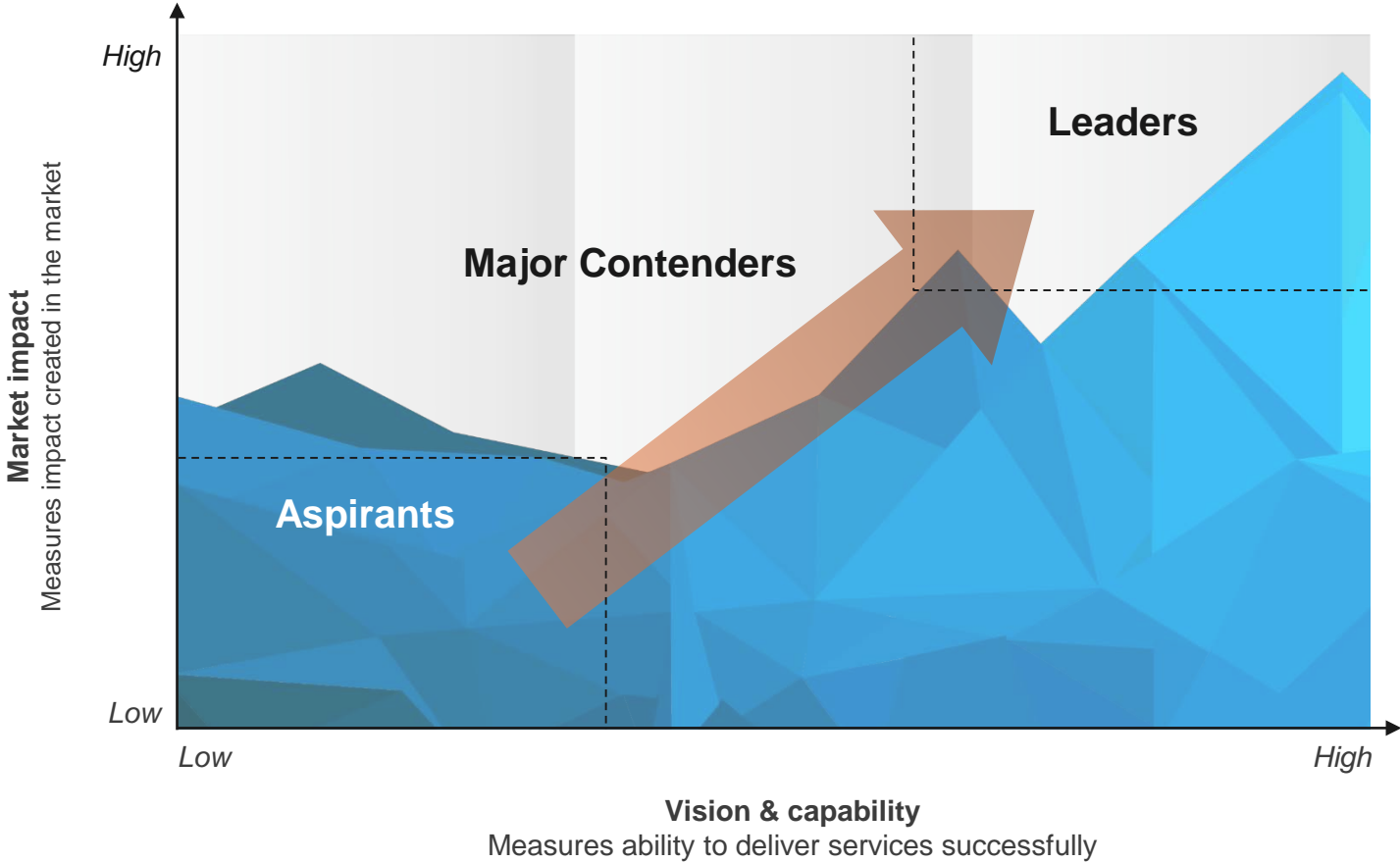
Key events (representative list)		
Event name	Type of event	Details
ZONE	Acquisition (2017)	Cognizant acquired ZONE, a Leading full-service digital agency specializing in digital content, commerce, channels and marketing
Netcentric	Acquisition (2017)	Cognizant acquired Netcentric, a leading provider of digital experience and marketing solutions and leading independent Adobe partner
Multiple	Partnerships	Partnerships with the following enterprises – AWS, Microsoft, MuleSoft, SAP, ServiceNow, SFDC, Adobe; Business – Mckinsey, E&Y, KPMG; Functional COTS – Veeva, Model N Revitas, Oracle, Kinaxis, DemandWare, BioClinica, Amplexor
AWS	Joint Partnership GTM for LS	Partnership to co-develop life sciences compliant solutions, specially targeted at enterprise business transformations: migration accelerator program, cloud validation strategy, IoT on cloud, trackwise on cloud, commercial on cloud
Microsoft		Partnership for modern Workplace - Office 365, Dynamics 365, Cortana based Services Desk; Data and Analytics - BigDecisions / Apps, BI / Data Platform, Oracle / Teradata Compete; Hybrid Cloud - SAP on Azure, IoT use-cases, DC Consolidation

Appendix

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

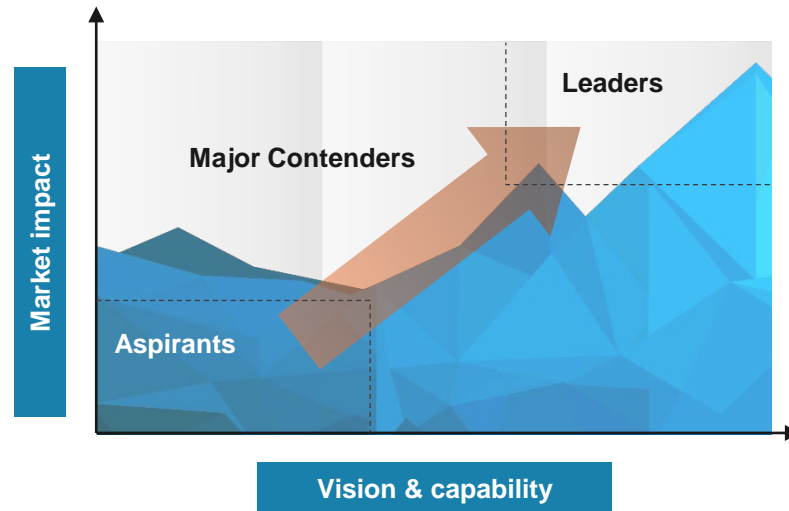
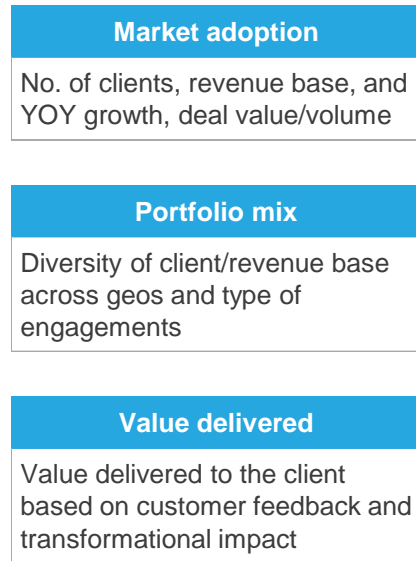


Everest Group PEAK Matrix

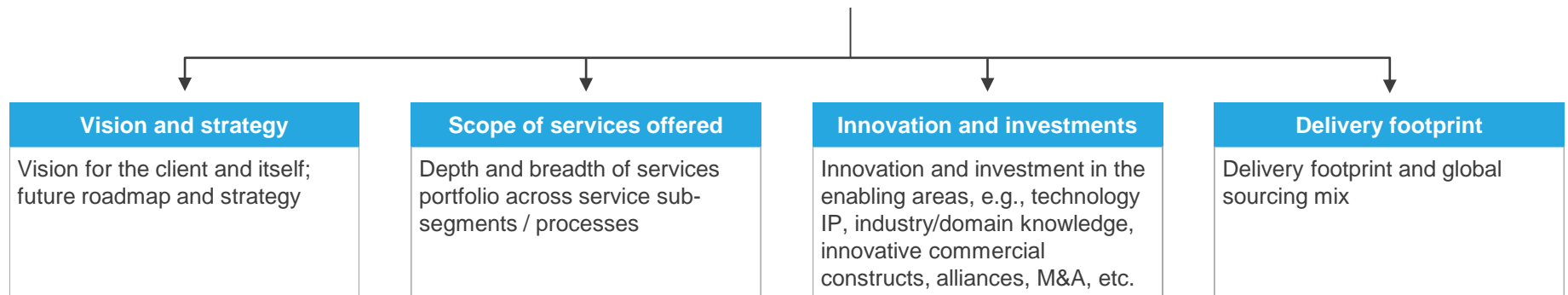


Services PEAK Matrix™ evaluation dimensions

Measures impact created in the market – captured through three subdimensions



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



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



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91 806-781-9999

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

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog

[Sherpas In Blue Shirts](http://www.sherpasinblueshirts.com)

www.sherpasinblueshirts.com