

# Everest Group PEAK Matrix<sup>®</sup> for ServiceNow Service Providers 2021

Focus on Cognizant  
November 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 Softek

### 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, **Cognizant emerged as a Leader**. This document focuses on **Cognizant’s** ServiceNow services experience and capabilities and includes:

- Cognizant’s position on the ServiceNow services PEAK Matrix
- Detailed ServiceNow services 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.

## 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 Softek

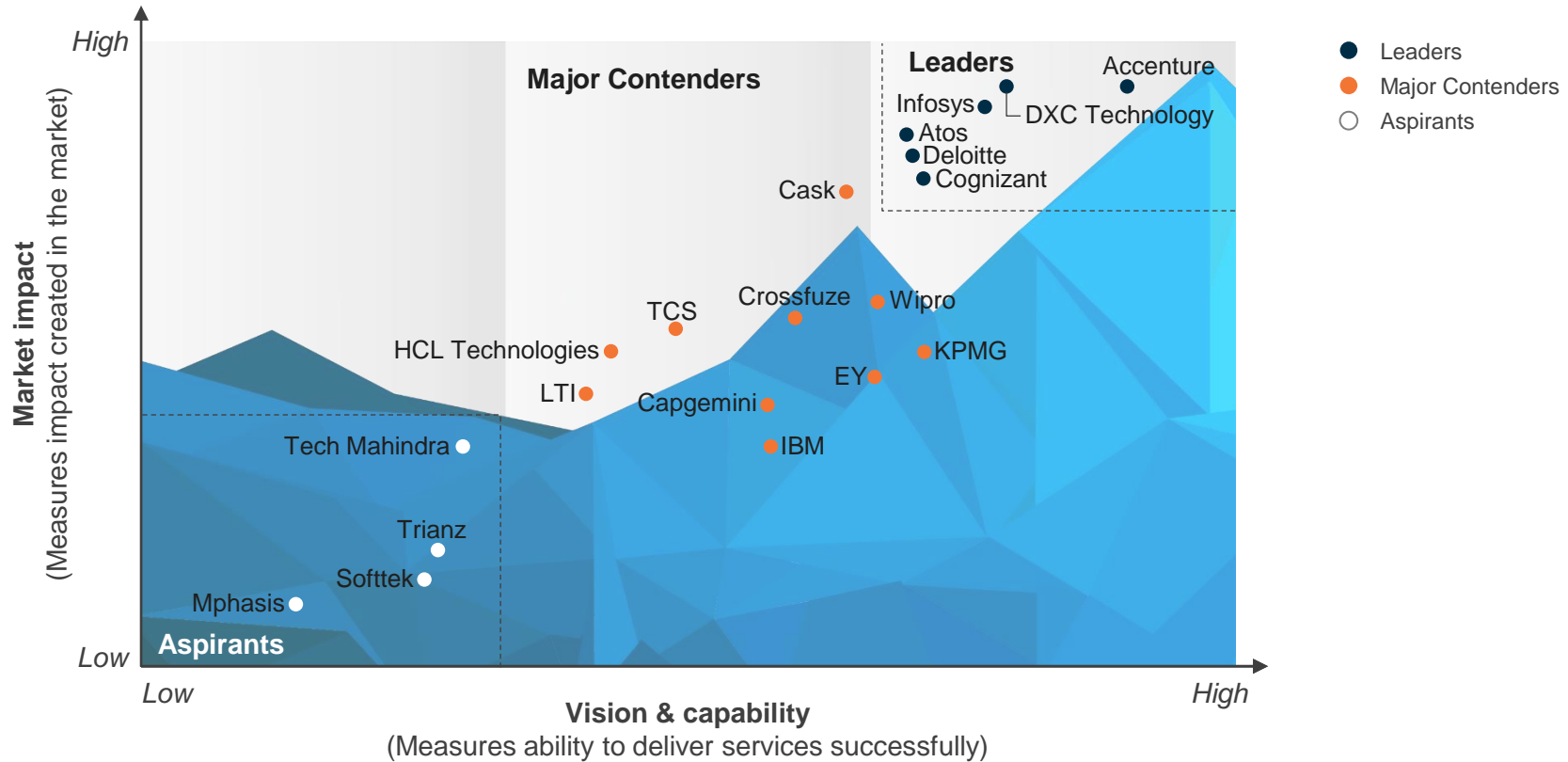
- Aspirants have credible proof-points in select areas, such as ITSM and ITOM, and are largely focused on small/mid-sized buyer segments
- Their onshore and offshore delivery capabilities are well-established to capture benefits of both labor arbitrage and client proximity; and they are investing in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

# Everest Group PEAK Matrix®

## ServiceNow Services PEAK Matrix® Assessment 2021 | Cognizant positioned as Leader



### 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

# Cognizant | 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

- Cognizant has invested in certifying its large ServiceNow talent pool – with focus on application developers that are core for implementation and managed services
- Cognizant has expedited time-to-market for its clients with IP tools / accelerators – such as Cognizant platform offering delivery and WorkNext Digital Engagement platform (focused on ITSM and ITOM) – built on ServiceNow platform
- Cognizant is a ServiceNow Elite Partner, and it has relatively higher CSAT score than peers for the last one year with a greater number of responses. This showcases its strong credibility to deliver end-to-end engagements
- Cognizant has credible proof-points in ITSM, focused on HLS, manufacturing, and energy & utilities










### Areas of improvement

- Cognizant's onshore delivery capabilities are less established, and few clients have highlighted that it could evolve its client proximity to better cater to upstream services
- Though Cognizant has a strong foothold in ITSM, it can further improve its capabilities in emerging areas such as HRSD, CSM, and SecOps to better serve the evolving client demands
- Few clients have highlighted that Cognizant could further improve its talent management capabilities – specifically around retaining the right talent and getting certified experts across different phases of the engagement

# Cognizant | 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 capabilities – guiding in designing the roadmap and processes with the best practices – through thought leadership are perceived as key strength by the market
- Clients can benefit from Its wide industry coverage, flexibility in engagement, and its solutioning approach
- It has meaningfully invested in upskilling and cross-skilling initiatives to enhance resource quality and delivery capabilities
- Cognizant has enlisted multiple apps in the ServiceNow store – focused on service desk operations and service portal templates – to further build its credibility in the market

### Areas of improvement

- Few clients also highlighted that Cognizant could invest in enhancing its account management capabilities and increase the breadth of ServiceNow services coverage
- While Cognizant has rich experience in serving clients in North America and Europe, its Asia Pacific client base is negligible

# Cognizant | ServiceNow services profile (page 3 of 4)

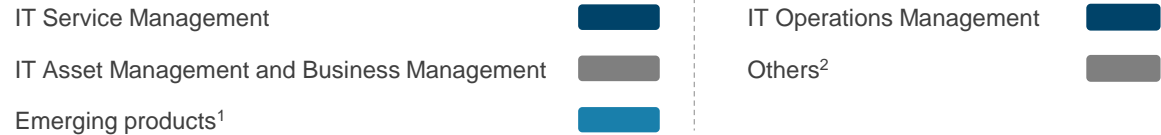
## Provider overview

**Vision for ServiceNow services:** Cognizant's vision is to become a trusted digital transformation partner by engineering modern digital workflows, leveraging the power and flexibility of NOW platform, and collaborating with ServiceNow on co-creating industry solutions.

### Current partnership status with ServiceNow: Elite

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

#### Percentage of projects by products



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

#### Proportion of ServiceNow services revenue by business function



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

#### Percentage of projects by buyer size (annual revenue)



1 Emerging products include CSM, HRSD, FSM, and industry solutions

2 Others include custom applications, partner applications, etc.

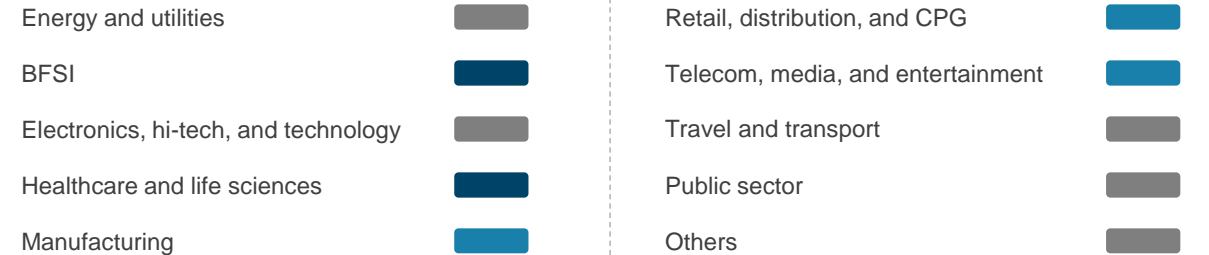
3 Current CSAT score represents feedback from customers effective April 1, 2020. Legacy CSAT score represents feedback from engagements prior to April 1, 2020

**ServiceNow Customer Satisfaction Rating (CSAT)³:** 4.5 / 5 (Current), 9.2 / 10 (Legacy)

# Projects completed: -

# ServiceNow certified experts: 800-900

#### Percentage of projects by industry



#### Percentage of projects by geography





# Cognizant | ServiceNow services profile (page 4 of 4)

## Case studies, solutions, and investments

### Case study 1

#### Client: A global manufacturer of agricultural machinery

Business challenge	To automate multiple on-premise ITSM tools and platforms for security operations and data reconciliation from different sources; integrate existing multiple formats for maintaining applications; and improve the firm's organizational efficiency, customer experience, agility, and cost
Solution	<ul style="list-style-type: none"> <li>Migrated to a single cloud-based ServiceNow platform and implemented various modules of ITSM, ITOM, ITBM, and SecOps</li> <li>The solutions/services provided leveraged ServiceNow platform to help the client streamline and automate multiple processes and tasks across various business units</li> </ul>
Impact	<ul style="list-style-type: none"> <li>Saved over US\$1.6 million annually through multiple digital transformation initiatives. Resulted in lower call abandonment rates from 16% to less than 5%, elevating user experience</li> <li>Achieved time, effort, and cost savings; and an increased overall visibility with accurate data</li> </ul>

### Case study 2

#### Client: A Switzerland-based multinational pharmaceutical company

Business challenge	To replace the client's existing fragmented interaction processes, services, tools, and data sets, resulting in high cost, low productivity, and non-uniform user experience
Solution	<ul style="list-style-type: none"> <li>Provided digitally enabled smart solutions and services for client's digital transformation</li> <li>The centralized, simplified, and personalized services provided led to improved work experience for over 100,000 associates across various business units present in over 150 locations</li> </ul>
Impact	<ul style="list-style-type: none"> <li>Reduced ticket volumes from 100,000 to 74,000 a month</li> <li>Saved ~US\$2 million over five years by reducing software license costs and decommissioning systems</li> <li>Consolidated 34 local shared services centers into five HR global service centers; and company-wide consistent employee experience delivery</li> </ul>

### Proprietary solutions (representative list)

Solution name	Focused ServiceNow product	Details
Cognizant Platform Offering Delivery (CPOD)	All products	A container-based offering delivery platform that provides a marketplace-like experience for customers to pick and choose Cognizant's ServiceNow solutions resulting in lower time-to-market for clients
WorkNEXT™ Digital Engagement Platform	ITSM and ITOM	A device- and OS-agnostic user engagement platform for end-user interaction with the IT department. It is a single glass of pane for users to access App store, Device store, and self-help options
Smart Clinical Trial Management	CSM	The solution includes clinical trial device provisioning, service coordination, hot site integration, health helpdesk support, and shared investigator platform integration

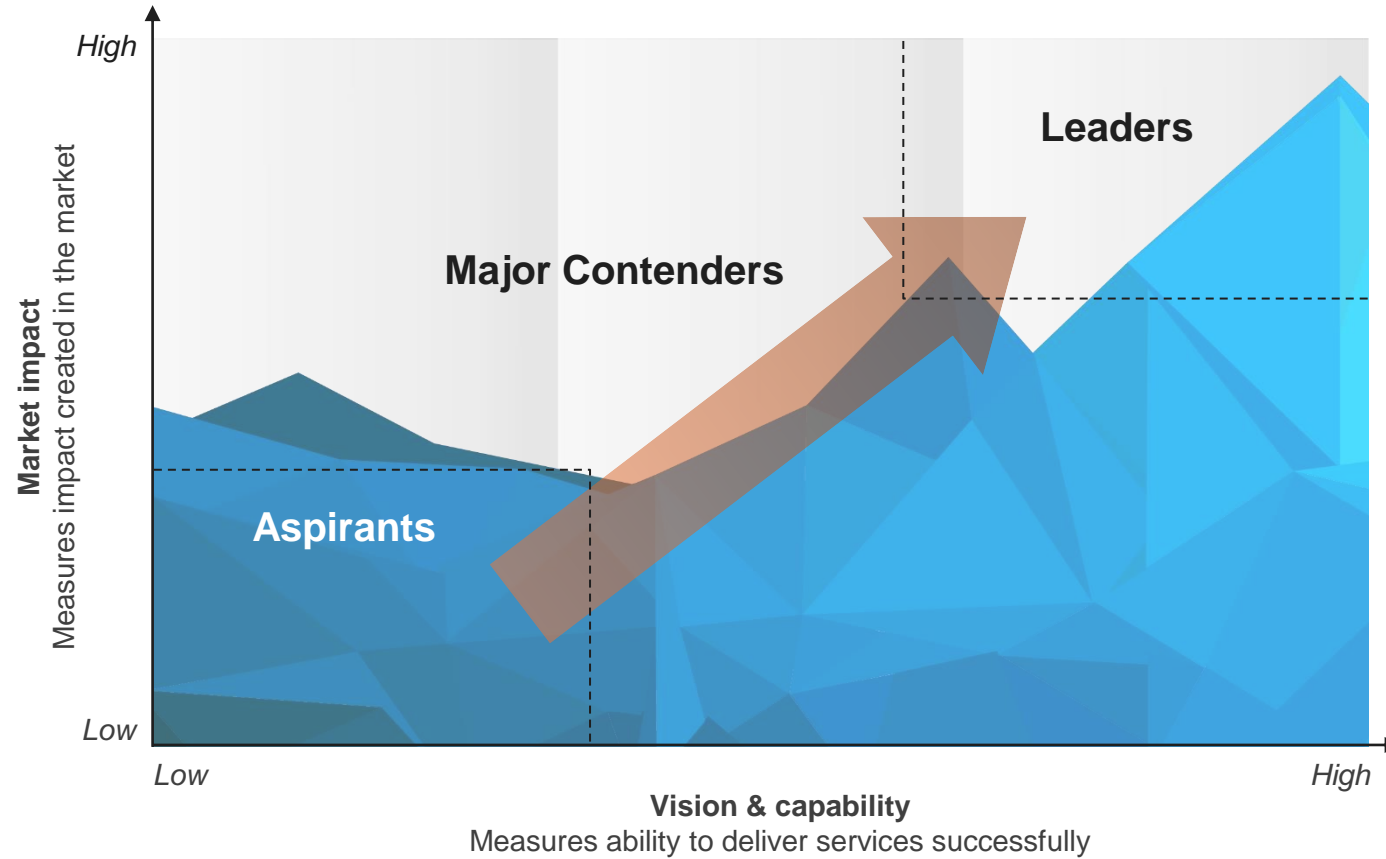
### Key Investments (representative list)

Investment theme	Focused ServiceNow product	Details
Acquisitions	All products	<ul style="list-style-type: none"> <li>In 2020, acquired Collaborative Solutions, a consultancy firm, to increase footprint in HR advisory and employee engagement with Workday as the HCM stack and ServiceNow as employee engagement layer</li> <li>In 2019, acquired Contino, a premier enterprise DevOps and cloud transformation consultancy, to bring core modernization capabilities alongside cloud management platforms such as ServiceNow CMP. Also acquired Zenith Technologies in 2019, to strengthen its smart factory capabilities</li> </ul>
Strategic event sponsorship	All products	Platinum sponsorship in ServiceNow Knowledge 18, ServiceNow Knowledge 19, and select sponsorship in Knowledge 2020 Digital Experience, to engage with ServiceNow leadership and other industry experts to exhibit its solutions and offerings

# Appendix

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

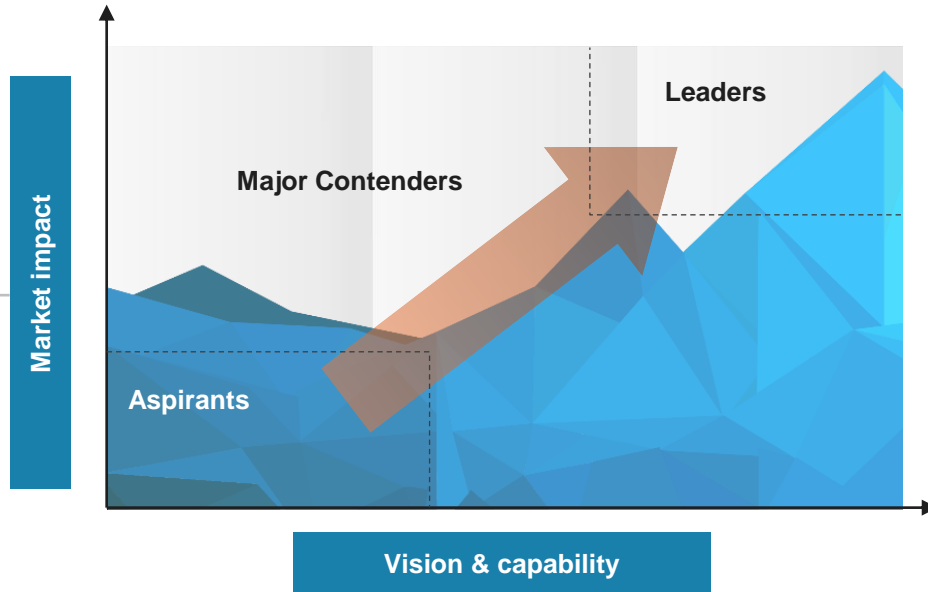
Everest Group PEAK Matrix



# 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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