



Everest Group PEAK Matrix[®] for Digital Workplace Service Provider 2022 – North America

Focus on Zones
October 2022



Background of the research

- With enterprises focusing on digital transformation initiatives, the digital workplace services market recovered rapidly in 2021. It is expected to continue its strong growth trajectory in 2022, as enterprises attempt to drive maximum value in the hybrid work model, from their recent workplace investments done during the pandemic, through partnership with a right-fit service provider
- The digital workplace market in North America has higher preference for shorter transformation timelines, agile work methodologies, and process optimization. Also, due to the recent Great Resignation Movement and a heightened talent war, there is a higher demand for employee experience-centric solutions and transformations within this region. Further, considering the maturity of this market, the propensity to adopt next-generation workplace offerings remains high
- In this research, we present an assessment of 25 digital workplace service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2022 – North America](#).

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2022, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

The full report assessed the following 25 service providers on the digital workplace services PEAK Matrix® – North America:

- **Leaders:** Cognizant, HCL Technologies, Infosys, NTT DATA, TCS, and Wipro
- **Major Contenders:** Accenture, Atos, Capgemini, CGI, Compucom, DXC Technology, Fujitsu, Kyndryl, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones
- **Aspirants:** Microland, Milestone Technologies, Mindtree, Mphasis, Orange Business Services, and UST

Scope of this report:



Geography
North America



Service providers
25 leading digital workplace
service providers



Services
Digital workplace
services

Digital workplace services PEAK Matrix® (North America) characteristics

Leaders:

Cognizant, HCL Technologies, Infosys, NTT DATA, TCS, and Wipro

- The digital workplace services Leaders have established a successful business, driven by years of capability building and experience across different workplace services segments
- These providers have a highly balanced portfolio, display coherent vision, and continue to invest in technology and services capability development (internal IP/tools, partnerships, acquisitions, etc.). They are also focused on talent empowerment, solution contextualization, and sales and marketing enablement
- Leaders are highly proactive in taking their innovations and next-generation service offerings to clients to help them future-proof their workplace environments. In addition, they are increasingly focusing their services on enhancing the workplace experience for end-users
- That said, the current Leaders face a stiff challenge from Major Contenders, in both new and rebid deal situations alike. Leaders need to continue focusing on building effective solutions that are well-balanced and address the seemingly conflicting dual mandate from enterprises for enhanced user experience and services cost optimization

Major Contenders:

Accenture, Atos, Capgemini, CGI, Compucom, DXC Technology, Fujitsu, Kyndryl, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones

- The Major Contenders segment includes a mix of global and regional service providers
- These service providers have built meaningful capabilities to deliver workplace services (both management/run and transformation services); however, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across workplace services segments or geographies or both) – this is also reflected in the scale of market success achieved by these providers (vis-a-vis Leaders)
- However, these service providers are making continued investments in developing internal IP and tools, as well as expanding their service and technology partnership networks in order to plug their capability gaps. They also provide a competitive and innovative pricing structure to clients, thereby positioning themselves as strong challengers to the Leaders in this space

Aspirants:

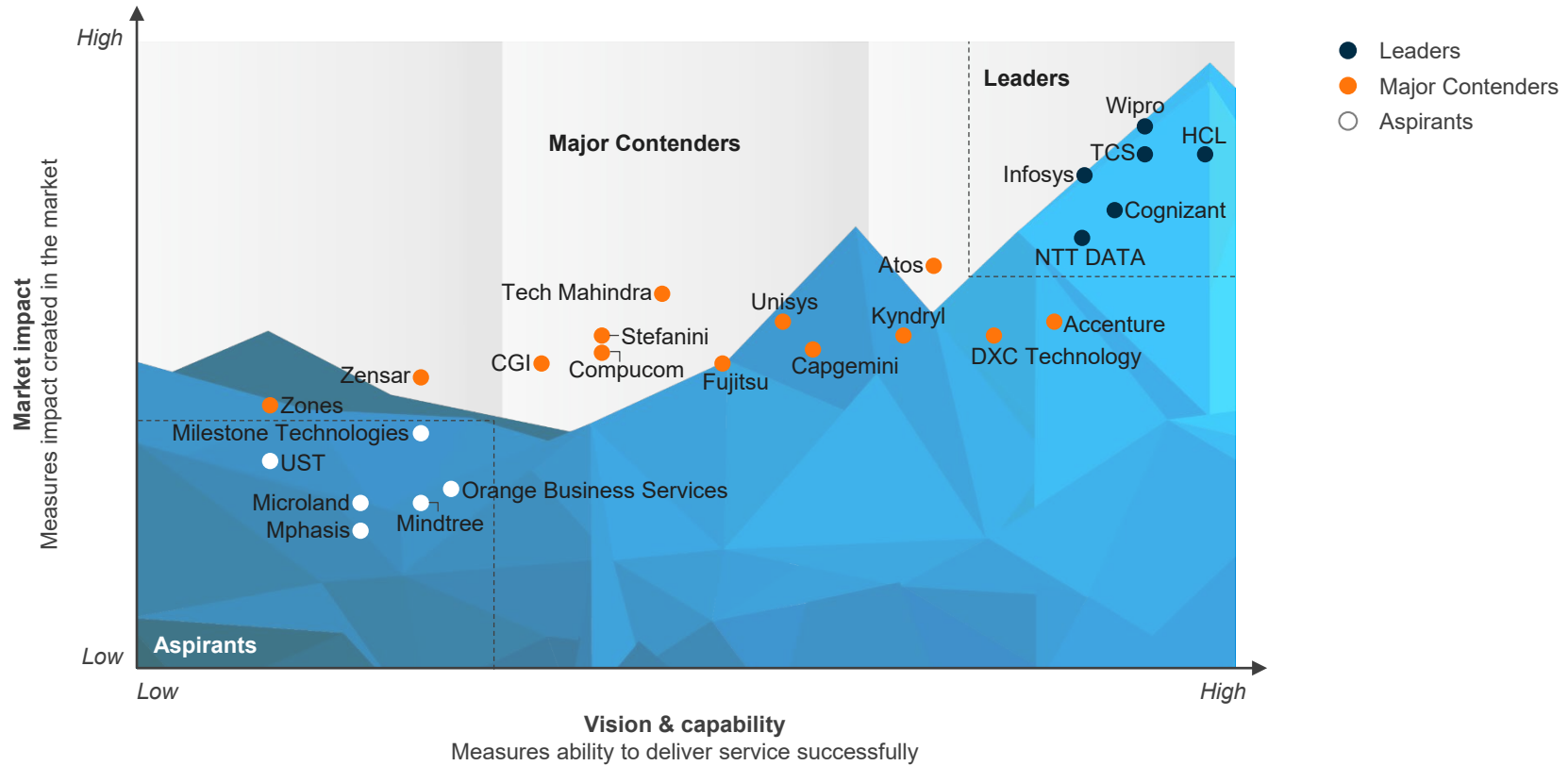
Microland, Milestone Technologies, Mindtree, Mphasis, Orange Business Services, and UST

- The digital workplace services business of Aspirants is at a relatively nascent/initial stage and is not a leading revenue generator for such service providers
- Nevertheless, they are focused on ensuring service flexibility, customer-centricity, and workplace transformation agility to strengthen their mindshare and positioning in the market

Everest Group PEAK Matrix®

Digital Workplace PEAK Matrix® Assessment 2022 – North America | Zones positioned as a Major Contender

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2022 – North America¹












¹ Assessments for Capgemini, CGI, Fujitsu, and Kyndryl exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2022)

Zones | digital workplace services profile – North America (page 1 of 4)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation and investments	Delivery footprint	Overall
								

Strengths

- It leads with an end-to-end value proposition combining its VAR and services expertise for all enterprise hardware needs, from hardware procurement to management to disposal
- Its strong VAR legacy has enabled it to build a robust partnership ecosystem with hardware OEMs such as Dell, HP, and Lenovo and allowed it to upsell and cross-sell in existing client logos
- Enterprises from the retail and healthcare industry verticals will find Zones a relevant choice due to its industry customized solutions such as POS solution for retail customers, virtual support for medical devices, and end-user device carts for healthcare customers
- Enterprises seeking innovative pricing constructs will benefit from Zones, as it has been innovative with its pricing structure and offers an outcome-based pricing model. It has developed a pricing calculator, which gives per-device or per-user pricing for services
- It is strengthening its position through bundled DaaS and service desk services, to position itself as a managed services provider

Limitations

- Enterprises from BFSI, and travel & transport verticals need to carefully evaluate Zones as it has very low presence in these sectors
- Its geographical presence is tilted towards the United States, with limited presence in countries such as Canada and Mexico
- Zones needs to invest in sales and marketing efforts to improve its brand awareness from a legacy VAR provider to a strategic managed service provider
- Enterprises looking for end-to-end managed workplace services might not find Zones attractive, as it has limited proof points and case studies of end-to-end managed workplace services and its workplace transformation solutions are still in a maturing stage
- Enterprises seeking support in segments such as BYOD/mobility and desktop management need to be wary of Zones as it has limited capabilities in these segments

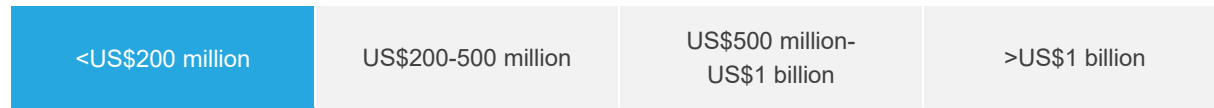
Zones | digital workplace services profile – North America (page 2 of 4)

Overview

Digital workplace services vision

Zones' vision is focused on fostering a collaborative, responsive, and information sharing culture across the organization, leading to improved business performance. The focus is on developing consumer-oriented, automated, self-service-enabled user experiences across a wide range of devices using a cloud-first and mobile-first approach. The current strategy is to enhance digital experience and IT automation by investing in experience management, proactive monitoring, and intelligent analytics.

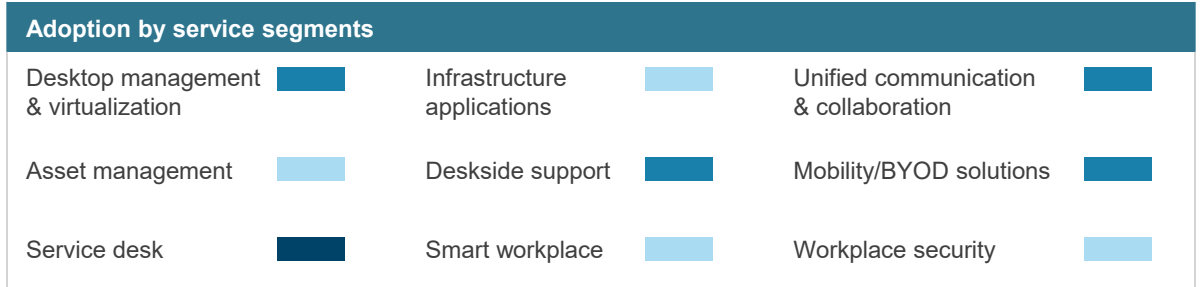
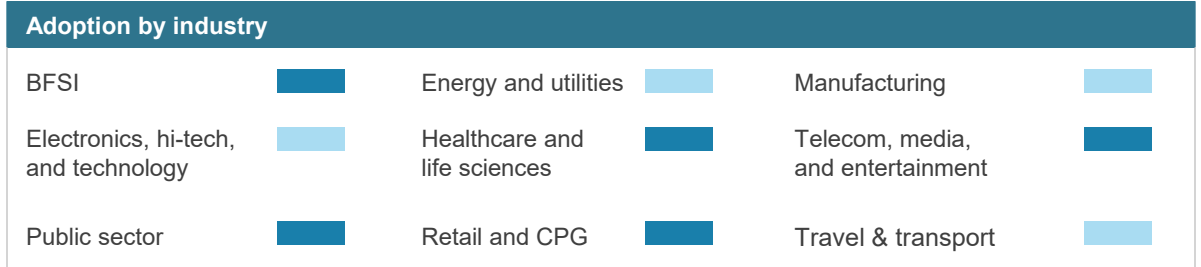
Digital workplace services revenue (2021)



Scope of coverage

- Number of users served through service desk support – ~100,000
- Number of service desk contacts managed – ~1 million
- Number of deskside/break/fix incidents managed – ~300,000
- Total number of end-user devices managed – ~285,000

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



Source: Everest Group (2022)

Zones | digital workplace services profile – North America (page 3 of 4)

Solutions

Proprietary digital solutions (representative list)

Solution	Details
Enterprise™	This is an end-to-end asset management solution. It is a service delivery tool for end-to-end visibility.
ZonesConnect	This solution is a web-based procurement portal for customers.
Zones IntelliPlan SM	Zones claims that this technology solutions center provides expert IT life cycle services that help get the job done efficiently, effectively, and economically.
Zones Discovery Services	This is a discovery platform that combines tools, people, and processes to quickly and effortlessly gain deep insights into everything on the corporate network.
Zones Operation Platform - DWP Module	This is a solution that provides digital experiences including chatbot and self-help services.

Zones | digital workplace services profile – North America (page 4 of 4)

Partnerships and investments and recent activities

Partnerships (representative list)

Partner name	Details
Lakeside	Partnered with Lakeside to leverage and co-sell digital experience management solutions, which include self-service, self-heal, proactive monitoring, and analytics insights
ServiceNow	Zones empowers its customers with automated workflows and integrations on the cloud as all its tools and platforms are connected with ServiceNow.
Engati	Leverages the partnership to use and co-sell customized chatbot solutions
ManageEngine	Leverages the partnership for unified endpoint management & remote support solutions, including implementation support and PoCs
Anakage	Leverages the partnership for endpoint automation and chatbot services with implementation support and PoCs
Jamf	Provides automated device provisioning, application life cycle management, and a self-service portal for end-users through the partnership
Apple	Through this partnership, it provides Mac evaluation assessments, end-to-end life cycle management, and device care services. Zones claims that it leverages the partnership to provide discounted pricing as well.
Block 64	<ul style="list-style-type: none"> • Leverages this partnership to assess the unique requirements of its customers' business and users and create a roadmap for workplace transformation • Leverages the latest Microsoft Office 365 productivity and collaboration technologies with a licensing solution that fits the customer's budget

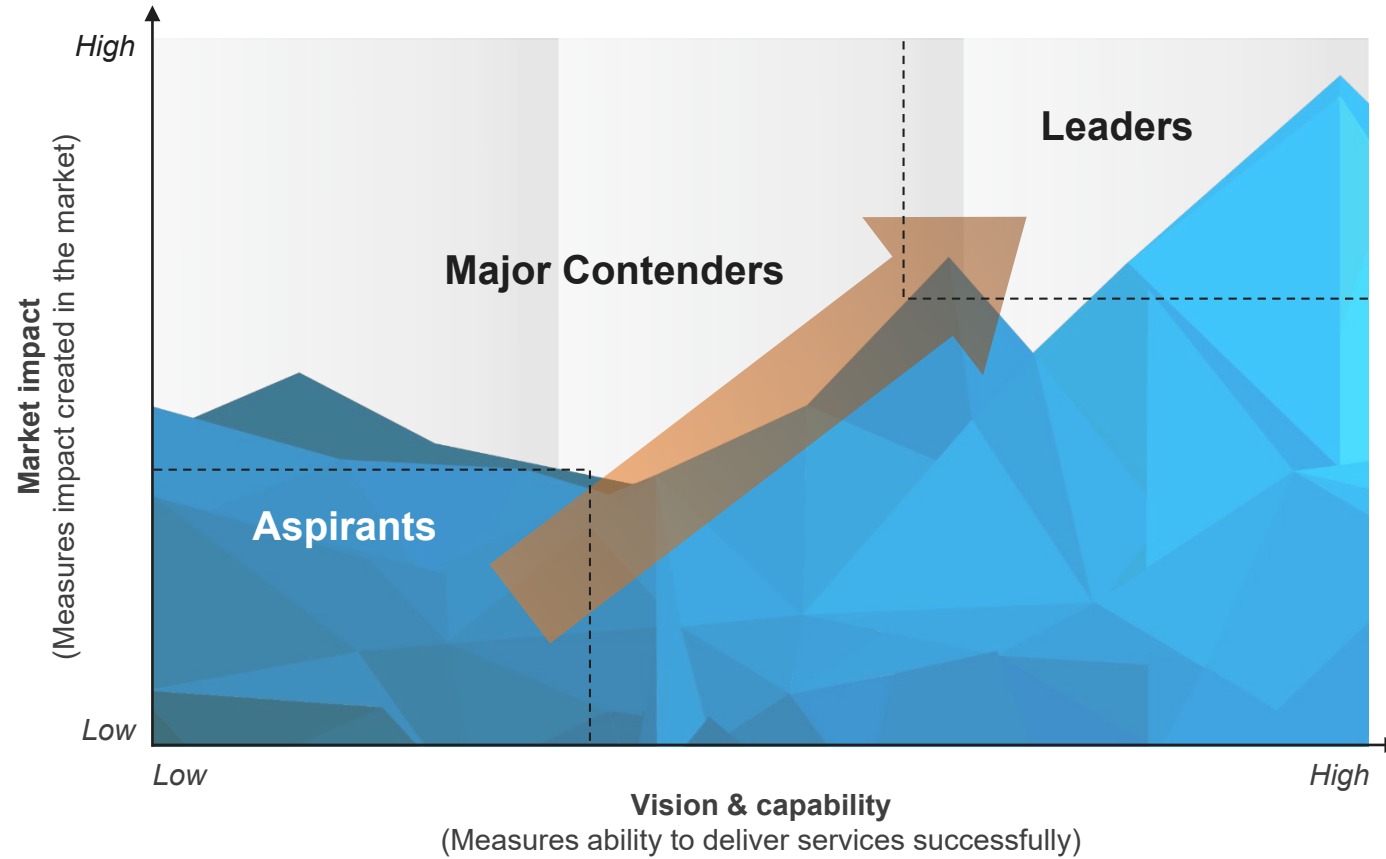
Investments (representative list)

Investment name	Details
Innovation and investments	<ul style="list-style-type: none"> • Invested in an innovation center facility and implemented use cases of the digital workplace • Onboarded partners aligned with its digital transformation strategy
Investments/Skill development	<ul style="list-style-type: none"> • IT invested in training ~70 resources to support premier operations for O365 services • Invested in training and certification of resources to understand and implement new features and services

Appendix

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

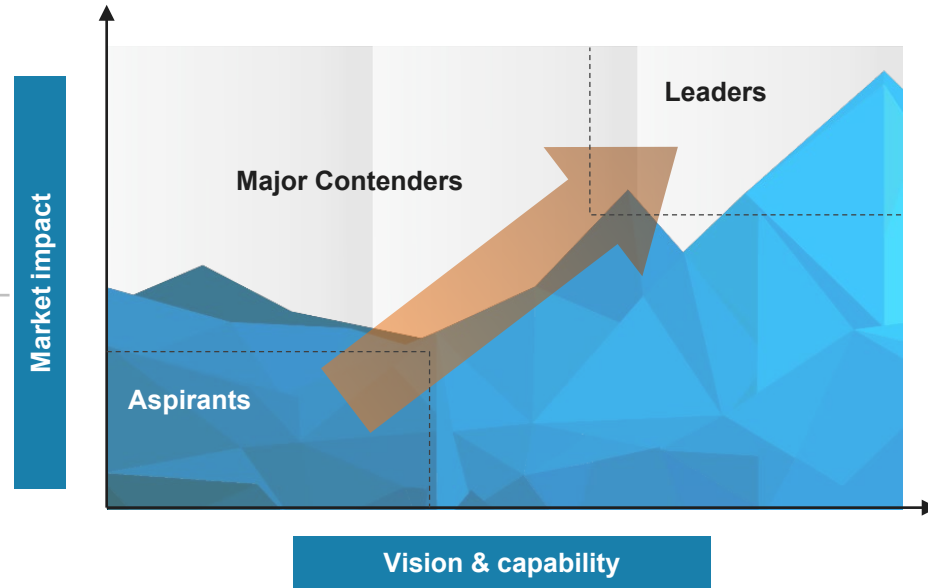
Everest Group PEAK Matrix



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 takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for 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 Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.




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