



Everest Group Digital Workplace Service PEAK Matrix® Assessment 2023 – North America

Focus on Zones
October 2023



Background of the research

- With the ongoing changes in the workplace, various trends have driven transformations. The upcoming years are poised to be remarkable for the digital workplace, marked by the third wave of value-centric transformation. This phase will see enterprises adopting a fully digital future of work, prioritizing improved employee experience, value realization, productivity, cost efficiency, and workplace cohesion. Realizing this goal would require collaboration with suitable Service Providers (SPs)
- In North America, existing economic headwinds such as increasing inflation, banking crisis, a steep rise in interest rates, and intense competition for talent have prompted enterprises to scrutinize their spend and intensify their focus on business value outcomes and value creation throughout their workplace transformation journey. At the same time, there is a growing interest in industry-specific workplace solutions, AI-driven innovations, and product-oriented approaches. SPs are focusing on strengthening their capabilities to aid enterprises in their workplace engagements
- In this research, we present an assessment of 26 digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® – North America

The assessment is based on Everest Group’s annual RFI process conducted over Q1 and Q2 2023, interactions with leading digital workplace service providers, and an analysis of the digital workplace services marketplace in the North American region.

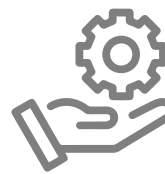
This full report includes the profiles of the following 26 leading digital workplace providers featured on [Digital Workplace Services PEAK Matrix® Assessment 2023 – North America](#):

- **Leaders:** Cognizant, HCLTech, Infosys, NTT DATA, TCS, and Wipro
- **Major Contenders:** Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, Stefanini, Tech Mahindra, Unisys, Zensar, and Zones
- **Aspirants:** Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

Scope of this report



Geography
North America



Providers
26 leading digital
workplace service
providers



Services
Digital workplace
services

Digital Workplace Services PEAK Matrix® (North America) characteristics

Leaders

Cognizant, HCLTech, 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 service cost optimization

Major Contenders

Accenture, Atos, Capgemini, Compucom, DXC Technology, Kyndryl, LTIMindtree, Milestone Technologies, 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

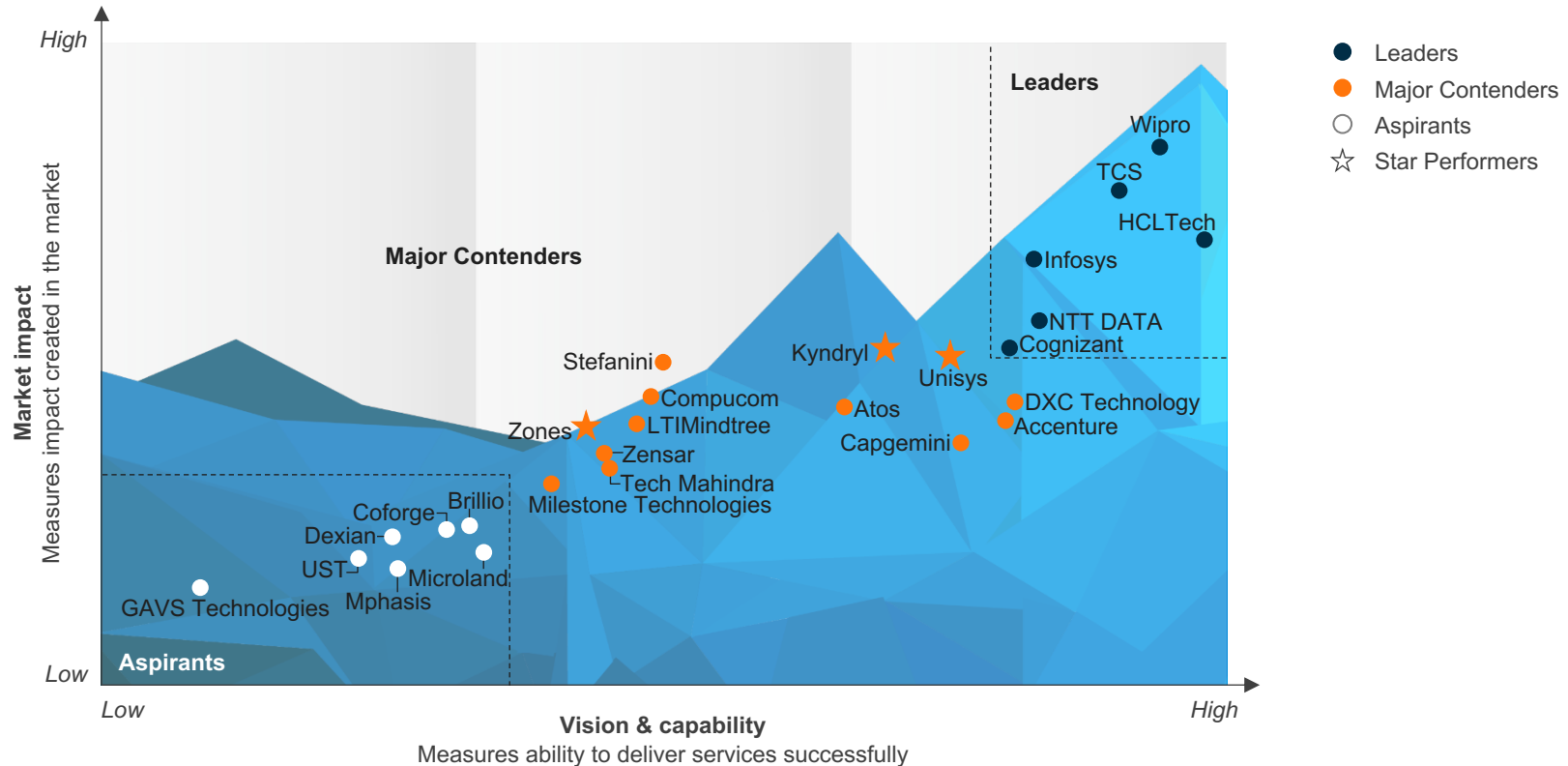
Brillio, Coforge, Dexian, GAVS Technologies, Microland, Mphasis, and UST

- 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 Services PEAK Matrix® Assessment 2023 – North America | Zones is positioned as a Major Contender and a Star Performer

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2023 – North America^{1,2,3,4}



1 Assessments for Tech Mahindra and UST excludes 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
 2 Analysis for LTIMindtree is based on capabilities after the merger of LTI and Mindtree
 3 Analysis for Kyndryl is based on capabilities after the split into IBM and Kyndryl
 4 We have not considered LTIMindtree for Star Performer title since erstwhile Mindtree participated as a separate entity in the 2022 refresh of the assessment
 Source: Everest Group (2023)

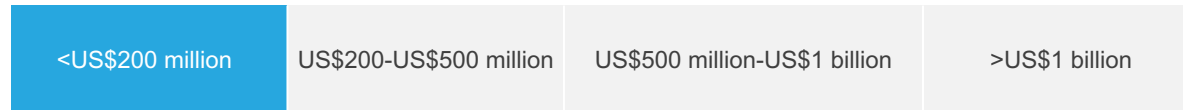
Zones profile (page 1 of 4)

Overview

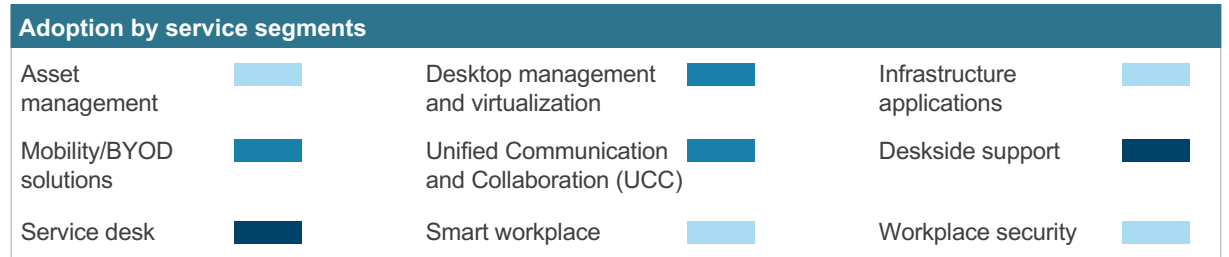
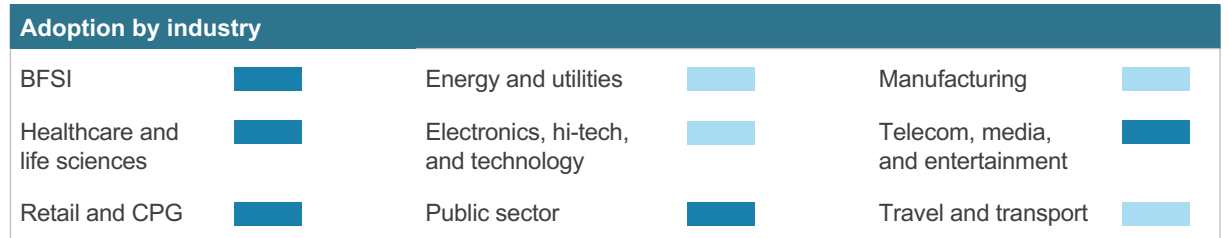
Digital workplace services vision

Zones' vision is to design and manage efficient workplace ecosystems that enable seamless collaboration and enhance productivity to drive business success. With a persona and digital experience-centric approach to solutioning, Zones strives to exceed clients' expectations with initiatives such as i) zones Innovation center ii) new global delivery centers iii) investments in tools and frameworks iv) strengthening the resource pool, and v) verticalized solutions to stay ahead of the curve in the rapidly evolving digital landscape.

Digital workplace services revenue (2022)



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



Source: Everest Group 2023

Zones profile (page 2 of 4)

Solutions

Proprietary solutions/IP/products (representative list)

Solution	Details
Infrastructure	The solution provides end-to-end asset management.
ZonesConnect	This solution is a web-based procurement portal for customers.
Zones IntelliPlan (ZIP)	Zones claims that this technology provides expert IT life cycle services that help get the job done efficiently, effectively, and economically.
Zones Discovery Services (ZDS)	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, which include chatbot and self-help services.

Zones profile (page 3 of 4)

Partnerships, 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	Empowers its customers with automated workflows and integrations on the cloud as all its tools and platforms are connected to ServiceNow
Engati	Leverages the partnership to use and co-sell customized chatbot solutions
ManageEngine	Leverages the partnership for unified endpoint management and 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	Provides Mac evaluation assessments, end-to-end life cycle management, and device care services
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 implementing use cases of the digital workplace in the innovation center facility Onboarded partners aligned with its digital transformation strategy and released a new lab platform
Investments / Skill development	<ul style="list-style-type: none"> Invested in training ~120 resources to support unified operations for O365 services Invested in the training and certification of resources to understand and implement new features and services with multiple connects with OEMs / service providers

Zones profile (page 4 of 4)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

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

- Zones has a strong focus on providing end-to-end workplace services by combining its value-added reseller (VAR), field support, and device capabilities, bolstered through robust partnerships with OEMs such as Apple, Dell, and HP, which is resonating well with enterprises
- Enterprises seeking employee-centric workplace transformation will benefit from Zones’ revamped focus on end-user experience, where it has upped the ante by investing in workplace innovation centers and solutions such as ZonesConnect and Zones IntelliPlan
- Enterprises from the retail and Healthcare and Life Sciences (HLS) segments will find Zones’ Retail IT and Healthcare IT solutions attractive, with capabilities such as retail digital signage and self-service kiosks
- Enterprises can expect Zones to continue with investments in the digital workplace space to diversify its portfolio and strengthen capabilities within growing segments such as communication and collaboration, desktop engineering, and workplace security
- Clients have been appreciative of Zones’ competitive pricing on devices and overall flexibility of engagement

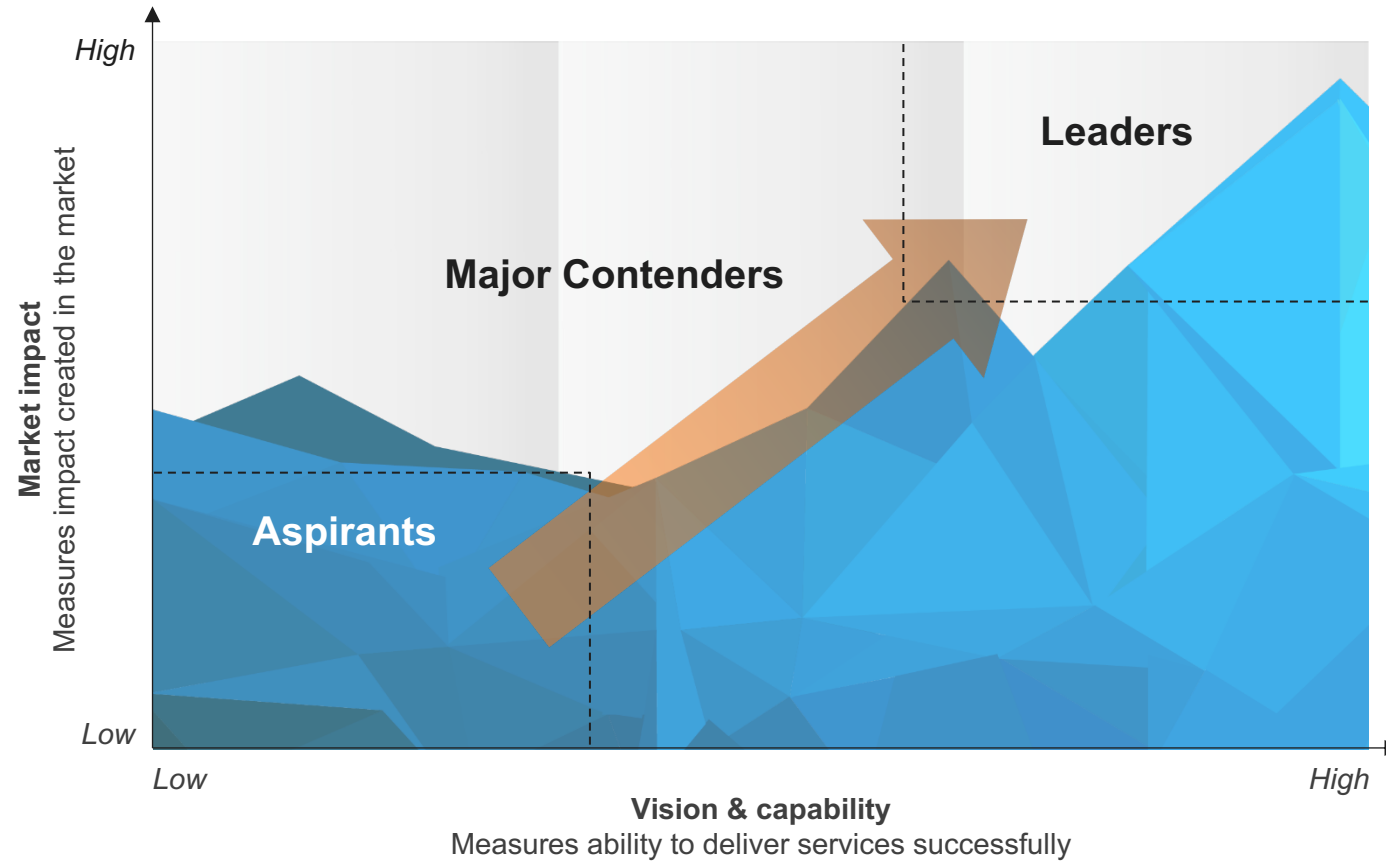
Limitations

- While Zones is trying to diversify its capabilities and proof points across fast-growing segments such as UCC and mobility, the pitch around these segments looks underwhelming and lacks credibility and proof points
- Zones XLAs GTM is underwhelming and passive, while peers are more actively pursuing it
- Zones has limited expertise and proof points on next-generation themes such as cloud-based workspaces, AR-/VR-based services, sustainability, generative AI, and metaverse
- Enterprises from energy and utilities and travel and transport sectors must evaluate Zones’ capabilities, owing to its limited credible proof points in these verticals
- Zones’ geographical presence is primarily focused on the US, with limited presence in countries such as Mexico
- Enterprises seeking innovative pricing constructs might not find Zones appealing owing to a significant proportion of its deals being structured with traditional pricing constructs
- Some clients have highlighted proactive updates and speed of services as an improvement area for Zones

Appendix

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

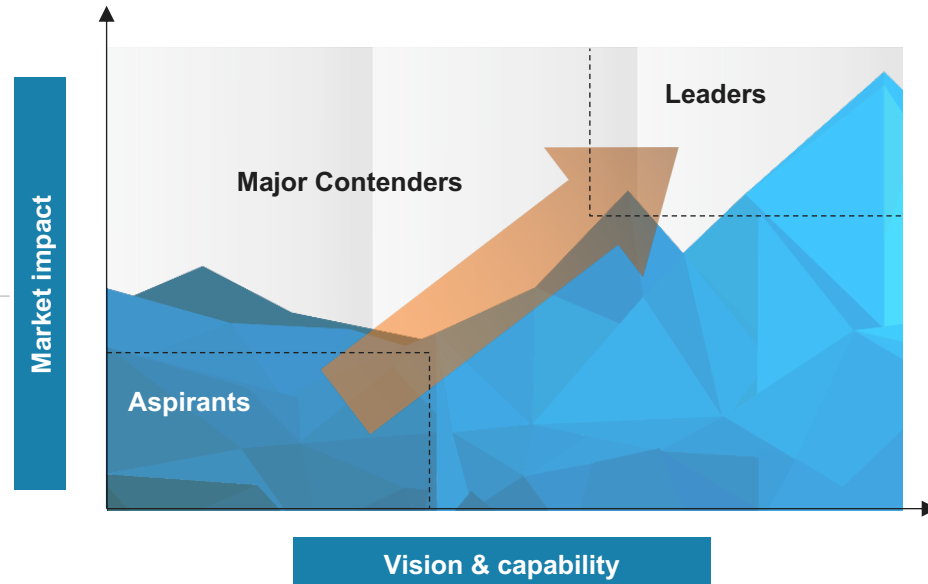
Everest Group PEAK Matrix



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



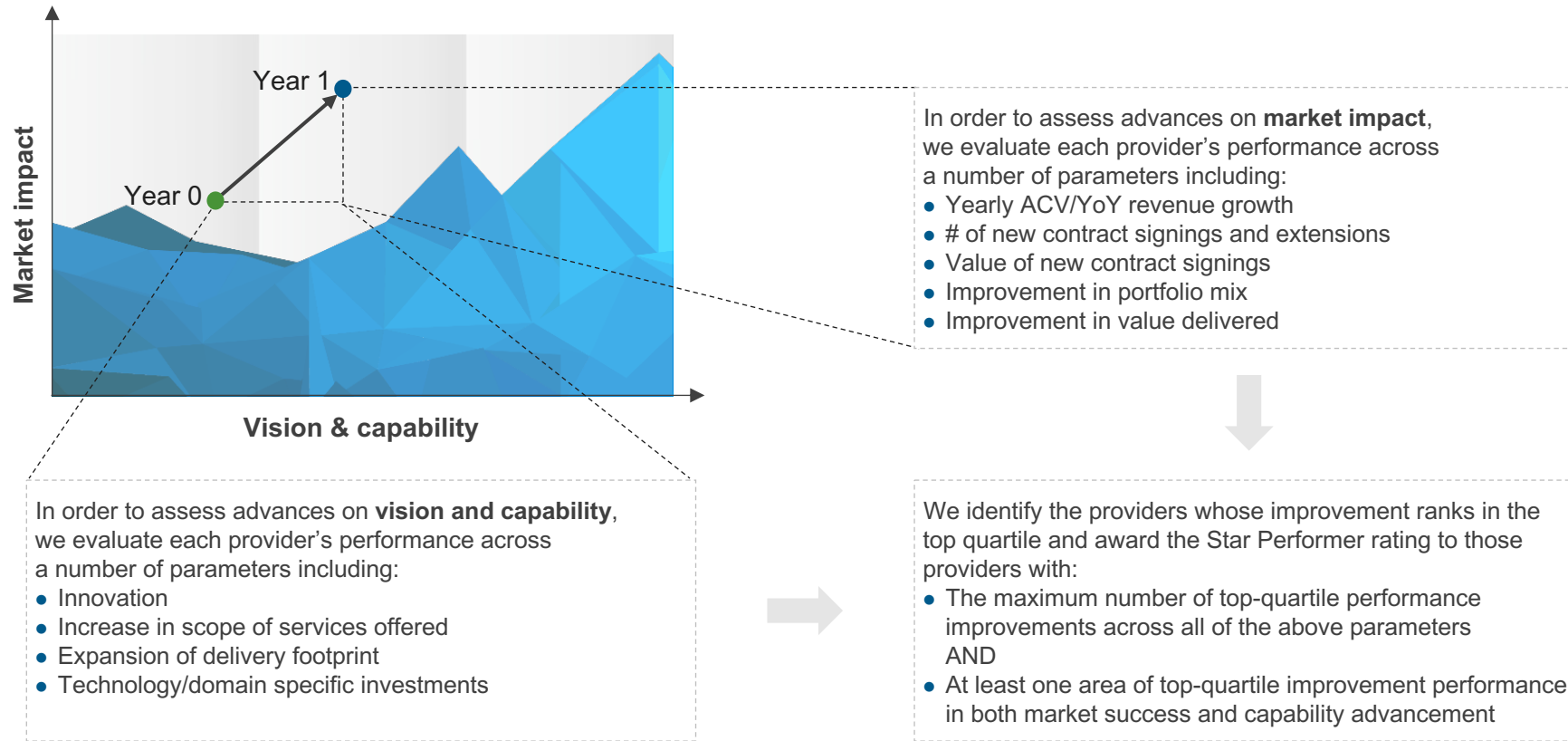
Measures ability to deliver services successfully. This is captured through four subdimensions

- 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

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

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.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Stay connected

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

Toronto
canada@everestgrp.com
+1-214-451-3000

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