From Dissatisfaction to Delight: Sustaining Client Satisfaction in a Post-pandemic World

March 2021

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Contents

For more information on this and other research published by Everest Group, please contact us:

Yugal Joshi, Vice President

Nitish Mittal, Vice President

Sampada Rahalkar, Practice Director

Pranati Goswami, Senior Analyst

Abhishek Chauhan, Analyst

01

Introduction and overview

- Background of the research
- Research methodology
- Scope of the research
- Demographics of the research

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Background of the research

Background of the research

- The uncertainties caused by the pandemic have challenged the business continuity of enterprises globally and accelerated the adoption of a digital-first working model for remote collaboration, in turn opening new doors for innovation
- Service providers have fared well in terms of adapting to the sudden shift in enterprise demands, and their investments in cloud, digital, and data have served as the perfect combination in plugging the IT services industry's supply-demand gap. More importantly, service providers and product vendors have emerged as strategic partners to help enterprises adapt to the new reality and keep their lights on
- Everest Group believes it is imperative to understand the true picture around enterprises' IT investment priorities and their experience in working with technology vendors
- In this research we present:
  - A summary of various enterprises' views on the capabilities of services providers they engage with across applications, digital, cloud and infrastructure, and enterprise platform services
  - Enterprises' views about their key investment priorities in technology and digital services in 2021
- The assessment is based on **523** unique interviews (not a survey), conducted in 2020, with enterprises globally across service lines such as application services, digital services, enterprise platform services, and cloud and infrastructure services. These enterprises were nominated as reference clients by different service providers and product vendors studied across Everest Group's multiple PEAK Matrix® evaluations

Scope of this report:

Geography
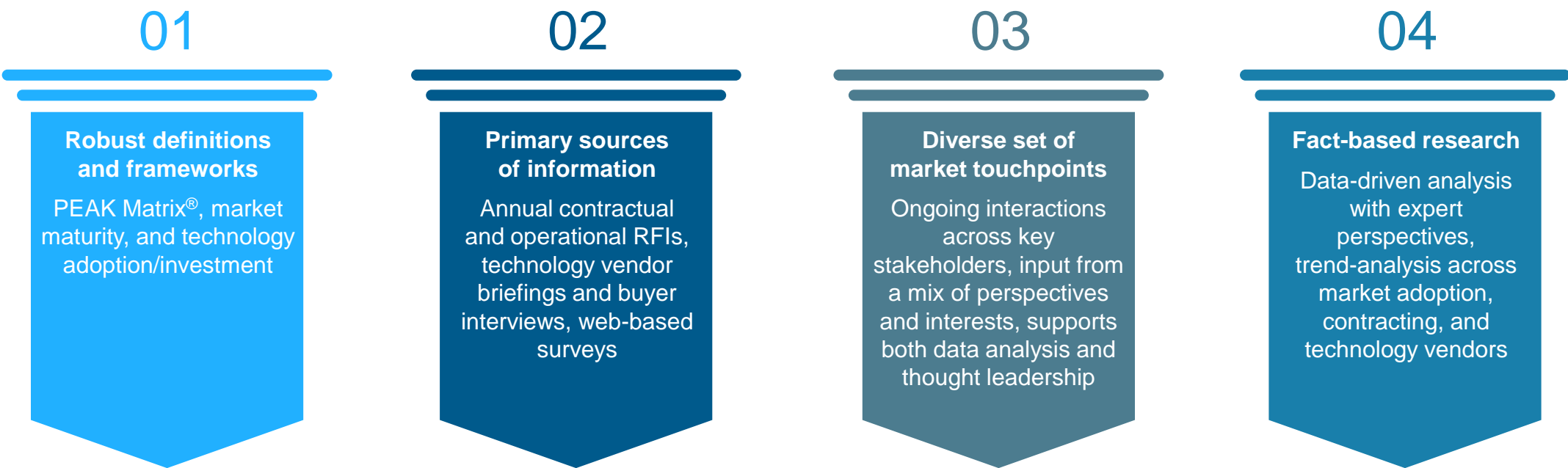Global

Interviews
523 interviews

Services
IT application services,
digital services, cloud and infrastructure,
and enterprise platform services

Technology vendors
68 global technology vendors

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01
Robust definitions and frameworks

PEAK Matrix®, market maturity, and technology adoption/investment

02
Primary sources of information

Annual contractual and operational RFIs, technology vendor briefings and buyer interviews, web-based surveys

03
Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04
Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and technology vendors

Proprietary contractual database of over 500 buyer interviews (updated annually)

Year-round tracking of 60+ IT technology vendors

Large repository of existing research in IT services

Over 25 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, technology vendors, technology providers, and industry associations

Research methodology | enterprise pulse study

Enterprise reach-out	Data synthesis and analysis	Data collection
Conducted 523 enterprise interviews in 2020 as part of PEAK Matrix® assessments across IT services, spanning multiple industries and geographies; technology vendors assessed in these reports shared the enterprise references	Assessed performance themes, conducted gap analysis, and analyzed the future market potential of technology vendors across different IT services functions (e.g., digital, testing, ADM, infrastructure, and cloud)	Structured interviews[1] (~15 questions) with each enterprise, capturing quantitative and qualitative insights across technology priorities, digital agendas, outsourcing strategies, and perceptions about technology vendors

We conducted interviews[1] with enterprises that technology vendors nominated as reference checks for our various PEAK Matrix® assessment projects. Each enterprise was asked multiple questions regarding their experience of working with specific technology vendors and their investment priorities.

1   Please refer to the Appendix for more details related to the questionnaire discussed with enterprises

Research methodology | scope of services

Coverage of services in the report

Application services

Application development and maintenance	Testing services	Package implementation	IT consulting

Digital services

Digital design and consulting	Mobility services	Big data and analytics services	IoT and next-generation technologies	Social media services

Enterprise platform services

ERP platforms	CRM platforms	HCM platforms	Data and digital platforms

Cloud and infrastructure services

Datacenter and cloud services	Workplace services (end-user computing)	Network and security services	Infrastructure operations	Digital platform integration

The report presents consolidated results from interviews with enterprises consuming applications, digital, cloud & infrastructure, and enterprise platform services.

Demographics of the research

Breakdown by enterprise size
2019; percentage of enterprises

100% = 378

- >US$60 billion — 12%
- <US$1 billion — 24%
- US$1-15 billion — 35%
- US$15-60 billion — 29%

Breakdown by industry vertical
2019; percentage of enterprises

100% = 378

- Others — 8%
- Retail, distribution, and CPG — 6%
- Energy and utilities — 4%
- Communication, media, and entertainment — 6%
- Electronics, high-tech, and technology — 7%
- Manufacturing — 5%
- Travel & transport — 2%
- Banking, financial services, and insurance — 39%
- Healthcare and life sciences — 23%

Breakdown by buyer designation
2020; percentage of total discussions

100% = 523

■ CXO ■ Non-CXO

| 68% | 32% |

Breakdown by type of engagement
2020; percentage of service engagements

100% = 523

■ Traditional services ■ Digital services

| 20% | 80% |

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02

Enterprises' assessment of technology vendor capabilities

- Executive summary
- Enterprises' future priorities
- Typical profiles of satisfied and dissatisfied enterprises
- Enterprises' satisfaction levels across years
- What enterprises look for in a technology vendor
- Enterprises' satisfaction levels across industries
- What enterprises think of individual technology vendors

Executive summary

The proportion of satisfied customers has increased by 21% over 2019-20, as opposed to a 5% drop in satisfaction levels over 2018-19.

Enterprises are satisfied with their technology vendors in terms of technical and domain expertise, flexibility of engagement, and relationship management with senior stakeholders.

Enterprises are dissatisfied with the lack of innovation and resource productivity management. They want better reporting, knowledge transfer, and standardization across long-term projects.

More than 80% of the enterprises highlight cost management their top business mandate. About 40% of enterprises indicate automation and cloud adoption as their top digital levers to achieve profitability and growth.

Satisfaction levels have seen an uptick across industries; however, enterprises point to the need to accelerate flexible pricing models to deal with the pandemic-induced uncertainties.

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Enterprises are aligning their future priorities across cost, revenue, and compliance as they enter the next normal

Future priorities

Cost reduction

- Automation
- Cloud adoption
- Modernization
- Application rationalization
- Core rationalization
- Infrastructure rationalization
- Platform rationalization

Revenue growth

- Customer experience
- New offerings
- New markets
- Upselling/cross-selling

Risk and compliance

- Security
- Regulatory compliance
- Risk management
- Data governance
- Fraud handling
- Business continuity management

- Enterprises' future priorities encompass business mandates and technology levers that will help them achieve their goals

- In 2021, enterprises' key focus areas will be cost reduction, revenue growth, and improved risk management and regulatory compliance. Cost savings stand out as the most important focus area, as enterprises shift to a digital-first business model, comprising increased automation initiatives, cloud adoption, modernization, and rationalization of the infrastructure, core systems, and application landscape

Lower profitability due to the pandemic has compelled enterprises to focus on reducing costs

Enterprises' stated future priorities in terms of business mandates
2020; percentage

100% = 278

82%	46%	12%
Cost reduction	**Revenue growth**	**Risk & compliance**
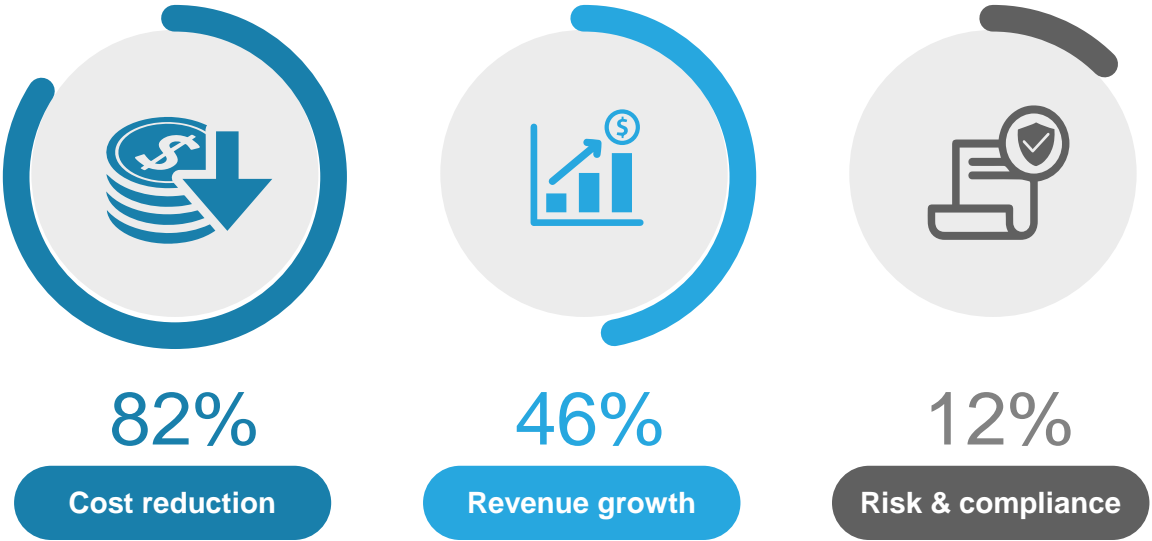
- Managing costs has turned out to be the top mandate for enterprises, followed by revenue improvement and risk and compliance adherence

- Enterprise focus on costs has increased in the wake of weak investment returns, market uncertainty, and the need to achieve substantial yet sustainable cost reduction and workforce productivity improvements

- COVID-19 has severely impacted enterprise budgets; consequently, enterprises are trying to keep their costs low through increased automation initiatives, cloud-for-efficiency mandates, application rationalization, API-based platforms, and vendor rationalization

Automation and cloud are the primary levers to drive the cost transformation mandate for enterprises

Enterprises' stated future priorities in terms of cost levers
2020; percentage

100% = 227

Cost lever	Percentage
Automation	28%
Cloud adoption	26%
Modernization	16%
Infrastructure rationalization	3%
Application rationalization	2%
Platform rationalization	1%
Core rationalization	1%
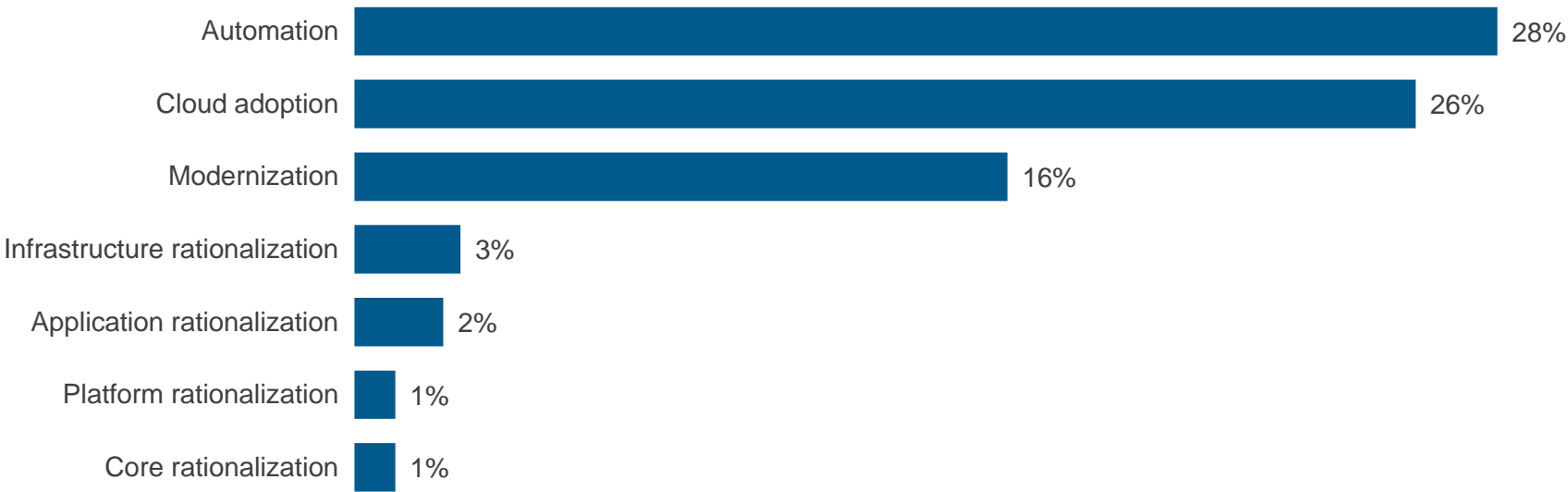
- Automation and cloud adoption have emerged as the top choices for enterprises to manage and reduce their costs, accounting for more than half of the cost-reduction initiatives
- The focus has also been on decommissioning legacy systems to reduce maintenance costs, modernize the application and infrastructure landscape, rationalize application portfolios, and consolidate supplier footprint
- Enterprises are adopting cloud for efficiency by identifying mismanaged resources, eliminating waste, reducing total cost of ownership, and right-sizing computing services to scale

Enterprises are focusing on customer experience to fuel their growth agendas

Enterprises' stated future priorities in terms of revenue
2020; percentage

100% = 126

Priority	Percentage
Customer experience	33%
Upsell/Cross-sell	31%
New offerings	9%
New markets	7%
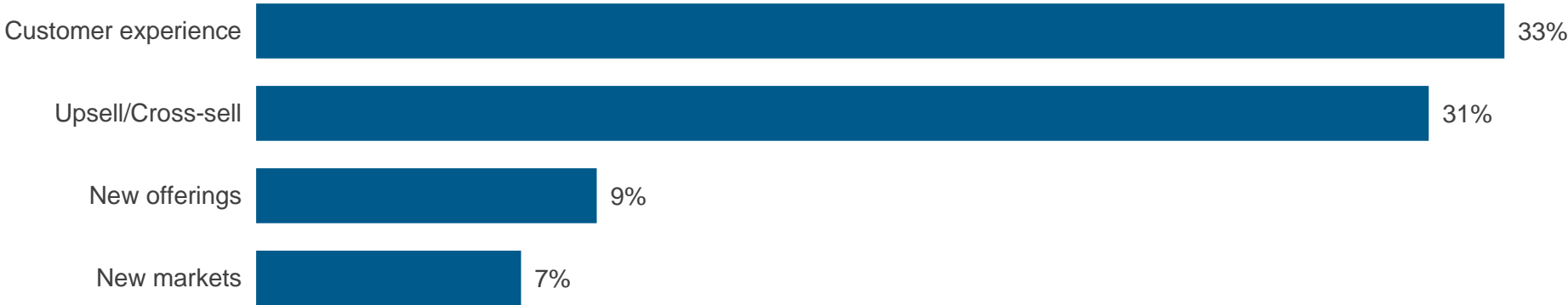
- Improving customer experience and upselling/cross-selling products and services are the top two ways in which enterprises plan to boost their revenues
- The focus on customer experience is paramount due to the shift in consumer spending via digital channels, such as websites, apps, and social media, and a rise in the demand for hyper-personalized products, omnichannel experience, and responsive user interfaces. To improve customer experience, enterprises can either improve existing offerings or provide new offerings across new and existing business lines
- Restrictions on the movement of goods and provision of services during the pandemic have severely impacted expansion into new markets; hence enterprises will continue to focus on expanding their operations and applications support to new regions and grow inorganically by acquiring smaller players

Security has become a top priority due to a shift in the service delivery model from physical to digital

Enterprises' stated future priorities in terms of risk and Compliance
2020; percentage

100% = 31

Category	Percentage
Security	39%
Regulatory compliance	18%
Risk management	15%
Data governance	12%
Fraud management	9%
Business Continuity Management (BCM)	6%
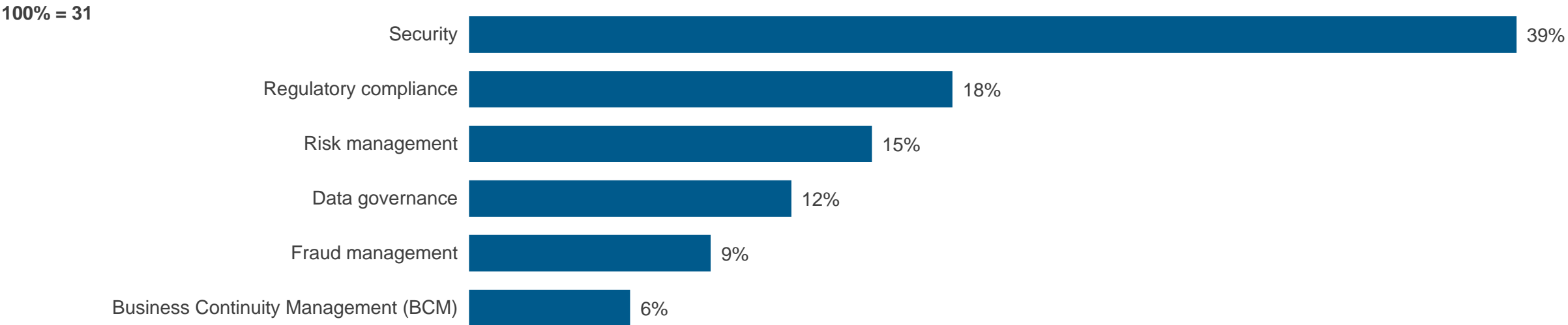
- As global businesses adopt a digital working model, mitigating risks such as cybercrime has become a top priority to enhance organizational resiliency

- The pandemic has also posed regulatory challenges due to the remote working model, in terms of reporting mandates, safety concerns, and even responding to changing restrictions. The pandemic has exposed the shortcomings in both the security and technical infrastructure across industries, with cybersecurity threats and fraud surging during the period

- Data governance is another priority due to the need to manage the availability, usability, integrity, and security of high-volume data in enterprise systems

Automation, data and analytics, cloud migration, and modernization are the top digital levers for enterprises to achieve growth and profitability

Enterprises' stated future priorities in terms of technology levers
2020; percentage

100% = 278

Lever	Percentage
Automation	23%
Cloud adoption/migration	21%
Big data / analytics	17%
Modernization	14%
Digital channel growth	6%
DevOps/DevSecOps/CICD/Agile	4%
Platform/systems implementation	3%
Advanced (blockchain/AR/VR/IoT)	2%
API and microservices	1%
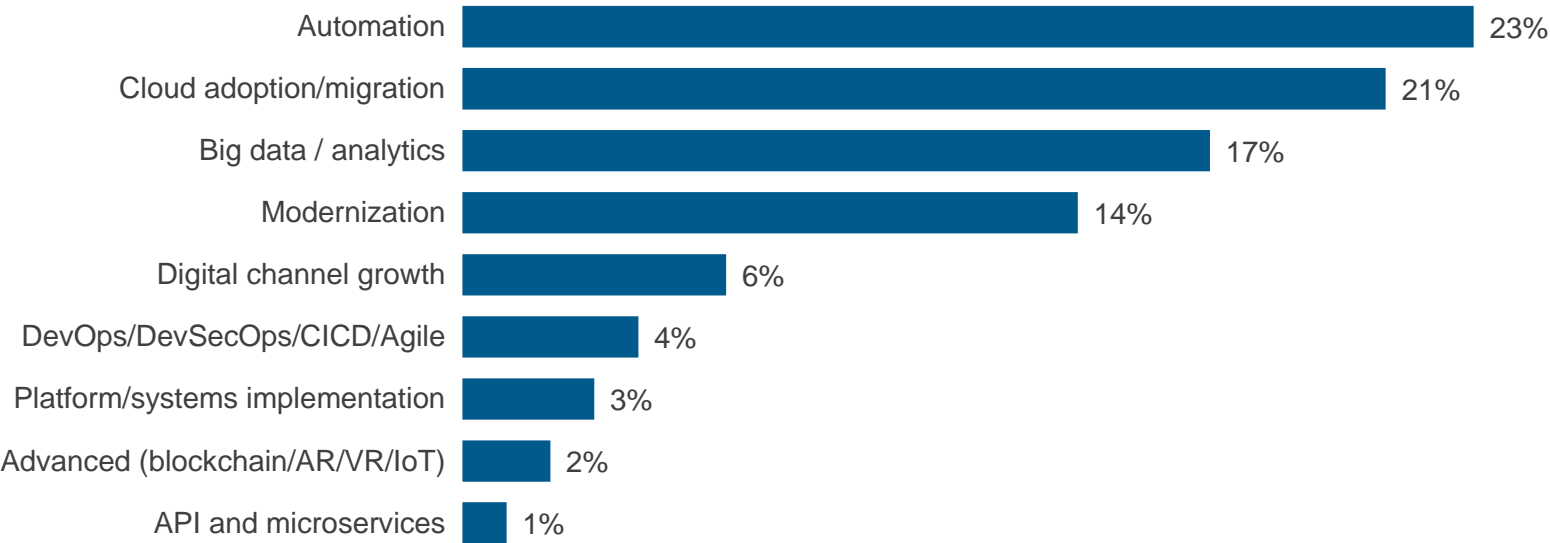
- Automation and cloud adoption emerged as the top technology levers for enterprises as they focus on their cost transformation initiatives

- The digital working model has redirected enterprise focus on cloud modernization requirements as enterprises move to a cloud-based architecture powered by API integration, microservices, and sunsetting on-premise legacy systems

- Enterprises have also been focusing on big data / analytics to handle the surge in data in the remote working model and provide a more personalized experience to customers

- The need for modernization has emerged in all areas, as enterprises look to modernize their data warehouses, application landscape, and core systems across all stages of their product life cycle

Technical expertise and client management are the key areas of satisfaction for a majority of enterprises, while talent and resource management are the major pain points

Profile of a typical satisfied enterprise

- This enterprise typically belongs to an annual revenue bucket of US$1 billion-15 billion
- Commonly expressed positive comments regarding technology vendors are about their technical and domain expertise, relationship management, and engagement flexibility
- The most common limitations include the need for innovation and talent management

Profile of a typical dissatisfied enterprise

- This enterprise typically belongs to an annual revenue bucket of US$15 billion-60 billion
- Commonly expressed positive comments regarding technology vendors are about client management and technical expertise
- The most common limitations include the need for better pricing models, resource management, and strategic partnership

Technology vendors have emerged as true strategic partners, helping enterprises navigate the implications of the pandemic exceptionally well

Enterprises' overall satisfaction with technology vendors[1]
Percentage

	2020	2019	2018
	100% = 523	100% = 299	100% = 272

2020	2019	2018
70% Satisfied / **30%** Not satisfied	**49%** Satisfied / **51%** Not satisfied	**54%** Satisfied / **46%** Not satisfied
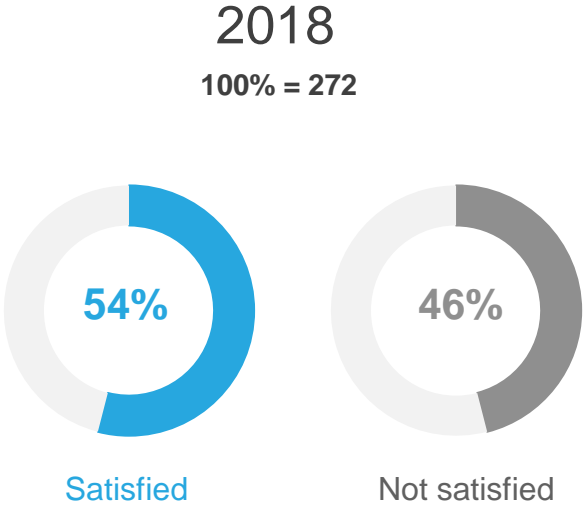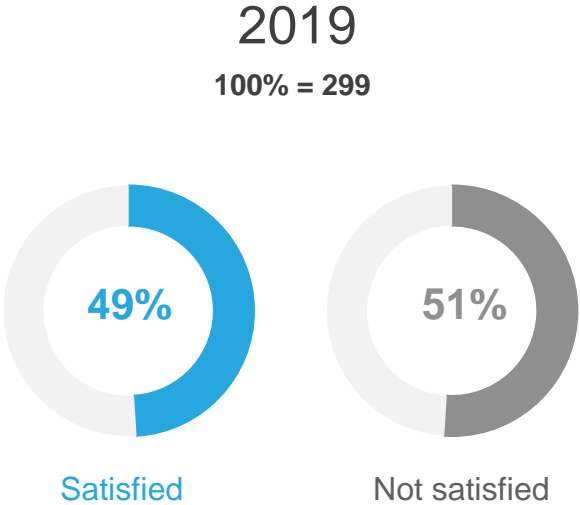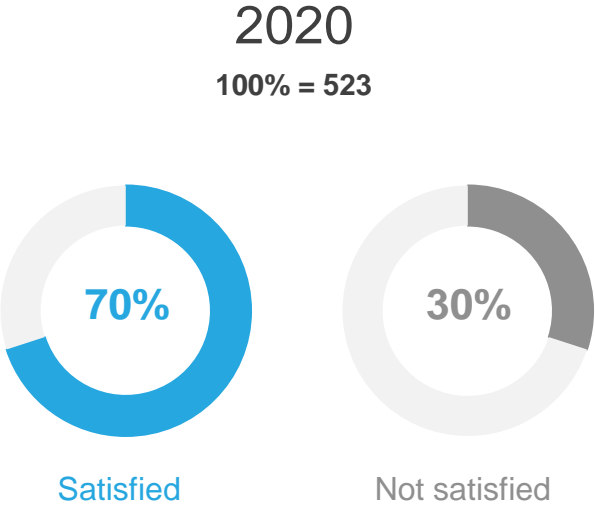
- The proportion of satisfied customers increased by 21% in 2020 over the last one year, and 16% over the last two years
- Technology vendors' investments to enhance their offerings in cloud and digital increased enterprises' satisfaction in 2020, as they sought to adopt newer technologies and build industry-specific partnerships
- The major pain points for enterprises are talent attrition and productivity, value-add and innovation, and technology vendors' inability to communicate effectively with the senior leadership

1   Satisfied: A satisfaction rating of 8 or above; Not satisfied: A satisfaction rating below 8 (out of 10)

North American enterprises have reported above-average satisfaction scores vis-a-vis firms in the UK and Continental Europe

Enterprises' overall satisfaction with technology vendors across geographies[1]
Percentage

100% = 261

North America
73%

100% = 161

UK & Europe
63%

100% = 68
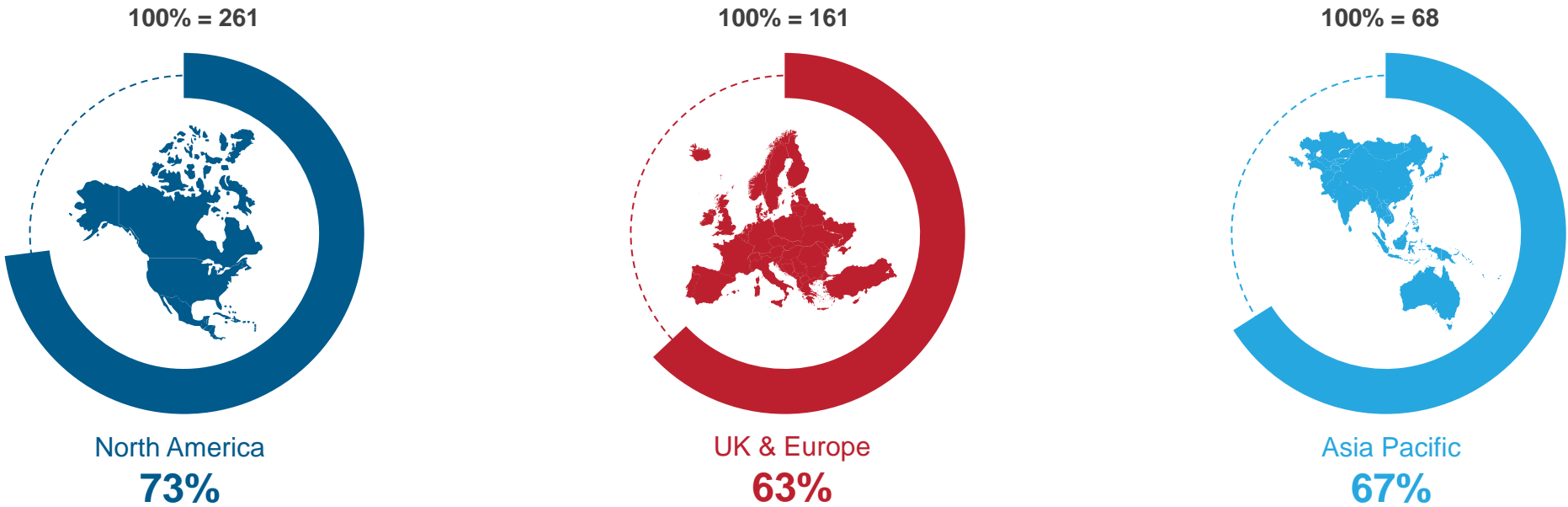
Asia Pacific
67%

- Enterprises in North America experienced higher satisfaction as compared with ones in the UK & Europe and Asia Pacific, mainly because of lower talent attrition in the region along with superior client management skills

- Also, enterprises in the UK & Europe and Asia Pacific have expressed dissatisfaction with their technology vendors' inability to provide the right talent in terms of cultural fit and native language support. Technology vendors' domain expertise in these regions is also lower than those in North America, primarily due to the lack of industry-specific solutions and limited understanding of geographic nuances

1   Satisfied: Satisfaction rating of eight or above, Not satisfied: Satisfaction rating below eight (out of 10)

What do enterprises look for in a technology vendor? (page 1 of 2)

Partnership approach	Service delivery	Talent management
• **Transparency –** Table stakes include transparent, proactive, and open communication across delivery timelines and bottlenecks • **Strategic partnering –** Understanding enterprises' strategic vision has become a hygiene factor. The current pandemic has led to the preference for technology vendors that align their decision-making with enterprises' strategic interests • **Beyond engagement –** Enterprises expect long-standing partners to leverage innovation for gaining process efficiencies. Those who delight go above and beyond the scope of the engagement to bring forth new ideas and initiatives	• **Proactive, not reactive –** Table stakes include proactiveness in monitoring and mitigating potential issues/challenges; with pandemic-related uncertainties shifting global business dynamics, enterprises prefer high responsiveness to changes in expected outcomes • **Industry best practices –** Enterprises prefer technology vendors that leverage industry best practices and leverage technology to create better operating and service models • **Decode competition –** Table stakes include deciphering the competitive landscape and recommending innovations	• **Cultural fit –** For onshore talent, cultural fit is one of the most important aspects for enterprises. They prefer talent that is proficient in the local language and can understand geography-specific nuances of their business • **Attrition –** Attrition has been one of the major concerns for enterprises this year, as it affects project costs and timelines • **Expertise –** Enterprises look for technology vendors that can provide talent with the right level of technical and domain expertise. They want people who understand the industry well and can synergize their technical and domain knowledge to drive business outcomes

What do enterprises look for in a technology vendor? (page 2 of 2)

Commercials	IT ecosystem	Communication
• **Transparency –** Enterprises prefer technology vendors that offer line-by-line pricing models and are upfront about any structural or rate changes • **Fixed vs. flexible model –** Enterprise response to fixed versus flexible pricing models is varied. Technology vendors should provide enterprises with the choice to opt for a model that works best for them. Typically, larger enterprises prefer flexible pricing models to meet any variations in scale, while smaller enterprises prefer fixed pricing models to have a better view of their expenditures	• **Technology –** Investments in the latest technology skill sets have become table stakes. Enterprises prefer technology vendors that are abreast with the latest innovations and technologies so that they can identify the right set of opportunities for them • **Domain –** Enterprises look up to technology vendors that present the right set of people who can demonstrate the required industry experience to do the job. Understanding industry nuances helps create differentiated insights and analysis • **Governance –** In recent times, there has been substantial regulatory pressure on enterprises. Thus, they rely on technology vendors that can leverage the regulatory and compliance dynamics to help them approach the market in the most appropriate manner	• **With the enterprise –** Technology vendors should be able to sell business outcomes to the client's senior leadership. Generally, the communication is only limited to their engineering team. Enterprises want technology vendors to make their senior leadership feel confident about their investments • **Internal communication –** Technology vendors should facilitate a similar degree of communication across all their hierarchy levels. They should make sure that account managers and the middle-management layer are able to translate business requirements to the technology team • **Standardization –** There should be more standardization in reporting and documentation across all levels. Enterprises want standardized documentation of all the methodologies and outcomes to obtain a simple and holistic view of the project

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Technology vendors have observed an overall increase in customer satisfaction

Satisfaction score in 2020 vs. 2019: ⬆ > 0.1   ⬇ < -0.1   ⬌ ≥ -0.1 & ≤ 0.1

Technology vendors	YoY change in customer satisfaction	Technology vendors	YoY change in customer satisfaction	Technology vendors	YoY change in customer satisfaction
accenture	⬆	GFT	⬇	Softtek	⬆
Atos	⬆	happiest minds The Mindful IT Company Born Digital . Born Agile	⬆	TATA CONSULTANCY SERVICES	⬆
birlasoft	⬆	HCL	⬆	Tech Mahindra	⬆
Capgemini	⬆	HEXAWARE	⬌	virtusa	⬆
Coforge	⬆	IBM	⬆	wipro	⬌
Cognizant	⬆	Infosys	⬇	ZenSar	⬆
CSS CORP	⬇	LTI Let's Solve	⬌	SONATA SONATA SOFTWARE	⬌
DXC.technology	⬆	MICROLAND Extraordinary. Everyday.	⬇	stefanini GROUP	⬆
epam	⬆	Mphasis The Next Applied	⬆	UST	⬆
genpact	⬇	NTT DATA	⬌		

Technology vendors' strengths and limitations
Aggregated market perspective

Technical expertise

Flexibility and responsiveness

Domain expertise and market understanding

Relationship building

STRENGTHS

LIMITATIONS

Creativity and innovation

Standardized reporting and documentation

Onshore attrition and offshore productivity

Value addition

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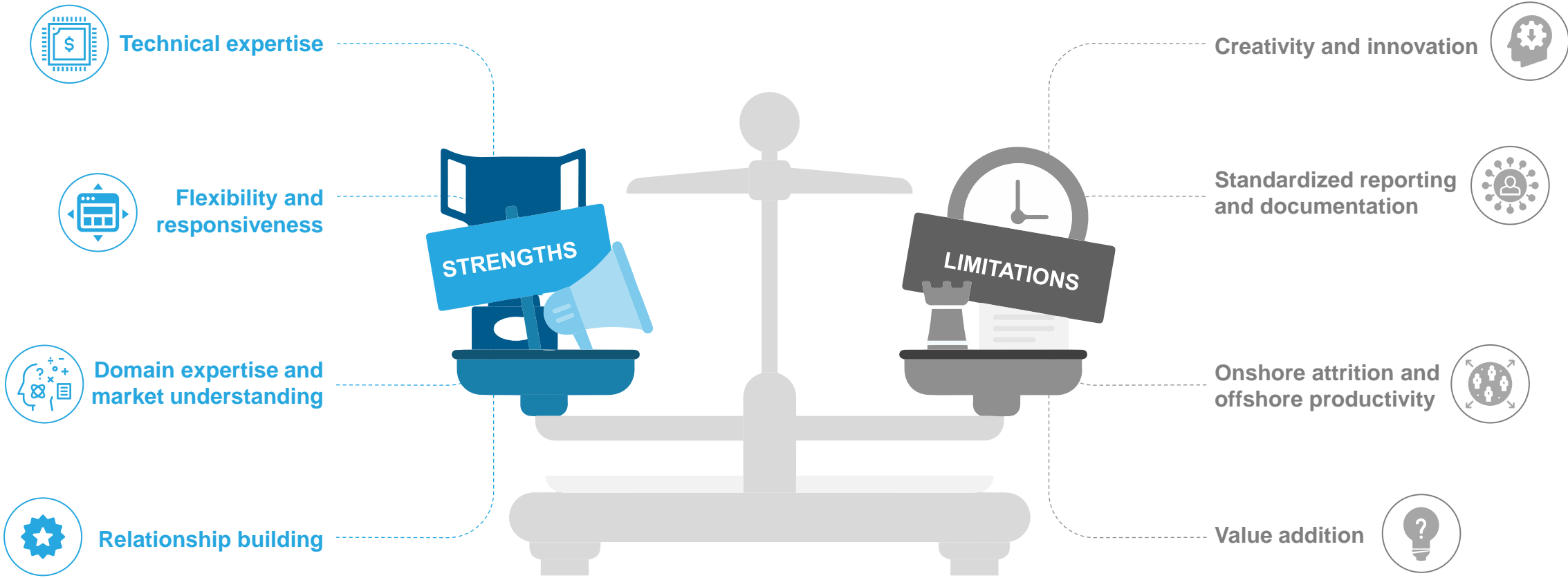
Enterprises want technology vendors that are proactive to business challenges and competitors' moves

Technical expertise

Technology vendors' investments to upskill their talent pool with digital skills such as automation, AI/ML, cloud, and data have started showing results, and clients are acknowledging the business benefits realized from these initiatives.

Domain expertise

Domain expertise remains one of the top imperatives for enterprises, which trust technology vendors that can provision SMEs, understand regulatory dynamics, and leverage industry-specific nuances to drive business outcomes.

Talent management

With the global business model transitioning to remote working, talent management has suffered and hence become a key criterion for enterprises when evaluating their investments. Onshore talent requirement necessitates not only technical and domain expertise, but also cultural fit and adaptability with the enterprises' organization structure. Enterprises consider attrition to be an issue, and they see more opportunities in offshore talent management in terms of overall expertise, productivity, level of connect, and standardization in reporting and communication.

Commercials

Enterprises have been neutral in terms of their satisfaction levels with technology vendors' commercials. They prefer a pricing model that allows the flexibility to scale up/down and accommodate scope changes. With business continuity being severely impacted and operating models shifting to remote working, enterprises appreciate pricing models that offer transparency at the line/element level.

Client management

Enterprises suggest that technology vendors take responsibility of all aspects of the working relationship and ensure transparency in delivery and timelines. Some large enterprises have highlighted that technology vendors that are abreast with the latest organizational updates earn greater trust.

Strategic partnership

Enterprises want technology vendors to align technical decision-making with their strategic interests. They look for transparency and not complacency. They want technology vendors to tell them what to do and lead meaningfully on project delivery, resource efficiency, and IT estate.

Value addition and innovation

Enterprises are typically dissatisfied with the level of innovation that technology vendors bring to the table. They want technology vendors to think outside the box and leverage advanced technologies such as automation, blockchain, and ML to reduce manual effort, cut down costs, and increase business efficiencies.

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Technology vendors have fared well in strategic relationships with enterprises, but lag in terms of providing the right pricing constructs

Satisfaction score in 2020 vs 2019: ↑ > 0.1   ↓ < -0.1   ↔ ≥ -0.1 & ≤ 0.1

	Technical expertise	Domain expertise	Talent management	Commercials	Client management	Strategic partnership	Value addition and innovation
BFSI	↔	↑	↑	↑	↑	↑	↑
Communication, media, and entertainment	↔	↑	↑	↓	↔	↔	↑
Electronics, high-tech, and technology	↑	↑	↑	↑	↑	↑	↑
Energy and utilities	↓	↓	↓	↓	↑	↑	↓
Healthcare and life sciences	↑	↓	↑	↔	↑	↑	↑
Manufacturing	↓	↑	↓	↓	↑	↑	↓
Retail, distribution, and CPG	↔	↓	↓	↑	↔	↑	↔
Travel and transportation	↓	↑	↑	↓	↑	↑	↑

- Technology vendors rose to the challenge and emerged as true enterprise partners, helping enterprises maintain business continuity during the pandemic and have been lauded for their client management capabilities
- A major area of dissatisfaction across verticals is technology vendors' inability to provide suitable commercial constructs. During the pandemic, enterprises faced a serious cash crunch and were dissatisfied with technology vendors' inability to adjust their pricing models to suit their short-term requirements

Strengths of technology vendors
Enterprise views

> They invest in being strategic partners by finding ways to deliver value beyond the SLAs. They do not act like vendors; they act like partners – they care.
>
> *– Director, Digital Innovation, one of world's largest pharmaceutical firms*

> The technology vendor has provided quality talent for our project. It is a dedicated team that handles complex projects independently with very little interference from our side.
>
> *– SVP, a US-based multinational financial services firm*

> The provider ensures adherence to our stringent timelines, provides high-quality output, and proactively seeks our support to brainstorm solutions for complex processes.
>
> *– Director, one of the world's largest telecommunications firms*

> The provider responds quickly and effectively when things go wrong and has been flexible in providing additional resources to meet sudden requirements.
>
> *– CIO, an international specialty insurance group*

Limitations of technology vendors
Enterprise views

> **"** We have faced challenges in explaining our processes to the technology vendor. The technology vendor has a very complex and hierarchical system, which makes it challenging for us to navigate our way up to the highest levels during bottleneck situations.
>
> *– VP, International Servicing, a large Swiss insurance company* **"**

> **"** We faced a lot of attrition over the last 18 months. Though the partner provided resources on time, the knowledge management process was not streamlined, which affected our project timelines.
>
> *– Head, New Product Development, a Fortune 500 diversified financial services group* **"**

> **"** Resources are focused on service delivery and do not understand our business priorities. They do not interact with us on a regular basis and seldom provide perspectives on how we can increase productivity.
>
> *– Senior Director, Data Science, a US-based multinational mass media and entertainment conglomerate* **"**

> **"** The vendor brings in some strategic thinking, but we need to have regular interactions with senior stakeholders. These interactions will ensure that we continue to derive higher value from services and improve our existing processes.
>
> *– VP, Analytics & Insights, a US medical devices company* **"**

What enterprises think of individual technology vendors (page 1 of 7)

Technology vendor	Strengths	Limitations
aseya	• Technical expertise • Automated testing	• Onshore talent management • Commercial constructs
accenture	• Senior leadership engagement • Proactive client-centric leadership	• Competitive pricing for long-term/annuity contracts • Value-added services
APPIRIO	• Technical expertise • Responsiveness and collaboration	• Onshore talent management • Testing
ArisGlobal	• Client partnership • Domain expertise	• Project management • Commercial constructs
	• Client management • Project management	• Domain expertise • Value addition and innovation
Atos	• Agile and responsive • Resource management	• Commercial constructs • Time-to-market
birlasoft	• Technical expertise • Proactive in bringing innovation	• Talent management • Global outreach
BRIDGEi2i	• Domain expertise • Commercial constructs	• Communication gap between teams • Proactiveness and accountability
Capgemini	• Responsive and proactive leadership • Strong technical expertise and innovation	• Line-by-line pricing model • Standardized reporting and communication
brillio	• Cloud and digital capabilities • Design thinking	• Automated cloud infrastructure monitoring • Talent management

What enterprises think of individual technology vendors (page 2 of 7)

Technology vendor	Strengths	Limitations
Cask	• Technical and domain expertise • Consulting capabilities	• Agile delivery • Talent management
CitiusTech	• Technical and domain expertise • Communication and transparency	• Narrow offerings • New technology areas
Cognizant	• Senior leadership engagement • Large project execution	• Thinking outside-the-box • Stagnant in terms of service-level incremental improvements
CSS CORP	• Change management • Automation	• Talent management • Technical expertise
CUSTOMERTIMES	• Client management • Commercials	• Technical expertise • Talent management
DAMCO Ensuring Success. Always	• Agile development • Technical expertise	• Quality assurance • Proactive monitoring
DATAMATICS	• Technical expertise • Data analytics & engineering	• Domain expertise • Commercial constructs
DMI DRIVING MOBILE INNOVATION	• Technical expertise • Client-centricity	• Domain expertise • Commercial constructs
DXC.technology	• Commercial flexibility • Talent expertise and retention	• Change management • Proactive innovation
emids experience partnership.	• Domain expertise • Client management	• Talent management • Technical expertise

What enterprises think of individual technology vendors (page 3 of 7)

Technology vendor	Strengths	Limitations
epam	• Core software development expertise • Responsiveness and flexibility	• Flexible commercials • Talent allocation
EXL	• Strategic partnership • Domain expertise	• Analytics product offerings • Advanced technologies
GAVS	• Technical and domain expertise • Agile and nimble	• Understanding client requirements • Managed services
genpact	• Domain expertise • Client management	• Commercial constructs • AI best practices
GFT	• Client partnership • Domain understanding	• Talent management • Proactive, not reactive planning
happiest minds The Mindful IT Company Born Digital . Born Agile	• Client partnership • Resource quality	• Technical expertise • Creating internal IP
HARMAN A SAMSUNG COMPANY	• Technical and automation expertise • Agile and flexible	• Microservices offerings • In-house competency development
HCL	• Strong technical capabilities, especially in cloud and infrastructure • Consistent innovation	• Onshore talent management • Proactiveness and innovation
HEXAWARE	• Technical expertise • Commercial constructs	• Strategic partnership • Thought leadership
IBM	• Client management • Innovation	• Commercial constructs • Talent management

What enterprises think of individual technology vendors (page 4 of 7)

Technology vendor	Strengths	Limitations
incedo	• Client management • Strategic partnership	• Domain expertise • Innovation
indegene	• Flexibility and scalability • Domain expertise	• Digital services • Scalable analytics
infinite	• Domain expertise • Vertical solutions	• Operational, not strategic partner • Proactiveness
infogain	• Communication with senior leadership • Commercial constructs	• Innovation • Strategic partnership
infostretch	• Proactiveness • Talent management	• Domain expertise • Industry best practices
Infosys	• Strong technical capabilities • Long-term partnerships based on trust and thought leadership	• Bringing innovation • Wider adoption of automated testing
IQVIA	• Client management • Innovation	• Competitive pricing • Customized platforms
jade GLOBAL	• Talent management • Project management	• Strategic partnership • Consulting capabilities
LTI Let's Solve	• Focus on consistency with quality • Flexible in terms of talent onboarding, agility, and scalability	• Increase the breadth of technical capabilities • Talent management
medidata	• Technical expertise • Change management	• Commercial constructs • Corporate strategy

What enterprises think of individual technology vendors (page 5 of 7)

Technology vendor	Strengths	Limitations
mednet *The preferred choice for healthcare solutions*	• Technical expertise • Talent management	• Risk and compliance • Inventory management and randomization
MICROLAND® Extraordinary. Everyday.	• Client management • Strategic partnership	• Project management • Domain expertise
Mindtree A Larsen & Toubro Group Company	• Client management • Agile and flexible	• New technology initiatives • Bringing innovation
Mphasis The Next Applied	• Domain expertise • Automation	• Talent management • Client management
Mu Sigma DO THE MATH	• Technical expertise • Client management	• Lack of flexibility • High turnaround time
Coforge	• Domain expertise • Strategic partnership	• Proactiveness • Brand recognition and footprint
NORDIC	• Technical expertise • Client management	• Bringing innovation • Strategic partnership
NSE NSEIT	• Client management • Domain expertise	• Technical expertise • Talent management
NTT DaTa	• Domain expertise • Commercial constructs	• Talent management • Proactiveness and nimbleness
ORACLE	• Platform capabilities • Documentation and reporting	• Talent management • Technical expertise

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What enterprises think of individual technology vendors (page 6 of 7)

Technology vendor	Strengths	Limitations
(Publicis Sapient logo)	• Technical expertise • Talent management	• Domain expertise • Value addition and innovation
pwc	• Client management • Technical expertise	• Talent management • Domain expertise
RapidValue Driving Digital Excellence	• Domain expertise • Client management	• Innovation • Proactiveness
SILVERLINE	• Technical resources • Client management	• Domain expertise • Partnership approach
Softtek®	• Technical expertise • Commercial constructs	• Strategic partnership • Proactiveness
SONATA SONATA SOFTWARE	• Talent management • Responsiveness	• Strategic partnership • Standardized documentation
sopra steria	• Domain expertise • Client management	• Commercial constructs • Technical expertise
stefanini GROUP	• Strategic partnership • Project management	• Talent management • Standardized documentation
TATA CONSULTANCY SERVICES	• Strong relationship management • Domain-specific consulting capabilities	• Managing onshore resources in terms of attrition and cultural fit • Internal communications
Tech Mahindra	• Relationship management • Strong technical and domain expertise	• Should scale up automated testing abilities • Resource management

What enterprises think of individual technology vendors (page 7 of 7)

Technology vendor	Strengths	Limitations
TRIANZ DIGITAL EVOLUTION SIMPLIFIED	• Technical expertise • Consulting capabilities	• Domain knowledge • Automation
ttec	• Client management • Commercial constructs	• Domain expertise • Innovation
UST	• Strategic partnership • Innovation	• Standardized documentation • Automation
vírtusa	• Technical expertise • Client management	• Domain expertise • Talent management
wipro	• Agile workforce • Strong technical capabilities	• Onshore talent management • Relationship management
WNS	• Talent management • Flexibility and timeliness	• Domain expertise • Commercial constructs
ZenSar	• Technical expertise • Commercial constructs	• Domain expertise • Client management
ZS	• Strategic partnership • Technical expertise	• Artificial intelligence • Commercial constructs

03

Appendix

- Research methodology – questions asked to enterprises
- Scope of discussions conducted with enterprises' references
- Glossary
- Research calendar

Research methodology | questions asked to enterprises

We asked enterprises the following sample questions regarding their respective service partners:
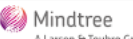
- What are your top three investment priorities for the next 12-18 months?

- What is your level of satisfaction with your technology vendor(s)?

- What differentiates your technology vendor from others offering similar services?

- How would you rate your experience working with your provider on the following dimensions?
  (1 – lowest, 10 – highest):
  - Domain expertise
  - Technical expertise
  - Innovation / value addition
  - Pricing/commercials
  - Strategic partnership
  - Client management
  - Talent management

- What are the limitations of your technology vendor? In which specific areas would you like to see increased investment from your provider?
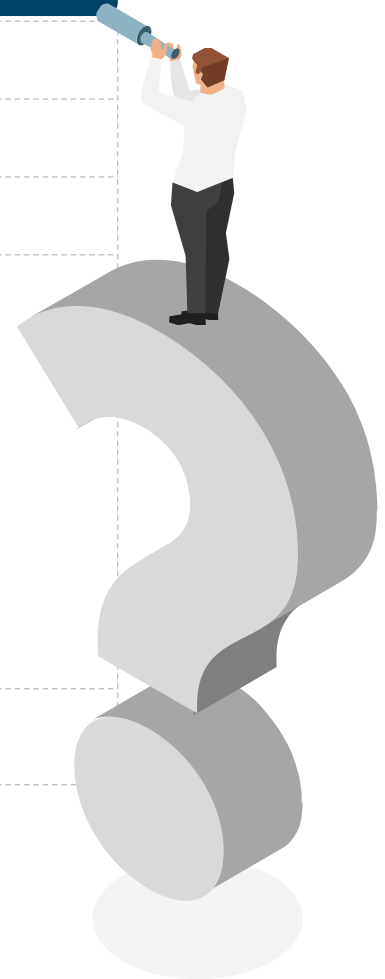
Scope of discussions conducted for respective technology vendors; the number of enterprise clients nominated may vary by vendor (page 1 of 2)

Technology vendor	Application services	Cloud and infrastructure services	Digital services	Enterprise platform services
aseya				✓
accenture	✓	✓	✓	✓
APPIRIO				✓
ArisGlobal			✓	✓
(logo)	✓			
AtoS	✓		✓	✓
birlasoft	✓		✓	
BRIDGEi2i			✓	
brillio	✓	✓	✓	
Capgemini	✓	✓	✓	✓
Cask				✓
CitiusTech			✓	
Coforge	✓			✓
Cognizant	✓	✓	✓	✓
CSS CORP	✓	✓		
CUSTOMERTIMES		✓	✓	
DAMCO	✓			

Technology vendor	Application services	Cloud and infrastructure services	Digital services	Enterprise platform services
DATAMATICS			✓	
DMI	✓		✓	
DXC.technology	✓	✓		✓
emids			✓	
epam	✓			
EXL			✓	
GAVS	✓	✓	✓	
genpact	✓	✓	✓	
GFT	✓			
happiest minds	✓	✓	✓	
HARMAN			✓	
HCL	✓	✓	✓	✓
HEXAWARE	✓			
IBM	✓	✓		
incedo	✓			
indegene			✓	
infinite			✓	

Scope of discussions conducted for respective technology vendors; the number of enterprise clients nominated may vary by vendor (page 2 of 2)

Technology vendor	Application services	Cloud and infrastructure services	Digital services	Enterprise platform services	Technology vendor	Application services	Cloud and infrastructure services	Digital services	Enterprise platform services
infogain			✓		pwc	✓			
infostretch			✓		RapidValue	✓			
Infosys	✓	✓	✓	✓	SILVERLINE		✓	✓	
IQVIA			✓	✓	Softtek	✓			✓
jade GLOBAL	✓				SONATA	✓		✓	
LTI Let's Solve	✓	✓	✓	✓	sopra steria	✓			
medidata			✓	✓	stefanini GROUP	✓		✓	
mednet			✓	✓	TATA CONSULTANCY SERVICES	✓	✓	✓	✓
MICROLAND		✓			Tech Mahindra	✓	✓	✓	✓
Mindtree	✓				TRIANZ	✓	✓		✓
Mphasis	✓			✓	ttec				✓
Mu Sigma			✓		UST	✓	✓	✓	
NORDIC			✓		virtusa	✓	✓	✓	✓
NSE NSEIT	✓				wipro	✓	✓	✓	✓
NTT DATA	✓		✓	✓	WNS			✓	
ORACLE			✓	✓	ZenSar	✓	✓	✓	✓
		✓	✓		ZS			✓	

Glossary of key terms used in this report

Technical expertise	The technology vendor's ability to understand client requirements and translate them into an IT application using various software technologies
Domain expertise	The knowledge of industry dynamics and the ability to understand the broader business functionality of IT applications
Strategic partnership	The ability to have a big-picture view of the business problem and the willingness to provide an end-to-end solution in an integrated manner; the solution covers both advisory and implementation aspects
Talent management	The ability to rightly map resources per project requirements; it also includes striking the right balance between offshore and on-site resources and attrition levels
Pricing	The ability to rightly price services with an appropriate level of outcome ownership
Client management	The ability to orchestrate between account and delivery teams to maintain coherent communication and deliver IT projects
Value addition and innovation	Innovation could be in the form of additional benefits to the client, over and above those contractually committed in the scope of work or the use of innovative processes and technologies to improve client outcomes.

Research calendar
Information Technology Services

<table>
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Flagship ITS reports	Release date
Insurance Business Model Innovation Enablement Services PEAK Matrix® Assessment 2021 – Pathways to Drive Competitive Advantage Amidst Uncertainties	November 2020
Application and Digital Services in Capital Markets PEAK Matrix® Assessment 2021	November 2020
Salesforce Healthcare Services PEAK Matrix® Assessment 2021	December 2020
Artificial Intelligence (AI) Services – State of the Market Report 2021 | Scale the AI Summit Through Democratization	January 2021
From Dissatisfaction to Delight: Sustaining Client Satisfaction in a Post-pandemic World	**March 2021**
Application and Digital Services in Banking PEAK Matrix® Assessment 2021	Q2 2021
Open Banking Platforms PEAK Matrix® Assessment 2021	Q3 2021
Digital Claims Solutions PEAK Matrix® Assessment 2021	Q4 2021

Thematic ITS reports	Release date
Strength in Adversity: Enterprise Service Resilience During the COVID-19 Crisis	June 2020
BigTechs in BFSI Industry: The Theory of Co-existence for Market Expansion	August 2020
Charting the Skilling Journey to Build the IT Services Talent of Tomorrow: Replacing the Commodity IT Services Role Definitions	August 2020
With Spin-off, IBM Finally Embraces a Cloud and AI-first Future	October 2020
Is Work From Home (WFH) the Future of Work? A Perspective on WFH, Locations, and Delivery Strategy Beyond COVID-19	December 2020
Recalibrating for Resiliency – 2021 Key Issues in Global Sourcing – Enterprise IT Perspective	January 2021
London Insurance Market – State of the Market Report 2021 | Evolution or Digital Revolution ?	Q4 2021

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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

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-647-557-3475