

Everest Group PEAK Matrix™ for Digital Workplace Service Providers 2019

Focus on NTT DATA
July 2019



Introduction and scope

Everest Group recently released its report titled “[Digital Workplace Services PEAK Matrix™ Assessment 2019: Enterprises, It is Time to Humanize the Workplace Experience](#).” This report analyzes the changing dynamics of the digital workplace services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 21 service providers on the Everest Group PEAK Matrix™ for digital workplace services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of digital workplace service providers based on their absolute market success and delivery capability. Everest Group also identified 5 service providers as the “2019 Digital Workplace Services Market Star Performers” based on the strongest forward movement demonstrated on the PEAK Matrix year-on-year.

Based on the analysis, **NTT DATA emerged as a Leader**. This document focuses on NTT DATA’s digital workplace experience and capabilities and includes:

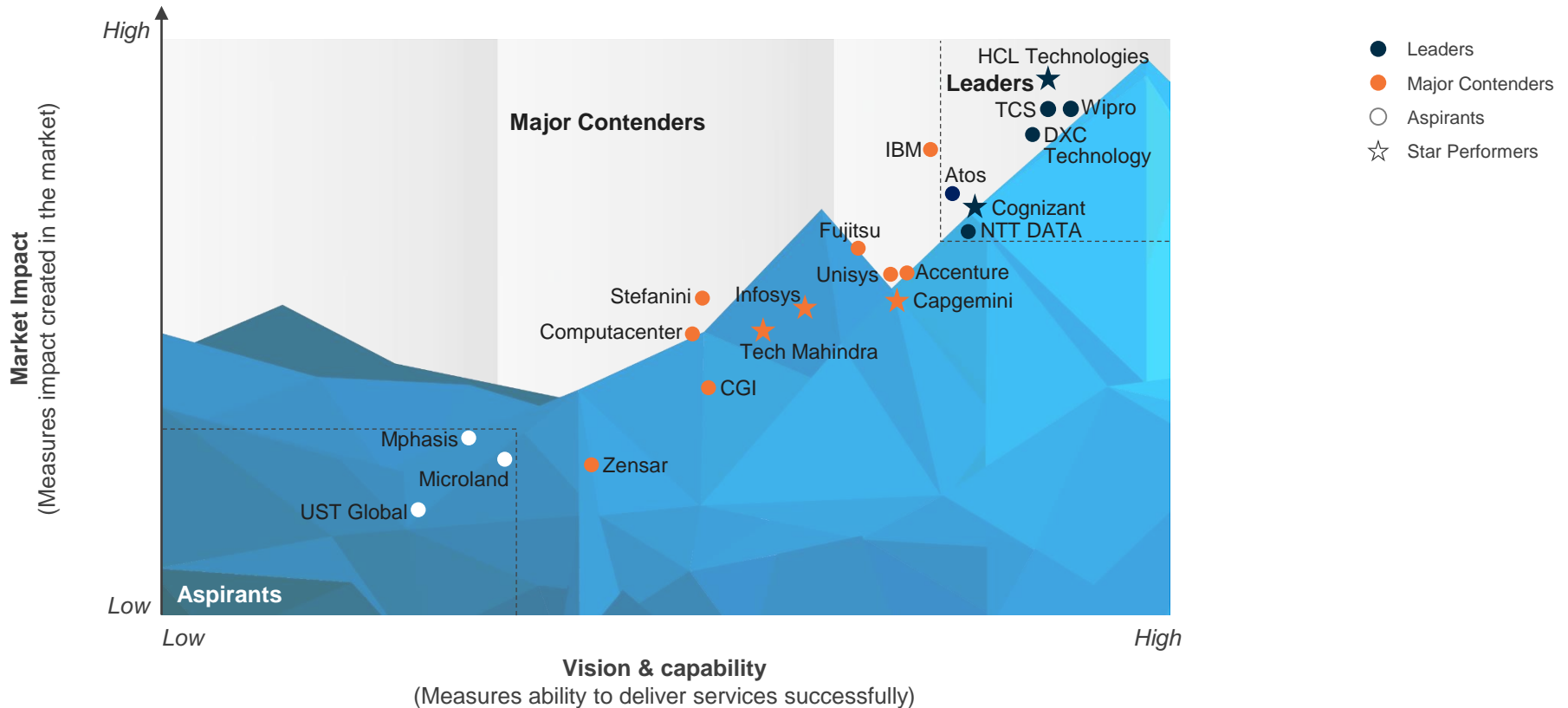
- NTT DATA’s position on the digital workplace services PEAK Matrix
- Detailed digital workplace services profile of NTT DATA

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers’ relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Everest Group PEAK Matrix™

Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment 2019 | NTT DATA positioned as Leader

Everest Group Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment 2019¹



¹ Assessment for Atos, CGI, Fujitsu, and IBM excludes service provider inputs in this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers

Source: Everest Group (2019)

Digital workplace services overview

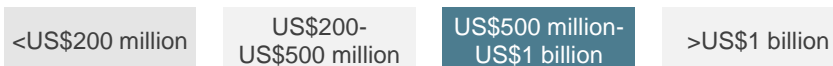
Strengths

- Has balanced and scaled workplace services portfolio underpinned by credible proof points spread across different workplace segments and industries
- Credible set of partnerships with large vendors as well as startups, to enhance its digital workplace capabilities
- Clients appreciate NTT Data's focus on user experience and client-centric transformation approach

Areas of improvement

- Needs to position itself as a strategic partner through better relationship management with acquired clients (e.g. clients from Dell services)
- Existing clients have pointed out lack of proactive innovation push, less than effective account management, and lack of client education on next gen themes as key areas that NTT DATA needs to work on; current view of NTT DATA is limited to a credible operations provider rather than a strategic partner

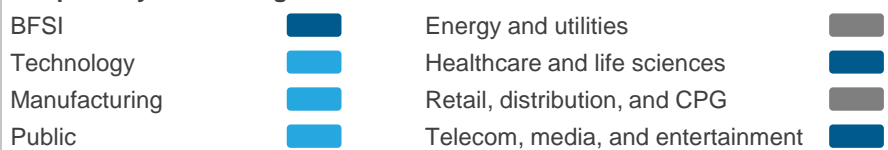
Workplace services revenue



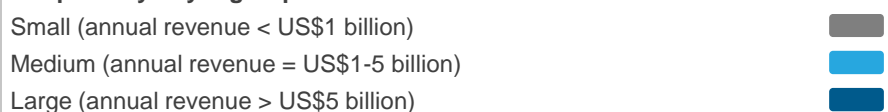
Scope of coverage

Number of FTEs dedicated to workplace services: ~12,000 employees
 Number of end users supported by service desk: 4.6 million
 Number of tickets handled by service desk: 11.8 million
 Number of devices managed by desk-side field support: ~2.5 million devices.

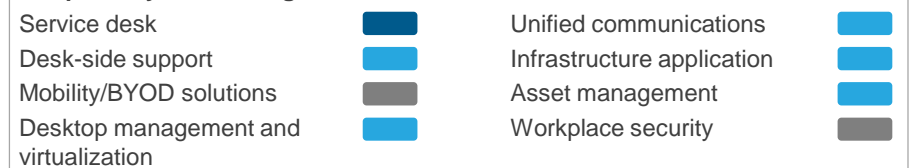
Adoption by service segments



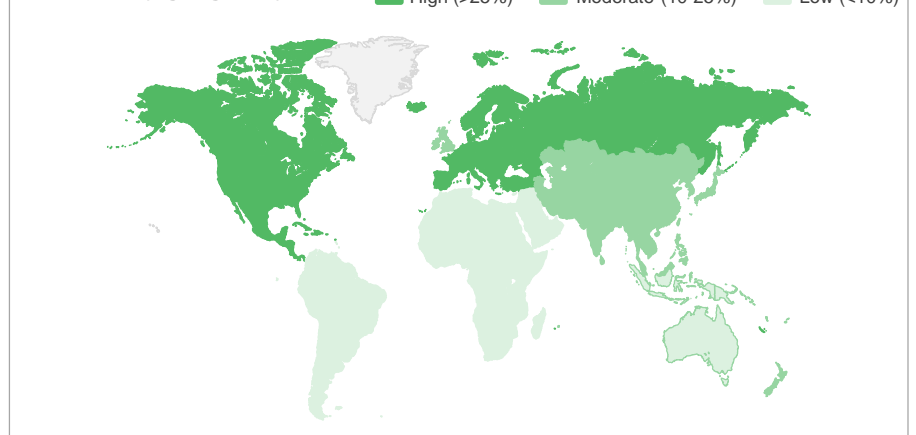
Adoption by buyer groups



Adoption by service segments



Adoption by geography



Source: Everest Group (2019)

NTT DATA | Digital workplace services profile (page 2 of 2)

Digital workplace services overview

NTT DATA's vision is to provide a delightful user experience for their customers by removing IT friction across all aspects of the modern workplace environment. As enterprises struggle with talent attraction and retention, security, and cost constraints, NTT DATA believes that modern workplace services plays an increasing role in the digital workplace. Its workplace offering is a set of six services comprising over 30 unique capabilities and over 120 tools such as AI based analytics, DaaS, omnichannel support, expert device support, UC&C, and transformation consulting and advisory services.

Proprietary solutions (representative list)

Solution	Details
NTT Data Digital Services Online	The solution provides orchestration, approval, and a billing engine for large complex enterprises with multiple systems of record and automation platforms. It functions as a "marketplace" to connect high level automation and complex workflow management
NTT Data Mozaic	NTT Data Mozaic is a L2/L3 engineering automation and visibility platform that drives cost reduction across the most expensive IT resources
NTT DWS Device Platform	Provides automated end-to-end device lifecycle management such as device ordering, device delivery, field services supply chain management, and logistics handling

Workplace services partnerships (representative list)

Partner Name	Type of partnership	Details
Citrix	Technology partnership	Strategic partner for software licensing
VMware	Service partnership	Strategic partner for software licensing
Microsoft	Technology partnership	Strategic partner for software licensing

NTT Data also has partnerships with ServiceNow, IpSoft, Cisco, BT, Lakeside, Riverbed, BMC, 1e, Tanium, and Aptean

Recent activities (representative list)

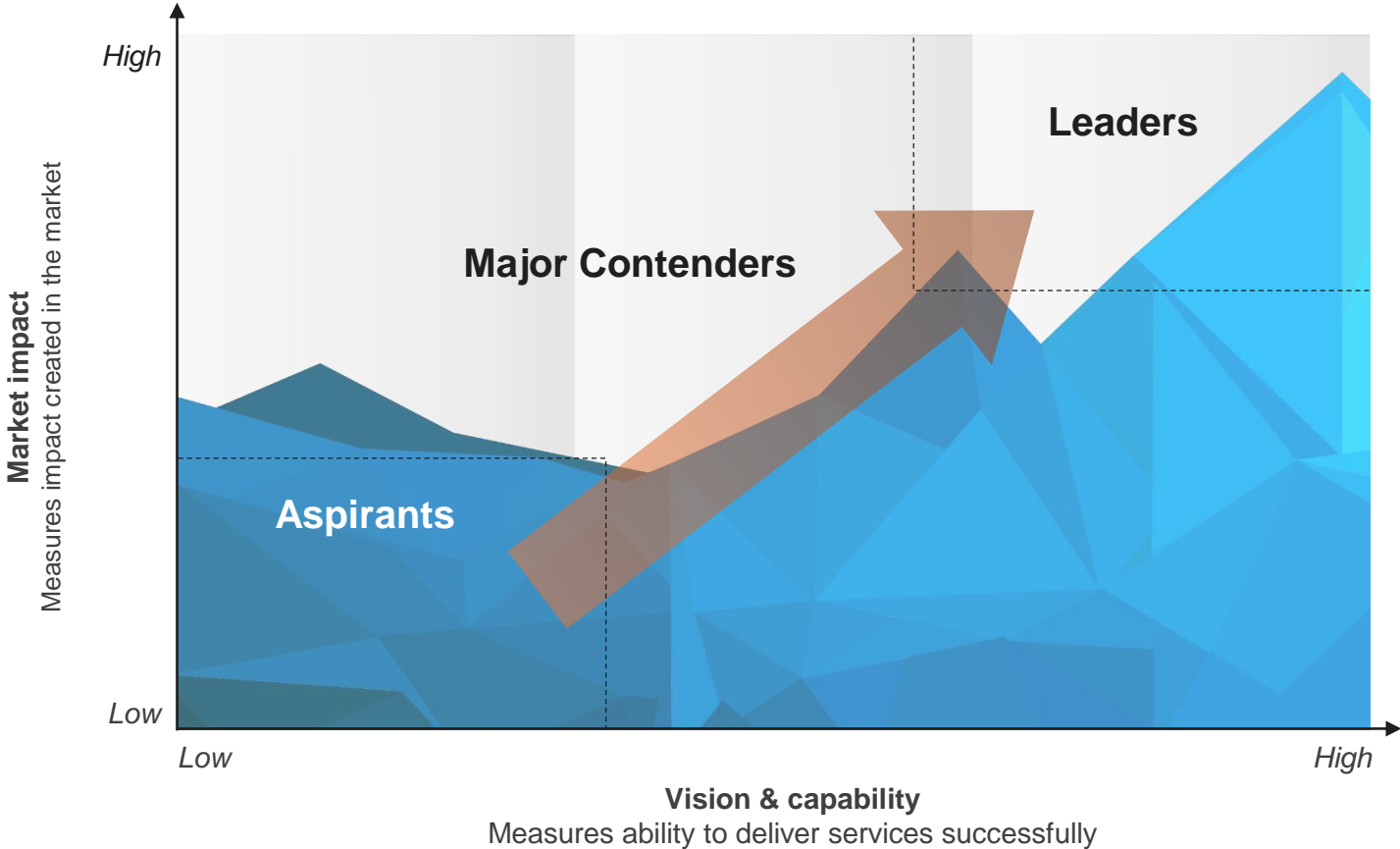
Development	Details
NTT Data Mozaic	Proof of concept and minimum viable product launch at a large multinational biotech firm

Source: Everest Group (2019)

Appendix

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

Everest Group PEAK Matrix



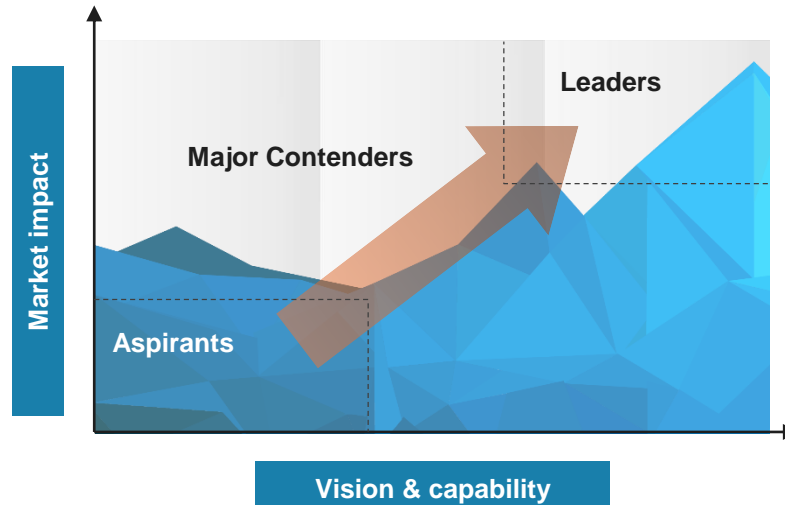
Services PEAK Matrix™ evaluation dimensions

Measures impact created in the market – captured through three subdimensions

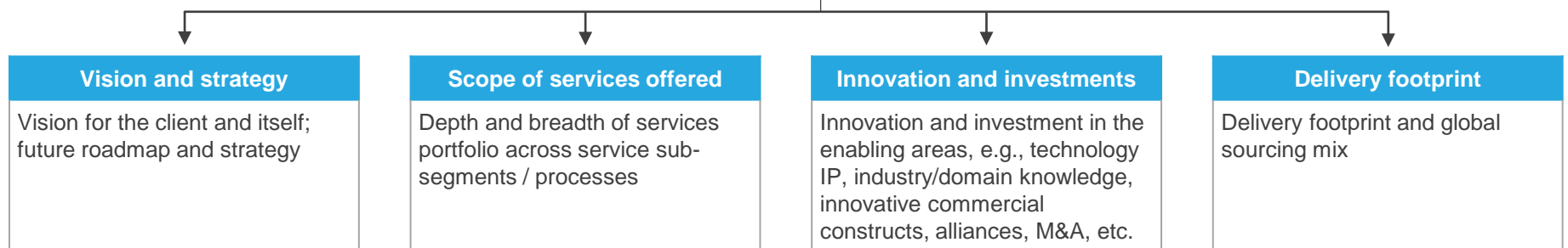
Market adoption
No. of clients, revenue base, and YOY growth, deal value/volume

Portfolio mix
Diversity of client/revenue base across geos and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



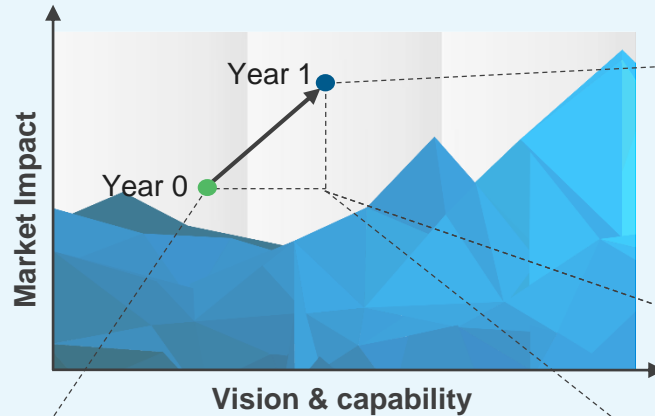
Measures ability to deliver services successfully. This is captured through four subdimensions



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



In order to assess advances on **market impact**, we evaluate each service provider's performance across a number of parameters including:

- Yearly ACV/YOY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each service provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain specific investments

We identify the service providers whose improvement ranks in the top quartile and award the Star Performer rating to those service providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

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.

Does the PEAK Matrix™ assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

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

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

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

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



About Everest Group

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

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