



Everest Group Digital Workplace Services PEAK Matrix® Assessment 2024: Mid-market Enterprises

Focus on Sutherland Global

November 2024



Introduction

After a period of substantial growth, the digital workplace market has experienced a slowdown, primarily due to global macroeconomic challenges. These conditions have accelerated the realization phase for organizations, prompting them to focus on maximizing the value of their prior investments. However, the next few years are expected to see a resurgence in investment trends, characterized by a strategic blend of cost optimization and transformative initiatives. At the forefront of this shift is the integration of generative AI, which is set to play a crucial role in driving organizational change.

Mid-market digital workplace customers share similar priorities with larger enterprises but approach them differently. While large organizations have the resources to develop complex, highly customized solutions, most Small and Midsize Businesses (SMBs) focus on cost efficiency and prefer staggered investments through shorter, more agile engagements. In response to these distinct demand themes and the evolving workplace landscape, service providers are increasingly investing in different initiatives

and building unique offerings and IP assets to support mid-market clients in their digital workplace transformation.

In this report, we present an assessment of 21 digital workplace service providers featured on the [Digital Workplace Services PEAK Matrix® Assessment 2024: Mid-market Enterprises](#).

The full report includes the profiles of the following 21 leading digital workplace service providers featured on the Digital Workplace Services PEAK Matrix® Assessment 2024 – Mid-market Enterprises:

- **Leaders:** Cognizant, Compucom, Lenovo, Movate, Pomeroy, Stefanini, and Unisys
- **Major Contenders:** Bell Techlogix, Coforge, Happiest Minds, LTIMindtree, Microland, Milestone Technologies, Mphasis, Randstad Digital, Sutherland Global, UST, and Zones
- **Aspirants:** Dexian, GAVS Technologies, and Itransition

Scope of this report

Geography: Global

Industry: 21 leading digital workplace service providers

Services: Digital workplace services

Digital workplace services – mid-market enterprises PEAK Matrix® characteristics

Leaders

Cognizant, Compucom, Lenovo, Movate, Pomeroy, Stefanini, and Unisys

- Leaders showcase high expertise and experience in delivering end-to-end workplace engagements, while maintaining client satisfaction through their balanced portfolio, coherent vision, and robust suite of agnostic and contextualized IP and solutions, supported by skilled talent and strong delivery capabilities
- Further, these providers have been able to effectively leverage next-generation themes such as Copilot and generative AI, backed by their expansive partnerships with technology vendors, niche providers, and start-ups to co-create solutions and engage in joint Go-to-market (GTM) in this space to deliver quick business outcomes to enterprises
- However, despite this, Leaders face tough competition from Major Contenders in both retaining and winning new deals and must continue enhancing their capabilities to offer clients unique benefits

Major Contenders

Bell Techlogix, Coforge, Happiest Minds, LTIMindtree, Microland, Milestone Technologies, Mphasis, Randstad Digital, Sutherland Global, UST, and Zones

- While these providers continue to strive to augment their broader workplace capabilities with targeted investments in developing their suite of IP and technology, delivery capabilities, and partnership ecosystem, their end-to-end workplace services capabilities continue to have some visible gaps
- Despite building meaningful capabilities across workplace segments, their portfolio and delivery capabilities are not as balanced as Leaders', reflecting in their relative market success
- However, these providers are making targeted investments in talent skills, delivery frameworks, internal IP, and partnerships to address capability gaps, positioning themselves as strong contenders to Leaders in workplace services

Aspirants

Dexian, GAVS Technologies, and Itransition

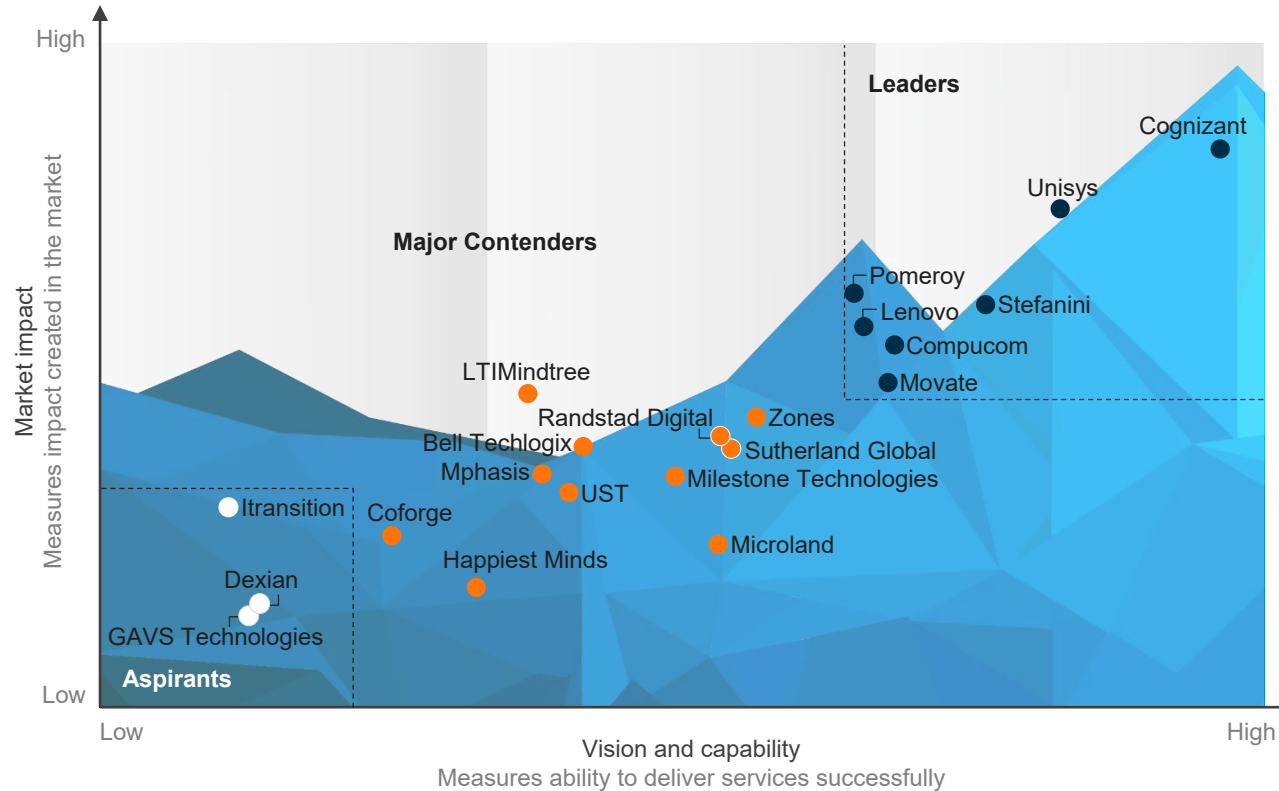
- Aspirants' workplace services show gaps in service scope, internal IP maturity, and coverage across industry verticals and geographies
- However, these providers are focused on expanding their workplace capabilities through investment in service flexibility, experience-centricity, and technology partnership to help generate major workplace revenue and improve market positioning

Everest Group PEAK Matrix®

Digital Workplace Services PEAK Matrix® Assessment 2024: Mid-market Enterprises | Sutherland Global is positioned as a Major Contender

Everest Group Digital Workplace Services PEAK Matrix® Assessment 2024: Mid-market Enterprises¹

- Leaders
- Major Contenders
- Aspirants



¹ Assessments for Dexian and Coforge excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2024)

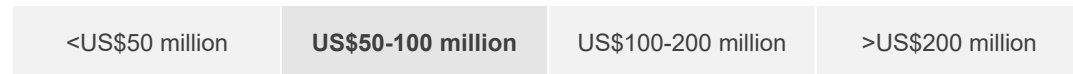
Sutherland Global profile (page 1 of 5)

Overview

Vision for Digital Workplace Services (DWS)

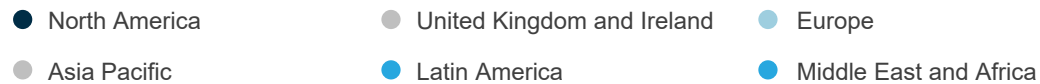
Sutherland's vision is to integrate AI and smart workplace technology and empower enterprises to streamline internal processes, promote employee productivity, collaboration, and improve EX.

DWS revenue (CY 2023)



● N/A (0%) ● Low (<10%) ● Medium (10-25%) ● High (>25%)

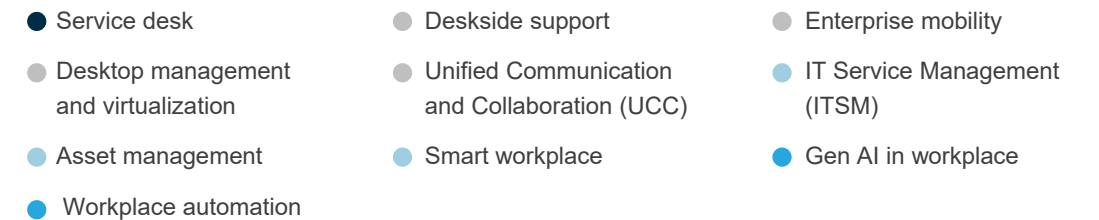
By geography



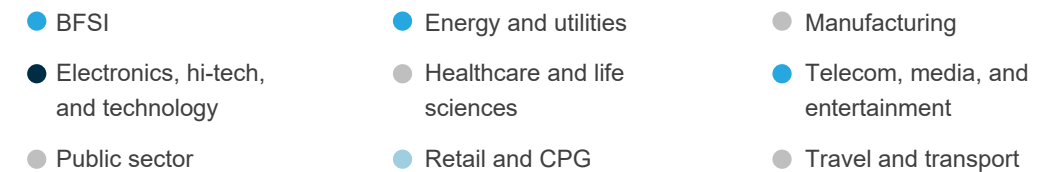
DWS revenue mix (CY 2023)

● N/A (0%) ● Low (<10%) ● Medium (10-25%) ● High (>25%)

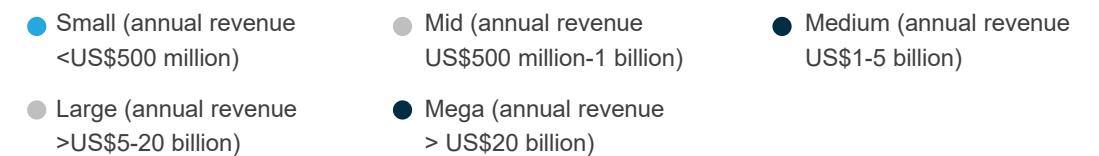
By services segment



By industry



By buyer size



Sutherland Global profile (page 2 of 5)

Solutions

[REPRESENTATIVE LIST]

Proprietary solutions for digital workplace services

Solution name	Details
Sutherland Sentinel AI™	This solution is a real-time suite of work-at-home security solutions, which makes working from home more efficient and secure, and employs tried-and-true technologies.
Envision	This solution manages endpoints by identifying and resolving issues before they escalate, minimizing disruption and ensuring smooth system performance.
ServiceNext	This solution is a conversational AI and RPA enables automation of routine IT and HR tasks. By reducing ticket volumes and integrating with existing systems, it helps in operational efficiency and streamlining support processes.
HelpTree	This solution is a no-code platform for augmented knowledge management powered by Gen AI, which facilitates self-service and self-healing, enabling technicians to swiftly resolve known issues and empowering end-users to fix problems independently without contacting IT.
Translate.AI	This solution provides clients with a cost-effective, scalable solution to support multiple languages without the need to hire dedicated, native language speakers.
Sutherland Robility™	This solution is a comprehensive cognitive RPA platform with nine modules for requirements gathering, design, development, monitoring, mobile control, and platform management, integrating with analytics, computer vision, and NLP to streamline business processes.
Smartbot	This solution provides diagnostics and self-help, integrated with CRM and knowledge bases to let end-users resolve issues independently, reducing desk visits and improving support efficiency.
SmartSolve	This solution automates L1 and L2 support with over 100 automated fixes, reducing the need for human intervention, improving first-time resolutions, and cutting handling time.
Signals.AI	This solution uses predictive analytics to foresee and prevent incidents, using historical data to help ITSM teams act and optimize service delivery.
Sutherland CX360	This solution uses AI and NLP algorithms to analyze interactions, automate audits, and offer personalized coaching, boosting end-user satisfaction and operational efficiency.

Sutherland Global profile (page 3 of 5)

Recent investments

[REPRESENTATIVE LIST]

Digital workplace services investments

Investment name/theme	Details
Acquisition	<ul style="list-style-type: none"> Acquired a digital engineering services firm with specialization in edge-core-cloud. Sutherland acquired ITSM, asset management, and automation technologies as part of the digital workplace services, which offer ITSM consultancy, increased automation practice, and professional data scientists that design AI/automation solutions for DWP use cases Acquired Augment CXM to enhance stakeholder experiences by providing real-time insights for chat and voice channels to guide agents on the best possible responses
Innovations and investments	<ul style="list-style-type: none"> Created and launched products for digital workplace services such as HelpTree and Envision through Sutherland's platform and solutions group, incorporating AI and gen AI in recent updates. The team focuses on AI platforms that drive technology transformations, introducing innovations such as digital lockers and smart walk-ins, and enhancing predictive support models Launched LevelUp, an in-house platform focused on performance management, quality assurance, coaching, development, rewards, and gamification Created a dedicated CoE for Gen AI implementations in digital workplace services, manned by data scientists and research teams on models to be used/fine-tuned. Case summarizing and email writing are common use cases for Gen AI, and Gen AI adoption supports efficiency improvement goals across all channels Established Digital Acceleration Center helps businesses streamline processes and adopt advanced technologies such as AI, ML, and IoT. It offers services such as AI-powered OCR, cognitive chatbots, and intelligent automation, focusing on improving efficiency and customer interactions as part of Sutherland's digital engineering expansion Invested in IoT services, particularly in projects, to create smart workplaces. Additionally, it established a CoE tasked with growing and fostering offerings to satisfy customer needs Continually expanding its partnership ecosystem, recently partnering with Alteryx for advanced data science training and collaborating with firms such as SettleMint, Celonis, Lauramac, Zyentus, and industry-specific partners such as Finastra and Sabre Invested in new locations strategy to expand into Africa and additional delivery centers in APAC and the Middle East

Sutherland Global profile (page 4 of 5)

Partnerships

[REPRESENTATIVE LIST]










Digital workplace services partnerships

Partner name	Details
Google	Leverages this partnership to collaborate on Joint Innovation Labs, a Google-funded initiative, to advance Conversation AI (CCAI), next-generation Natural Language Processing (NLP), and Natural Language Understanding (NLU) technology.
Amazon	Leverages this partnership to collaborate on the following initiatives: Sutherland NLP and Amazon comprehend medical NLP integration, Amazon Labs 126 Partner, and AWS Cloud.
Microsoft	Leverages this partnership as a Gold Certified Partner of Microsoft, which collaborated on the UAE launch of Azure, with Sutherland Connect being sold on the Microsoft Store as Azure Connect.
Oracle	Leverages this partnership as an Oracle premium partner for cloud services and digital transformation acceleration.
Genesys	Leverages its partnership with Genesys for foundational software used in Sutherland Connect.
Stanford University	Leverages its partnership with Stanford University for AI labs, Sutherland mosaic for ML routing, and Sutherland Sentinel for video analysis attribution.
Zendesk	Leverages Zendesk as a BPO and system implementation partner and got recognized as Zendesk’s go-to partner of the year in the US in 2023.
LivePerson	Leverages LivePerson as an alliance and implementation partner.
Playvox	Leverages its partnership with Playvox for foundational software used in Sutherland Global’s performance.
Accruent	Leverages this partnership to form IoT-as-a-Service.
VoiceGain	Leverages this partnership for speech-to-text technology to analyze and transcribe client voice data into text.

Sutherland Global profile (page 5 of 5)

Everest Group assessment – Major Contender

Measure of capability:  Low  High

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

Strengths

- Enterprises seeking intelligent service desk capabilities would benefit from Sutherland Global’s strong focus in this segment, augmented through its AI-powered service desk and Zero Incident Framework (ZIF)
- Enterprises seeking conversational AI capabilities would find value in Sutherland Global ServiceNext’s offering which enables automation of routine IT and HR tasks
- Enterprises seeking strong automation capabilities would benefit from its Sutherland Robility™ – a cognitive RPA platform and Sutherland SmartSolve – which automates L1 and L2 support with automated fixes
- Clients have appreciated Sutherland Global for its proactive service approach and its effective understanding of customer needs

Limitations

- Despite having a vision for employee experience in the digital workplace, Sutherland Global currently lacks strategic partnerships within this domain to develop differentiated solutions for enterprises
- It has relatively lesser focus in the Europe and APAC regions. Enterprises looking for workplace services in these regions should evaluate its capabilities in depth
- Enterprises from manufacturing, HLS, public sector, and travel and transport verticals should do further due diligence on its capabilities and market impact in their respective verticals
- Clients have expressed concerns about pricing and expect more flexibility from Sutherland Global around costs
- Some clients have noted that there is a need to improve the domain and technical expertise of its Level 2 resources

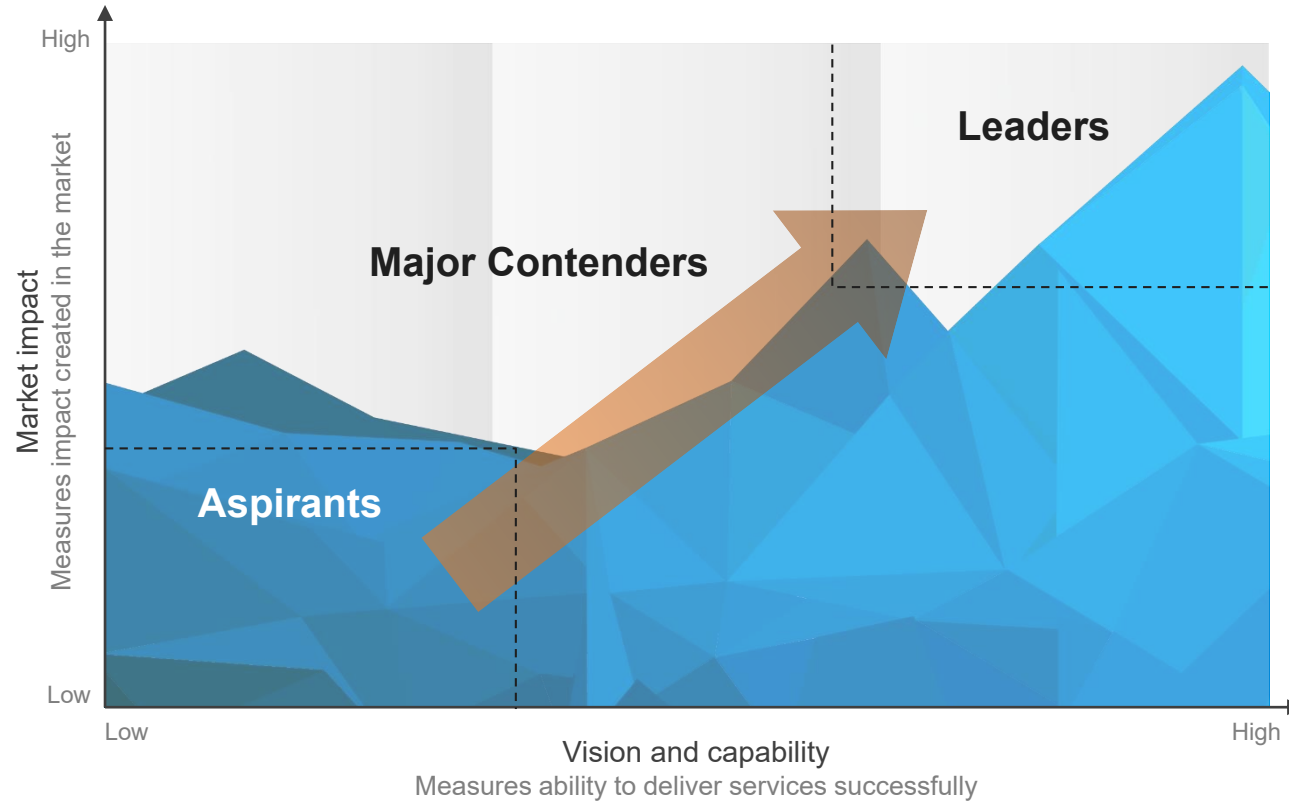
Appendix

PEAK Matrix® framework

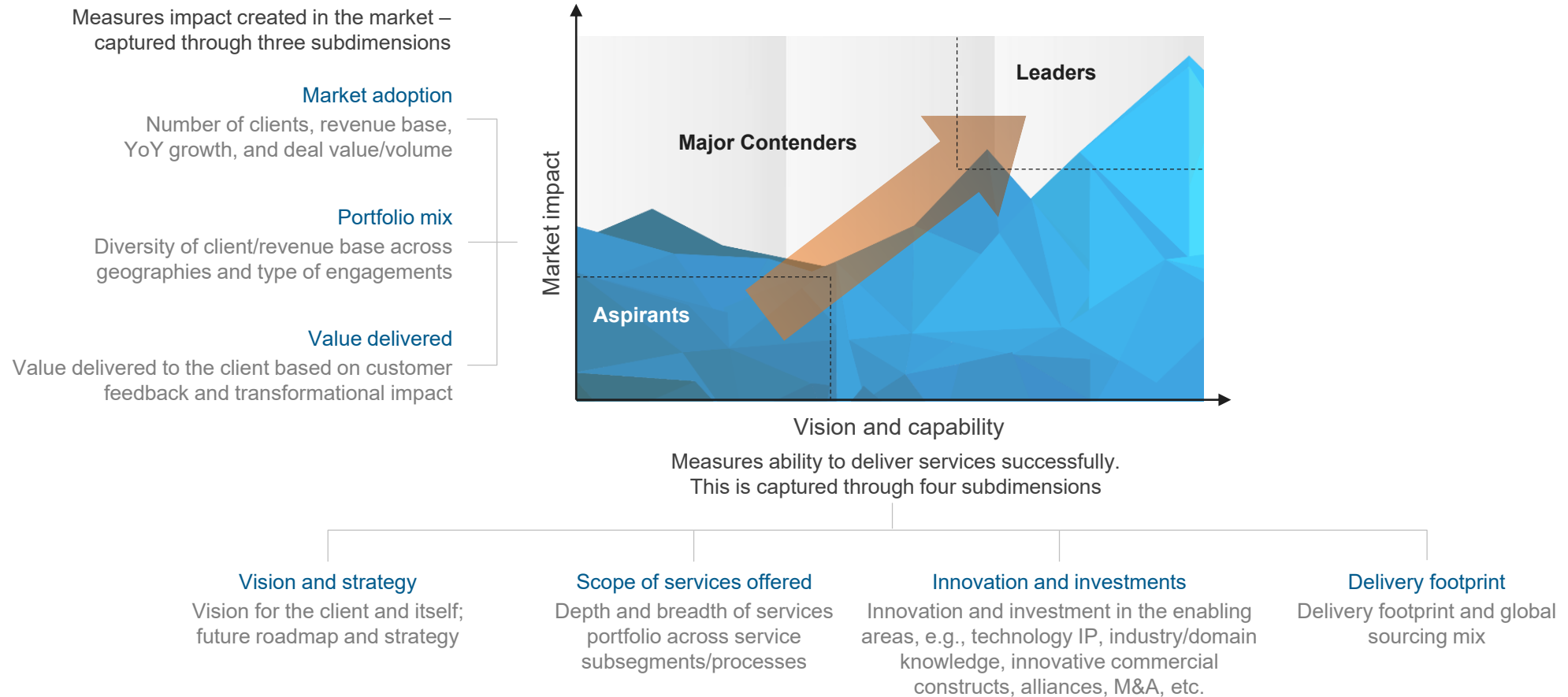
FAQs

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

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: 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.

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

A: 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.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: 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.

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

A: 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

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

A: 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

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

A: 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.

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

Website

everestgrp.com

Blog

everestgrp.com/blog

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