Everest Group®

Everest Group PEAK Matrix® for Microsoft Dynamics 365 Service Providers 2021

Focus on Infosys
September 2021

Everest Group
PEAK MATRIX®

Background of the research

- Enterprises, especially small and medium, are adopting Microsoft Dynamics 365 to modernize customer experience and finance and operations, enable end-to-end visibility across the supply chain, and streamline marketing and sales. Large enterprises adopt Microsoft Dynamics 365 mainly to buttress their core ERP and CX

- Microsoft has established its sweet spot by closely integrating Dynamics 365 with Microsoft office, outlook, and teams. It has gained momentum in the market owing to lower TCO compared to its close competitors and faster time to market as it is SaaS-enabled

- To help adopt Microsoft Dynamics 365 across existing complex portfolio, service providers are investing in skilling talent and building robust accelerators to help enterprises in their digital transformation journeys

- In this research, we present an assessment of 18 service providers featured on the Microsoft Dynamics 365 services PEAK Matrix®

- The assessment is based on Everest Group's annual RFI process for calendar year 2020, interactions with leading services providers, client reference checks, and an ongoing analysis of the Microsoft Dynamics 365 services market

This report includes the profiles of the following 18 leading service providers featured on the Microsoft Dynamics 365 services PEAK Matrix:

- **Leaders:** Accenture and Avanade, HCL Technologies, Hitachi Solutions, and Infosys

- **Major Contenders:** Capgemini, Cognizant, Deloitte, HSO, IBM, LTI, Sonata, TCS, and Wipro

- **Aspirants:** Alithya, Birlasoft, UST, Visionet, and Yash Technologies

Scope of this report:

Geography
Global

Service providers
18

Services
Microsoft Dynamics 365 services

Introduction and scope

Everest Group recently released its report titled "Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2021". This report analyzes the changing dynamics of the Microsoft Dynamics 365 services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 18 service providers on the Everest Group PEAK Matrix® for Microsoft Dynamics 365 services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of Microsoft Dynamics 365 service providers based on their absolute market success and delivery capability.

Based on the analysis, **Infosys emerged as a Leader.** This document focuses on **Infosys'** Microsoft Dynamics 365 services experience and capabilities and includes:

- Infosys' position on the Microsoft Dynamics 365 services PEAK Matrix
- Detailed Microsoft Dynamics 365 services profile of Infosys

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.

Source: Everest Group (2021)

Microsoft Dynamics 365 services PEAK Matrix® characteristics

Leaders:

Accenture and Avanade, HCL Technologies, Hitachi Solutions, and Infosys

- Leaders are characterized by their ability to successfully execute large-scale, multi-continent, end-to-end Dynamics 365 services, underpinned by their strong global delivery network
- These providers have showcased end-to-end transformational case studies covering large portfolio of Dynamics 365 replacing multiple legacy CRM and a few elements of ERP
- Leaders have helped enterprises with their advisory capabilities to navigate the business transformation and have leveraged in-house IP tools and accelerators to expedite engagement timelines
- These providers have invested significantly to grow and engage talent to combat high attrition in the Microsoft Dynamics 365 services market. Leaders are also able to successfully leverage domain experts to provide business-specific knowledge and insights to clients
- Furthermore, they have a mature suite of Microsoft-certified, Dynamics 365, verticalized solutions to accelerate time-to-market for their clients

Major Contenders:

Capgemini, Cognizant, Deloitte, HSO, IBM, LTI, Sonata, TCS, and Wipro

- These players have built meaningful capabilities to deliver Microsoft Dynamics 365 services – implementation and management/run; however, their service portfolios are not as balanced and comprehensive as those of Leaders (in terms of coverage across Dynamics 365 service segments, service type, geographies, or verticals)
- These providers have good partnership with Microsoft and specialist technology partners to curate client-specific Microsoft Dynamics 365 solutions. They have been recognized by Microsoft with multiple partner awards showcasing their credibility in the Dynamics 365 markets
- Also, Major Contenders are making continued investments in building proprietary tools and solutions, as well as scaling their talent for Microsoft Dynamics 365

Aspirants:

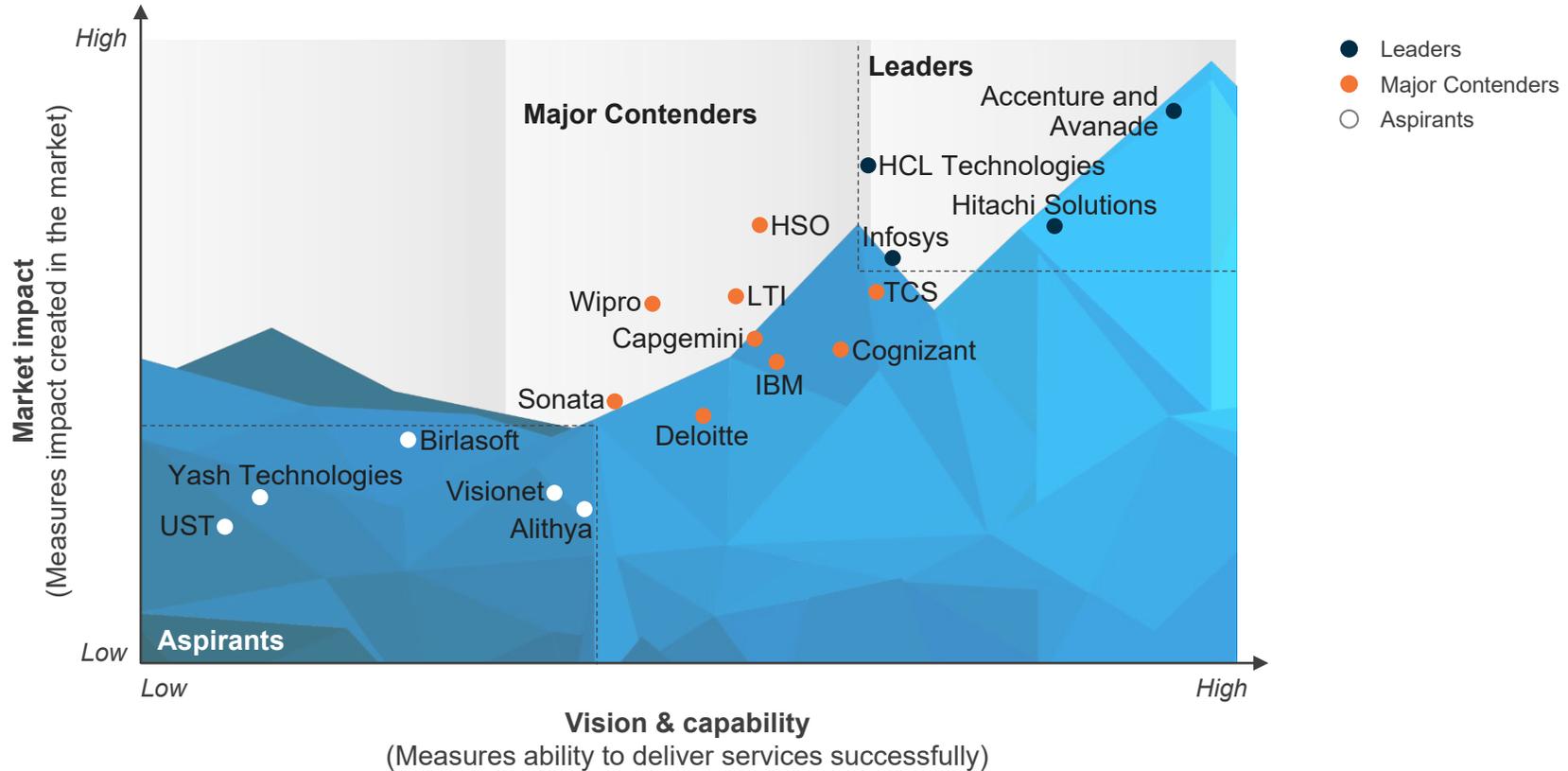Alithya, Birlasoft, UST, Visionet, and Yash Technologies

- Aspirants have good proof points in delivering low to medium complex implementation and maintenance Dynamics 365 services for Small and Mid-sized Buyers (SMBs)
- They are either focused on a region(s) or vertical(s), or currently have a relatively small Microsoft Dynamics 365 practice
- Clients acknowledge aspirants' pricing and commercial flexibility as well as account management flexibility

Everest Group PEAK Matrix®
Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2021 | Infosys positioned as a Leader

Everest Group Microsoft Dynamics 365 Services PEAK Matrix® Assessment 2021[1]

Leaders
Major Contenders
Aspirants

Leaders

Accenture and Avanade

HCL Technologies

Hitachi Solutions

Infosys

Major Contenders

HSO

Wipro

LTI

TCS

Capgemini

Cognizant

IBM

Sonata

Deloitte

Birlasoft

Yash Technologies

Visionet

UST

Alithya

Aspirants

Market impact
(Measures impact created in the market)

Vision & capability
(Measures ability to deliver services successfully)

High

Low

Low

High

Infosys | Microsoft Dynamics 365 services profile (page 1 of 6)
Everest Group assessment – Leaders

Measure of capability: ◔ Low ● High

Market impact				Vision & capability				
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services	Innovation & investments	Delivery Footprint	Overall
◑	◑	◕	◕	●	◔	◕	◑	◕

Strengths

- Clients appreciate Infosys's talent pool for their extensive experience in Microsoft Dynamics 365 and consequently acknowledge technical expertise along with its organizational change management capabilities

- Infosys has strong domain expertise specifically in industries such as banking, electronics and technology, and energy and utilities to aid clients in their journey

- Infosys engages with clients in multiple pricing constructs ranging from traditional FTE-based, to more upcoming outcome-based constructs. It offers clients the flexibility to engage in pricing construct that better suits client's needs

- Clients appreciate its overall talent management strategy, its account management capabilities and acknowledge leveraging Infosys for future requirements

- Its advisory services – in guiding clients for creating transformational roadmap and shaping the business case along with their implementation capabilities expertise across Microsoft portfolio – are well acknowledged by clients

Limitations

- While it has strong Dynamics 365 offerings for enterprises within BFSI, hi-tech, and utilities, the presence across manufacturing and retail and CPG is limited

- Clients wanting their team to work hand-in-hand with Infosys and looking for cultural alignment may face challenges because of its offshore-heavy delivery model

- A few of the clients highlighted that Infosys can further invest in innovation/in-house IP and bring in market leading thought leadership for shaping large scale functional transformations

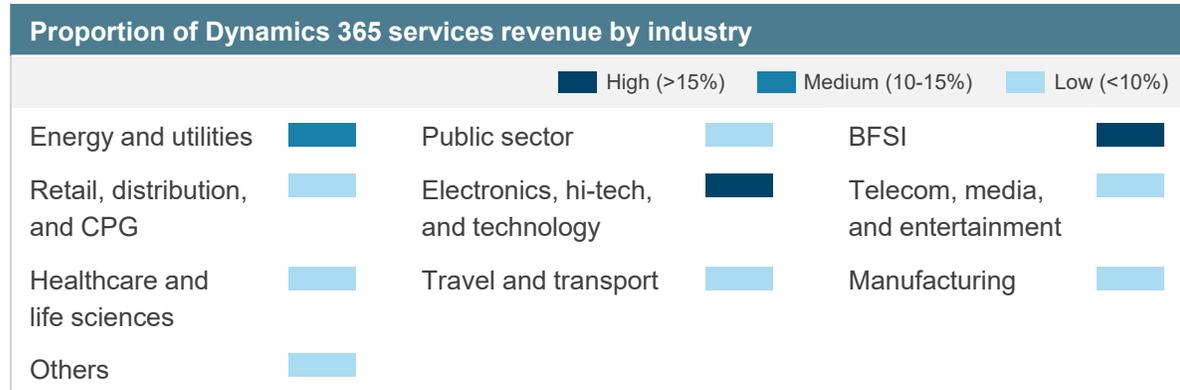# Infosys | Microsoft Dynamics 365 services profile (page 2 of 6)
Overview

Vision for Microsoft Dynamics 365 services: Infosys' vision is to be the leading GSI in MBAS market, creating value for its clients in their digital transformation, harnessing global and local talent with an open ecosystem.
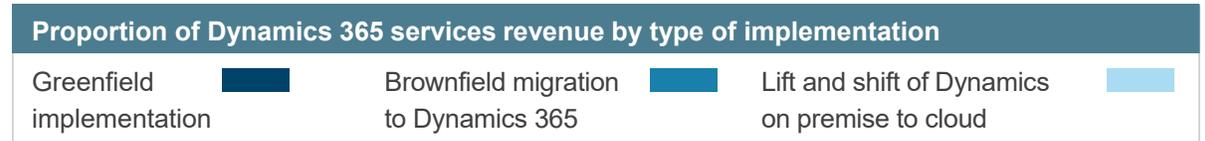
Partnership status with Microsoft: Gold partner
Number of projects completed in 2020: 174
Number of Microsoft Dynamics 365 experts: 1,401

High (>25%)	Medium (10-25%)	Low (<10%)

Proportion of Dynamics 365 services revenue by modules/capabilities

Finance	Medium	Sales	Medium	Marketing	Low	Supply chain	High
Service	High	HR	Low	Others	Low		

Proportion of Dynamics 365 services revenue by geography

North America	High	Europe (excluding UK)	Medium	South America	Low
Middle East & Africa	Low	United Kingdom	Medium	Asia Pacific	Low

Proportion of Dynamics 365 services revenue by business function

High (>30%)	Medium (15-30%)	Low (<15%)

Consulting	Medium	Implementation	High	Maintenance and support	Low

Proportion of Dynamics 365 services revenue by type of implementation

Greenfield implementation	High	Brownfield migration to Dynamics 365	Medium	Lift and shift of Dynamics on premise to cloud	Low

Proportion of Dynamics 365 services revenue by industry

High (>15%)	Medium (10-15%)	Low (<10%)

Energy and utilities	Medium	Public sector	Low	BFSI	High
Retail, distribution, and CPG	Low	Electronics, hi-tech, and technology	High	Telecom, media, and entertainment	Low
Healthcare and life sciences	Low	Travel and transport	Low	Manufacturing	Low
Others	Low				

Proportion of Dynamics 365 services revenue by buyer size (annual revenue)

Less than US$1 billion	Medium	US$1-5 billion	High	US$5-10 billion	High
US$10-20 billion	Low	Greater than US$20 billion	Medium		

Infosys | Microsoft Dynamics 365 services profile (page 3 of 6)
Key solutions

Proprietary solutions (representative list)			
Solution name	**Industry in focus**	**Focused Dynamics 365 module**	**Details**
Modern CX for Banking	Financial services	Sales, service, and marketing	Transforming the banking business with automation and intelligence in customer engagement, coupled with digital experience solutions and self-service.
Smart Retail	Retail	Commerce	This solution addresses the retail and PoS management across products, stores, pricing and promotions, sales, and inventory management for retail customers.
Connected Field Services/Smart Spaces	Cross-vertical	Field services	Infosys Smart Spaces solutions help build environments where humans and technology-enabled systems can interact with each other.
Citizen Safety Services	Public sector	Customer service,	Addresses the safety reports management and processing across multiple stages for protection of all segments of citizens – children, adults, and senior citizens.
Treasury Management	Public sector	sales, and marketing	Scalable and repeatable platform for end-to-end needs of treasuries.
AX D365 Upgrade Accelerator	Cross-vertical	Finance and operations	Reliable and cost-effective migration from older versions of Dynamics AX to Dynamics 365 ERP.
Modern CX for Utilities	Utilities	Sales, service, and marketing	Pre-packaged solution enabling rapid adoption, faster deployment, reduced TCO, and enhanced experience of utilities sector operations across sales, service, and field service and engagement.

Microsoft-certified solutions on Microsoft marketplace compatible with Dynamics 365 (representative list)			
Solution name	**Industry in focus**	**Focused Dynamics 365 module**	**Details**
Facilities management solution	Cross-vertical	Field service management	A facilities management solution across facility hierarchy, services, predictive maintenance, and digital self- service.
Infosys Ecowatch Solution for sustainability	Cross-vertical	Marketing, Power Platform	End-to-end holistic solution for sustainability planning, data collection and computation, audits, publishing, insights, and stakeholder management.

Infosys | Microsoft Dynamics 365 services profile (page 4 of 6)
Key solutions (continued)

Microsoft-certified solutions on Microsoft marketplace compatible with Dynamics 365 (representative list)			
Solution name	**Industry in focus**	**Focused Dynamics 365 module**	**Details**
Infosys Dynamics CTSM	Life sciences	Supply Chain Management	The solution helps manage supply chain activities in clinical trials. With timely and accurate supply of drugs to patient sites at optimum cost, it improves the overall control while ensuring compliance with regulations and Goods Manufacturing Practices (GMP).
Infosys Solution for better Customer Insights	Cross-vertical	Power Platform, Finance	Generate insights and unlock value from data with customer insights across verticals with golden source of truth.
Return To Work Solutions (RTW)	Cross-vertical	Power Platform	Digital experience solutions for employers and employees to manage return to work, remote working, and hybrid working management.
Infosys Oil Field Services (OFS)	Energy	Field Service, Finance, Operations	Manages end-to-end job life cycle for OFS companies.

Infosys | Microsoft Dynamics 365 services profile (page 5 of 6)
Investments and partnerships

Key investments (representative list)		
Investment theme	**Focused Dynamics 365 module**	**Details**
Sikich India Acquisition/Rebadging	D365 FO and D365 CE	The acquisition helped in fueling Infosys' competency and growth in the automotive vertical and its business in the US.
CoEs (Banking, Sustainability, Retail, etc.)	D365 CE, commerce, customer insights, marketing, Power Platform, Omnichannel	The CoEs propel business growth across verticals and help generate thought leadership in the market.
Microsoft Labs	D365 FO and CE stack, Power Platform	Microsoft Labs help in customer outreach by showcasing industry solutions.
Industry Solutions	D365 FO, D365 CE, Power Platform, Azure Cognitive Services, and Azure Bot Services	Industry solutions help by improving the customer mindshare of the set of offerings, generate thought leadership across verticals, and improve pipeline and deal conversions.
MBAS Academy	D365 FO, CE, and Power Platform	MBAS Academy is an integral part of talent shaping focusing on entry-level training, certifications, and also continuous capability building for the skills required in the future.

Key partnerships (representative list)		
Partner ecosystem		
Cosmo Consult	Four Vision – HRPlus	Innofactor
DealHub	Signup Software – Exflow – Readsoft Online	Sensei
McKinsey	Great Circle – Extended Banking	Yavica
ADP	Annata Software	Alfa People
Hubdrive	CRG Group	Sikich
SK Global	To-Increase	Sprinklr

Infosys | Microsoft Dynamics 365 services profile (page 6 of 6)
Case studies

Case study 1	A UK-based local housing authority

Business challenge

The client wanted an organization-wide effective case management system for housing management. and Housing Needs Department to improve their ability to deliver a consistently high-quality stakeholder service experience for citizen wellbeing.

Solution

Transformed the housing management service delivery model from an unstructured, semi-manual, and disintegrated process to a streamlined end-to-end omnichannel Housing Management solution with a consolidated platform and unified information view covering Housing Repair, Tenancy Management, Property Management, etc., for an enhanced resident experience by leveraging D365 CE, portals and Power platform (Power Apps, Power Automat, and Power Virtual Agent), and field service.

Impact

- Improved user experience through use of a simple and efficient system providing effective self-service capabilities
- Reduced call handling time due to customer 360 view of information for support agents by 15%
- Lowered volume of calls and letters owing to self-service channel enablement by 20%
- Provided transition from many disparate systems to the new D365-based system that was used as a single source of truth

Case study 2	A leading oil field services provider based out of the US

Business challenge

The client had challenges with disintegrated systems, processes, and high overhead cost of maintaining legacy systems.

Solution

Infosys implemented an integrated Microsoft Dynamics 365 FO and CE solution across finance, supply chain, and other LoBs with end-to-end program management and governance in an ItaaS model.
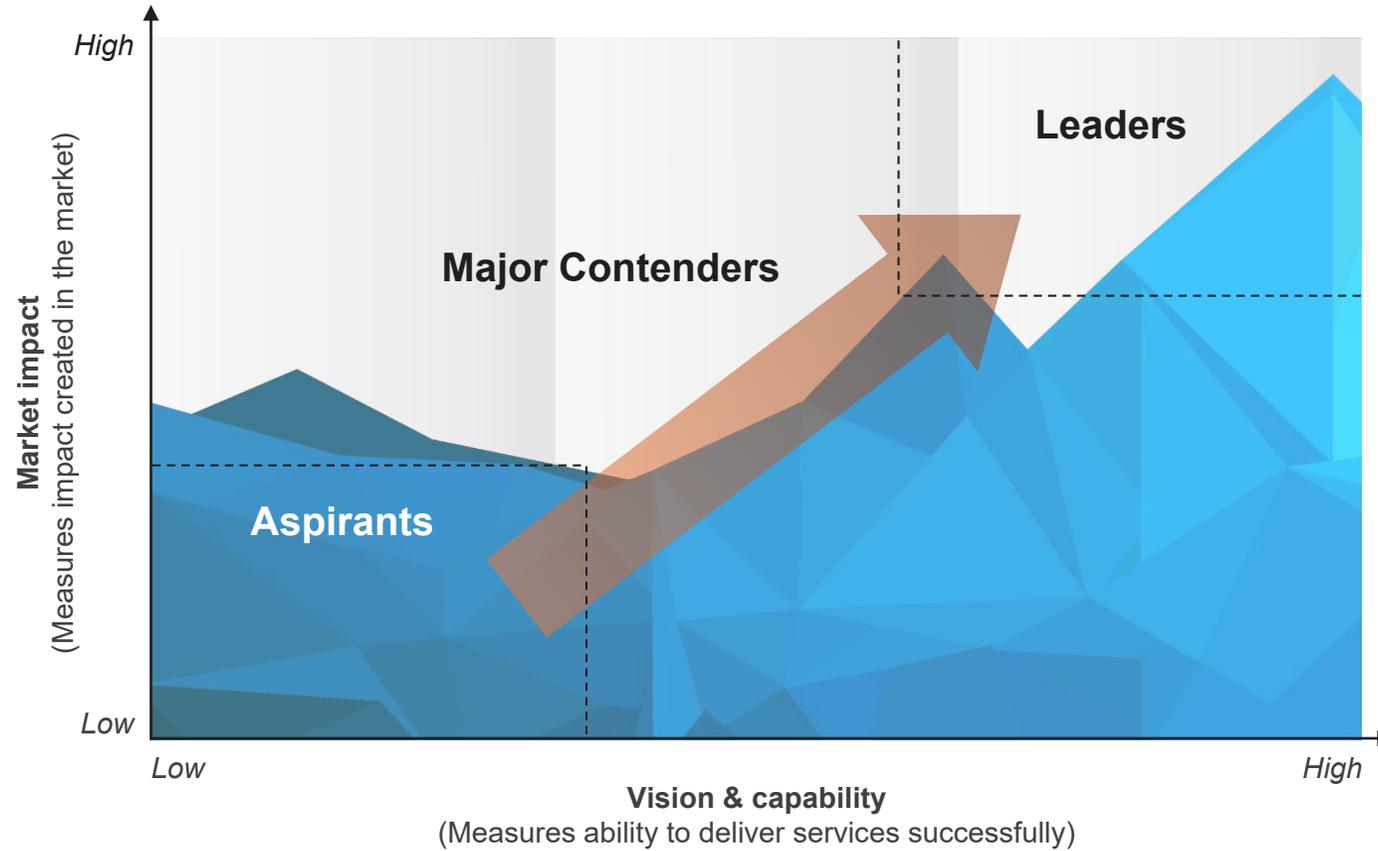
Impact

- Reported efficiency leading to approximately two-person day saving for 10-member finance team (one person year savings ~US$100,000)
- Technology refresh savings ~US$250,000 annually
- Commercial efficiency leading to annual savings of ~US$1 million
- Price leakage and DSO improvement resulting into ~US$1.2 million saving annually
- Ease of extended, modern functionality

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Appendix

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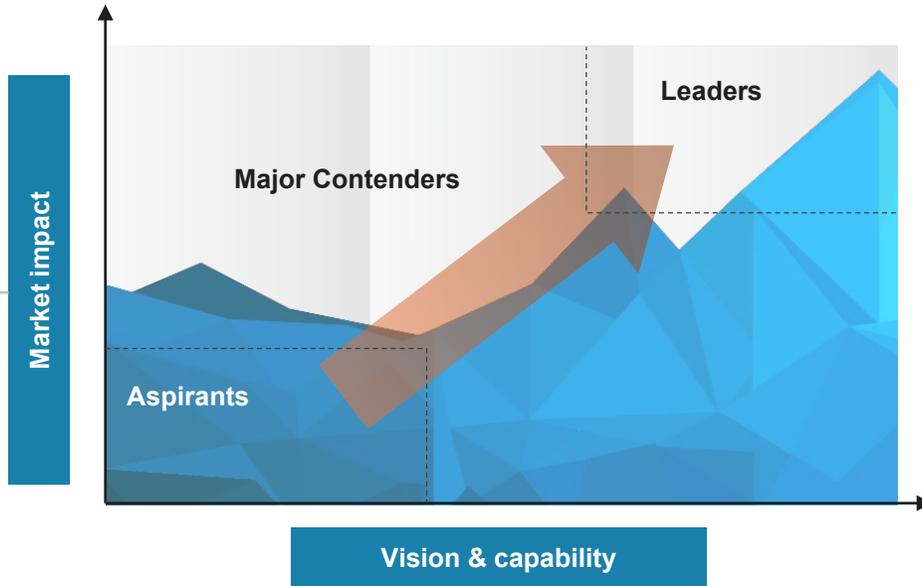
Everest Group PEAK Matrix

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

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability

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

Vision and strategy

Vision for the client and itself; future
roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio
across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling
areas, e.g., technology IP, industry/domain
knowledge, innovative commercial
constructs, alliances, M&A, etc.

Delivery footprint

Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment 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

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