

IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2022 Vendor Assessment

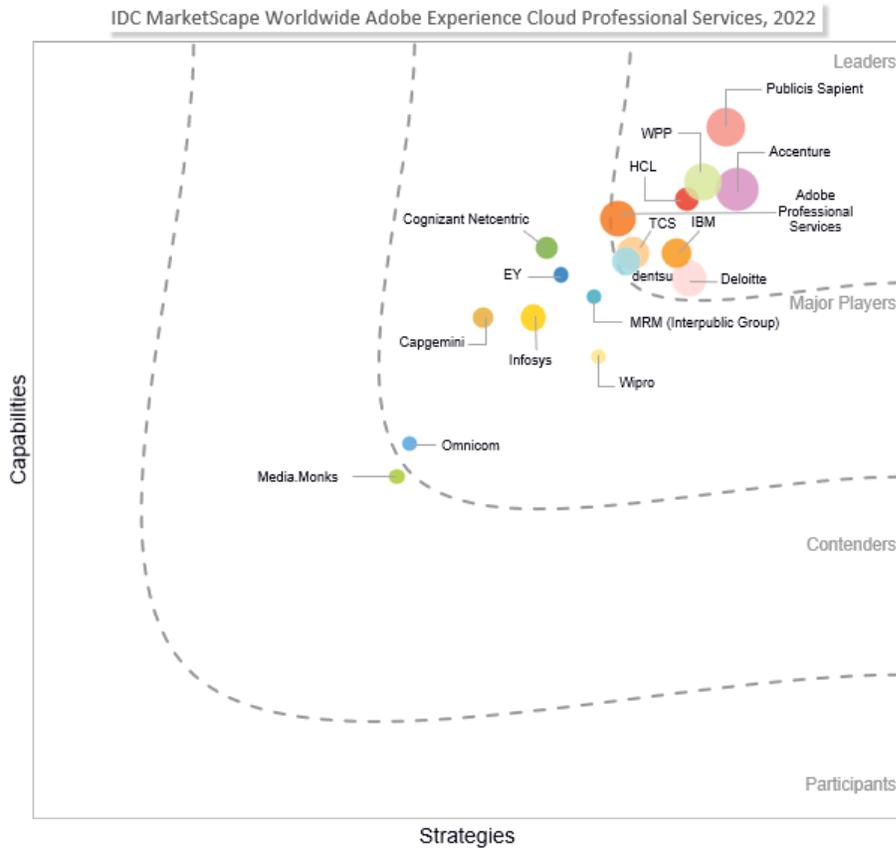
Douglas Hayward

THIS IDC MARKETSCAPE EXCERPT FEATURES HCL

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Adobe Experience Cloud Professional Services Vendor Assessment



Source: IDC, 2022

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2022 Vendor Assessment (Doc # US47542221). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

The Emergence of an Adobe Experience Cloud Partner Ecosystem

Adobe is a critical tier 1 provider of technology for creating and driving customer experience (CX). Through both organic product development and acquisitions, the software maker has assembled a wide-ranging suite of applications that comprise Adobe Experience Cloud.

Adobe's partner ecosystem has consequently grown in size and importance as the suite has grown in breadth and maturity. The partner ecosystem around Adobe Experience Cloud now includes many of the largest consulting and IT services companies globally, including 16 of the 17 vendors assessed in this IDC MarketScape. The 17th vendor in this assessment is Adobe's in-house professional services organization.

Enterprises aiming to drive business value from Adobe Experience Cloud technology should obviously plan and implement their Adobe-related projects in the best way possible. This will often involve seeking help from organizations that provide professional services – business consulting, IT consulting, and software implementation and integration services – that draw on the power of Adobe Experience Cloud. This IDC MarketScape therefore assesses a range of global professional services organizations that have a proven expertise in consulting and implementation services related to Adobe Experience Cloud.

The Adobe Experience Cloud suite itself includes several applications. This IDC MarketScape assessed the strengths of vendors in a number of areas, which included the following Adobe Experience Cloud applications:

- Adobe Commerce
- Adobe Experience Manager
- Adobe Analytics
- Adobe Audience Manager
- Adobe Target
- Adobe Campaign
- Adobe Marketo Engage
- Adobe Workfront

Adobe Experience Platform, the underlying architecture for Adobe Experience Cloud, was also evaluated. Some applications within Adobe Experience Cloud were not included in this evaluation, specifically Adobe Real-Time CDP, Adobe Journey Optimizer, and Customer Journey Analytics.

Adobe Experience Cloud Professional Services Engagements Are Generating Business Value for Enterprises

During the field research for this IDC MarketScape, IDC spoke to more than 45 reference clients of the 17 vendors assessed in this document. In addition, IDC carried out a global survey in late 2021 of organizations that bought Adobe-related professional services (source: IDC's *Global Buyer Perception of Adobe Experience Cloud Professional Services Providers Survey, 2021*). Respondents to the survey had either begun or completed a project that involved advice or implementation services from an external services provider regarding Adobe Experience Cloud within the past 24 months. The survey had 634 individual respondents globally and was carried out in October and November 2021. Respondents could give feedback on more than one vendor.

Globally, 91% of the organizations that IDC surveyed reported that their Adobe Experience Cloud related project had been under way for long enough that some or all of the expected benefits can be seen and measured. Respondents were asked to place the level of benefits experienced on a 1-5 scale, where 1 was "not at all important for our organizational globally," 3 was "moderately important for our organizational globally," and 5 was "strategically important for our organizational globally" (2 and 4 were not described).

Of these organizations that reported measurable benefits worldwide, an impressive 36% said that the measurable benefits of the project were "strategically important for our organizational globally" and only 16% said that the measurable benefits of the project were "moderately important for our organizational globally." Just 1% said the benefits were "not at all important for our organizational globally."

Globally, 81% of respondents chose either 4 or 5 on the 1-5 scale for measurable benefits – meaning that an overwhelming majority of organizations worldwide reported more than "moderate" benefits from Adobe-related professional services engagements.

IDC also asked respondents to grade their organizations in terms of how mature they are at driving value from digital technologies, specifically IDC asked, "Where do you think your organization stands compared with your worldwide peers in using digital technologies to measurably improve your business?," on a 1-5 scale, where 5 was described as "best in class," 4 was "exceed our peers, but not best in class," 3 was "average – on par with our peers," 2 was "behind our peers, but not significantly," and 1 was "far behind our peers."

While this data is self-described, it gives us a view of how higher-performing organizations (those at 4 or 5 on this scale) differ in their attitudes and experiences from their lower-performing peers (those at 1 or 2 on the scale).

Some 59% of organizations that described themselves as best in class in their ability to use digital technology to improve their business said that the benefits they observed from the project were "strategically important for our organizational globally" versus 36% of all organizations. Only 4% of best-in-class organizations said that their observed benefits were "moderately important for our organizational globally" versus 16% of all organizations. So the maturity of the client organization probably plays a role in the success of the project.

Clients Are Selecting Vendors for The Right Reasons

The two most important criteria for choosing a professional services vendor for Adobe-related work cited by respondents to IDC's global survey of buyers were the quality of their proposal, closely followed by the strength of a vendor's experience Adobe Experience Cloud. The next most important criteria listed by clients were an existing corporate or personal relationship with the vendor, recommendations from Adobe, the expected price, and referrals or reference-client recommendations.

An encouraging message from this is that organizations on average are selecting their Adobe professional services vendors on the likelihood of success and the likely impact of the project, rather than on the expected cost. No doubt the cost has to be reasonable, but it's good to see cost treated as secondary to likely business impact in vendor selection.

Vendors Deploy High-Quality People and Drive Business Value for Clients

What about the quality of people employed by providers of Adobe professional services?

When IDC asked respondents "Overall, how would you rate the quality of each of the following vendor's professionals, specifically with regard to Adobe Experience Cloud?" some 79% of vendors were described by their clients as having people who were either "strong" or "exceptional," while just 5% of vendors were described by clients as employing either "weak" or "somewhat weak" professionals.

If we look just at those organizations saying that they generated strategically important benefits as a result of their project, some 83% of vendors were described by their clients as having either "strong" or "exceptional" people.

What about the actual delivery of business value? Again, the picture is positive.

When IDC asked organizations "How would you rate the overall ability of the following professional services vendors to drive measurable business value for your organization?" some 76% of vendors were described by their clients as having either "strong" or "exceptional" ability to drive measurable business value, while only 6% were described as "weak" or "somewhat weak."

Looking just at client organizations that experienced "strategically important" global benefits from their project, some 81% of vendors were described as having "strong" or "exceptional" ability to drive value using Adobe technology.

Organizations Intend to Raise Their Spend on Adobe Professional Services – Especially If It's Already Producing Results

The organizations surveyed by IDC worldwide overwhelmingly expected to maintain or to increase their spending on Adobe-related professional services in 2022. Some 50% said they expected their spend on Adobe-related professional services to rise in 2022, while 37% expected spend to remain the same. Just 12% expected spend to decline in 2022.

But the higher spend will likely go more to those vendors that are better at driving success for their clients. Among those organizations saying that they experienced "strategically important" benefits globally from their Adobe project, 60% said they intended to raise their spending on Adobe-related professional services in 2022 versus 50% of organizations in general.

The broad findings of the global buyer survey were confirmed in calls that IDC held with reference clients of the vendors in this assessment. Overall, providers of Adobe Enterprise Cloud professional services are on average doing a good job of deploying high-quality people who drive business value for their clients.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

The inclusion criteria for this IDC MarketScape consisted of three main dimensions:

- Vendors needed to have Platinum partner status with Adobe.
- Vendors need to have a specialization in at least two Adobe products and to have a global total of at least 200 Adobe credentials.
- Vendors had to have a global presence. This meant that they had to have the capability to service clients directly (i.e., not solely through partners or subcontractors) in all three of IDC's macroregions (Americas, EMEA, and Asia/Pacific).

ADVICE FOR TECHNOLOGY BUYERS

IDC has the following advice for organizations looking for a provider of Adobe Experience Cloud services:

- **Focus on the quality of the proposal, not the price, when selecting your Adobe professional services vendor.** Nobody wants to overpay for anything, let alone a potentially critical project involving business and technology change. But while it's important to keep vendors pricing their services competitively, price should not be the dominant criterion.
- **Talk to reference clients of prospective Adobe professional services vendors – and talk to your Adobe account manager about potential service vendors.** It's a good idea to talk to organizations that have been down the path that you intend to go down – and specifically to ask them about their experience of named vendors.

- **Focus on the quality of the vendor's people.** Ultimately, while tools and intellectual property are valuable and often differentiating assets for services vendors, success in technology-related business projects is often determined mostly by the quality of the vendor's professionals. After all, the main reason that most organizations look for outside help has historically been that they do not have the necessary skills and experience to plan and execute the project in-house. In IDC's global survey of Adobe professional services buyers, organizations that reported generating strong business results from their Adobe-related project were almost two times more likely than others to describe their vendor's people as "exceptional."
- **Look for vendors that can integrate Adobe Experience Cloud with your legacy IT estate.** It may seem almost an afterthought, but the ability to integrate Adobe Experience Cloud technology with an organization's legacy IT estate is an important capability for vendors, and according to IDC's conversations with enterprises, it's currently something of a pain point for organizations using professional service vendors.
- **Look for vendors that can demonstrate innovation and creativity.** Execution excellence and strong client service ethic are key characteristics of a great professional services vendor in the Adobe Experience Cloud space. But sometimes, overlooked vendor capability is creativity and innovation. Organizations often want their professional services vendors to supplement their execution excellence and their client dedication with something quite different – the ability to think outside the box, to surprise the client with new or counterintuitive ideas, and to present the client with unexpected ways to solve problems. While clients do not want to be bombarded with whacky and unrealistic ideas, they do want an element of *proactive* creativity and innovation from their vendors, even as part of very down-to-earth technology implementation projects. IDC's conversations with enterprises indicated that, as with integration of Adobe with the legacy IT estate, the innovation and creativity of vendors is currently something of a "pain point" for many organizations.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

HCL

According to IDC analysis and buyer perception, HCL is positioned in the Leaders category in the worldwide 2022 IDC MarketScape for Adobe Experience Cloud professional services.

HCL is an India-based services company with more than 198,000 employees in about 52 markets around the world. In late 2021, HCL had around 2,600 professionals dedicated to Adobe-related services for clients.

HCL goes to market through three business units: IT and Business Services (ITBS), Engineering and R&D Services (ERS), and Products and Platforms (P&P).

The company serves a range of industries, including financial services, manufacturing, technology and services, telecom and media, retail and CPG, life sciences and healthcare, and public services.

HCL is a Platinum partner of Adobe and was a Platinum sponsor of Adobe Summit 2022. It has participated in beta programs for products including Adobe Campaign, Adobe Experience Manager, and Adobe Sensei and is in the process of being onboarded to Adobe's Partner Advisory Board.

HCL has an Adobe Accredited Solution: HCL ADVantage Experience for Hi-Tech and Manufacturing, a partner/customer engagement platform that can be hosted by high tech and manufacturing enterprises encompassing both B2B and B2C interactions.

In early 2022, HCL held seven Adobe specializations, including global specialization for Experience Manager (Sites) and Americas specializations for both Analytics and Target.

HCL has won awards from Adobe including Best Data Driven Experience award for its work with Manchester United, at the EMEA Adobe Experience Maker Awards in 2019.

HCL has a number of key intellectual property assets to help its clients drive value from Adobe technology, including Advantage Suite with Advantage Experience that helps clients accelerate their Adobe Experience Cloud transformation journey; Industry Playbooks and Process enablement toolkits for multiple industries; FENIX 2.0, an industry-aligned execution framework that helps organizations rewire their core DNA to realize digital transformation objectives; Nexus Consulting, a framework for human-centered approach for end-to-end customer experience transformation that helps client from strategy through execution with focus on business outcomes; Digital Marketing Maturity, a framework that measures the performance of a client's digital marketing landscape and initiatives, measuring its customer experience maturity across 11 dimensions and more than 600 parameters.

HCL hosts webinars/webcasts, LinkedIn live events, roundtables, and panel discussions with clients and engages with independent client communities through conferences and forums such as CGT and NRF in the retail and consumer goods sector and ACMP Global Meet for change management professionals. HCL's client-facing innovation network includes:

- 60+ co-innovation labs and scale digital centers provide an entrepreneurial environment where clients' business stakeholders and end users can work with HCL's multidisciplinary teams
- Labs aggregate digital skill sets such as design thinking practitioners, UX experts, process consultants, anthropologists, digital program managers, industry evangelists, visual designers, and technology architects. These practitioners work with clients to define digital road maps.
- Innovation centers are modular and contain elements such as design studios, scaled delivery centers, and partner spaces.
- Next Gen Innovation Centers are focused on developing cutting-edge solutions in various technologies, including Adobe Experience Cloud.

Key HCL clients in the Adobe Experience Cloud professional services space include a U.S. multinational technology company, a German multinational investment bank, a large European energy provider, a large Malaysian life insurance company, a Dutch multinational banking and financial services company, a Premier League football club in England, a U.S. multinational fast-food corporation, a United States-based credit union company, and a United States-based computer hard disk manufacturer and digital storage company.

Recent HCL acquisitions in the experience space include Starschema, a Hungarian-based data engineering company in 2022; GBS, a German-based digital consulting company in 2021; DWS, an Australia-based IT services and design company acquired in 2020; and Strong-Bridge Envision, a United States-based digital transformation consulting firm acquired in 2019.

HCL says that its mission in Adobe-related professional services is "to partner with Adobe to support our customers through CX transformation journeys. We strive to create exceptional user-centered experiences to transform their customer engagement from acquisition to retention. To build powerful digital foundations with business-aligned marketing operations in collaboration with Adobe to deliver seamless and unique customer experiences."

Strengths

On average, the three areas where HCL Technologies reference clients commended the firm most highly were for value for money, leading-edge Adobe services, and people quality. Comments from clients included:

- "When I talk to HCL, pricing is not first thing we talk about. We just go straight to talking about the business impact that we want."
- "HCL are exceptional in giving us ideas. I wish I could implement them all."
- "They are high-quality people. The talent that I'm getting from HCL are not people who they have just migrated from other technologies but are very skilled and certified within the Adobe toolsets that they use."

Challenges

HCL Technologies has the opportunity to improve its perception among clients in industry knowledge/expertise and in innovation and creativity.

Consider HCL When

HCL is potentially a good choice for organizations that want a partner that combines strong technology consulting and delivery skills with a client-centric mindset. As one HCL Technologies client said, "I go to HCL because of the flexibility in their thought and the way they engage with us. HCL listen to what we want, rather than just being very scope driven like a lot of systems integrators. There's this flexibility with HCL that allows us to move forward better."

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

The 17 vendors in this assessment represent in IDC's view the most important global providers of Adobe-related professional services, based on the breadth and depth of their Adobe-related advisory and implementation capabilities, and their global reach.

However, the vendors in this assessment are not necessarily the only vendors worth considering for either global or regional business and technology change projects involving Adobe Experience Cloud. Adobe has a number of partners with a regional rather than a global focus, which may be suitable for regional projects.

Adobe also has both global and regional partners with a narrower range of services offerings that is narrow than those of the vendors in this assessment but which may be sufficient for the needs of a business project. An organization should normally consider where it can use vendors not included in this assessment, dependent on the scope of its needs.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Adobe Experience Cloud professional services are provided by business consultancies, systems integrators, and digital agencies to help clients achieve strategic business outcomes. They achieve this using Adobe Experience Cloud to transform or build their marketing operations, their commerce and sales channels, or their customer support services.

The goal is variously to help the client grow its brand, its connection to customers, its revenue, and its profitability by deploying or transforming one or more components of Adobe Enterprise Cloud. These engagements may include the full range of professional services. Ideally, implementation of Adobe technology helps the client transform its operating model and its organizational culture to become more agile, proactive, innovative, customer centric, and digital native.

They typically begin with advising the client on the potential of Adobe technologies to drive CX transformation, which will likely involve business consulting services, for instance around identifying opportunities for the organization to improve the experience of its external and internal stakeholders, such as customers clients, citizens, employees, and trading partners. This early phase may also involve IT consulting services, for example, around the business implications for the organization of adopting Adobe products or around the significance for the organization of the Adobe product road map.

These initial services are typically followed by more practically oriented project services, which may include change management, systems integration, and process-transformation services required to implement Adobe software and related technologies in order to drive improvements in customer experience and employee experience.

This IDC MarketScape does not assess vendors' managed services offerings, such as application management, nor does it assess marketing services such as the outsourced provision of advertising or marketing campaigns.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Digital Strategy Consulting Services 2021 Vendor Assessment*, (IDC #US46766521, June 2021)
- *IDC MarketScape: Worldwide Customer Experience Improvement Services 2020 Vendor Assessment* (IDC #US45658220, September 2020)

Synopsis

This IDC study represents a vendor assessment of the 2022 Adobe Experience Cloud professional services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide Adobe Experience Cloud professional services market.

This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing cloud professional services in both the short term and the long term. A component of this evaluation is the inclusion of the perception that buyers of Adobe Experience Cloud professional services buyers have of both the key characteristics and the capabilities of the provider evaluated. Buyers were surveyed across all three of IDC's macroregions for the vendors participating, and IDC spoke to more than 45 reference clients of participating vendors.

"As the Adobe Experience Cloud suite expands in scope and deepens in functionality, its partner ecosystem becomes larger and more important," says Douglas Hayward, research director for Customer Experience (CX) Related Services at IDC. "The range of potential services partners in this space is large, but the good news is that when enterprises select external partners, they are focusing more on the quality of vendors' people and proposals than they are on price. Overall, the vendor ecosystem is providing high-quality professionals who drive business result for their clients."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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