

IDC MarketScape: Worldwide Adobe Experience Cloud Professional Services 2024–2025 Vendor Assessment

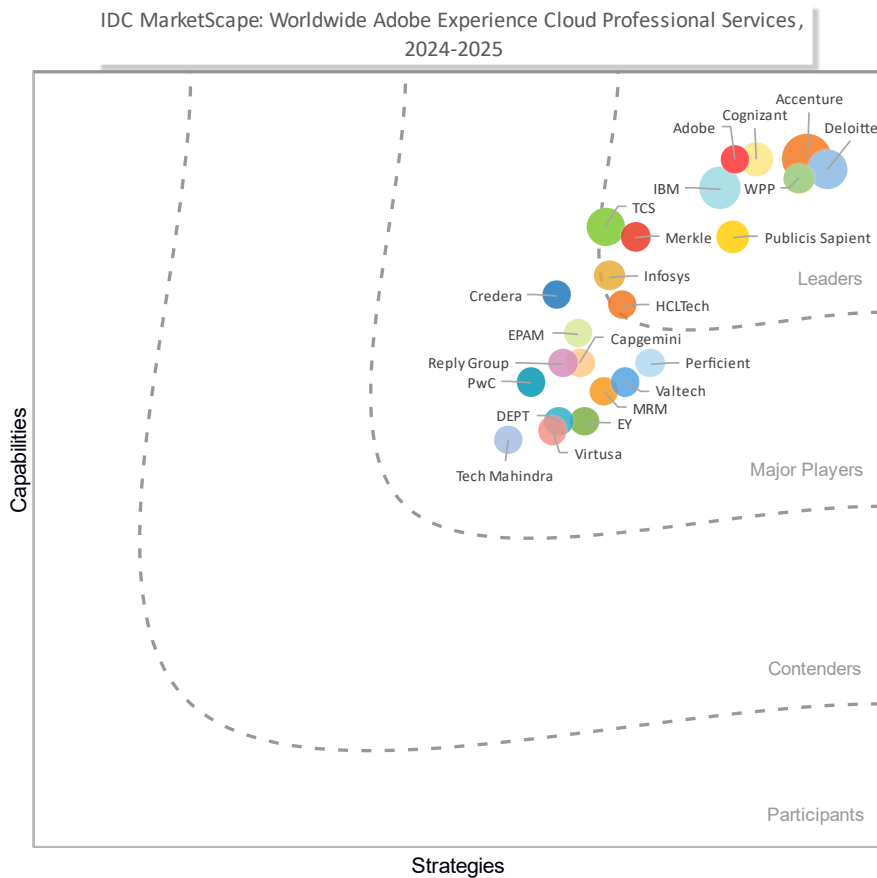
Douglas Hayward

THIS MARKETSCAPE EXCERPT FEATURES HCLTECH AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Adobe Experience Cloud Professional Services Vendor Assessment



Source: IDC, 2024

See the Appendix for the 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 2024–2025 Vendor Assessment (Doc # US51741024).

IDC OPINION

This IDC study provides a vendor assessment of the 2024–2025 Adobe Experience Cloud professional services market using the IDC MarketScape model. The 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 various vendors participating in the worldwide Adobe Experience Cloud professional services market and is based on a comprehensive framework and set of parameters expected to be the most conducive to successfully providing professional services relating to Adobe Experience Cloud in the short and long terms. This evaluation includes the perception of professional service buyers of these providers' key characteristics and capabilities. The study surveyed buyers across all three of IDC's macroregions.

The following are some key findings from IDC's 64 calls with reference clients of Adobe Experience Cloud professional services vendors:

- Feedback from calls with reference clients indicated that buyers of Adobe Experience Cloud professional services were most impressed by the quality of professionals that vendors deployed, with vendors' ability to drive business value from Adobe technologies in second place. The third-highest scoring area on average was value for money: the balance between the money buyers paid their vendor — which they often pointed out was substantial — and the business value they received from the engagement.
- This indicates that the industry is doing a good job of recruiting and managing smart and value-focused professionals. The survey evidence shows that the broader community of buyers also believes that vendors supply high-quality professionals who deliver real business value to their clients.
- Feedback revealed that vendors performed the worst in differentiation, an area that often has the lowest average score in reference client calls. The second-lowest average score was vendors' willingness to challenge clients, which is usually a weak point according to IDC MarketScape reference clients, with industry-specific capabilities ranking third lowest.

- This highlights that Adobe-related professional service teams can drive greater client satisfaction and business value by providing clients with insights and best practices from other engagements and consistently, proactively, and constructively challenging them.

Key findings from IDC's field survey of calls with Adobe Experience Cloud professional services buyers were the following:

- Feedback from the broader field survey of Adobe Experience Cloud professional service buyers also indicated that buyers were most impressed by the quality of their vendors' professionals, with vendors' ability to deliver business value from Adobe technology deployment in second place. Client empowerment achieved the third-highest satisfaction score (rather than value for money, as was the case for reference clients).
- IDC's calls with reference clients and its broader field survey of buyers revealed that both groups of Adobe Experience Cloud professional services clients were most impressed with vendors' quality of professionals and ability to deliver business value.
- The weakest area for vendors in IDC's survey of buyers of Adobe Experience Cloud professional services was differentiation, with value for money in second place and the willingness to challenge clients in third place. Vendor differentiation and willingness to challenge clients also received the lowest scores from reference clients.

Although it may seem a paradox that value for money is one of the top 3 vendor weaknesses in the field survey but a top 3 strength in reference client calls, it is logical. Reference clients tend to be more satisfied than the general body of clients, although this is not always the case. Reference clients differ on average from the broader buyer community by often having a deeper and/or longer relationship with their vendor, encouraging them to judge the value the vendor creates in this context rather than in shorter-term transactional terms. However, vendors are also unlikely to nominate organizations they believe have not received value for money from engagements as reference clients.

Overall, vendors perform well in the fundamentals of recruiting and training high-quality professionals and ensuring they deliver business value for their clients.

Nonetheless, they need to constructively challenge clients more consistently and proactively and can benefit from differentiating themselves — potentially through unique intellectual property or by forging closer, more strategic relationships with their clients. The more clients consider vendors to be commodity suppliers, the worse it is for vendors — and arguably worse for enterprises seeking ambitious and differentiated uses of Adobe technology.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes an analysis of 23 Adobe Experience Cloud professional services providers and evaluates each one's characteristics instead of their size or breadth of services. The inclusion criteria related to Adobe Experience Cloud services are the following:

- The vendor must have Platinum Partner status.
- The vendor must have over 100 certified employees.
- The vendor must have over 100 certifications.
- The vendor must have over 300 credentials.
- The vendor must have over 3 specializations.

The vendors in this assessment met all five criteria.

ADVICE FOR TECHNOLOGY BUYERS

IDC offers the following advice to organizations looking to buy Adobe Experience Cloud-related professional services:

- They should choose vendors that will firmly but constrictively challenge them technology and business wise. At a time of rapid and deep social, economic, political, and technological change, advisors should challenge an organization's experience strategy and its accompanying technology choices based on their hands-on experience with other clients.
- Organizations should choose vendors that know how to integrate their clients' increasingly complex legacy applications and infrastructure with new and updated Adobe products and new non-Adobe technologies (such as GenAI and Web 3.0) for at least the foreseeable future. Integrating new products and technologies is often a pain point for enterprises, and Adobe platforms are no exception.
- They should mix pragmatism and strategic vision in CX in general and in the Adobe space in particular. Although Adobe Experience Cloud consultants and implementers need a strong vision and point of view about the future, they should balance this intellectual leadership with more pragmatic and immediately actionable advice and execution that focuses on the organization's strategic needs.
- Clients should choose an Adobe professional services partner that knows their organization inside out (or can at least quickly acquire this knowledge) and understands it at a human and political level. A professional services vendor must be familiar with an organization's "human side" and be able to gauge its

capabilities and weaknesses to propose the right technology (Adobe or not) and the right process or cultural change. Without these abilities, even the best technology cannot produce the value it should for the organization.

- Organizations should seek professional services vendors that bring them best practices (both Adobe-related and generic) from other clients to help guarantee value creation from adopting new technology products. Organizations that IDC surveyed said that they highly value the insights that their service partners bring from other clients, even (or sometimes especially) if these clients operate in other industries and geographies.
- Organizations should work with vendors that supply a balanced mix of disruption and assurance. Great professional services providers combine freewheeling, innovative, and creative consulting services — which can sometimes be disruptive or even disconcerting for the organization — with industrialized and KPI-driven implementation services that ensure the safe, on-time, and on-budget delivery of technology-rich projects.

FEATURED VENDOR PROFILE

This section briefly explains IDC's key observations resulting in HCLTech's position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and opportunities.

HCLTech

According to IDC analysis and buyer perception, HCLTech is in the Leaders category in the 2024–2025 IDC MarketScape for worldwide Adobe Experience Cloud professional services.

HCLTech is an India-based services company with more than 224,000 employees in 60 markets around the world. HCLTech goes to market with four main business units: Digital Business; Digital Foundation; Digital Process Operations; and Engineering and R&D. It offers domain-focused solutions, including CloudSMART Solutions (an integrated consultancy and delivery platform for cloud services) and several GenAI solutions such as AI Force and AI Foundry.

The vendor serves industries such as construction and engineering, education and social services, entertainment, leisure and hospitality, financial services, government, healthcare, insurance, IT/technology services, manufacturing, media, natural resources and mining, pharmaceuticals and medical equipment, primary production, professional services, retail, telecommunications, transportation, utilities, and wholesale.

HCLTech is an Adobe Platinum Partner. As of mid-September 2024, HCLTech had 209 Adobe-certified employees, 294 Adobe certifications, 5 Adobe Solution Partner Specializations, 630 Adobe credentials, and 1 Adobe Accredited Partner Solution. IDC

estimates that HCLTech dedicates around 3,500 FTEs to Adobe-related services. Since 2021, four of its employees have been appointed Adobe Community Advisors and the company has been a Platinum sponsor of Adobe Summit twice.

HCLTech has several key intellectual property assets to help its clients drive value from Adobe technology, including:

- **Advantage Experience:** This framework helps clients build and deliver meaningful and contextual experiences for marketers across different digital touch points to drive optimized brand marketing, prospect conversion, and retention. The solution enables enterprises to build data-driven experiences and AI-led conversations at scale.
- **Advantage Experience AI Assist:** This GenAI-based tool helps marketers automate content creation and categorization, SEO optimization, and automatic digital assets generation. It reduces content creation and authoring efforts and improves accuracy so clients can maximize their resources' value for marketing campaigns and interventions.
- **Marketing as a Service:** This is a scalable marketing operations framework with tools and services to help clients set up marketing processes and governance. Key features include HCLTech teams that can work in colocated, remote, and distributed models and utilities such as Marketing Accelerator Packages Ops that help clients accelerate marketing operations, focusing on quality and consistency.
- **Advantage Commerce:** This offering uses headless architecture to help clients provide an experience-driven shopping experience to customers to convert moments of truth into revenue.
- **Design to DevOps:** This methodology, process, and design platform enables clients to align their product and development teams to drive greater value, consistency, and efficiency.

HCLTech has a global innovation network of labs and digital centers where clients and users can directly engage with the company's multidisciplinary teams. The network includes:

- More than 60 co-innovation labs and scale digital centers that provide an entrepreneurial environment where clients' business stakeholders and end users can work with HCL's multidisciplinary teams
- Labs that aggregate digital skill sets such as design thinking practitioners, UX experts, process consultants, anthropologists, digital program managers, industry evangelists, visual designers, and technology architects who work with clients to define digital road maps
- Modular innovation centers that contain elements such as design studios, scaled delivery centers, and partner spaces

- Next Gen Innovation Centers that develop cutting-edge solutions in various technologies, including Adobe Experience Cloud

HCLTech says that its mission in Adobe-related professional services is “to help our clients build world-class experiences for their customers leveraging the latest Adobe technologies. To work together with Adobe to deliver connected and scaled experiences to serve our customers better. Our services help businesses advance human-centric experiences to the next level using cutting-edge technology services from strategy to execution.”

Strengths

HCLTech is an offshore-based IT services provider that combines experience cloud suite implementation capabilities with a more recent focus on digital marketing services. *IDC MarketScape: Worldwide Experience Design Services 2023–2024 Vendor Assessment* (IDC #US49988123, December 2023) positioned the company in the Leaders category. Based on conversations with HCLTech’s clients in this assessment, the vendor excelled in value for money, Adobe-specific thought leadership, and value creation.

Challenges

Based on conversations with HCLTech’s clients, the vendor can improve its perception among buyers of Adobe-related professional services in industry-specific capabilities and Adobe technology integration with the rest of a client’s IT estate.

Consider HCLTech When

HCLTech is potentially a good choice for organizations seeking a partner that combines strong IT services with Adobe platform capabilities and focuses on driving business value for clients.

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.

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

Consultancies, IT services providers, and digital agencies provide Adobe Experience Cloud professional services to help clients achieve strategic business outcomes by using Adobe Experience Cloud to transform or build their marketing operations, commerce and sales channels, or customer support services.

Adobe Experience Cloud professional services mainly make up activities from three of IDC's services foundation markets, which *IDC's Worldwide Services Taxonomy, 2022* (IDC #US47769222, July 2022) defines in its entirety. These foundation markets are business consulting, IT consulting, and systems integration.

The goal is to help clients grow their brand, connect to customers, and drive revenue and profitability by deploying or transforming one or more Adobe Enterprise Cloud components. These engagements may include the full range of professional services.

Engagement may begin with advising the client on Adobe technologies' potential to drive CX transformation, which will likely involve business consulting services to identify 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 to determine the business implications of an organization's adoption of Adobe products, for example, or the significance of the Adobe product road map for the organization.

After advisory services, more practically oriented project services typically follow, which may include change management, systems integration, and process transformation services necessary to implement Adobe software and related technologies to improve customer and employee experience.

This IDC MarketScape did not assess vendors' managed services offerings, such as application management, or marketing services such as outsourced advertising or marketing campaigns.

This assessment defines the scope of Adobe Experience Cloud as follows:

- Adobe Content and Commerce comprises Adobe Commerce and AEM, including AEM Assets, AEM Forms, AEM Managed Services, AEM Run and Operate, and AEM Sites.
- Data Insights and Audiences comprises Adobe Analytics, Adobe Customer Journey Analytics, Adobe Audience Manager, and Adobe Real-Time CDP.
- Customer Journeys comprises Adobe Target, Adobe Campaign, AJO, and Adobe Marketo Engage,
- Marketing and Workflow Planning comprises Adobe Workfront and Adobe Mix Modeler.
- AEP comprises the Adobe Experience Platform architecture but not the products Adobe developed for this architecture. Note that Adobe Experience Platform is not formally part of Adobe Experience Cloud but is part of the strategy axis in this assessment.

LEARN MORE

Related Research

- *Market Analysis Perspective: Worldwide CX Services, 2024* (IDC #US51521424, September 2024)
- *IDC Market Glance: Customer Experience Services, 3Q24* (IDC #US51521224, August 2024)
- *Worldwide and U.S. Customer Experience Services Forecast, 2024–2028* (IDC #US51521324, July 2024)

- *Worldwide Services Market Shares, 2023: Market Remains Steady Despite Economic Uncertainties* (IDC #US50781824, May 2024)
- *IDC MarketScape: Worldwide Experience Design Services 2023–2024 Vendor Assessment* (IDC #US49988123, December 2023)
- *IDC MarketScape: Worldwide Experience Build Services 2023–2024 Vendor Assessment* (IDC #US49988323, December 2023)
- *IDC’s Worldwide Services Taxonomy, 2022* (IDC #US47769222, July 2022)

Synopsis

This IDC study provides a vendor assessment of the Adobe Experience Cloud professional services ecosystem through the IDC MarketScape model. It discusses both quantitative and qualitative characteristics that explain success in the Adobe Experience Cloud professional services market. This IDC MarketScape covers various vendors participating in the Adobe Experience Cloud professional services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

“Adobe Experience Cloud is a key platform for creating compelling experiences that deliver value not just to the people who use or buy products and services — such as consumers, employees, citizens, and gamers — but just as importantly to the organizations providing these products and services. Most organizations need outside help planning and deploying technology, which means buying the right Adobe Experience Cloud-related professional services is often a critical choice for enterprises and public bodies,” says Douglas Hayward, senior research director for CX services and strategies at IDC. “Organizations choosing an Adobe Experience Cloud professional service should look for proof that their vendor has high-quality professionals who have a track record in empowering their clients and delivering the best value for the fairest price.”

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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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