



Everest Group PEAK Matrix™ for Life Sciences Data and Analytics Services for Sales and Marketing Service Providers 2020

Focus on TCS
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Introduction and scope

Everest Group recently released its report titled “[Life Sciences Data and Analytics Services for Sales and Marketing Services PEAK Matrix™ Assessment with Service Provider Landscape 2020](#)” This report analyzes the changing dynamics of the life sciences D&A services for sales and marketing landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 16 service providers on the Everest Group PEAK Matrix™ for Life Sciences Data and Analytics Services for Sales and Marketing services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of Life Sciences D&A services for sales and marketing based on their absolute market success and delivery capability.

Based on the analysis, **TCS emerged as a leader**. This document focuses on TCS’ Life Sciences Data and Analytics Services for Sales and Marketing services experience and capabilities and includes:

- TCS’ position on the Life Sciences Data and Analytics Services for Sales and Marketing services PEAK Matrix
- TCS’ year-on-year movement on the Life Sciences Data and Analytics Services for Sales and Marketing services PEAK Matrix
- Detailed Life Sciences Data and Analytics Services for Sales and Marketing services profile of TCS

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.

Background and scope of the research

The traditional methods of sales and marketing are failing due to the changing landscape of the life sciences industry. Data and Analytics (D&A) is revolutionizing the industry as analytics-based insights are replacing instinct-based decision-making. Sales and marketing is the biggest adopter of D&A within life sciences and uses it to design strategies for the function. The industry is moving from simple descriptive models that were used to analyze existing trends, to highly sophisticated predictive and prescriptive models, in order to define a future growth strategy.

To support enterprises in their journeys, service providers are ramping up capabilities through life sciences-specific partnerships and acquisitions. This, in turn, is driving the need for on demand research and market intelligence as well as an understanding of supply trends in life sciences D&A services. Everest Group's life sciences ITS research program addresses this market need by analyzing outsourcing trends and service provider capabilities in life sciences D&A services for sales and marketing.



In this report, we analyze the capabilities of 16 global IT service providers specific to the life sciences sector . These service providers are mapped on the Everest Group PEAK Matrix™, which is a composite index of a range of distinct metrics related to a provider's capability and market impact. We focus on:

- D&A services market trends for life sciences sales and marketing
- The landscape of D&A service providers for life sciences sales and marketing
- Assessment of the service providers on several capability- and market success-related dimensions

Scope of this report:



Geography
Global



Industry
Life sciences (pharmaceuticals, medical devices, biotechnology, and other life sciences¹)



Services
D&A services for sales and marketing

¹ Includes healthcare data & information services and medical products distribution

Life sciences D&A services for sales and marketing PEAK Matrix™ characteristics

Leaders:

Cognizant, TCS, and ZS Associates

- Leaders have established themselves as front runners to support large life sciences customers that prefer service providers to help them commercial transformation through D&A initiatives
- These players have balanced portfolios, are able to come up with innovative use-cases for life sciences firms, and continue to keep pace with the market dynamics through continued investments in technology and services capability development (internal IP/tools, M&A, partnerships, etc.)
- Leaders have showcased high levels of proactiveness in taking their innovations and next-generation service offerings to clients
- They tend to be the providers of choice for large life sciences firms looking for partners with a similar global footprint
- That said, the current Leaders face a stiff challenge from progressive Major Contenders in terms of both D&A for sales and marketing services capabilities and commercials. Hence, they need to focus on building effective solutions that leverage D&A trends and also address the cost-takeout mandate

Major Contenders:

Accenture, Axtria, Capgemini, Deloitte, DXC Technology, Genpact, HCL Technologies, Indegene, IQVIA, NTT DATA, and Wipro

- The Major Contenders segment comprises a varied mix of global MNCs, large- & mid-sized firms, and life sciences specialists
- While some have built meaningful capabilities to deliver a wide range of digital services across the life sciences LoBs and value chain, others focus on differentiating by specializing in specific areas within the life sciences domain
- The service portfolios of Major Contenders are not as balanced as compared to Leaders, and also tend to be less comprehensive in value chain coverage
- However, these players are offering the leaders stiff competition by making high-profile investments and meaningful partnerships around sales and marketing offerings.

Aspirants:

Atos, EPAM

- Aspirants are majorly focused on mid-sized clients with low focus on large and very large clients
- Some of the players are trying to grow their life sciences businesses through industry-specific offerings

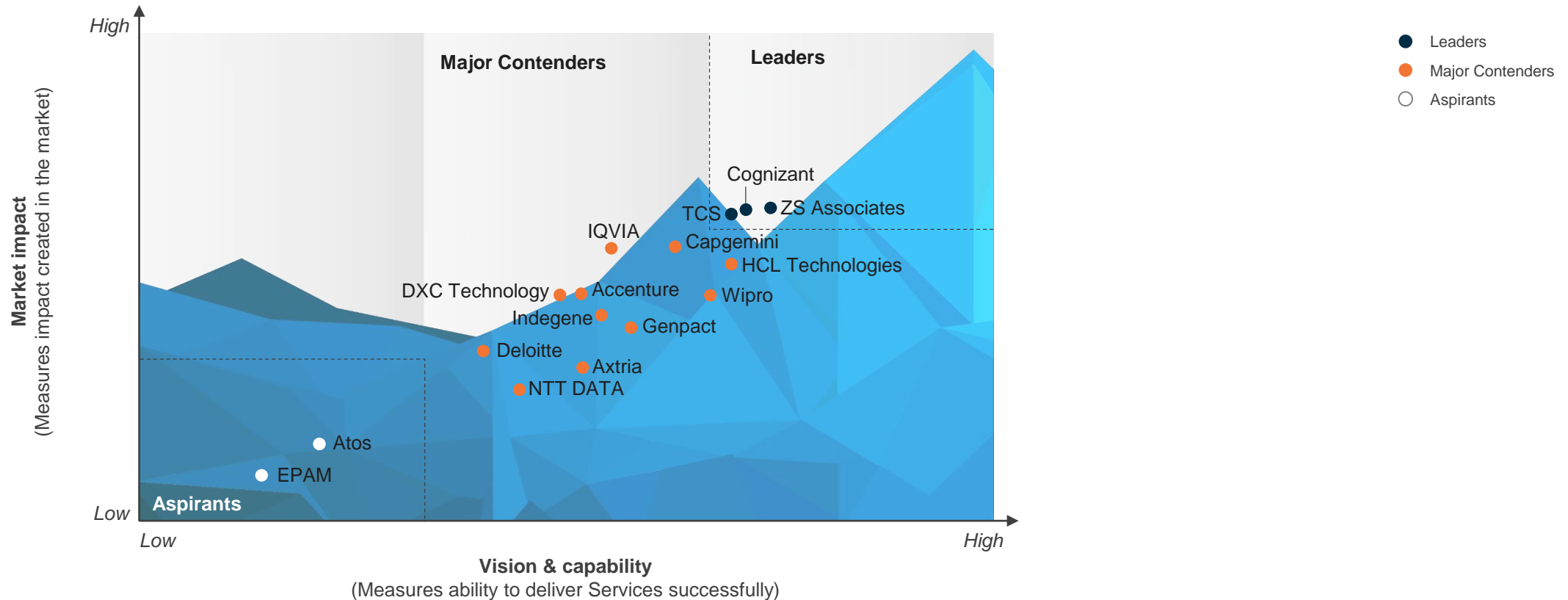
Source: Everest Group (2020)

Everest Group PEAK Matrix™

Life Sciences Data and Analytics Services for Sales and Marketing Services PEAK Matrix™ Assessment 2020 | TCS positioned as Leader



Everest Group Life Sciences Data and Analytics Services for Sales and Marketing Services PEAK Matrix™ Assessment 2020



Note 1: PEAK Matrix specific to life sciences D&A services for sales and marketing

Note 2: Assessments for Accenture, Atos, Deloitte, EPAM, IQVIA, and ZS Associates excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

Overview

Strengths

- TCS has a consulting-led approach for client problems
- It has an independent platform solution to collect real-world data, which makes it strong in data management in addition to a strong focus on data analytics
- It has solutions covering the entire value-chain

Areas of improvement

- Needs to look at increasing its focus in the mid-market as the existing focus is majorly on large enterprises
- Needs to ramp up capabilities for biotech clients

LS LOB coverage¹

■ High (>30%) ■ Medium (10-30%) ■ Low (<10%)



LS sales and marketing D&A services revenue



Adoption by buyer groups¹

■ High (>30%) ■ Medium (10-30%) ■ Low (<10%)



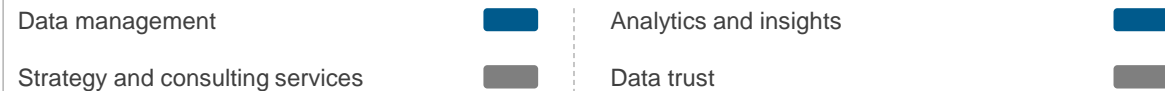
LS D&A value chain coverage¹

■ High (>20%) ■ Medium (10-20%) ■ Low (<10%)



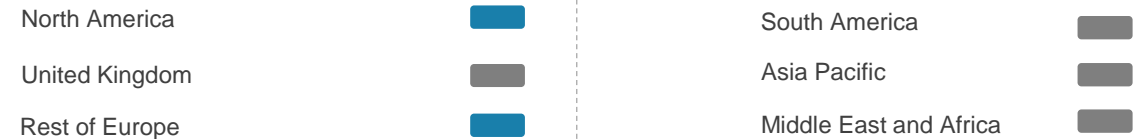
LS sales and marketing services revenue by D&A segment

■ High (>30%) ■ Medium (10-30%) ■ Low (<10%)



LS sales and marketing services revenue by geography

■ High (>60%) ■ Medium (10-60%) ■ Low (<10%)



¹ Classified as high/medium/low, based on contribution to revenue

² Includes healthcare data & information services and medical products distribution

Offerings and recent developments

| Proprietary solutions for life sciences sales and marketing D&A (representative list) | |
|---|---|
| Solution | Details |
| Cognitive Commercial Intelligence Platform (CCI) | Digital KOL - automated identification of KOL and their connection mapping |
| | Multi-channel Marketing (MCM) Analytics - An extensive solution on multiple channels of marketing such as web, paid/organic search, e-mail, social media, and sentiment analysis to get more precise insights |
| | Market Mix Modelling – This solution helps brand/territory managers build strategy for the marketing promotions |
| | Customer Segmentation – This solution enables higher profitability through an understanding of the needs of each customer segment and targeting them suitably |
| | Sales Force Effectiveness - Enables organizations to measure the performance of a salesforce/individual salesperson for increasing company revenues through increased customer acquisition, product/service sales, and upselling/cross-selling additional products and services |
| | Market Intelligence - A comprehensive real time solution providing 360-degree view of market, competition and brand insights to drive business decisions |
| Real World Evidence (RWE) Platform | Real World Data & Analytics – This solution provides a common platform to consolidate real-world and internal data. It easily manages real-world data assets within the organization and standardizes data sources to provide insights |
| | Cognitive Search - A web-based tool for enhanced searching of PubMed/MEDLINE or any customized database. Interprets unstructured literature and returns high value and relevant results using TCS developed ranking algorithms |
| | Systematic Literature Review (SLR) Automation - Machine-first screening and extraction from identified literature using a combination of rule-based, NLP, ML, and deep learning solutions. This is an offering from TCS' RWE platform |
| Managed Market Analytics | This solution provides national and regional accounts (payer) to review performance by market, product, geography, account, plan, and channels |

Offerings and recent developments

Key events (representative list)

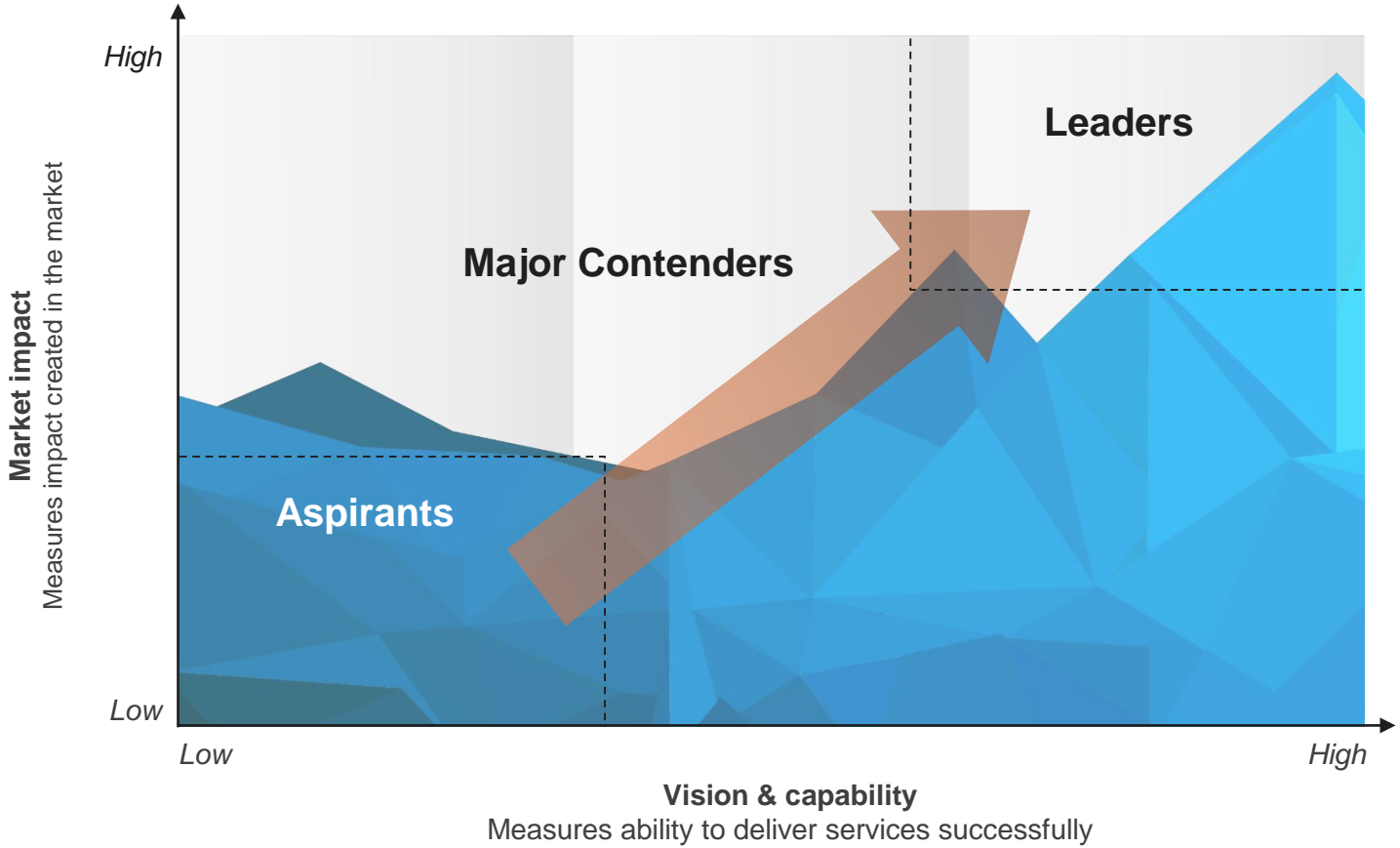
| Event name | Type of event | Details |
|--|---------------|---|
| Cognitive Commercial Intelligence platform | Investment | TCS has invested heavily in developing an in-house cutting edge platform (cognitive commercial Intelligence) that helps sales, marketing, pricing and market access functions within life sciences organizations make smarter decisions at scale by providing transformational and flexible analytics |
| Real World Evidence platform | Investment | TCS has developed a platform for RWE. The platform provides end to end value evidence lifecycle management capabilities including RWE, knowledge and evidence management, study conduct and management, evidence generation and synthesis and value communication |
| State-of-the-art digital lab | Investment | A digital lab has been set up for embracing emerging digital technologies to build next-generation solutions. Key focus areas include technologies in UI/UX, 3D printing, VR, cognitive, big data, digital marketing, and more |
| Life Sciences Interactive | Investment | TCS Life Sciences agency services for Pharma Marketing function covering branding/strategy, creative and execution, media print and digital, content creation/medical communication, digital production, User Experience etc. |
| Technology partnership | Partnership | TCS has got a number of technology partners in D&A namely Cloudera, Hortonworks, MapR, AWS, MongoDB, Tableau, Qlikview, and Microsoft |

Appendix

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



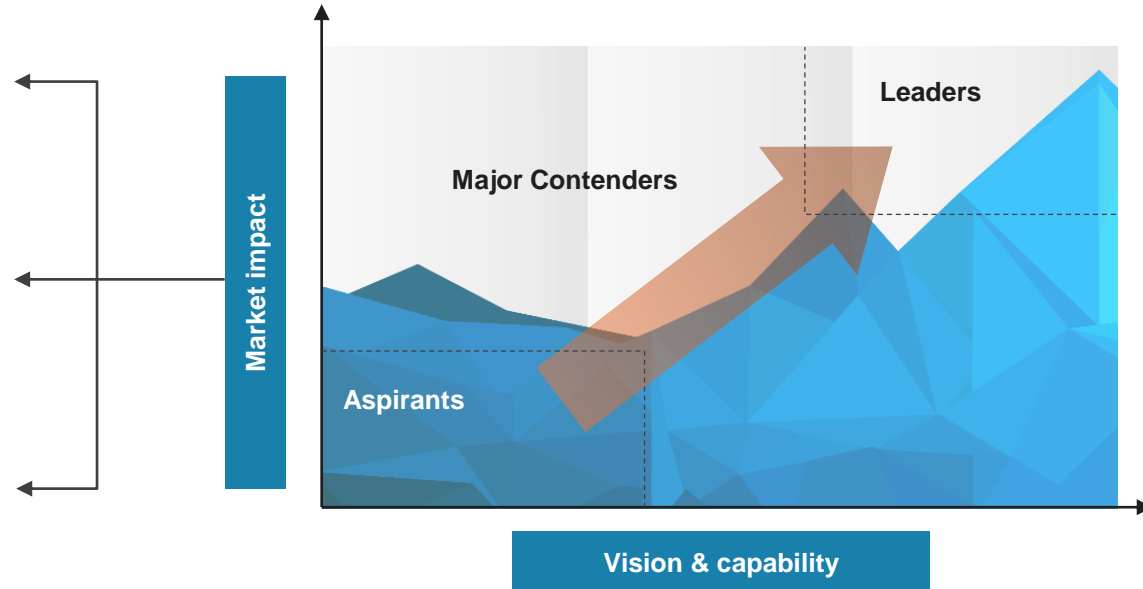
Everest Group PEAK Matrix



Services PEAK Matrix™ evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
No. of clients, revenue base, and YOY growth, deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geos and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



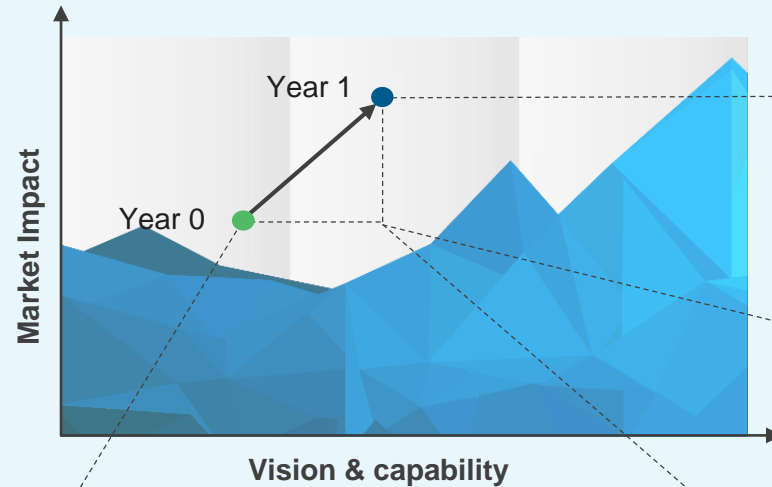
Measures ability to deliver services successfully.
This is captured through four subdimensions

- 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 sub-segments / 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

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix™

Methodology

Everest Group selects Star Performers based on the relative YOY improvement on the PEAK Matrix



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

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

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

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

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

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

The Star Performers title relates to YOY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

Does the PEAK Matrix® assessment incorporate any subjective criteria?

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

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

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

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

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

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

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

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

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

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

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



About Everest Group

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

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