



Everest Group Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment 2023

Focus on Accenture
September 2023



Introduction

Supply chain IT transformation services have been the focus of investments for retail and Consumer Packaged Goods (CPG) enterprises in the past few years, particularly after the pandemic. The global disruption underscored the urgency of a flexible and resilient supply chain. These transformation services play a pivotal role in optimizing operations, aligning demand and supply, enhancing customer experiences, and facilitating swift responses to market changes.

In the aftermath of the pandemic, these services are crucial for enterprises to navigate uncertainties, ensure continuity, and meet evolving consumer demands while fostering competitiveness and sustainability in an increasingly dynamic and unpredictable landscape.

In this research, we present an assessment of 15 service providers featured on the Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® 2023. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading service providers, client reference checks, and an ongoing analysis of the retail and CPG IT services market.

The full report includes the profiles of the following 15 leading service providers featured on the [Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment 2023](#):

- **Leaders:** Accenture, EY, TCS, and Tech Mahindra
- **Major Contenders:** Capgemini, Cognizant, Deloitte, Genpact, HCLTech, Infosys, LTIMindtree, and Wipro
- **Aspirants:** Sonata Software, Visionet Systems, and Zensar

Scope of this report



Geography
Global



Providers
15 service providers



Services
Supply chain IT transformation services in the retail and CPG industry

Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® characteristics

Leaders

Accenture, EY, TCS, and Tech Mahindra

- Leaders are characterized by their ability to successfully execute complex, multi-product/platform, advisory-led supply chain transformations, underpinned by their strong global delivery network
- These providers have strong partnerships with big tech firms, such as SAP and Oracle, cloud vendors, such as AWS, Azure, and GCP, and a majority of the supply chain specialists to build and innovate client-specific solutions
- They have a mature suite of supply chain-focused and retail and CPG-related solutions to accelerate time-to-market for their clients

Major Contenders

Capgemini, Cognizant, Deloitte, Genpact, HCLTech, Infosys, LTIMindtree, and Wipro

- These providers are making continued investments in building supply chain-focused proprietary tools, solutions, and accelerators to enhance their service delivery capabilities
- They have built meaningful capabilities to deliver supply chain transformations; however, their service portfolios are not as balanced and comprehensive as those of Leaders
- They take a balanced organic and inorganic approach to fill gaps across their supply chain services portfolio and further improve their global delivery footprint

Aspirants

Sonata Software, Visionet Systems, and Zensar

- Aspirants have good proof points in delivering implementation and/or maintenance of supply chain transformations of low- to medium-complexity for Small and Mid-sized Buyers (SMBs)
- They are either focused on a certain product(s) or currently have a relatively small supply chain or retail and CPG practice
- They lack the scale of supply chain-focused partnerships and IP to enable complex supply chain transformations

Everest Group PEAK Matrix®

Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment 2023 | Accenture is positioned as a Leader

Everest Group Supply Chain IT Transformation Services for Retail and CPG PEAK Matrix® Assessment 2023¹



¹ Assessments for Accenture, Capgemini, Deloitte, EY, and Infosys 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 retail and CPG buyers
Source: Everest Group (2023)

Accenture profile (page 1 of 4)

Overview

Vision for supply chain transformation services for the retail and CPG sector

Accenture’s global team of experts in end-to-end digital supply chain network transformation works together to help companies build future-ready supply chain networks that deliver on the promise to simplify people’s lives and help organizations do business the right way.

Overview of client base

Its key clients include global food and beverage firms, home and personal care businesses, agribusiness, and other leading retail and CPG enterprises.

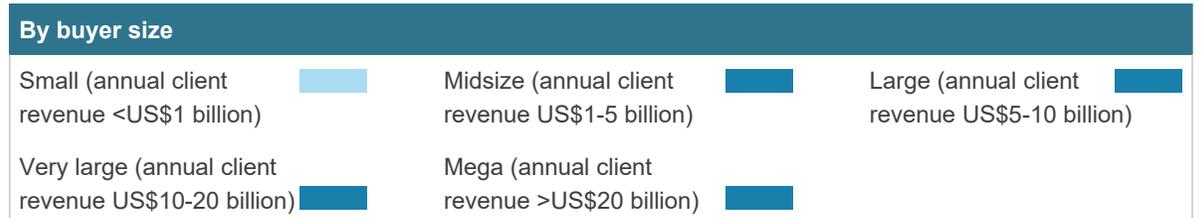
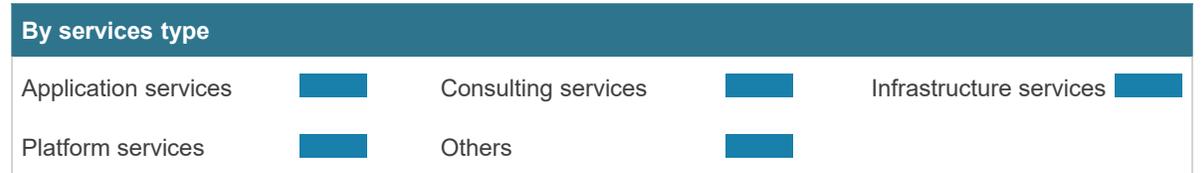
Supply chain transformation services revenue from the Retail and CPG sector (CY 2022)



Number of active retail and CPG clients for supply chain transformation services



Legend: N/A (0%) Low (1-15%) Medium (15-30%) High (>30%)



Accenture profile (page 2 of 4)

Key solutions and investments

Proprietary IP/solutions/frameworks/accelerators/tools developed internally to deliver Supply Chain Transformation services in the Retail and CPG sector	
Name	Details
Synops	SynOps uses next-generation technologies and provides Supply Chain Management (SCM) capabilities including procurement, logistics, and manufacturing operations. The platform integrates data from various sources to provide a holistic view of the supply chain, enabling businesses to identify areas for improvement and optimize their operations.
Accenture Supply Chain Control Tower (SCCT)	It offers real-time supply chain visibility and autonomous execution, empowering proactive orchestration across functions and the larger network. It enables responsive and agile supply chains. Additionally, SCCT promotes sustainability by optimizing vehicle utilization, last-mile delivery, and fuel efficiency, thereby reducing greenhouse gas emissions.
myWizard	myWizard is an AI-powered automation platform that streamlines firm operations by automating tasks such as order processing, inventory management, shipment tracking, and predictive maintenance. It also optimizes maintenance operations through predictive capabilities.
myConcerto	myConcerto, an integrated digital platform, offers various solutions, industry processes, and functional blueprints. It includes SCM capabilities such as real-time supply chain visibility from procurement to delivery, and tools for demand planning and forecasting, enabling businesses to manage operations and anticipate demand effectively.
Connected Mine	Connected Mine is a digital platform with solutions integrating analytics, AI, and IoT for real-time mining operation monitoring. By merging data from sensors, machines, and enterprise systems, it empowers data-driven decision-making, aiming to enhance operational efficiency, cut costs, and enhance safety for mining companies.

Key partnerships/alliances/acquisitions/JVs leveraged to deliver Supply Chain Transformation services in the Retail and CPG sector		
Name	Type of investment (year)	Details of investment
SAP	Partnership	It enhances the overall supply chain capabilities. SAP and Accenture have also developed a joint integrated digital platform, myConcerto, which combines the latest SAP solutions and technologies with Accenture's industry and functional expertise.
o9	Partnership (2016)	It strengthens supply and demand capabilities.
Blue Horseshoe	Acquisition (2021)	It is a SCM and strategy consulting firm and systems integrator specializing in fulfillment and distribution solutions. Its expertise supports Accenture's vision for building customer-centric, resilient, and responsible supply chains that benefit people, society, and the planet.
Kinaxis	Acquisition (2022)	It is a supply chain consultancy, which specializes in logistics and warehouse management, as well as offering expertise in data visualization, analytics, digital yard solutions, inventory management systems, and robotics. This acquisition has strengthened Accenture's logistics and warehouse management capabilities.
Inspirage	Acquisition (2022)	Inspirage is an integrated supply chain specialist firm focused on Oracle technology. The acquisition further enhances Accenture's Oracle Cloud capabilities, helping accelerate innovation for clients through emerging technologies, such as touchless supply chain and digital twins.

Accenture profile (page 3 of 4)

Case studies

Case study 1

One of the world's largest food and beverage firms

Business challenge

The enterprise's service level, measured by Case Fill Rate (CFR), was only reaching about 84% post the pandemic, some 11-12 percentage points below the pre-pandemic performance. Orders were delayed or incomplete and shelves were empty or understocked. The company was concerned about losing market share and the trust of consumers.

Solution

- Implemented a control tower to provide visibility across all operations
- Made existing tools and data more useful and responsive by adding new processes and governance to fill in the gaps
- Connected existing analytics dashboards to an ERP system and other data sources so the S&OE team could create predictive reports
- Added proactive alerts that addressed potential issues up to six weeks out and helped in actively planning for disruptions

Impact

- Enabled a case fill rate pass of 90%, a level it had not achieved in more than two years
- Created a resilient supply chain system that helped the firm be prepared for what was ahead and react more efficiently to future supply chain disruption

Case study 2

A global CPG firm

Business challenge

The enterprise's legacy procurement and supply chain management tools and processes were slow and offered limited functionality. The process also lacked real-time visibility causing delays for others.

Solution

- Designed a cloud-enabled, intelligent procurement model that would offer greater visibility and insights
- Implemented Coupa's procurement platform with built-in algorithms and chatbots that
- Provided real-time support prompts to enhance speed
- Layered the new system on top of the company's core SAP ERP system to expedite orders and payments, and allow data to flow seamlessly

Impact

- Cut the length of the procurement process from budget requisition to invoice validation by more than half
- Optimized spend for savings increased from 40% to 65% after rollout in the two pilot countries; it is predicted to be 90% after the global rollout.

Accenture profile (page 4 of 4)

Everest Group assessment – Leader

Measure of capability:  Low  High

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

Strengths

- Accenture has invested heavily in building pre-configured industry-specific tools/solutions such as SynOps platform and Supply Chain Control Tower (SCCT) to enable intelligent operations and to streamline processes
- It has made several acquisitions on a global scale such as Blue Horseshoe and Inspirage to augment its customer-centric approach, scale its SCM services portfolio, and offer end-to-end capabilities
- It has established a robust partner ecosystem of cloud vendors, technology partners, and supply chain specialists to enhance their delivery of supply chain solutions
- It has a high focus on ESG-driven use cases such as emissions reporting and implementation of circular supply chain

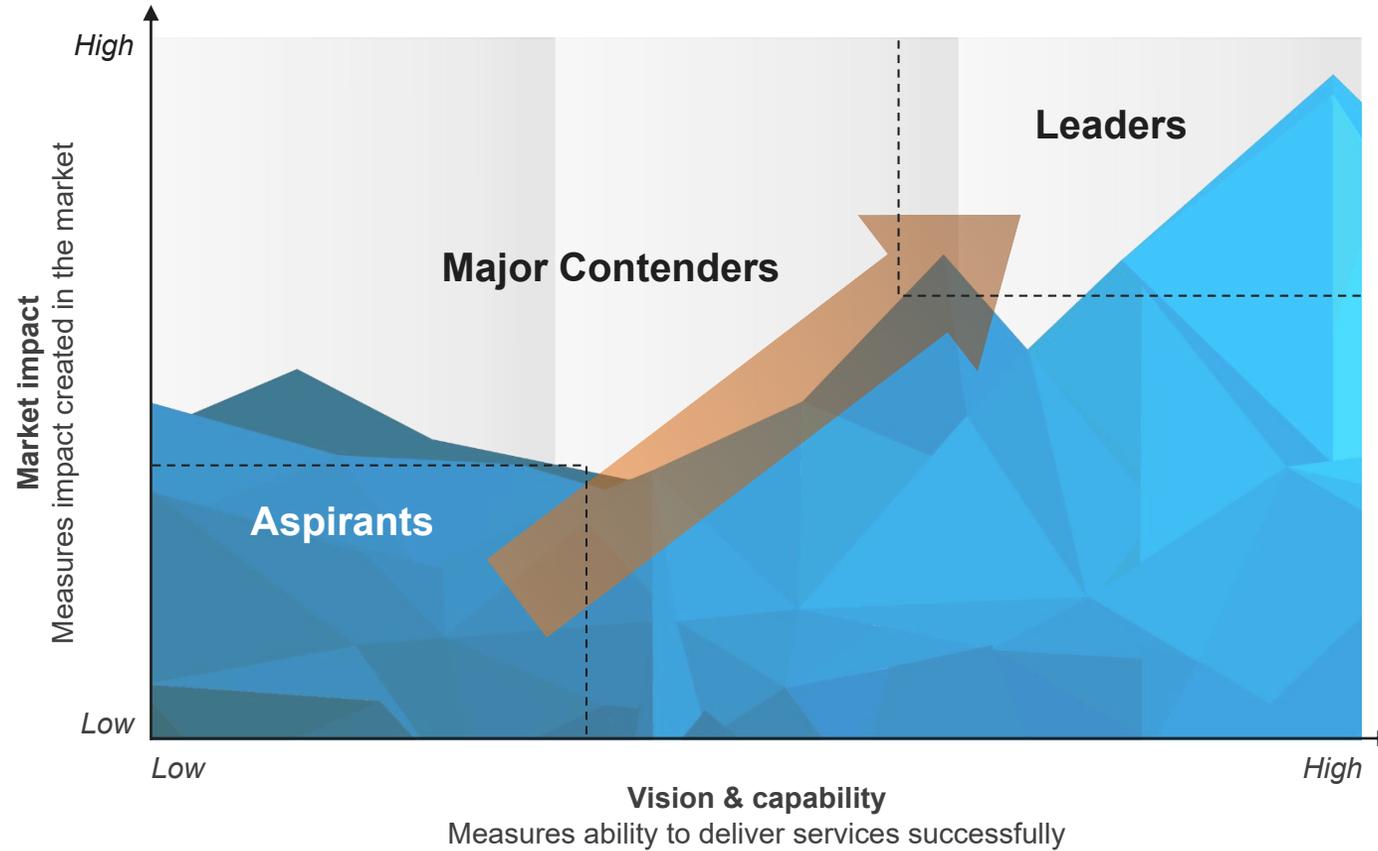
Limitations

- Accenture is positioned as a premium-priced partner in supply chain engagements. Clients have expressed concerns about the lack of commercial flexibility and costly pricing models compared to its peers
- It has an onshore-/nearshore-heavy delivery model that may prevent it from capturing labor arbitrage opportunities; it can look to further scale resources in offshore locations
- While Accenture has an extensive list of IP solutions, clients feel that there is an increased dependence on these solutions, thus, complicating the process of implementing customizations

Appendix

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

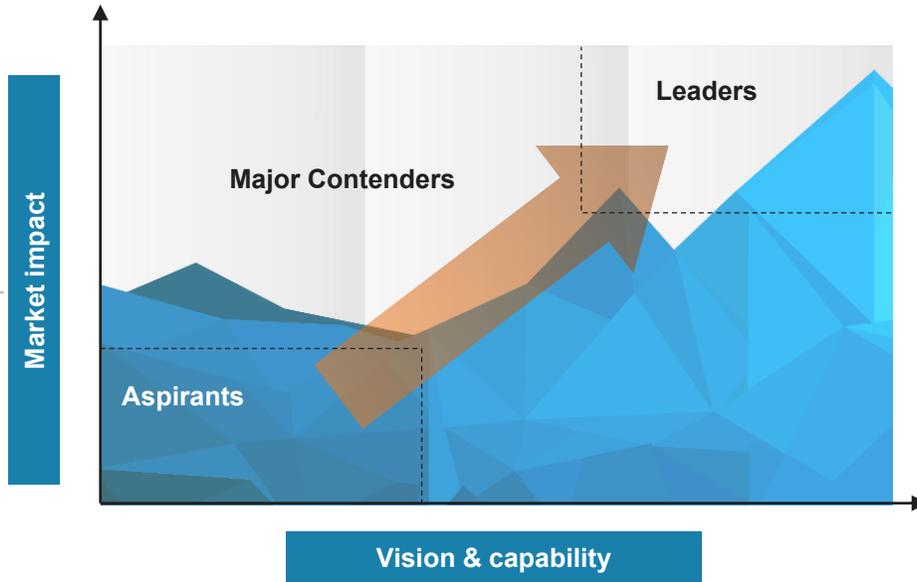
Everest Group PEAK Matrix



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



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 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.

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 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

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.

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

- 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

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

- 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](#)

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

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.



Everest Group[®]

With you on the journey

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