



# PARTNERSHIP DRIVEN GROWTH BLUEPRINT

EMPOWERING THE TECH ECOSYSTEM IN A DYNAMIC ERA



# TABLE OF CONTENTS

|   |           |
|---|-----------|
| <b>Introduction</b> .....   | <b>04</b> |
| <b>The Enterprise Software Boom</b> .....   | <b>05</b> |
| <b>Revenue Multiplier Effect for Tech Service Providers</b> .....                         | <b>07</b> |
| <b>The Expanding Role of Service Providers in the Enterprise Software Ecosystem</b> ..... | <b>09</b> |
| <b>Methodology</b> .....  | <b>11</b> |
| Step 1: Enterprise Software Market Segmentation .....                                     | <b>12</b> |
| Step 2: Framework Definition for Partnership-Driven Revenue Multiplier Effect .....       | <b>15</b> |
| Step 3: Survey-Driven Analysis to Identify Target Segments .....                          | <b>17</b> |
| Step 4: Partnership-Driven Revenue Multiplier Estimation .....                            | <b>21</b> |
| <b>The Growth Blueprint for the Partnership Ecosystem</b> .....                           | <b>23</b> |
| <b>Case in Point</b> .....  | <b>25</b> |
| <b>Conclusion</b> .....   | <b>27</b> |

# EXECUTIVE SUMMARY

The tech industry ecosystem is defined by the interplay between Software Companies, Service Providers, Investors, and Enterprises. Each contributes uniquely to growth and innovation, particularly in the era of AI transformation. Software Companies develop innovative platforms, balancing agility with market demands. Service Providers ensure successful implementation, while Investors fuel growth. Enterprises seek solutions to optimize operations.

The enterprise software market is experiencing unprecedented growth, projected to reach USD 1.2 Tn by 2027, driven by demand for AI/ML, Advanced Cybersecurity, and Data-driven strategies. This growth creates significant opportunities.

Software Companies must prioritize innovation in scalable AI platforms, including Agentic AI, tailored to specific industries, while building strong partnerships with Service Providers. Service Providers can capitalize on the "Revenue Multiplier Effect," where software license investments drive demand for value-added services. This requires expanding expertise in emerging technologies like AI, Generative AI, and Cybersecurity, coupled with deep domain-specific knowledge.

Investors play a crucial role by backing promising platforms and Service Providers. While current focus areas may include Hyperscalers, future growth lies in segments like AI and Cybersecurity. Enterprises benefit from cutting-edge solutions, especially when partnering with Service Providers for effective integration.

Success depends on collaboration. Firms failing to adapt risk missing the tech wave's profitability. Investors, Software Companies, and Service Providers must strategically position themselves to leverage these technologies, build strong partnerships, and drive sustained growth. Aligning with these trends is crucial for all ecosystem players to capitalize on the booming enterprise Software market.

# INTRODUCTION

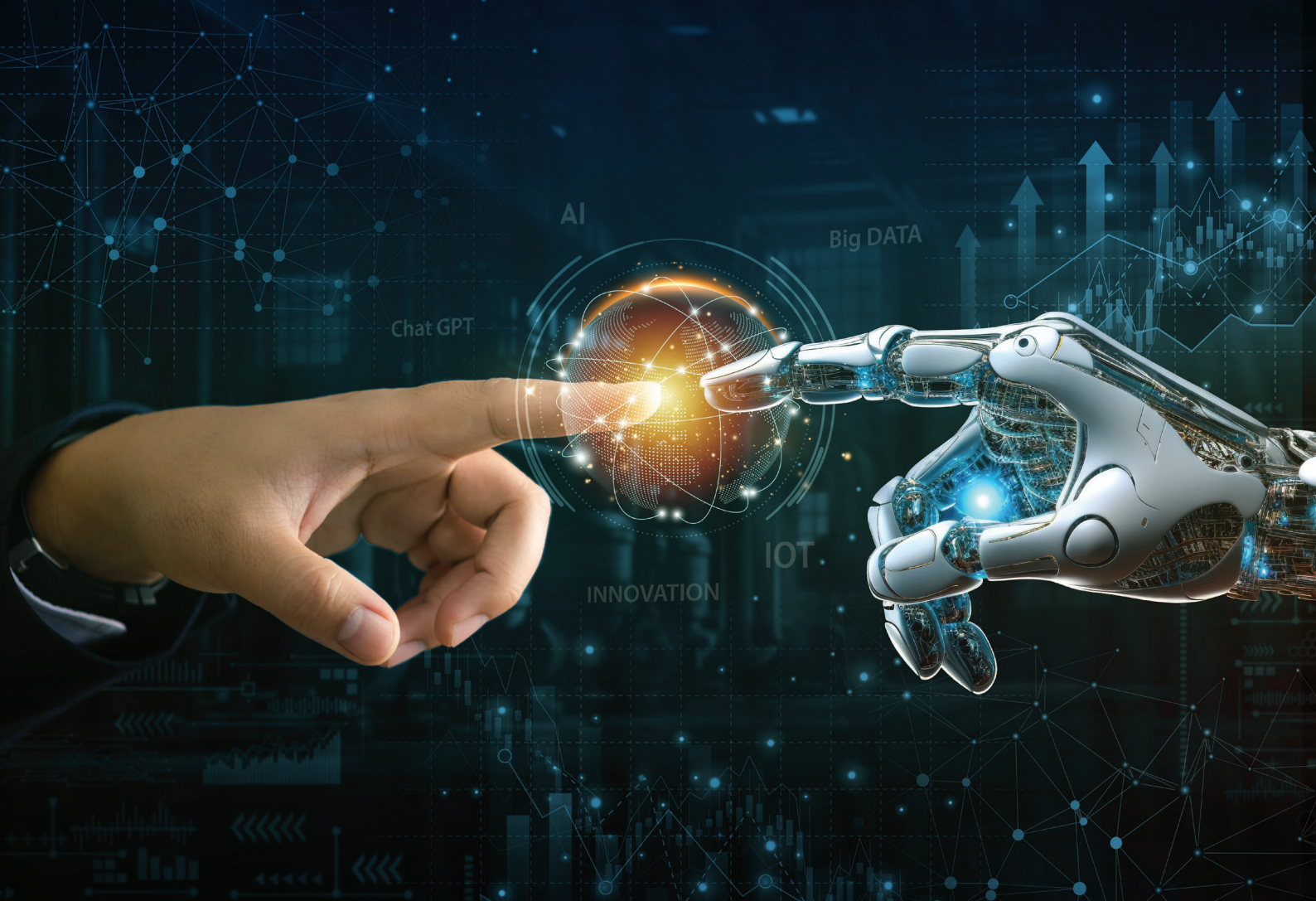
Every few decades, there comes a shift in the way we do business. Innovation cycles create room for businesses to develop new models that drive scale and growth. Today, for the Tech Services industry, those innovations are AI, Gen AI, and Agentic AI, which is marking a new era of Enterprise AI Transformation.

But Enterprise AI Transformation is like building a high-performance racing team. A fast car alone isn't enough—it takes skilled drivers, expert pit crews, and strong sponsors working together. Similarly, the Tech Services Ecosystem must come together. Software companies need to develop scalable AI platforms for industries like BFSI, Healthcare, and Manufacturing. Service Providers must ensure seamless integration and adoption, while investors play a crucial role in funding growth and advancing new technologies. Only through collaboration can they unlock AI's full potential and drive meaningful industry transformation.

However, there are a few key challenges that each ecosystem player must address independently:

- **Service Providers** must strategically align with the right partners and invest in emerging technologies to stay competitive.
- **Software Companies** need to balance innovation with agility, ensuring they meet evolving market demands while collaborating effectively with Service Providers.
- **Investors** face the challenge of identifying high-growth opportunities in a rapidly shifting technological landscape.

To understand the future of this landscape, we surveyed over 100 CTOs and CEOs across industries like Enterprise Software, BFSI, Retail, Healthcare, and Manufacturing. Our goal was to highlight the challenges and opportunities in the Enterprise Software and tech services ecosystem, emphasize the importance of strategic partnerships, and present a framework for aligning innovation with industry needs. By acting on these insights, ecosystem stakeholders can drive transformative growth and create lasting value in the era of Enterprise AI Transformation.

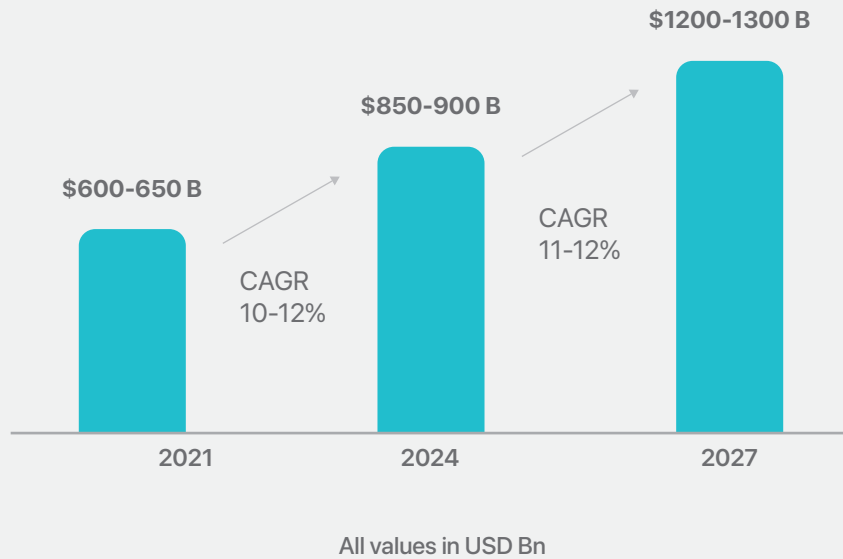


## THE ENTERPRISE SOFTWARE BOOM

The growing demand for AI/ML, Advanced Cybersecurity, and Data-driven strategies is accelerating business transformation. Organizations are increasingly leveraging these technologies to optimize workflows, enhance decision-making, and scale efficiently. As a result, Enterprise Software has become the foundation of modern operations, streamlining processes and unlocking strategic value.

Additionally, as these Enterprises face increasingly complex market demands, the need for tailored, industry-specific Software Solutions is also rising. This growing trend is driving the Enterprise Software market toward an estimated USD 1.2 Tn valuation by 2027, with a robust CAGR of 11-12%.

Does this mean everything about the Tech Services landscape is undergoing change? No—cloud infrastructure, powered by Hyperscalers like Microsoft Azure, AWS, and Google Cloud, will continue to play a crucial role in enabling scalable and resilient architectures. Meanwhile, functional software solutions such as ERP and CRM systems will continue to remain essential in managing operations and accelerating business growth.



### Business Model Innovation Through Technology

Enterprises are increasingly blending technology into their core business models, shifting from traditional product-based approaches to service-oriented or subscription-based models

### Focus on Data-driven Decision Making, Security, & AI/ML

Enterprises are increasingly turning to Enterprise Software companies who offer these products to harness the benefits of emerging technologies like AI, Cybersecurity and Data

### Spending on Cloud, Digital transformation set to continue

Enterprises are investing on hyperscalers, and functional software such as ERP, CRM to accelerate digital transformation

Spending Outlook on Enterprise Software



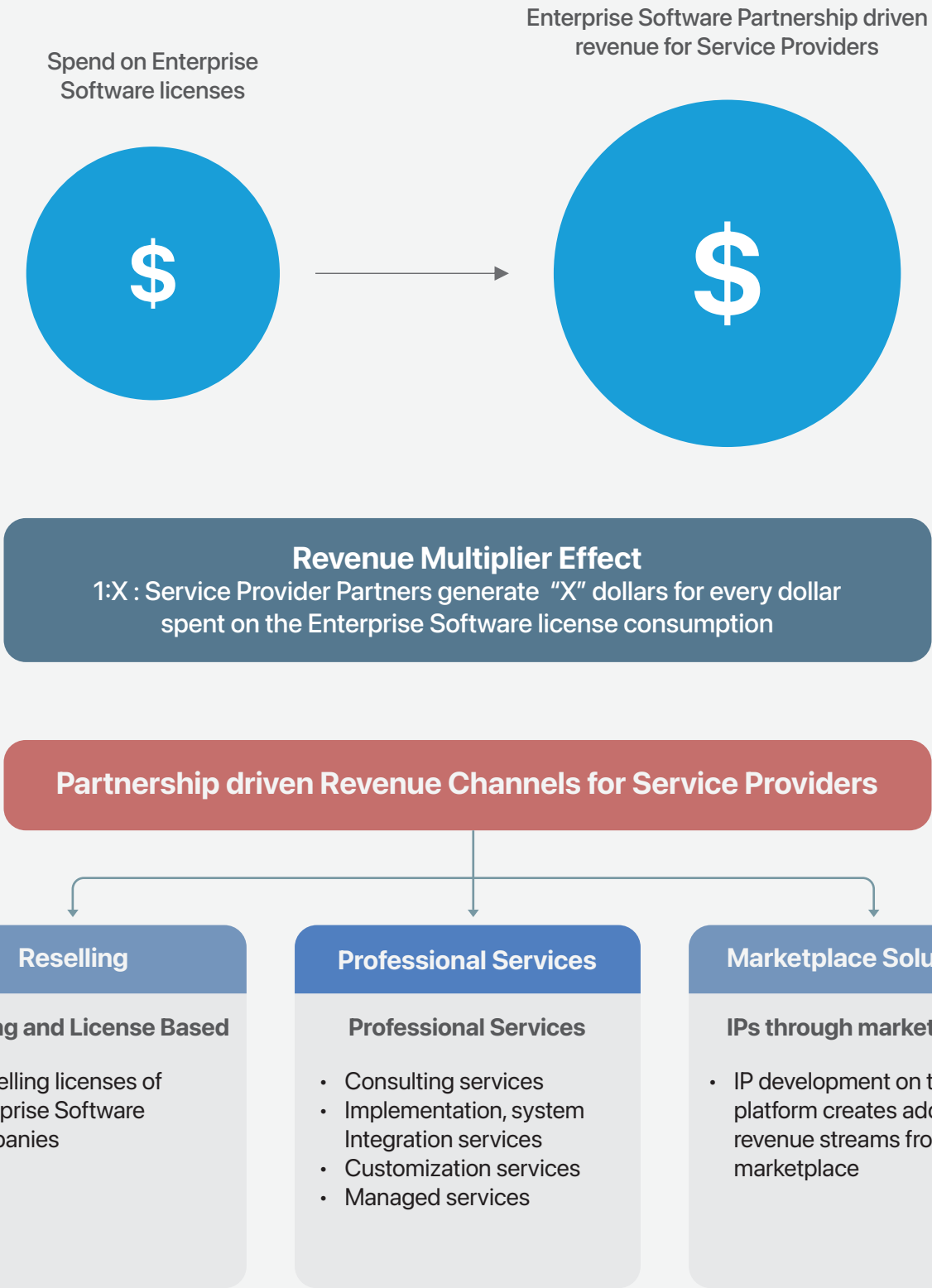
## REVENUE MULTIPLIER EFFECT FOR TECH SERVICE PROVIDERS

The expanding Enterprise Software market presents a major growth opportunity for Tech Service Providers through their strategic partnerships with Enterprise Software Companies. These partnerships generate multiple revenue streams through value-added services across various service and sales channels. This dynamic demonstrates the **Revenue Multiplier Effect**, where every dollar being spent on Enterprise Software Licenses generates several times that amount through complementary services, driving exponential growth for Service Providers.

To capture the benefits of the **Revenue Multiplier Effect**, Service Providers are providing a variety of offerings, including:

- **Reselling and License-Based Revenue**  
Facilitating software adoption while generating revenue from license sales
- **Consulting and Professional Services:**  
Delivering strategic guidance and integration services to ensure seamless Enterprise AI transformations
- **Customization and Ongoing Support:**  
Tailoring solutions to industry needs and providing ongoing optimization for sustained performance

Enterprise Software Companies also are actively creating platforms that enable Service Providers to develop and monetize proprietary IP through software marketplaces. This further helps Service Providers expand their customer reach and create recurring revenue streams. Additionally, the rising demand for specialized services is strengthening the partnership ecosystem. Service Providers who build strong partnerships with Enterprise Software companies can capitalize on these opportunities for sustainable growth.



Revenue Multiplier Effect Explained

Revenue Multiplier Effect HIGH  LOW



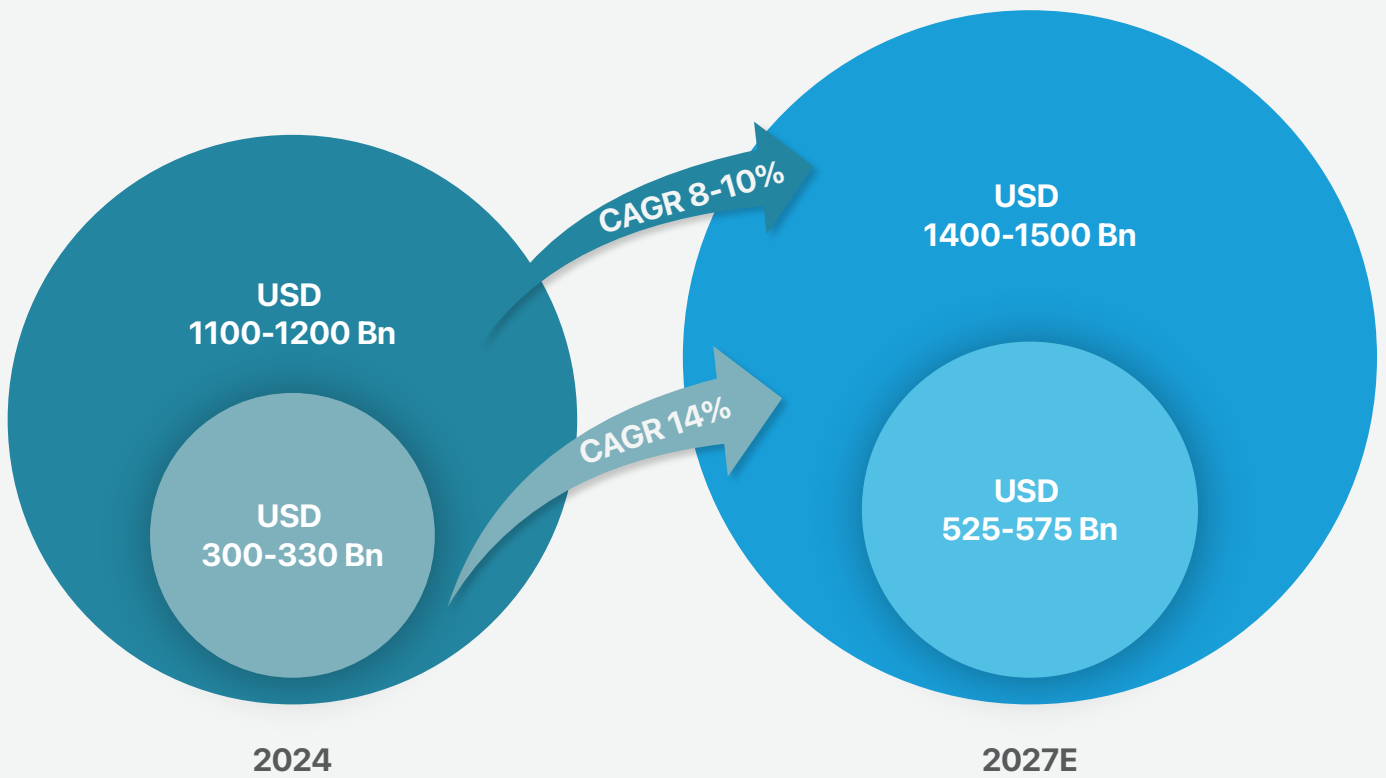
## THE EXPANDING ROLE OF SERVICE PROVIDERS IN THE ENTERPRISE SOFTWARE ECOSYSTEM

Service Providers are poised for significant growth within the Enterprise Software ecosystem as both Enterprises and Software Vendors increasingly rely on their domain expertise. According to our survey of over 100 CTOs and CEOs across multiple industries, 78% of Enterprises plan to increase their Service Provider spending by over 10% annually, demonstrating their growing need for expert Software Integration, Customization, and Support Services.

Enterprise Software companies are equally committed to this partnership model, with 80% planning to strengthen their Service Provider relationships. This strategic alignment allows Enterprise Software companies to focus on product innovation while entrusting implementation services to their partners, creating a mutually beneficial ecosystem.

The market opportunity is substantial. Currently, Service Providers generate USD 1.2 Tn in total revenue, with USD 300-330 Bn coming from partnership activities. By 2027, total revenue is projected to reach USD 1.5 Tn, with partnership revenue growing to USD 525-575 Bn—expanding from 25-30% to 38-40% of total revenue.

These strategic partnerships are becoming fundamental to Service Providers' growth strategy, enabling them to capture greater value in the expanding enterprise software market.



- Service Provider Revenues (in 2024)
- Service Provider Partnership driven Revenues (in 2024)

- Service Provider Revenues (in 2027)
- Service Provider Partnership driven Revenues (in 2027)

**As spending on Enterprise Software expands, these Enterprise Software companies are increasingly investing in their Service Provider partner ecosystems for growth while continuing to focus on their core products**

80% Enterprise Software companies intend to grow their reliance on Service Provider ecosystem, according to Zinnov's survey

**Enterprises are turning to Service Providers partners of Enterprise Software to integrate and customize their products and receive ongoing support**

78% Enterprises intend to increase their annual spend on partner-based services by more than 10%, according to Zinnov's survey

Growth of partnership driven revenue outpaces overall Service Provider growth



## METHODOLOGY

Tech Service Providers traditionally grew through partnerships with Hyperscalers like Microsoft, Google, AWS, and major Enterprise Software Companies such as SAP, Salesforce, and Oracle. However, future growth opportunities lie in expanding partnerships to emerging, Cloud-first, and AI-first Enterprise Software Companies.

By partnering early with these platforms, Service Providers can gain competitive advantages and foster mutual growth. As these companies mature, their increasing needs for implementation, customization, and managed services create significant revenue opportunities.

Zinnov's structured analysis identified promising partnership segments and estimated potential revenue multipliers, helping position Service Providers for growth in the expanding enterprise software ecosystem.

- 1 Market Segmentation**  
Divided the enterprise software market into Hyperscalers, Horizontal Software (ERP, CRM, HRMS), and Vertical Software (industry-specific solutions), assessing partnership maturity in each segment.
- 2 Revenue Multiplier Framework**  
Developed a model to estimate partnership revenue potential based on platform adoption, service demand, and ecosystem dependency.
- 3 Market Research**  
Conducted dual surveys with 100 industry CEOs and 100 software company CTOs to identify high-potential partnership segments.
- 4 Multiplier Calculation**  
Integrated survey findings to quantify revenue multipliers across target segments, highlighting the most profitable partnership opportunities.

This approach helped identify optimal partnership segments for Service Providers to drive growth.

## STEP 1

# ENTERPRISE SOFTWARE MARKET SEGMENTATION

Zinnov segmented the Enterprise Software market into three primary areas: **Hyperscalers**, **Horizontal Enterprise Software**, and **Vertical Enterprise Software**, each with distinct characteristics and opportunities for Service Providers.

## Hyperscalers

Cloud giants like AWS, Microsoft Azure, and Google Cloud deliver scalable infrastructure across industries. Service Providers play a critical role in integration, customization, and managed services.



How Service Providers are Capitalizing on Hyperscaler Alliances for Cloud and Digital Growth

# Horizontal Enterprise Software

- Functional Software**

(ERP, CRM, HRMS, SCM, GRC): Widely adopted for automating core business functions, driving demand for integration, consulting, and support.

- System Software**

Development and management platforms require integration, development, and ongoing support services.

# Vertical Enterprise Software

Tailored solutions for industries like Healthcare, BFSI, and Manufacturing offer niche opportunities for providers with domain expertise.

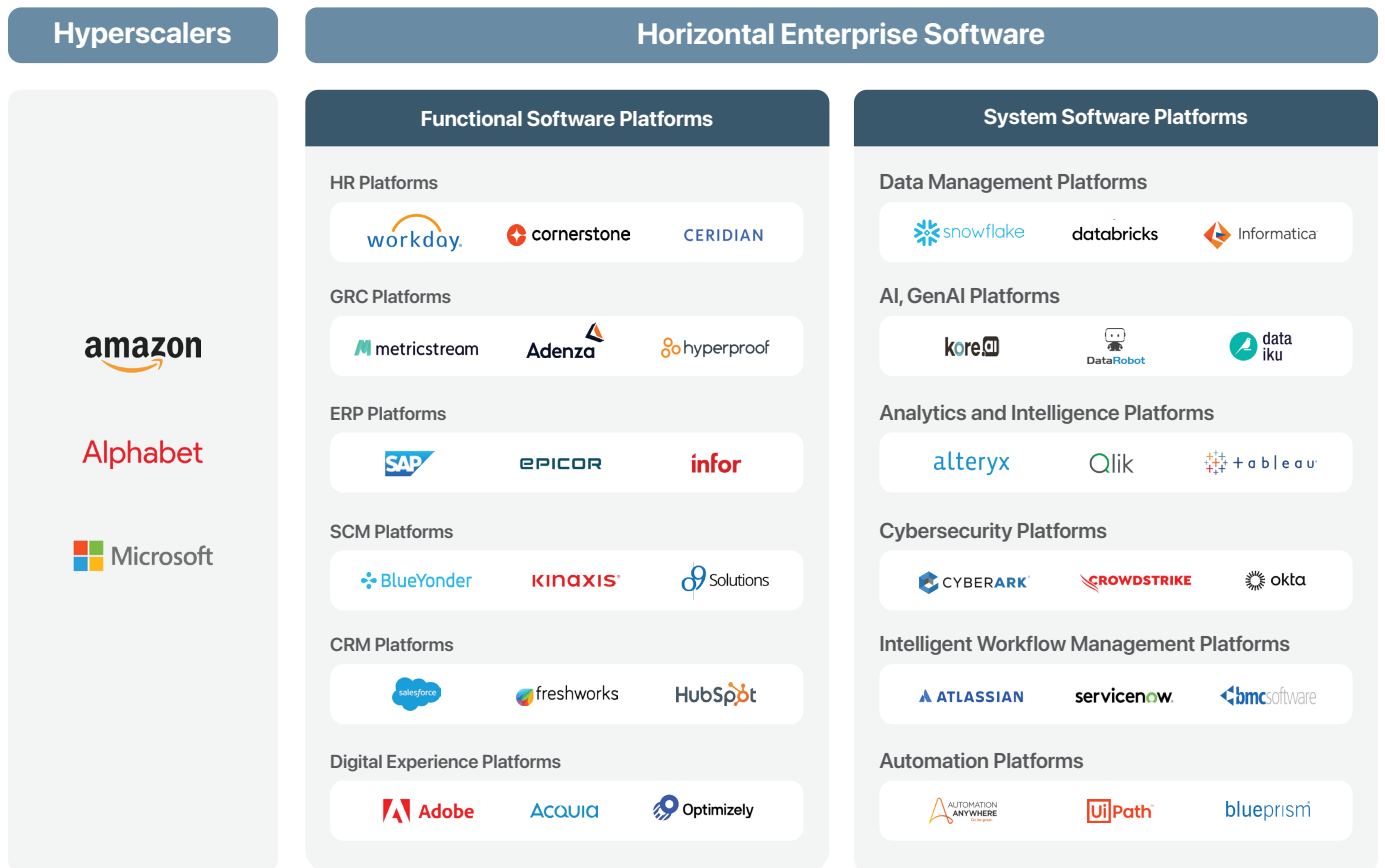
Zinnov emphasized Hyperscalers and Horizontal Enterprise Software due to their broad adoption, scalability, and diverse service requirements. Horizontal platforms are especially impactful, driving demand for verticalized solutions across industries. Both segments exhibit strong partnership intensity as Enterprises increasingly rely on Service Providers for integration, optimization, and customization.

| ENTERPRISE SOFTWARE SEGMENTS                          |   |  |   |   |
|---|---|--|---|---|
|   | Hyperscalers  | Horizontal Enterprise Software   |   | Vertical Enterprise Software  |
| Description   | Large-scale Cloud providers operating across multiple segments. Includes AWS, Microsoft, and Google Cloud | Functional Platforms: Platforms driving business functions such as S&M, HR, GRC, ERP, SCM, etc | System Platforms: Platforms for developing, deploying, and managing applications or services in Data Analytics, Automation, infra etc | Platforms targeted for an industry vertical, such as Retail, Healthcare, Manufacturing, BFSI and others |
| Top Players with Strong Service Provider Partnerships | <br><br>  | <br><br><br><br><br><br>   | <br><br><br><br><br><br>  | <br><br><br><br><br><br>  |
| Current Partnership Maturity <sup>^</sup>             |   |  |   |   |

<sup>^</sup>Current Partnership Maturity is measured based on no. of Service Provider partners, no. of trained resources in premium service provider partners, penetration of large service providers working as partners, marketplace solutions by Service Provider partners

Enterprise Software Segmentation and Partnership Maturity Across Segments

Within the Horizontal Enterprise Software segment, Zinnov identified **Functional** and **System Platforms** as critical sub-segments for further evaluation. The appendix provides detailed definitions of these sub-segments.



Sub-Segmentation of Enterprise Software

## STEP 2

# FRAMEWORK DEFINITION FOR PARTNERSHIP-DRIVEN REVENUE MULTIPLIER EFFECT

The framework Zinnov developed to identify high-potential Enterprise Software segments for Service Providers, analyzed two key dimensions: **Current Partnership Maturity** and **Future Outlook (2027)**.

## 1 Current Partnership Maturity

The **current state** of partnership maturity was assessed across several key factors reflecting present demand and reliance on Service Providers

- **Enterprise Software Adoption – Current State**

Assesses the extent of current adoption and spending across industries, highlighting immediate partnership opportunities.

- **'Services' Demand – Current View**

Focuses on enterprises' needs for consulting, implementation, customization, compliance, support, and maintenance services.

- **Dependency on Service Providers**

Analyses the current reliance on Service Providers for deployment, optimization, and system integration.

## 2 Future Outlook (2027)

The **future outlook** for Enterprise Software adoption and services demand was projected for 2027, providing insights into how demand will evolve and forecasting long-term partnership potential

- **Adoption Growth**

Forecasts increased Enterprise Software spending, driven by emerging technologies and expanded use cases.

- **Service Demand Expansion**

As platforms evolve, higher needs for consulting, implementation, customization, compliance, and maintenance are anticipated.

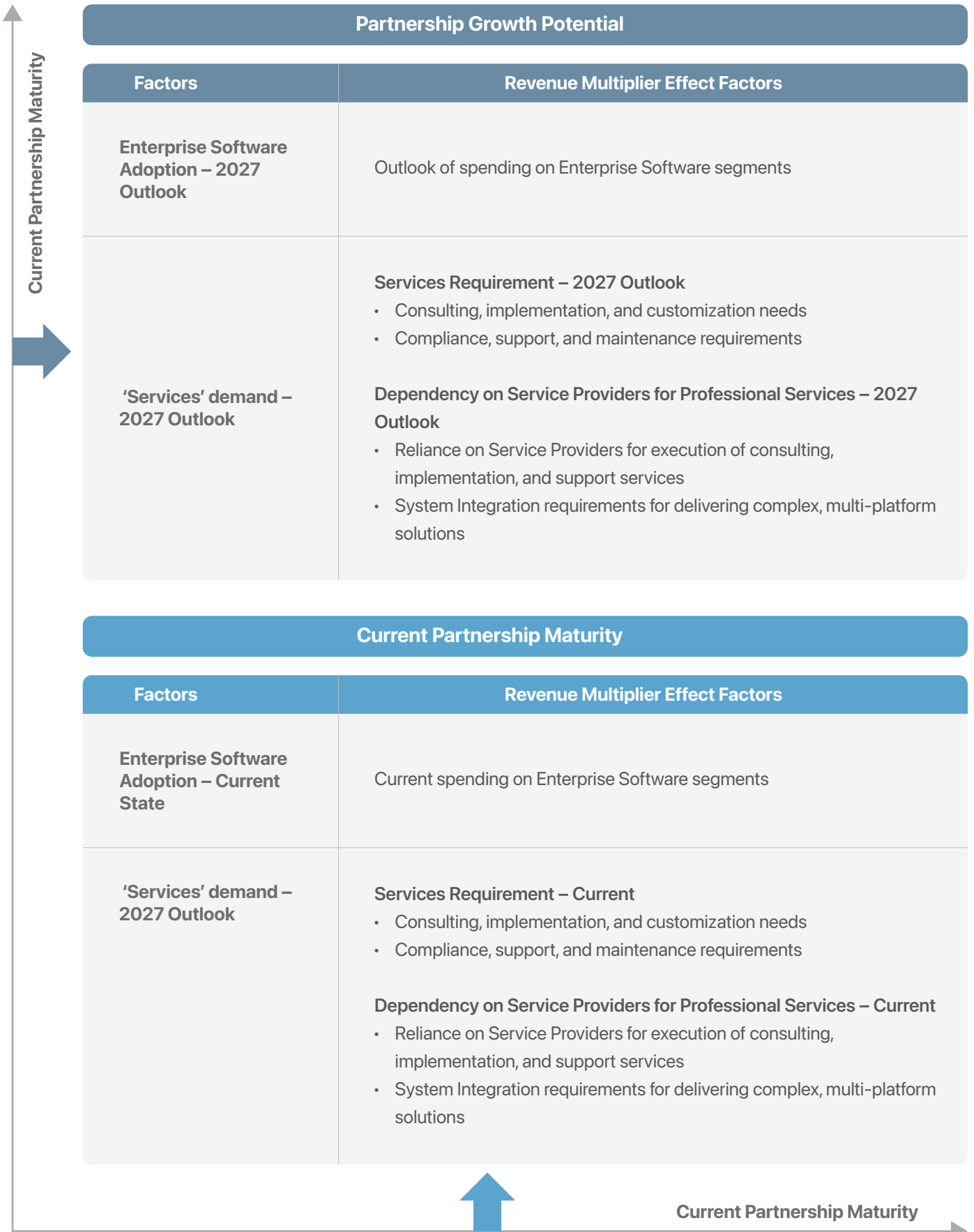
- **Increased Dependency on Service Providers**

Projects greater reliance on professional services for scaling, integration, and digital transformation initiatives.

## Outcome and Identification of High-Potential Segments

By evaluating both current and future dynamics, Zinnov's framework identifies Enterprise Software segments with the highest partnership-driven revenue potential. Segments showing strong present demand and significant future growth are ideal for Service Providers seeking to maximize revenue and deepen partnerships.

This framework equips Service Providers to strategically prioritize investments and focus on high-growth segments, unlocking substantial revenue multiplier effects.



Framework to Identify and Prioritize Target Segments for Partnership

## STEP 3

# SURVEY-DRIVEN ANALYSIS TO IDENTIFY TARGET SEGMENTS

Zinnov conducted comprehensive surveys with both Enterprises (end customers) and Technology and Product CXOs from Enterprise Software platforms to understand demand patterns and estimate the revenue multiplier effect across various Enterprise Software segments. The insights drawn from these surveys are summarized below:

## Enterprise Software Adoption Analysis

Zinnov's analysis identified **Hyperscalers**, **AI/ML platforms**, **Data Management**, **Cybersecurity**, and **Intelligent Workflow Management** as the top five Enterprise Software segments expected to see the highest adoption rates.

- **Hyperscalers**

Demand continues to grow as Enterprises scale AI/ML models requiring significant computational power. Hyperscalers are integral to supporting these resource-intensive workloads.

- **AI/ML Platforms**

Enterprises increasingly adopt AI/ML to enhance customer, employee, and developer experiences through automation, personalization, and advanced decision-making.

- **Data Management**

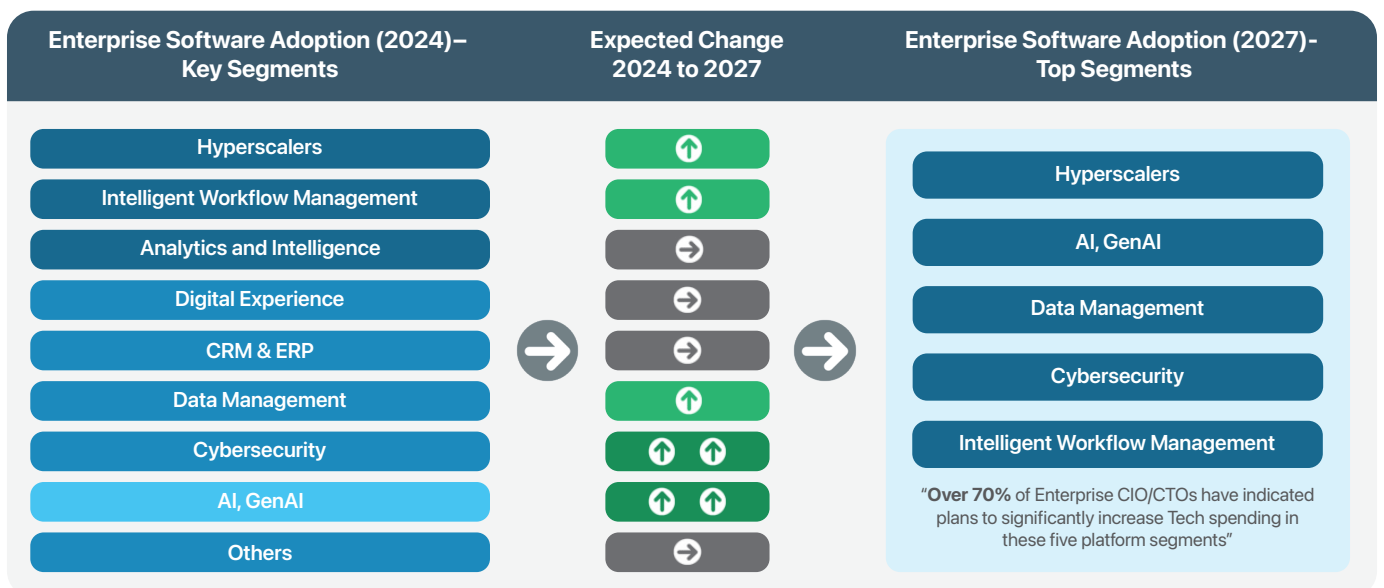
Unified platforms are essential for Data-driven decision-making and AI deployment, driven by exponential data growth and the need for integration and standardization.

- **Cybersecurity**

Investments are rising in response to evolving cyber threats, increasing attack frequency, and stringent regulatory requirements, creating demand for adaptive and robust solutions.

- **Intelligent Workflow Management**

Enterprises prioritize these platforms to optimize processes, improve efficiency, and enhance stakeholder experiences, creating significant opportunities for Service Providers.



Others – GRC, SCM, HR, Automation platforms

High Low

Enterprises are leveraging AI and Generative AI platforms to enhance experiences across three key stakeholders – Customers, Employees and Developers

Demand for Hyperscalers continue to grow due to increased requirements for high computational power for AI and Generative deployments

The growing demand for a single source of truth to facilitate Data-driven decision-making and the deployment of AI models is driving growth in data management platforms

Increasing Cybersecurity threats, coupled with the rising frequency of sophisticated attacks and regulatory compliance requirements, are driving significant investments in Cybersecurity platforms

Adoption Outlook Across Enterprise Software Sub-Segments

## Services demand analysis

The demand for services is escalating across **Data Management, Digital Experience, and AI/ML platforms**, while segments like Hyperscalers, CRM, and ERP continue to maintain strong momentum.

- **Hyperscalers, CRM, and ERP**

Digital transformation continues to drive demand for long-term support, managed services, and integration/customization expertise. Enterprises increasingly seek partners with industry-specific capabilities to optimize these platforms.

- **Data Management**

The exponential growth of Data, coupled with regulatory compliance and the need for actionable insights, is driving demand for integration, standardization, and management services.

- **AI/ML and Digital Experience**

Rapid technological advancements are creating skill gaps in Enterprises, fueling demand for Consulting and Advisory Services. According to Zinnov's **Partnership Revenue Multiplier Effect Survey**, approximately 82% of Enterprises plan to invest in **AI** or **Digital Experience** consulting services over the next three years.



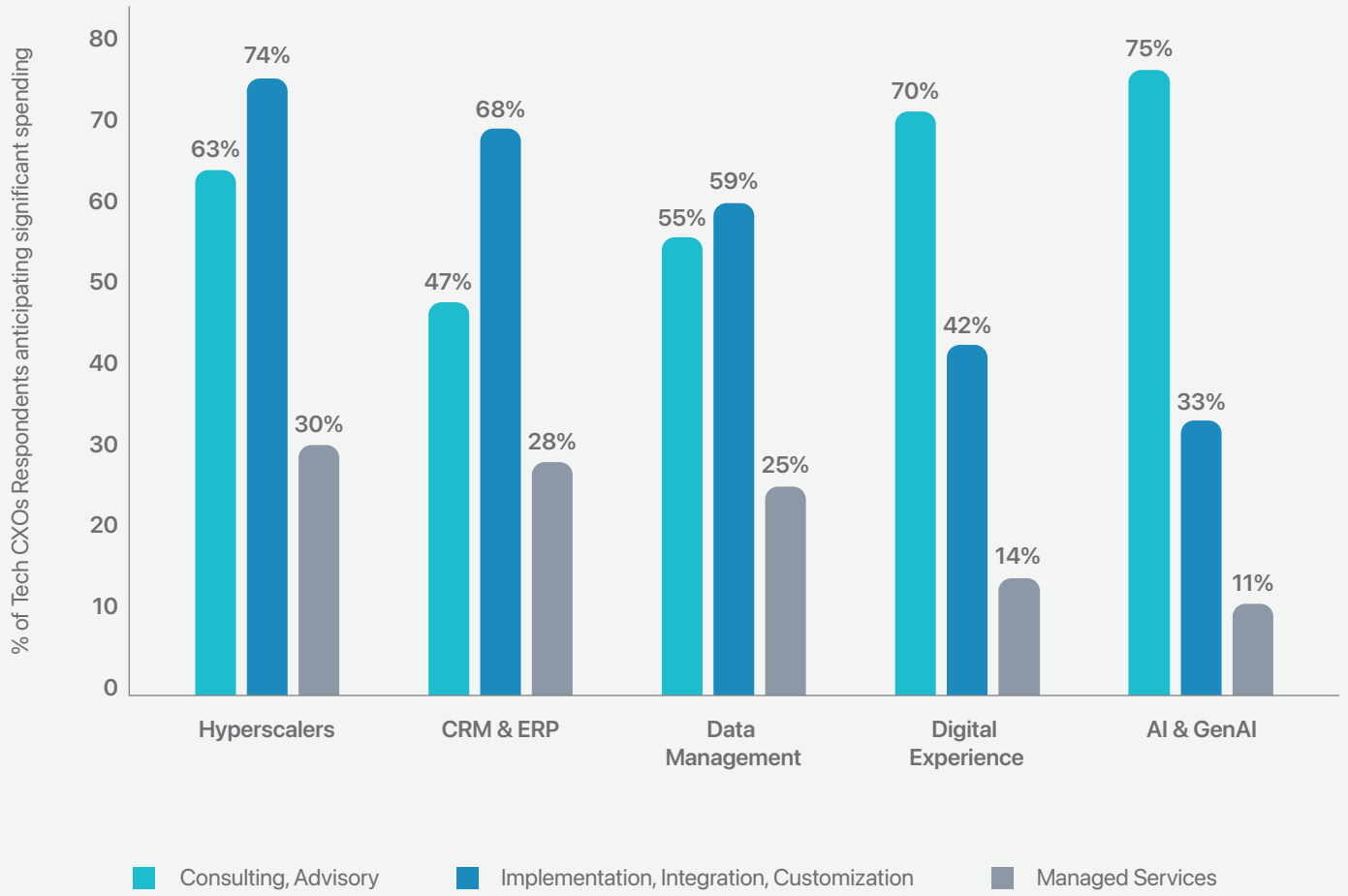
### Growth Drivers

- Ongoing Digital Transformation is driving services demand for **Hyperscalers, CRM, and ERP Solutions**, with a growing need for industry-experienced partners who can offer long-term support and managed services, along with integration and customization
- As Data volumes grow exponentially, Enterprises require expert services to integrate and standardize this Data, driving growth of **data management** platforms
- The growth of **AI, Generative AI and Digital Experience Platforms** are driven by the high demand for consulting and Advisory Services due to rapid advancements, in-house skill gaps, and regulatory compliance requirements
- Approx. 82% Enterprises intend to invest in AI, Generative AI or Digital Experience consulting services in the next 3 years

Services demand outlook across Enterprise software sub-segments

By 2027, **Digital Experience** and **AI platforms** are expected to experience high demand for advisory services.

- Among the top five segments with significant service demand, **Implementation, Integration, and customization** will remain the most required services, driven by the maturity of **Digital Transformation** efforts across industries.
- In the case of **AI Platforms**, consultative services will be in peak demand as Enterprises look to Service Providers to better understand the use cases most relevant to their needs and to define a roadmap for successful AI adoption. This will involve a deep partnership with Service Providers to unlock the full potential of AI solutions and ensure optimal results.

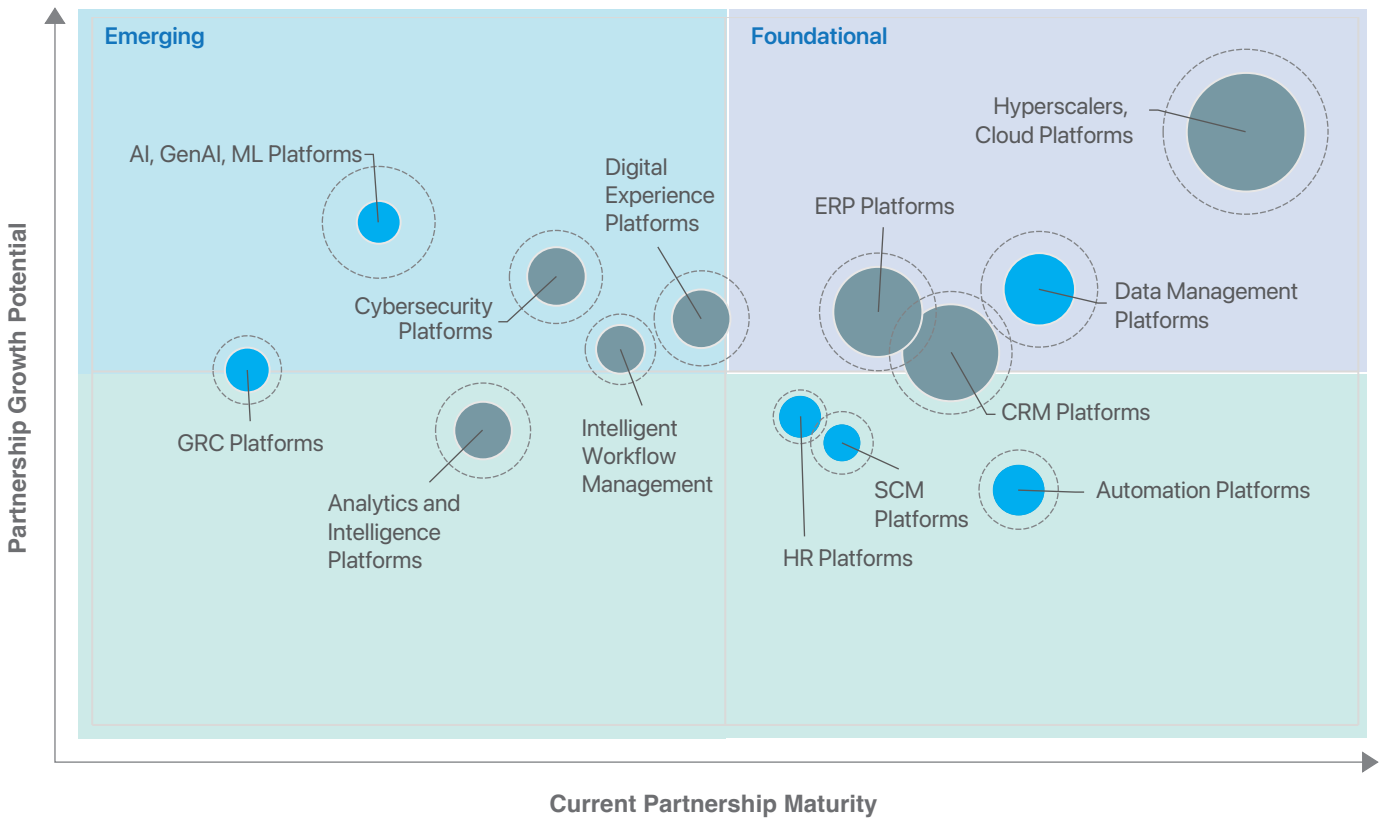


Requirement for Consulting and Advisory Services to Grow

## STEP 4

# PARTNERSHIP-DRIVEN REVENUE MULTIPLIER ESTIMATION

Zinnov's framework classifies Enterprise Software platforms into two critical quadrants, helping Service Providers prioritize efforts to maximize growth, differentiation, and scalability.



- Functional Platforms
- System Platforms
- Current Spending on Enterprise Software Platforms (2024)
- Future Spending on Enterprise Software Platforms (2027)

**Foundational**

Service Providers must leverage partnerships in **Hyperscalers, Data Management platforms, ERP, CRM and Digital Experience** platforms as these areas are both well-established and poised for significant future growth

**Emerging**

Service Providers should form strategic partnerships in **Intelligent Workflow, Cybersecurity, and AI Platforms** to capitalize on their high growth potential and secure early-mover advantages

Target Segments for Partnerships

**Foundational Partnerships Quadrant:** This quadrant includes **mature platforms with high current partnership maturity and substantial future potential**, such as **Hyperscalers, ERP, CRM, Data Management, and Digital Experience**. Enterprises have heavily invested in these areas, driving consistent demand for Consulting, Implementation, Integration, and Support Services. These platforms form a stable revenue base for Service Providers, with growth fueled by increasing Enterprise Software spending, particularly in Cloud and Data-driven solutions. The multiplier effect is pronounced here, offering scalable, long-term revenue opportunities for Service Providers.

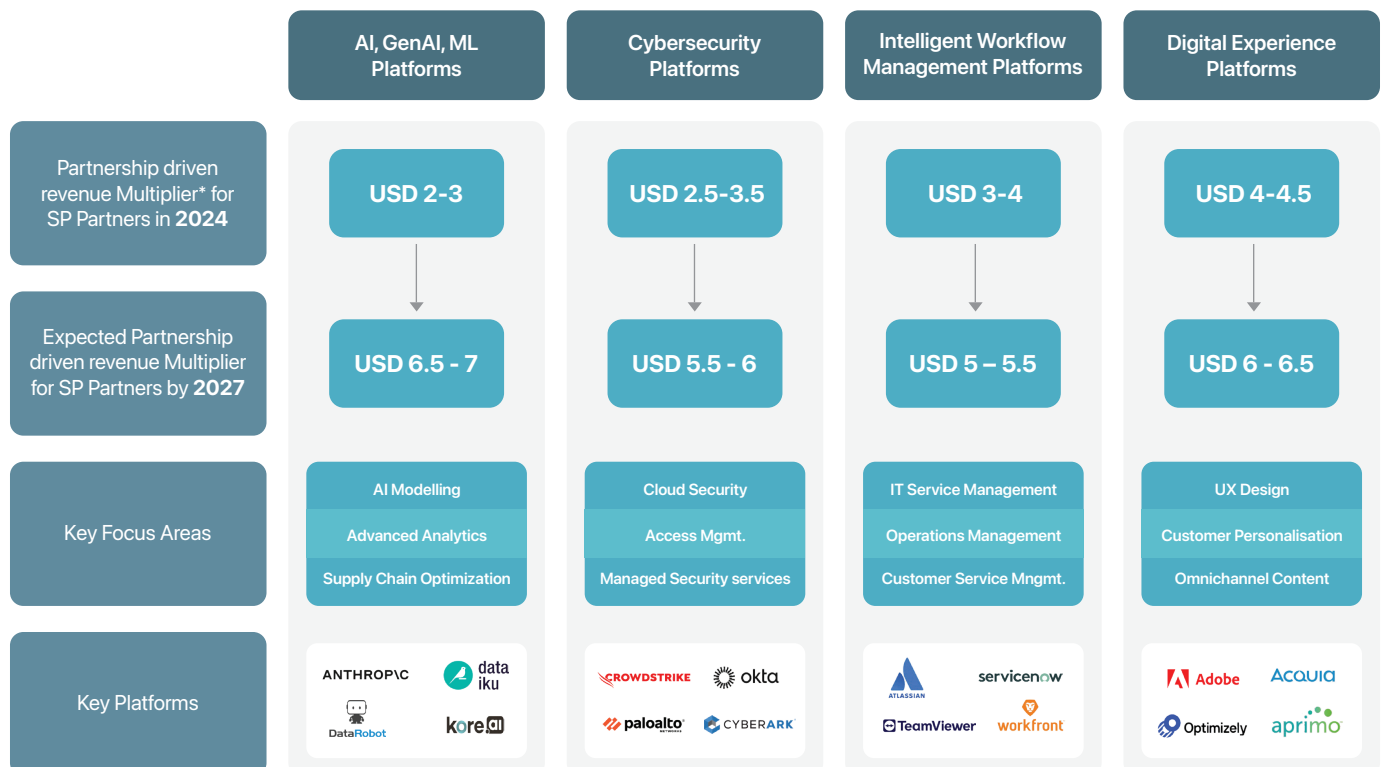
**Differentiating Partnerships Quadrant:** Emerging platforms like **AI/ML, Intelligent Workflow Management, and Cybersecurity** fall into this category, marked by **low current partnership maturity but high future potential**. As Enterprises seek advanced analytics, automation, and robust security to enhance operations and differentiation, demand for Consulting, Integration, and Optimization Services in these segments is set to surge. Service Providers establishing early capabilities in these areas can secure a competitive edge, capitalizing on sustained growth as these platforms mature.

## Strategic Implications

Foundational platforms ensure stable, scalable revenues while emerging platforms offer high growth potential and opportunities for differentiation. Service Providers must balance investments across these quadrants, leveraging immediate scale from foundational partnerships while building expertise in emerging technologies to capture future growth.

## Revenue Growth Outlook

Emerging platforms like **AI, Cybersecurity, Intelligent Workflow Management, and Digital Experience** are projected to drive **1.5–2X service demand growth** over the next three years. Increased Enterprise reliance on these technologies for operational optimization, enhanced security, and customer experience improvements positions Service Providers as critical enablers of Digital Transformation and innovation.



Revenue Multiplier Estimation for Top Target Segments for Differentiation

\*Partnership driven revenue multiplier of USD 2-3 implies that for every dollar the enterprise software platform earns via licenses, service provider partners earn 2-3 dollars



# THE GROWTH BLUEPRINT FOR THE PARTNERSHIP ECOSYSTEM

Growth is a key priority for every stakeholder in business, and with AI driving the next wave of industry expansion, firms must focus on **riding the wave** strategically for sustained success. Capitalizing on high-growth opportunities and staying ahead of technological trends is crucial.

This blueprint for the partnership ecosystem outlines strategic recommendations for Investors, Enterprise Software companies, and Service Providers to drive growth and maintain a competitive edge in the Enterprise Software and Tech Services market.

| Investors   | Enterprise Software Companies  | Service Providers   |
|---|--|---|
| <p><b>Identify High-Growth Opportunities</b><br/>Focus on AI, Cybersecurity, and Intelligent Workflows for innovation.</p> <p><b>Assess Service Providers' Revenue Potential</b><br/>Use insights to identify Service Providers likely to experience higher revenue multiplier effects.</p> <p><b>Invest in Market Leaders of Digital Transformation</b><br/>Choose Enterprise Software segments that can lead and maintain growth in the digital transformation space.</p> | <p><b>Focus on Joint GTM</b><br/>Engage in joint go-to-market strategies to accelerate platform adoption.</p> <p><b>Enhance Partnership Ecosystem</b><br/>Focus on elevating partnership ecosystem to create domain specific solutions and offerings</p> | <p><b>Strengthen Expertise in Emerging Platforms</b><br/>Focus on AI, Generative AI, Cybersecurity, and Intelligent Workflows for future growth.</p> <p><b>Build Advisory Capabilities</b><br/>Guide Enterprises in their Digital Transformation, offering strategic insights.</p> <p><b>Develop Tailored Solutions with Enterprise Software Companies</b><br/>Partner to create solutions that address specific client challenges.</p> |

Growth blueprint for The Partnership Ecosystem

- **Investors should focus on** high-growth segments like AI, Cybersecurity, and Intelligent Workflows, which drive significant business transformation. By identifying platforms and Service Providers positioned to lead in these areas, Investors can back companies with strong growth potential, ensuring high returns in the evolving digital landscape.
- **Enterprise Software Companies** must continue innovating while deepening partnerships with Service Providers. These companies are foundational to Digital Transformation, and stronger collaborations will drive adoption and innovation. Joint solutions and go-to-market strategies will also position these companies for sustained growth in an increasingly competitive market.
- **Service Providers** must expand their expertise beyond traditional services, embracing AI, Generative AI, Cybersecurity, and Intelligent Workflows. As trusted advisors, they can guide Enterprises through complex transformations, unlocking new growth opportunities and differentiation. While they implement this, they must also continue to deepen their focus on Hyperscalers and functional platforms to drive seamless integration, scalability, and innovation.



## CASE IN POINT

A USD 1 Bn+ engineering services company faced the challenge of doubling its annual revenue run rate from partnerships with Enterprise Software companies within the next three years. The company sought to establish a strong competitive positioning and emerge as a leader in the market. To drive growth, it identified a strategic Enterprise Software partner in the Hyperscaler sector and acquired a specialized firm to build its capabilities.

Zinnov played a pivotal role in addressing the customer's problem by crafting a targeted partnership strategy. Key contributions included:

- **Business Unit/Practice Design Recommendations**  
Structuring the Service Provider's organization to align with the Enterprise Software company's priorities and maximize partnership success.
- **Service Offerings & Value Proposition**  
Defining joint offerings with clear value propositions that leveraged both parties' strengths.
- **Go-To-Market Strategy**  
Designing a GTM strategy focused on partnership-driven opportunities, identifying key stakeholders, and mapping target accounts in focus verticals.

These initiatives enabled the company to achieve its revenue growth targets, enhance its market positioning, and become a leader in the Hyperscaler space.

## Customer Problem Statement

- Double the annual revenue run-rate from partnerships with Enterprise Software companies within the next three years.
- Establish a strong competitive positioning within the ecosystem to emerge as a market leader.
- Develop a targeted partnership strategy with tailored recommendations for business unit structuring, specifically focusing on Enterprise Software company in scope

## Zinnov Solution

### Positioning Strategy

- Define Enterprise Software company's vision in focus verticals
- Competitor Analysis on Enterprise Software company's partnerships
- Use case prioritization for Service Provider to build solutions for near term strategy
- Positioning strategy for Service Provider

### Business unit Recommendations

- Key Design Principles for BU to align with Enterprise software company's priorities
- Recommended org design for Service Provider Business Unit

### Service offerings and Value Proposition

- Joint service offering definition aligning with priorities of Enterprise Software company, capabilities of Service Providers and competition
- Detailed Value Proposition for each of the service offerings identified

### GTM Strategy Recommendations

- GTM Strategy for Partnership driven opportunities
- Stakeholder identification to enhance partnership maturity
- Target account and opportunity identification in focus verticals

# CONCLUSION

The Enterprise Software ecosystem has reached a defining moment. The convergence of AI, Generative AI, and Intelligent Workflows demands immediate action from all players—enterprises, Service Providers, and investors alike.

Our analysis reveals clear imperatives: Enterprise Software companies must prioritize co-creation and vertical solutions; Service Providers should balance existing partnerships with emerging tech capabilities; and investors must focus on companies demonstrating both strong partnerships and innovation potential in high-growth segments.

While implementing these strategies requires significant investment and careful navigation of technological change, inaction poses a greater risk. Those who move decisively now will secure enhanced market positions, deeper customer relationships, and new revenue streams.

The message is unequivocal: strategic partnerships and emerging technology adoption are no longer optional but essential for survival. The frameworks presented in this whitepaper provide a roadmap for capturing these opportunities. In an ecosystem that rewards foresight and agility, today's choices will determine tomorrow's leaders.

# APPENDIX

## Definition of sub-segments of Horizontal Enterprise Software

### 1. Functional Platforms

Functional platforms are designed to support specific business functions, enhancing operational efficiency, decision-making, and organizational performance across various departments. Key sub-segments include:

- **HR (Human Resources):** Software that automates and streamlines human resources functions such as recruitment, performance management, employee data management, and payroll processing.
- **GRC (Governance, Risk, and Compliance):** Platforms that help organizations manage risks, ensure compliance with regulations, and implement governance controls across business processes.
- **ERP (Enterprise Resource Planning):** Integrated software systems that manage core business processes, including finance, manufacturing, inventory, procurement, and human resources.
- **SCM (Supply Chain Management):** Platforms that oversee the flow of goods, information, and finances across the supply chain, optimizing procurement, logistics, and inventory management.
- **Digital Experience:** Platforms that focus on improving customer and employee experiences by delivering personalized, digital interactions across websites, mobile apps, and other touchpoints.
- **CRM (Customer Relationship Management):** Software that helps businesses manage customer relationships, track interactions, and enhance sales and marketing efforts by maintaining customer data and automating processes.

### 2. System Platforms

System platforms provide foundational technologies for developing, deploying, and managing applications or services across multiple industries. Key sub-segments include:

- **Data Management:** Platforms that manage, store, and organize large volumes of data, ensuring data accessibility, consistency, security, and compliance across organizations.
- **AI and GenAI Platforms:** Platforms focused on enabling artificial intelligence (AI) and generative AI capabilities, such as machine learning, natural language processing, and automated decision-making.
- **Analytics and Intelligence:** Platforms designed for data analysis, business intelligence, and actionable insights, helping organizations make data-driven decisions.
- **Cybersecurity Platforms:** Tools and services that provide protection against cyber threats by managing identity access, detecting vulnerabilities, and securing networks and data.
- **Intelligent Workflow Management Platforms:** Platforms that automate and optimize business processes through AI and other technologies, improving efficiency, collaboration, and decision-making.
- **Automation Platforms:** Software that enables the automation of repetitive tasks and processes across business functions, reducing manual effort and enhancing productivity.

# AUTHORS



**Nikhil Kulkarni**  
Partner  
Zinnov



**Chary MLN**  
Principal  
Zinnov



**Smriti B**  
Project Lead  
Zinnov



**Abhishek S**  
Project Lead  
Zinnov

zinnov 