ISG Provider Lens™

Digital Workplace of the Future — Services & Solutions

Managed Workplace Services - Large Accounts

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

October 2020

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of October 2020, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

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EXECUTIVE SUMMARY

Pandemic-Driven Accelerated Workplace Technology Adoption by U.S. Clients

The COVID-19 pandemic has affected and challenged U.S. clients in multiple ways. The most apparent, immediate and explicit impact may be that it has suddenly forced many of them to accept and facilitate remote working. Enterprises across the country were making progress in the journey toward enabling a digital workplace, and they were all at different stages of maturity in terms of enabling automation and focusing on managing the employee experience. The pandemic has accelerated these moves, and clients are undertaking many digital workplace transformation initiatives that otherwise would have taken many years. From the workplace technologies side, this is an exciting and challenging time. Changing working models and modern remote work require technology to further improve and innovate like never before, and at a high pace. For service providers implementing and managing such technologies, the times couldn't be more challenging, as they need to accelerate their workplace transformation initiatives, customize the technologies to unique business needs and maintain focus on employee engagement.

While there has been a lot of focus on managing the current remote working challenges, U.S. clients are also looking up to their technology and service partners to ensure that solutions and services take into account the future "new normal" way of working. It is now generally accepted that we may never go back to the old ways of working: A high number of clients are considering allowing more than 45 percent of their workforce to permanently work from home. This would require different technology outlooks for workers on campus, in offices and at home.

This year's ISG Provider Lens report for Digital Workplace of the Future compares service providers and vendors for their solutions and services during these difficult times and positions them based on their current portfolios and their outlooks on the future. This report compares vendors and service providers across different quadrants that represent key workplace areas where COVID-19 has led to significant changes and development.

Digital Workplace Consulting:

- ISG has been comparing service providers that offer workplace advisory and consulting around digital transformation for many years now, even though workplace consulting was usually seen as a part of managed and implementation services and not a separate offering. The pandemic has ensured that consulting is always an integral part of workplace transformation and that clients always need proper guidance before attempting any technology adoption or business process change that could affect employee experience. Clients are looking for service partners that can provide consulting catered to their business processes, industry and changing customer and employee expectations in the remote working world.

- Technology adoption has become a key element in the time of COVID-19. Previously, clients would adopt new technologies at their own pace. The pandemic and the resulting remote work culture have elevated the importance of such initiatives, and clients need to make sure they implement the proper work culture and associated change management to make the best use of technologies for business outcomes
- Perhaps for the first time, workplace technology transformation initiatives are being seen as closely tied to visible business benefits. Many workplace service providers and global system integrators were developing their offerings to be able to measure employee experience with workplace technologies and quantify their abilities to influence the experience. The resulting key performance indicators (KPIs) would translate into managed services contracts commonly known as experience level agreements (XLAs). The XLA approach requires significant focus on prior consulting to determine key parameters that need to be part of the XLAs.

Managed Workplace Services

- Service providers have been working with clients to help them adopt automated solutions to reduce incident tickets through technologies such as artificial intelligence (AI) and machine learning (ML). However, the level of adoption and implementation was not uniform throughout their client base. Because of the pandemic, end users cannot go to a tech café or support center and get in-person support. Neither can there be too much reliance on phone-based support, given high call volume from large users as everyone is working from home. The use of the latest technologies ensures employees perform self-help and tickets get automatically resolved so there is no interruption for the end user
- There are many KPIs that may be used in XLA-based contracts, ranging from enabling self-help to measuring users' digital dexterity. In the current pandemic times, providers can extract the most important and most relevant KPIs for their clients based on their business and industry requirements. Client IT organizations are also beginning to understand the XLAs and are ready to implement some.
- Many service providers have developed miniaturized versions of their comprehensive service offerings to help clients quickly adopt them to enable remote work. Service providers have been able to offer quick customization of their capabilities to rapidly enable and manage remote working.
- There has been a strong focus on Microsoft 365 solutions that include Microsoft's widely used office productivity suite, Windows 10 operating system and unified endpoint management solution. As it is easier to quickly integrate and upgrade within an existing Microsoft environment, multiple service providers have developed similar offerings for managed services around these technologies.

Managed Mobility Services

- With the pandemic, clients in the U.S. had to equip their large workforces to perform with minimal or no disruption. This included both devices and apps required by the end users. In addition to traditional computing devices such as PCs and laptops, clients also require managing multiple smartphones they issue to employees. In many cases where clients had logistical issues in sending devices to employees' homes, they had to let employees work on their own personal devices and needed to ensure that access to apps and data was secured and managed without compromising the user experience.
- There has been a strong demand for and focus on the device-as-a-service model, where the service provider manages the entire device lifecycle. This involves providing users with devices at their own location and letting them enroll the devices in the enterprise device management system, which could be an enterprise mobility or a unified endpoint management solution. This model manages the entire device lifecycle from procurement to retirement and provides an opex- based operating model that is quite flexible for clients.
- After many years of anticipation, 2020 finally proved to be "the year of virtual desktop infrastructure (VDI)" where clients are adopting virtualized desktops at scale to enable their mobile and remote workforces. There has been less focus on on-premise VDI and more on the cloud-hosted virtual desktop solution also known as desktop-as-a-service (DaaS) (Not to be confused with device-as-a-service.). Microsoft's Windows Virtual Desktop (WVD), released late last year, proved to be the most sought-after solution by clients for enabling this technology.
- Predictive analytics and device/app health monitoring solutions are in high demand, as they can ensure end users don't face challenges in remote working and there is no dip in employee experience. Device management usually forms a key aspect of XLA KPIs.

Unified Endpoint Management

- While UEM solutions are designed for managing all kinds of devices that employees of an enterprise use through a single pane of glass, we have seen U.S. clients mostly interested in co-management functionality, where they can manage both legacy client management tools (CMTs) such as Microsoft Endpoint Configuration Manager (earlier known as Microsoft System Configuration Manager or MSCCM) and modern mobility management tools . However, with COVID-19, there has been an accelerated shift towards modern management.
- UEM solutions are highly focused on secure access and increasing mobile security capabilities by implementing related technologies such as zero-trust mobile threat defense (MTD). As employees work from home, the threat of security breaches is paramount at both the data and the device level.
- UEM solutions are also extending their security capabilities at the application development level by providing protection for software development kits (SDKs). The solutions also provide app-wrapping and containerization to ensure workplace apps and data are protected regardless what device or network employees use.

- There has been some increased focus on the use of AI and ML technologies to enhance threat detection and incident prevention. AI can be used to assess user behavior to preempt a breach and ensure safety.

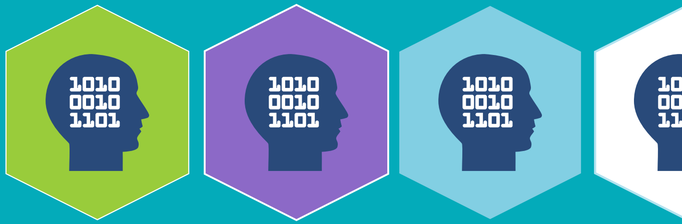
Enterprise Collaboration Solutions

- Clients in the U.S. distinguish enterprise collaboration from the traditional unified communication and collaboration (UCC) space that also includes solutions that provide meeting and conferencing capabilities. These solutions focus on enabling collaboration around teams and content collaboration can also provide task and project management capabilities.
- In the pandemic times, clients initially preferred to get the most out of their existing productivity suite solutions, which usually include email, productivity, meeting, file storage, intranet and chat apps to provide collaboration. While this worked for some, others had to invest in another solution for the collaboration they needed. Among those who didn't invest in a third-party solution, Microsoft Teams emerged as the single most widely used solution.
- Clients are looking for collaboration solutions that can be adopted quickly, require less training, ensure a high level of engagement and provide visible business benefits. Many popular and widely used solutions may fail to excel in all these areas. Though clients understand that it is not just the tool but the underlying company culture that enables collaboration, unfortunately, the pandemic has reduced the scope to the tool.
- Collaboration solutions have come to the forefront of the workplace technology ecosystem and can determine the effectiveness of remote working technology. Successful clients ensure optimal utilization of these solutions and innovative approaches to enhance user productivity and digital dexterity.

Meeting And Conferencing Solutions

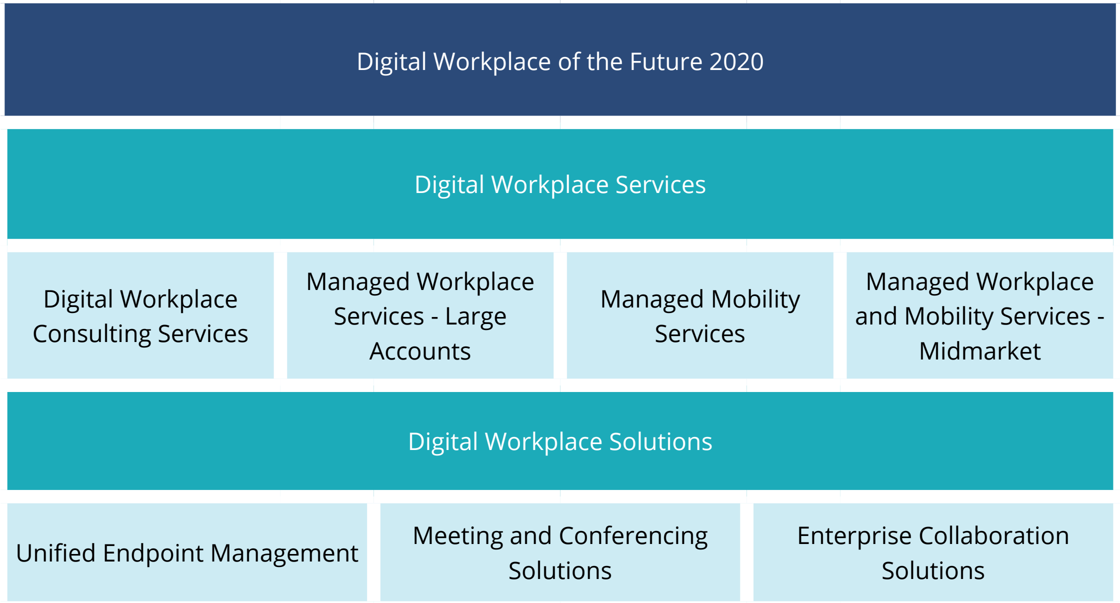
- During the COVID-19 pandemic, enterprises have not been able to host physical meetings and travel for conferences. Instead, they have relied on videoconferencing software solutions that saved them crucial time and money while enhancing convenience for end users. For employees working remotely from the comfort of their homes, the adoption of video as a mode of communication increased significantly, and major videoconferencing software vendors reported spikes in their daily and monthly active users.
- Collaboration solution vendors have realized their interdependency and have started to focus on interoperability to enhance ease of use. This trend has been prevalent across both hardware and software solution vendors. Users have also started to prefer integrated collaboration tools to enhance productivity and reduce going back and forth from one software to another in an environment of multiple devices and software. Productivity can be boosted by combining a consistent user interface with interoperability of various platforms.

- Deep integrations of videoconferencing solutions with productivity suites and CRM systems like Office 365, G Suite, Slack, Salesforce, Zendesk and ServiceNow have become a must to enable a seamless user experience. These vendors have started to support multiple integrations in addition to open APIs that allow enterprises and developers to customize their environment.
- As remote working has soared due to the pandemic, the use of meeting and conferencing solutions has also skyrocketed, and this, in turn, has attracted cybercriminals to these platforms. Consequently, the focus on security has become stronger in the videoconferencing market space. Users were trained in locking down meetings to enhance security, and vendors now need to balance security with ease of use.
- Innovation among videoconferencing vendors has accelerated and the focus on implementation of automation, smarter user experience with AI to eliminate mundane tasks and ease meeting fatigue has increased. Many software vendors have started to develop and implement speech-to-text, automated speech recognition, natural language processing, real-time transcription, sentiment analysis and facial recognition capabilities. The inclusion of 4K video meetings with enhanced audio capabilities has also become one of the focal points for many vendors.



Introduction

Simplified illustration



Source: ISG 2020

Definition

The digital workplace of the future refers to the technology ecosystem that enables enterprise employees to securely access their work profiles, stored data and applications anywhere, anytime and on any device or platform. It aims to improve digital dexterity and worker productivity while enabling them to connect and collaborate with fellow employees efficiently.

The digital workplace technology ecosystem encompasses software vendors offering solutions that provide secure device management, continuous access to apps and data over any device, next-generation collaboration and productivity. It also includes system integrators and service providers that act as partners for enterprises in their workplace transformation journey — helping to assess their workplace environment, suggesting best approaches, managing the entire technical environment and providing support to end users by leveraging the latest and emerging technologies.

Definition (cont.)

As global enterprises grapple with the COVID-19 pandemic, they need to enable remote working at scale for a majority of their workforce. This requires employees to have seamless access to their workplace apps through the device they carry (personal or company-owned). It also requires an overarching technical environment that ensures connectivity and collaboration among globally dispersed employees anytime and anywhere. Also, enterprises must ensure that corporate data and applications remain secure and protected from cyberattacks. This requires significant investments in secure tools for remote working, along with meeting and collaboration solutions to ensure employee productivity.

Scope of the Study

As part of this quadrant study, ISG is introducing the following seven quadrants on digital workplace services and solutions.

Digital Workplace Consulting Services: Digital workplace consulting centers on workplace optimization strategies. The modules include support for defining a workplace strategy, designing the architecture and creating the roadmap for validating the business case around transformation. Consulting and workplace assessment are essential parts of the digital workplace offering and are offered independently of the associated managed services. These advisory services are specific to workplace digital transformation. They typically include assessing the current workplace environment, designing the end-user-focused workplace transformation, defining the business case and return on investment (ROI), segmenting end-user personas, providing a roadmap for implementation, enabling technology adoption and change management.

Managed Workplace Services - Large Accounts: Managed digital workplace services encompass all managed services related to the digital workplace. An IT service desk with level 1 / 2 support, in-person technical support and user self-help services are the core components of the managed services offering. The quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing (EUC) and unified communication (UC) services and managed virtual desktop services.

Definition (cont.)

Managed Mobility Services: With the growing acceptance of mobility and the bring-your-own-device (BYOD) culture, these services have extended to cover secure device management, mobile application and content management, application deployment and accessibility related to roles and access policy. Managed mobility services include support for mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. They also include larger aspects of enterprise mobility management, such as mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

Unified Endpoint Management Solutions: Unified endpoint management (UEM) solutions are converging to encompass smartphones, tablets, laptops and PCs. A UEM solution should primarily provide full enterprise mobility management, covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). It provides a unified approach to managing desktops, PCs and mobile and smart devices through a single console. A UEM solution should support both on-premise and cloud deployments, remotely manage and configure devices and provide application and device analytics. It should also provide mobile security, endpoint security and PC/desktop management integration.

Meeting and Conferencing Solutions:

Meeting and conferencing solutions provide calling, conferencing, messaging and audio and video meetings. Organizations use meeting solutions to collaborate for both informal and formal meetings such as external presentations, training sessions, webinars and town hall meetings. Some videoconferencing systems provide integration of marketing automation and customer relationship management (CRM) software to synchronize essential business data into specific conferences, allowing for seamless follow-up communications and updates for contact accounts. The meeting solutions should follow protocols to protect information online through encryption and compliance to internationally accepted security and privacy standards

Enterprise Collaboration Solutions:

These are the new-age collaboration solutions that provide team-based collaboration that can extend to task management, project management, modern intranet, enterprise social networking and meeting solutions. They may or may not offer their own meeting and conferencing capabilities but can integrate with other solutions. The key focus area of these solutions are around enhancing user digital dexterity, digital adroitness, communication and collaboration, task and project management and productivity solutions.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "Leaders" among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "Product Challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market Challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader’s quadrant.

Rising Star

"Rising Stars" are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 1 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
42Gears	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in
8x8	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Accenture	Leader	Leader	Leader	Not in	Not in	Not in	Not in
Adobe	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Alcatel-Lucent	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Atos	Leader	Leader	Product Challenger	Not in	Product Challenger	Not in	Product Challenger
Avaya	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Baramundi	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in
Bell Techlogix	Not in	Market Challenger	Not in	Not in	Not in	Not in	Not in
Birlasoft	Not in	Contender	Not in	Contender	Not in	Not in	Not in
BlackBerry	Not in	Not in	Not in	Not in	Not in	Leader	Not in
BlueJeans	Not in	Not in	Not in	Not in	Not in	Not in	Leader
CA	Not in	Not in	Not in	Not in	Contender	Not in	Not in
Capgemini	Leader	Product Challenger	Product Challenger	Not in	Not in	Not in	Not in
Cisco	Not in	Not in	Not in	Not in	Product Challenger	Not in	Leader

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 2 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
Citrix	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Coforge	Not in	Contender	Contender	Product Challenger	Not in	Not in	Not in
Cognizant	Rising Star	Leader	Leader	Not in	Not in	Not in	Not in
Compucom	Contender	Market Challenger	Not in	Market Challenger	Not in	Not in	Not in
CSS Corp	Contender	Product Challenger	Not in	Leader	Not in	Not in	Not in
Digital Workplace Group	Product Challenger	Not in	Not in	Not in	Not in	Not in	Not in
DMI	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in
DXC	Market Challenger	Leader	Leader	Not in	Not in	Not in	Not in
ezTalks	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Flock	Not in	Not in	Not in	Not in	Contender	Not in	Not in
Fujitsu	Product Challenger	Product Challenger	Product Challenger	Not in	Not in	Not in	Not in
Google	Not in	Not in	Not in	Not in	Leader	Not in	Leader
HCL	Leader	Leader	Leader	Not in	Not in	Not in	Not in
Hexaware	Product Challenger	Product Challenger	Product Challenger	Rising Star	Not in	Not in	Not in
Honeywell	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 3 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
IBM	Leader	Leader	Leader	Not in	Not in	Leader	Not in
Igloo	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Infinite	Contender	Not in	Contender	Contender	Not in	Not in	Not in
Infosys	Leader	Rising Star	Product Challenger	Not in	Not in	Not in	Not in
ITC Infotech	Contender	Not in	Not in	Not in	Not in	Not in	Not in
Ivanti	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Jamf	Not in	Not in	Not in	Not in	Not in	Market Challenger	Not in
Jive	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Kaspersky	Not in	Not in	Not in	Not in	Not in	Market Challenger	Not in
Lifesize	Not in	Not in	Not in	Not in	Not in	Not in	Market Challenger
LogMeIn	Not in	Not in	Not in	Not in	Not in	Not in	Leader
Long View	Not in	Contender	Not in	Not in	Not in	Not in	Not in
LoopUp	Not in	Not in	Not in	Not in	Not in	Not in	Contender
LTI	Product Challenger	Product Challenger	Not in	Rising Star	Not in	Not in	Not in
Matrix42	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 4 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
Mattermost	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Microland	Contender	Contender	Contender	Product Challenger	Not in	Not in	Not in
Microsoft	Not in	Not in	Not in	Not in	Leader	Leader	Leader
Miro	Not in	Not in	Not in	Not in	Not in	Not in	Contender
MobileIron	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Mphasis	Contender	Product Challenger	Not in	Not in	Not in	Not in	Not in
NTT DATA	Leader	Leader	Product Challenger	Not in	Not in	Not in	Not in
Pexip	Not in	Not in	Not in	Not in	Not in	Not in	Market Challenger
PGi	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Pivot	Contender	Contender	Product Challenger	Product Challenger	Not in	Not in	Not in
Poll Everywhere	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Pomeroy	Market Challenger	Market Challenger	Not in	Leader	Not in	Not in	Not in
Quest KACE	Not in	Not in	Not in	Not in	Not in	Contender	Not in
RingCentral	Not in	Not in	Not in	Not in	Product Challenger	Not in	Product Challenger
Rocket.Chat	Not in	Not in	Not in	Not in	Product Challenger	Not in	Product Challenger

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 5 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
Salesforce	Not in	Not in	Not in	Not in	Market Challenger	Not in	Not in
SAP	Not in	Not in	Not in	Not in	Market Challenger	Not in	Not in
Slack	Not in	Not in	Not in	Not in	Leader	Not in	Not in
Smarp	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Snow Software	Not in	Not in	Not in	Not in	Not in	Contender	Not in
Softtek	Not in	Contender	Not in	Not in	Not in	Not in	Not in
Sophos	Not in	Not in	Not in	Not in	Not in	Contender	Not in
SOTI	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in
StarLeaf	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Stefanini	Contender	Product Challenger	Not in	Leader	Not in	Not in	Not in
Tangoe	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in
TCS	Leader	Leader	Leader	Not in	Not in	Not in	Not in
TeamViewer	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Tech Mahindra	Product Challenger	Product Challenger	Not in	Not in	Not in	Not in	Not in
TEK Systems	Not in	Market Challenger	Not in	Not in	Not in	Not in	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 6 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
TIBCO	Not in	Not in	Not in	Not in	Market Challenger	Not in	Not in
UberConference	Not in	Not in	Not in	Not in	Not in	Not in	Market Challenger
Unisys	Leader	Leader	Leader	Not in	Not in	Not in	Not in
UST Global	Product Challenger	Product Challenger	Product Challenger	Leader	Not in	Not in	Not in
Visionet	Not in	Not in	Not in	Not in	Contender	Not in	Not in
VMware	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Vox Mobile	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in
Wipro	Leader	Leader	Leader	Not in	Not in	Not in	Not in
Wire	Not in	Not in	Not in	Not in	Contender	Not in	Not in
Workplace from Facebook	Not in	Not in	Not in	Not in	Leader	Not in	Not in
Yash Technologies	Contender	Contender	Not in	Contender	Not in	Not in	Not in
Zensar	Product Challenger	Leader	Rising Star	Not in	Not in	Not in	Not in
Zoho	Not in	Not in	Not in	Not in	Rising Star	Rising Star	Rising Star
Zoom	Not in	Not in	Not in	Not in	Not in	Not in	Leader

Digital Workplace of the Future — Services & Solutions Quadrants

ENTERPRISE CONTEXT

Managed Workplace Services - Large Accounts, U.S.

This report is relevant to large enterprises across industries in the U.S. for evaluating providers of managed workplace services.

In this quadrant report, ISG highlights the current market positioning of managed workplace service providers to large enterprises in U.S. and how each provider addresses the key challenges faced in the region.

Due to the COVID-19 pandemic, enterprises are focused on creating a secure and effective remote/hybrid working environment for employees. Some of the major challenges faced by enterprises included accelerating workplace modernization and cost reduction simultaneously, optimizing the employee experience, enhancing end user adoption and transforming field services to support the remote workers. Enterprises are also looking forward to implementing self-heal and self-service technologies to automatically resolve ticket queries when users cannot access in-person support.

Large enterprises in the U.S. are moving from traditional service level agreements (SLAs) to contracts based on experience level agreements (XLAs), which can help in tracking relevant key performance indicators (KPIs) based on the requirements. Most enterprises have a strong demand for the Microsoft 365 solutions, and service providers have also improved their managed service offerings for handling multiple requirements. Workspace management solutions, digital lockers, IT kiosks, meeting room booking solutions, cognitive virtual assistants and formulation of a unified communications and collaboration (UCC) strategy are some of the major demands of enterprise clients.

Service providers are seeking to combine the power of artificial intelligence, analytics and automation for tackling the above-mentioned challenges.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed workplace services. The report also shows how the technical and integration capabilities of a service provider compare with the rest in the market.

Digital transformation professionals should read this report to understand how providers of managed workplace services fit their digital transformation initiatives and how they compare with one another.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of managed workplace service providers in the U.S.

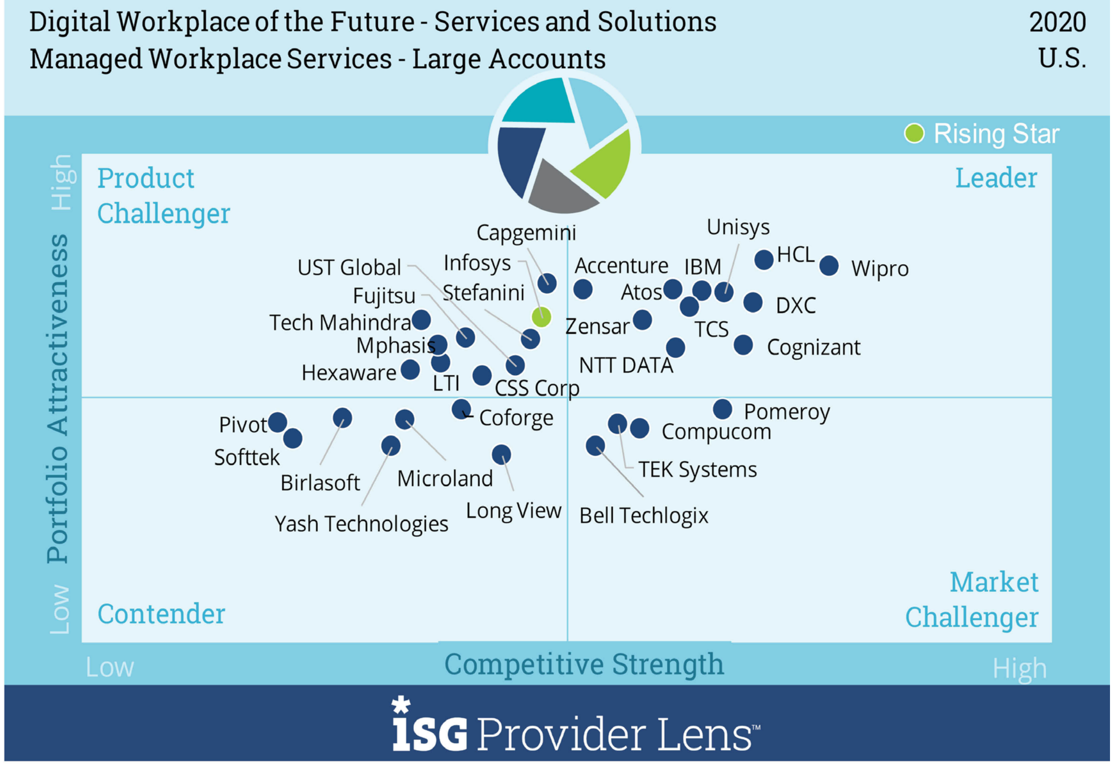
Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security while keeping the employee experience seamless for remote employees.

Admin and field services managers should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations.

MANAGED WORKPLACE SERVICES - LARGE ACCOUNTS

Definition

Managed digital workplace services include all managed services associated with the digital workplace. An IT service desk with level 1/level 2 support, in-person technical support and user self-help services form the core components of the managed services offering. This quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing (EUC) and unified communication (UC) services and managed virtual desktop services.



Source: ISG Research 2020

MANAGED WORKPLACE SERVICES - LARGE ACCOUNTS

Eligibility Criteria

- Provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents
- Offer onsite field support and in-person technical assistance
- Set up self-help kiosks, tech bars, IT vending machines and digital lockers
- Offer managed services for collaboration and communication over diverse platforms
- Provide device support, predictive analytics and proactive monitoring services
- Provide remote virtual desktop services, both cloud-based and on-premise

Observations

- COVID-19 has led to significant changes in the positions of many providers in this quadrant compared with last year. However, there is no change in position for some providers. Every provider evaluated for this quadrant was able to rapidly enable remote working for its clients during the pandemic, and many have introduced a specific miniaturized version of their wider managed services offering specifically for these difficult times.
- Wipro leads this market with excellent growth in the U.S. and is rapidly developing and successfully deploying capabilities specific to sudden remote working needs.
- HCL, Unisys and DXC are also leading the market with their strong focus on measuring user experience and relating it to an XLA approach. HCL released a new offering for the time of the pandemic that covers the most important elements of its services portfolio. DXC has a strong foothold in the U.S. market, while Unisys reports strong business growth.
- Atos has renewed its focus on employee experience with a focus on COVID-19 and the post-pandemic world, and its services include support for citizen developers and employee well-being. TCS introduced its Secured Borderless Workspaces for its clients, including key elements of user experience and technology management. IBM provides Watson-supported managed workplace services along with risk/reward-based pricing based on XLAs.

MANAGED WORKPLACE SERVICES - LARGE ACCOUNTS

Observations (cont.)

- Cognizant, with its recent WorkNEXT offering and strong U.S. presence, is a leader in the quadrant, and NTT DATA also leverages its strong local presence and ability to use customer experience (CX) parameters to define and measure experience levels.
- Zensar retains its leadership position because of its ability to generate business-related KPIs along with technology performance. Accenture, which was a Rising Star last year, became a Leader this year because of its Workplace Experience (WX) approach and strong growth.
- Infosys, with its ability to measure user experience with workplace technology, its growing credibility in the market and its focused smart building solutions, provides a promising scope and is identified as a Rising Star.

ACCENTURE

Overview

Accenture provides managed workplace services to clients, both independently and with Avanade, its joint venture with Microsoft. The company manages 700,000 users in the U.S. and has its service desk locations in Knoxville, Tennessee, and San Antonio, Texas, where it provides support in English, French and Spanish. It provides onsite field support in all major U.S. cities. It also offers smart building solutions, meeting solutions and AR/VR field support and has partnerships with HP, Dell, Lenovo and LogMeIn.

Strengths

WX strategy: Accenture's workplace experience (WX) strategy involves a three-pronged approach for workplace transformation, focused on modernizing platforms, transforming business operations and reimagining culture and employee experience. Its platform modernizing capabilities provide secured and managed workplace platforms across devices. Its operation optimization capabilities help to reimagine how work gets done, and cultural change services involve re-engineering the employee experience.

Automation and platforms: Accenture's services provide shift-left strategies and automation-enabled incident resolution with the application of AI and automation technologies. Its automation-enabled services can resolve 22 percent of incidents automatically. It empowers end users to independently resolve up to 46 percent of incidents before being raised. The company reports an average end-user satisfaction rating of 90 out of 100. Accenture also offers its own platforms, such as Nanoheal for predictive analytics; DIVA framework for email, chatbot prevention and closing common issues automatically; a real-time translator called Chameleon, Intelligent Email Advisor to auto-classify ticket emails; and NPS Advisor to predict net promoter score (NPS) in real time as service desk agents take the call.

User experience indicator: Accenture calculates the user experience index (UEI) by aggregating and collating data from different sources to enable predictive analytics and proactive system monitoring. It helps clients take the XLA journey by leveraging UEI as they shift focus toward the digital workplace experience of users.

Caution

Even though Accenture reports a significant increase in the number of users managed in the U.S. compared with last year, it forms a very small percentage of global users managed by the company compared to other leaders in this quadrant.

Accenture has a robust experience measurement approach. However, it still lacks in KPI maturity when it comes to experience-level parameters compared with other leaders in this space.

2020 ISG Provider Lens™ Leader

Accenture's analytics-driven experience measurement, combined with its automation capabilities, is well-suited for large-scale clients seeking managed workplace transformation initiatives.

ATOS

Overview

Atos continues to have digital workplace as one of its core strategic focus areas and reports steady growth in its workplace services business. The company manages about 2 million end users in the U.S. and has 14,200 employees globally for workplace design, implementation and managed services. Atos' managed workplace services follow a data-driven approach that is aimed at improving employee engagement and the company aspires to be a leader in employee engagement.

Strengths

Managed workplace services in the U.S.: Atos has strong credentials in managed workplace services in the U.S. market even though it largely seen as a European provider. It delivers service desk services from Mason, Ohio, and Cheshire, Connecticut. It also partners with NSC Global to offer on-site support that includes tech bars, IT kiosks and smart vending machines.

Renewed focus on employee experience: Atos has updated and realigned its offering as per the companywide SPRING program that updates the existing offering with an industry-focused viewpoint. It has also added additional capabilities for employee engagement and experience in light of COVID-19, including employee experience accelerators such as a citizen developer center of excellence (CoE), micro apps and employee well-being.

Analytics-driven XLA approach: Atos has been one of the pioneers of the XLA approach and leverages extensive analytics capabilities to provide an informed data-driven service portfolio. Its proactive experience services measure user experience around many parameters, which is then fed to its digital care center services, such as service desk, virtual assistants and physical and virtual tech bars. Atos has successfully implemented these XLAs for key U.S. clients by implementing proactive support, chatbots, analytics and modern management.

Caution

While Atos has key capabilities to perform user engagement and experience measurement-related analytics, it still lacks certain features that have suddenly become important in the post COVID-19 situation, where the workstyle depends on how users work remotely.

Atos' recently launched industry-aligned SPRING program led to significant changes in the workplace service portfolio. While working on internal alignment for its existing portfolio, the company should ensure that it doesn't disrupt ongoing engagements.

2020 ISG Provider Lens™ Leader

Atos strives to reach the next stage in managed workplace services by being the employee engagement leader and leveraging its strong capabilities in providing services focused on data-driven experiences.

COGNIZANT

Overview

Cognizant's digital workplace services under the WorkNEXT™ umbrella offering provide employee experience-focused transformation for its clients. The company manages 6.2 million end users globally and serves a significant number of clients in the U.S.

Caution

Even though Cognizant has developed an XLA approach, it still lacks on many parameters compared with other leaders in this quadrant.

Cognizant reported only little increment in its total user managed base among all leaders in this quadrant over the past year. It should pursue this market more aggressively.

Strengths

WorkNEXT™ portfolio of services: Cognizant WorkNEXT™ covers the following four key areas: Collaboration services, digital support services, device services and connected workplace services. Collaboration services offer support for the entire Office 365 suite and cover MS Teams-centric collaboration along with digital contact center services. Its digital support services include AI-enabled service desk, AR/VR-enabled field support, user experience management and analytics. Connected workspace services include building management and smart physical spaces solutions.

Automation-led workplace engineering: Cognizant's workplace and service desk engineering services provide up to 41 percent resolution through user self-help and automation. Its user experience command center uses a gradual approach to help clients get from a reactive to a proactive stage and finally a predictive mode of operations. It highlights gradual adoption of business KPIs and XLAs and helps to consistently improve the user experience score.

U.S. capabilities: Cognizant has two service desk delivery locations in the U.S., one each in Denver and Phoenix. It supports more than 20 languages globally with high first-level resolution (FLR) and average speed of answer (ASA) rates. Cognizant has partnered with Essintial Enterprise Solutions and DecisionOne to provide on-site support in the U.S. with AR/VR labs.

2020 ISG Provider Lens™ Leader

Cognizant's enterprise application and employee experience-focused managed workplace services are its differentiator and place it as a leader in this space.

DXC TECHNOLOGY

Overview

DXC's managed workplace services include the MyWorkStyle™ offering that helps generate personalized workplace experiences for end users. The company manages about 2.4 million end users and 215 clients in North America. It handles about 14 million contacts per year in the region, generating around US$1.05 billion in revenue with its digital workplace services.

Strengths

MyWorkStyle™ and associated IP: This offering covers digital support and intelligent collaboration solutions that provide unified communications, collaboration, smart campus connectivity, proactive monitoring and virtual agent support services. It also leverages its own IP assets, such as an agile service desk, conversational virtual agents and remote expert assistance.

Scale of U.S. operations: DXC has service desk locations in Pontiac, Michigan; Tulsa, Oklahoma; Cerritos, California; and Plano, Texas. It provides onsite and field support for 33 locations in North America and partners with Damovo, Hemmersbach, Insight Global (IG), Manpower and TekSystems. It also partners with RealWear, Microsoft Teams, iOffice, G Suite, HP Elite Slice and Zoom for smart meeting solutions.

XLA approach: DXC collects both qualitative and quantitative information from end-user interaction points and measures employee experience around workplace security, persona-specific services, proactive analytics and digital support services. To measure employee experience, it monitors interaction through sentiment analysis and intent recognition. It collects information through user surveys and telemetry and then aggregates those responses to provide experience data-based XLAs.

Caution

The growing uncertainty for DXC's workplace and mobility business could be a discouraging factor for clients, though ISG has not observed any deviation from its service delivery.

Even though DXC has a strong and relevant XLA capability geared toward IT-led user experience, it still lacks business-outcome-focused parameters that other leaders in this space offer.

2020 ISG Provider Lens™ Leader

DXC's managed workplace services are part of its MyWorkStyle™ offering powered by AI, automation and intelligent collaboration and serves large customers in the U.S.

HCL

Overview

HCL has a strong managed workplace service offering consisting of its homegrown IP and productized offering that cover areas around workplace support and user experience. The company manages 1.8 million users in the U.S., a 33 percent jump from last year. Its revenue from managed workplace services in the U.S. accounts for 73 percent of its total revenue from workplace services in the country.

Strengths

U.S. operations scale: HCL offers service desk services from Cary, North Carolina; Dallas; Jackson, Mississippi; Seattle and Redmond, Washington; Frisco, Texas; New York; Morristown, New Jersey; Pittston, Pennsylvania; and Hartford, Connecticut, providing support in English and Spanish. It provides onsite field support to all states in the U.S. and partners with Librestream, SightCall, RealWear and Microsoft Hololens for AR/VR support. It offers automation-led workplace support through self-help solution OptiBOT, predictive analytics solution WorkBlaze™ and virtual cognitive assistant LUCY. The company reports 85 percent first-call resolution, 36 percent incident resolution through automation and 21 percent resolution through self-help, with end-user satisfaction of more than 95 percent among U.S. clients.

Fluid Workplace: HCL launched its Fluid Workplace offering as a response to the COVID-19 pandemic. It leverages the HCL SMART workplace model to provide contextualized workplace support, self-healing machines, cognitive AI-powered users and IoT-powered smart physical workspaces. HCL also introduced SafeSense to provide offices with services conforming to social distancing and the new "contactless" norm. It also introduced Kalido a workforce management tool that helps to acquire, retain and develop talent and skills.

Pulse of employee experience: HCL takes an XLA approach by identifying the outcomes clients need and mapping them to the required user experience. It measures the overall employee experience while trying to bridge the gap between performance and user perception toward IT services. Measurable user experience is also powered by compassionate change management and empathy.

Caution

HCL's portfolio has too many components, IPs and solutions that cover multiple aspects of workplace transformation. It could be difficult for potential clients to realize the full value of its solutions without understanding the complete value chain. ISG suggests clients follow a consultative approach with HCL to determine the best possible combination of services and solutions as per their requirements.

Though HCL reports significant revenue generation from digital workplace services compared with last year, its growth in the U.S. is not as high as for other regions compared with its close competitors.

2020 ISG Provider Lens™ Leader

HCL's comprehensive workplace services, including homegrown IP and future-oriented offerings, place it as a strong leader in this space.

IBM

Overview

IBM's managed workplace services are part of its modern digital workplace services, which include workplace support services, workplace virtualization and collaboration services. The company manages 8.1 million end users globally.

IBM announced in early October that it was spinning off its managed infrastructure services as a new company and that digital workplace services will be part of the new company.

Strengths

Cognitive intelligence enabled WSS: IBM's Workplace Support Services (WSS) leverage the cognitive intelligence capabilities of the AI/ML-powered Watson® platform. It provides analytics on unstructured ticket data, chat logs, change requests and performance data to provide insights. IBM's cognitive capabilities use technologies such as natural language understanding (NLU), ML and natural language processing (NLP) to understand user context and provide remedial actions. The firm also conducts automation-enabled dynamic script implementation and self-healing to prevent issues from occurring.

U.S. regional strength: IBM has regional service desk locations in Buffalo and Boulder. It also offers workplace modernization services through client innovation centers in Dubuque, Iowa, and Columbia, Missouri. It partners with NTT DATA to provide local field support in the U.S.

Client adoption approach to pricing: IBM's commercial model for improving workplace support through Watson® automation takes into consideration the client's change adoption strategy and implements a risk-reward model based on the client's ability to drive and maintain change. IBM charges clients on a per-user price basis for its support services and defines a minimum threshold for adoption. If clients' adoption is below the expectation, there are no changes in the charges. If adoption is slightly more than minimum, then as per IBM's minimum strategic adoption, the client would pay as per the modern workplace user type that costs more than the traditional type. If adoption is significantly higher, the client pays for the digital workplace user type that is priced higher.

Caution

IBM's XLA approach is quite clear and depends highly on automated tickets with the usage of Watson® and associated risk and rewards. Other leaders in this space offer much more comprehensive XLA KPIs covering parameters beyond ticket handling, even though they offer less clarity on the risk-reward approach.

IBM does not report a significant increase in the number of users managed in the U.S. from last year compared with other leaders in this space.

2020 ISG Provider Lens™ Leader

IBM's years of experience in managing workplace support by leveraging automation and cognitive intelligence place it as a leader in the quadrant.

NTT DATA

Overview

NTT DATA offers managed workplace services as part of its Dynamic Workplace services. It manages 3.5 million end users and has 230 clients in the U.S.

Strengths

Dynamic Workplace services: NTT DATA's Dynamic Workplace services make use of advanced analytics and AI to drive user experience-centric services. It provides predictive analytics to auto-resolve 15 to 20 percent of level 1 and level 2 tickets. It also measures user sentiment and satisfaction levels and auto resolve issues that increases user productivity by 10 percent.

U.S. scale: NTT DATA provides global voice support services from Lincoln, Nebraska, Bowling Green, Kentucky, Oklahoma City and Nashville, Tennessee. It provides support in English and Spanish.

CX to XLA: NTT DATA provides a solutioning and contract business framework that uses CX elements to define experience levels. It uses a multilayered payment schedule with a risk-reward structure based on XLA success. It collects traditional metrics and measures the achievement of outcomes with shared rewards. It also measures NTT DATA's performance with performance standards such as employee productivity per week.

Caution

NTT DATA has limited presence among clients with an outcome-based pricing engagement model. Clients looking for such transformational engagement should leverage NTT DATA's participative approach around XLA, which contributes to co-creation and innovation with a risk-reward model.

NTT DATA should show more examples of U.S. clients with implantable XLAs on user productivity and improving digital dexterity.

2020 ISG Provider Lens™ Leader

NTT DATA has a strong presence in the U.S. and its focus on analytics and automation-driven workplace support place it as a leader in this quadrant.

TCS

Overview

TCS offers managed workplace services through its Digital Workplace Studio and manages 7.2 million end users globally. It offers service desk services from Chicago, Cincinnati and Dallas. It also offers onsite and field support from Dallas, Houston and Chicago.

Strengths

Secured Borderless Workspace (SBWS™): TCS' new offering for assisting clients in the post-pandemic world has been quite successful for its clients. It includes the comprehensive Digital Workplace Studio, Microsoft technology-focused rapid remote work enablement, enterprise cloud services, Workplace as a Service, digital behavior nudging for Office 365 adoption, cybersecurity, talent management and workplace analytics services. The company has successfully implemented SBWS™ services for U.S. clients, providing cognitive service desk, unified collaboration and virtual meeting-related services.

Digital Workplace Studio: TCS' Digital Workplace Studio provides zero-touch IT services that enable provisioning and auto-healing services, the next-generation workplace services that include predictive analytics and proactive monitoring. It also covers experience-focused services such as digital locker, gamification, smart VR-enabled meeting solutions and automatic speech recognizer. The company reports up to 25 percent ticket resolution through automation and 20 percent through user self-heal.

Business imperative-focused services: TCS has developed employee experience-focused business use cases and has successful case studies around multiple scenarios. It leverages its partnerships with Workday, ServiceNow, Microsoft and SAP and leverages its own IP to provide services around employee onboarding, satisfaction, engagement and re-skilling and for empowering field workers.

Caution

TCS does not report a significant increase in the number of users managed globally compared to last year. The number of users managed and the managed workplace services revenue in the U.S. are estimated to be lower than those of its key competitors

TCS' solid workplace services portfolio is highly centered on the Microsoft technology ecosystem, which may limit the firm's ability to serve clients with a non-Microsoft technology ecosystem. It should strongly highlight its capabilities for non-Microsoft technology environment.

2020 ISG Provider Lens™ Leader

TCS offers strong capabilities in managed workplace services powered by automation, and its pandemic-focused workplace service offering acts as a differentiator.

UNISYS

Overview

Unisys provides intelligent automation-powered managed workplace services and manages 148 clients and 5.9 million users in the U.S, a 67 percent increase compared to last year. The company offers end-to-end digital workplace services around intelligent support and digital experience of end users.

Strengths

U.S. operations: Unisys offers service desk services from Augusta, Georgia, and Salt Lake City. It also provides on-site support, walk-in Tech Café support and remote dispatch support through its own resources and partnerships with Pinnacle and Tech Systems. The company offers smart meetings capabilities plus physical building solutions in partnership with AVI-SPL as well as AR/VR-based onsite support through a partnership with Help Lightning. It leverages 2,200 field engineers and 19 parts warehouses in the U.S.

Automation-led workplace support services: Unisys InteliServe™ provides end-user empowering services such as secure apps, data and secure identity over cloud, real-time collaboration, and automated self-service through analytics. InteliServe™ also provides pervasive and intelligent support such as personalized assistance at Tech Café, intelligent virtual agent and self-help vending machines. The company reports 17.50 percent in incident resolution through automation and 13.6 percent through self-help.

Digital Experience monitoring: Unisys predictive analytics and proactive monitoring solutions provide a digital experience score that provides quantitative measures for key end-user experience areas. These include productivity collaboration score, security score, device score, business app score and web browsing score.

Caution

Though Unisys has strong capabilities in generating XLA KPIs and benchmarks against the industry average, it still places a greater focus on workplace technology performance than on user productivity and dexterity.

Unisys has a solid offering for both during and after pandemic scenarios. It can extend its services for business process reimagination, which can influence workplace experience.

2020 ISG Provider Lens™ Leader

Unisys provides automation enabled and experience-focused managed services and carves out specific offerings for challenging times, making it a strong leader in this quadrant.

WIPRO

Overview

Wipro offers managed workplace services under the umbrella branding of LiVE Workspace™. The company manages 3.8 million users in the U.S., a 6 percent increase from last year. The company's revenue from managed workplace services rose by 31 percent for the U.S. and its overall digital workplace services revenue for the region increased by 35 percent.

Strengths

Consolidated portfolio for pandemic world: Wipro has changed its service portfolio LiVE Workspace™ in the post-pandemic world, offering three main service pillars for remote working, safe working and support services. Its LiVE Workspace Connect remote working includes 7 IPs that include remote work assessment, VirtuaDesk, virtual desktop offering, remote experience monitoring, remote secure for zero trust security, remote setup for AI-powered virtual assistant, remote workspaces for ubiquitous workspace access and remote field support and AR/VR factories delivered through its Tech Innovation Centers.

Global no-shore delivery: Wipro leverages its service desk locations in Atlanta and Dallas with support in multiple languages. It also provides a no-shore delivery network offering next-generation field services. It partners with Amazon Locker, A&O, Hemmersbach, Iron System, Exics, ESP, GoPost, PUDO and WWTS for field services.

Analyzing workstyles in new norm: Wipro offers a tailored approach for analyzing new workstyles in this post-pandemic age. It provides productivity assessment and helps end users work efficiently by undertaking activities such as planning the day.

Caution

Wipro's revenue growth is significantly higher than the increase in the number of users managed. This is primarily due to its acquisition of major logos over the past year. However, it may give an impression that the company is developing a standard-ized solution for a large client base, while its differentiation lies in customization.

Wipro's offering seems to be the best fit for the current pandemic and the new normal. However, the company needs to be wary of developing too many capabilities for this period, which may be temporary. Also, the next new workstyles may be completely different, making it difficult for clients to transition back.

2020 ISG Provider Lens™ Leader

With a comprehensive service portfolio covering a complete spectrum of managed workplace services, Wipro has been able to strengthen its position in the market.

ZENSAR

Overview

Zensar offers a strong managed workplace services portfolio with a focus on user experience and business-aligned KPIs. The company manages 590,058 users in the U.S., an increase of 15 percent from last year. Managed services workplace revenue from the U.S. accounts for 75 percent of its revenue globally and is 37 percent more than last year.

Strengths

U.S. focus: Zensar provides service desk services from Massachusetts, North Carolina and Texas and provides English, Spanish and multilingual support through translation services. The company has experience centers that deal with workplace elements in Seattle; Westborough, Massachusetts; San Jose, California; Dallas; and Durham, North Carolina. Zensar also follows a strong U.S. sales model and goes to market with a combination of its horizontal U.S. direct sales team, vertical sales team and alliance sales.

IPs and accelerators: Zensar offers its own IPs and accelerators for managed workplace services. It recently created more IPs such as ZenDUX for end-user analytics and correlation for measuring and reporting a real-time user experience index. It also launched WorkNXT to provide user profiling and an app data device unification portal. It also launched WorkBot, a cognitive and AI-powered platform that delivers automated virtual desk services. The company also offers multiple IPs and accelerators for analytics, automation and adoption. It reports 32 percent of incident ticket resolution through automation and 24 percent through self-help, improving first call resolution to 95 percent.

Business-aligned XLA approach: Zensar offers traditional KPIs along with business and operational KPIs to define user-experience-focused XLAs. It leverages traditional SLAs for providing reactive managed workplace support. It also uses operational KPIs such as percentage of self-healing, preventive maintenance, and proactive issue resolution to measure preventive and proactive support. Business KPIs such as productivity loss/gain, business application SLA and line-of-business apps performance provide predictive and prescriptive support.

Caution

Despite the significant increase in revenue, Zensar's business with managed workplace services is still low compared to other leaders in this space.

Zensar offers XLAs around user productivity and change management with respect to workplace technologies. However, other leaders in this quadrant are also enhancing user experience measurement with respect to remote working and work-from-home styles, which could be a good addition to Zensar's KPI approach.

2020 ISG Provider Lens™ Leader

Zensar's approach to business KPIs and AI, plus analytics-led workplace support, position it strongly in the market.

RISING STAR: INFOSYS

Overview

Infosys offers comprehensive managed workplace services as part of its workplace operations services. It manages 901,000 users for 150 clients and 6,142 employees for digital workplace services in the U.S. Its managed workplace services focus on user self-help, automation and intelligence-driven insights.

Strengths

U.S. operations strength: Infosys provides service desk services from Phoenix, Atlanta, Milwaukee and Des Moines, Iowa, with support in English, Spanish, Portuguese, French and Asian languages. It provides onsite and field support services across the U.S. by leveraging local partnerships. It also partners with PixelGlobal, VEGA, Polycom, Crestron and Cisco for providing smart meeting solutions.

XLA approach: Infosys provides measurable experience levels for technical user experience, business user experience and performance backed by technology. Infosys also prices its offering directly tied to the client's business outcomes, such as employee productivity and organization effectiveness. Its XLA implementations showcase incident reduction through automation and knowledge database.

Smart spaces: Infosys focuses on smart spaces in collaboration with Microsoft. The SCALE framework (sustainable, connected, affordable, learning systems and experiential) is focused on bridging the physical and digital divide for enterprises and assists in developing smart buildings and spaces.

Caution

Infosys' revenue from managed mobility services in the U.S. is low compared to other leaders in this quadrant. It needs to pursue this market aggressively.

Infosys has built a strong service portfolio on Microsoft's technology and productivity stack. However, as other competitors are also developing a similar offering, this is no longer a competitive advantage. The company should showcase more examples of non-Microsoft productivity and technology ecosystem management in the U.S.

2020 ISG Provider Lens™ Rising Star

Infosys has simplified its portfolio and is focused on service and operational excellence for managed workplace services, which positions it as a Rising Star in this quadrant.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ Digital Workplace of the Future - Services & Solutions 2020" analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of 2020 ISG Provider Lens™ Digital Workplace of the Future — Services & Solutions market.
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases.
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable).
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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