Digital Workplace of the Future
USA 2019

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

UNiSYS | Securing Your Tomorrow®

September 2018
About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this report includes findings from the ISG Provider Lens™ program and 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 was current as of September 8, 2018. 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.

The lead author for this report is Mrinal Rai. The editors are Jan Erik Aase and John Burnell. The research analyst is Rahul Basu, and the data analyst is Bhanwar Chauhan.
<table>
<thead>
<tr>
<th></th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Executive Summary</td>
</tr>
<tr>
<td>7</td>
<td>Introduction</td>
</tr>
<tr>
<td>16</td>
<td>Digital Workplace Consulting Services</td>
</tr>
<tr>
<td>19</td>
<td>Digital Workplace Managed Services (Large Enterprises)</td>
</tr>
<tr>
<td>23</td>
<td>Managed Mobile Enterprise Services – Large Enterprises</td>
</tr>
<tr>
<td>27</td>
<td>Digital Workplace and Mobility Managed Services (Midmarket)</td>
</tr>
<tr>
<td>29</td>
<td>Unified Communication and Collaboration</td>
</tr>
<tr>
<td>31</td>
<td>Digital Workplace Services for BFSI</td>
</tr>
<tr>
<td>33</td>
<td>Digital Workplace Services for HCLS</td>
</tr>
<tr>
<td>37</td>
<td>Digital Workplace Services for Retail</td>
</tr>
<tr>
<td>39</td>
<td>Methodology</td>
</tr>
</tbody>
</table>

© 2018 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.
EXECUTIVE SUMMARY

Digital Workplace of the Future

Personal digital secretaries for everyone: The enterprise workplace environment has seen significant changes and technology evolution in the most recent few years. Adopting digital technologies and corporate cultural change management have become key elements for developing a digital workplace of the future. Enterprises aspire to upgrade and transform the workplace environment to not only equip existing employees, but also to attract new talent.

The rapid growth in disruptive technologies, like cognitive automation, robotics, machine learning, artificial intelligence and virtual reality, has increased their applicability in workplace ecosystems. These technologies have the potential to elevate the digital dexterity of employees by taking over mundane and regular tasks. Employees now often have these newer technologies at their disposal to improve their abilities to work and their overall workplace experience. Newer and innovative technical approaches can provide a personal digital secretary to every employee. Digital secretaries can help employees by automating repetitive tasks and providing data and analytics at the right moment to support decisions and perform more efficiently.

Digital Workplace Consulting

Consulting is an integral part of digital workplace transformation: The majority of workplace transformation initiatives are increasingly beginning with a consultative approach. Digital workplace consulting covers current workplace environment assessment and understanding digital technology gaps. Enterprises prefer vendor-agnostic, independent consulting services. Dedicated consulting should assess the current enterprise environment and advise on the viability of implementing different technologies.

Analytics and automation are used in persona segmentation: A key element in digital workplace consulting and assessment is segregating end users into user personas and defining the requirements specific to each persona. Automation technology is increasingly being used in persona and workplace definition. Automated agents deployed on the end user’s system can collect usage information that can be difficult to obtain through traditional methods like focus group discussions and interviews.

Design thinking is becoming a key approach for consulting: Consulting services with a design-thinking approach define the parameters affecting the end-user experience. Digital workplace transformation initiatives can measure their effectiveness and return on investment based on these parameters.
The CIO is no longer the primary audience for consulting: The digital workplace consulting services aim not just at cost reduction but also to help align the business vision with end users’ needs. Digital workplace consulting requires interaction with business functions other than enterprise IT. Enterprises are increasingly involving business functions like human resources (HR) in their workplace transformation initiatives.

Technology migrations need consulting expertise: Major transformation initiatives like migration to Windows 10, Office 365 or G-Suite or the adoption of new social collaboration solutions require dedicated consulting and planning. Migration-specific consulting provides assessment, prepares the migration and adoption blueprint and provides a roadmap to implementation.

Managed Digital Workplace Services

Automation and analytics drive “shift-left” initiatives: Managed workplace services are adopting shift-left strategies that are intended to reduce overall incident tickets and associated service desk costs. Proactively monitoring systems, devices and applications enables predictive analytics that can prevent incidents from occurring. Automation also provides self-help and self-service features that let end users resolve their own issues without raising a service desk ticket. Tickets that are routed to the service desk agents now are typically of higher complexity, and agents are better equipped with the information and analysis to handle them. ISG’s experience with enterprise clients indicate that IT spending for end user computing, service desk and collaboration functions is approximately 19 percent of the IT budget. Increasing use of automation and analytics can lead not only to improved cost savings but also significant productivity gains. An automation-enabled service desk can manage 46 percent more end users than a traditional one.

Usage of AI-enabled virtual agents is increasing: AI-based virtual agents are becoming an integral part of managed workplace services. These chatbots aim to provide human-like support to end users. An intelligent chatbot can understand end users’ problems with devices or applications and either self-heal or send an automated request to the help desk on the user’s behalf. Chatbot agents can include sentiment analysis to help them gauge end users’ feelings by their text entry. Sometimes these automated agents are integrated with other business processes and applications to trigger application output or a function based on a user’s suggestion. It is like conversational commerce, where the system directs end users to relevant applications based on the content of the conversation.

AR/VR is being used for on-site and field support: Onsite and field support services have started using augmented reality and virtual reality technologies to enhance end-user experience. AR and VR can produce savings by reducing the need to deploy people for on-site support. Enterprises are also adopting digital lockers and IT vending machines to enhance end-user self-service and the digital experience.
Device-as-a-service model usage is increasing: More enterprises are opting for the device-as-a-service model, where, unlike traditional engagements, hardware is not leased but is paid for as part of a monthly service fee. Service providers can handle the entire procure-to-dispose-and-refresh device lifecycle while also offering associated managed services.

Measurable experience level drives new agreements: Digital workplace engagements are increasingly driven by end-user experience-level agreements (XLAs) rather than by traditional service-level agreements (SLAs). Continuously monitoring systems, networks, devices and application performance can generate measurable information that can be used to provide overall end-user experience level.

Managed Mobile Enterprise Services

Workflow automation enables mobility: Enterprises are introducing mobility deeply within their workplace ecosystem and are focusing on integrating workflows and backend systems. Mobile enterprise programs continue to be a major contributor to business productivity beyond devices and communication. Enterprise clients are increasingly looking to service providers as partners for workflow automation.

Secured and managed access to devices: Different non-traditional mobile devices like wearable smart IoT devices are permeating the end-user space. Enterprise are looking for ways to securely manage diverse devices through technologies like mobile device management (MDM), enterprise mobility management (EMM) and user experience management (UEM). Device management services include business policy implementation, device configuration and secured application access.

Device- and application-level protection are necessary for security: Managing mobile enterprise services requires device- and application-level protection. Technologies like application refactoring and containerization secure availability and deployment across mobile devices. Service providers are also offering enterprise app stores that provide policy-enabled, secured access to approved applications for mobile devices.

Mobility solutions are increasingly industry-specific: There is an increasing focus on verticalizing mobility solutions. Many service providers are offering managed mobile services for industries and environments with unique requirements like manufacturing shop floors, secured areas and construction sites. Service providers also offer reusable dedicated managed mobility solutions for specific user needs in industries like retail, health care and banking, financial services and insurance (BFSI).

Analytics, AI-virtual agents: Analytics for telecom expense management and mobile strategy effectiveness measurement are becoming important aspects of managed services. Service providers are offering virtual agents that can be accessed via any device. Managed mobile enterprise services now also extend to smart IoT devices for predictive analytics, proactive monitoring and secured access.
Unified Communication and Collaboration

UCaaS is the preferred model as companies migrate to cloud: The movement toward cloud is inevitable, and many enterprises are now in the transitioning phase of migrating existing unified communication infrastructure. Employees are demanding similar experience in their unified communications and collaboration (UCC) technologies as with their personal devices and platforms.

Skype for Business and productivity suite usage has increased: Traditional telephony is increasingly being replaced by office productivity applications like Skype for Business and Google Hangouts. Modern communication and collaboration tools provide VoIP, video and chat mediums with consistent experience across channels and devices.

Social collaboration is taking center stage: Enterprises are overwhelmed by growth in the enterprise social collaboration market, where many team and content-centric collaboration tools continue to be introduced. Many social collaboration offerings can provide complete solution packages that would otherwise require disparate UCC elements.

Smart offices and meeting rooms improve productivity: Services oriented to smart offices and meeting rooms can enhance productivity and collaboration among employees. Service providers are investing, and enterprises are increasingly looking for digitalizing their office environment to promote a consistent collaborative experience.

Change management is key to success: A key element for deploying and managing unified communication and collaboration services is enabling change management within enterprise culture. Methodologies like gamification and crowdsourcing aim to promote and enhance new technology adoption.

Cloud-Based VDI Services

Cloud-based VDI demand is increasing: Demand has consistently increased for cloud-based desktop virtualization services. Banking and health-care organizations are increasingly looking for cloud-based VDI services to enable secured access on devices of employees’ own choice.

Thin client use is growing: Enterprises are also considering using cost-effective thin clients like Google Chrome to enable anytime, anywhere access with virtual desktops.

Hyperconverged infrastructure eases out VDI hurdles: Growth in hyperconverged infrastructure has also led to increased desktop-as-a-service (DaaS) adoption. Hyperconverged infrastructure attempts to counter the storage cost hurdle in virtual desktop infrastructures. With the growth in hyperconverged infrastructure vendors, cloud VDI is also gaining popularity.
End-user analytics measure and monitor end-user performance: Service providers are offering real-time analytics around end users’ usage for virtual desktops and can provision and deploy emergency and transient workloads in case of device failure. Device and app monitoring services can extend to cloud-based virtual desktop infrastructures and can predict downtime situations.

DIY trial versions bring in users: Some service providers are offering trials of their cloud-based desktop virtualization solutions from their websites. These offerings are aimed at increasing adoption and providing do-it-yourself (DIY) functionality for potential users to experience the provider’s service quality.

Cloud Workspaces – WaaS

WaaS is the next wave in cloud workspaces: Cloud-based desktops are gaining traction. However, more comprehensive resources are available in workplace-as-a-service (WaaS) cloud offerings. WaaS provides a complete workspace with associated applications, security provisions and device and application controls with managed services. WaaS implementation can significantly reduce enterprise capital spending because complete desktops, including applications and operating systems, can be managed and upgraded from the cloud.

Productized offerings are more common: Many service providers are moving toward a productized offering in digital workplace services. These cloud-based offerings are offered in a pay-as-you-go or pay-per-user model. Users get cloud-based “workspaces,” which can be a single interface for the end user to access all their workplace data and applications. Other managed services for the workplace form the back-end support system. Many service providers are already offering a mobile version, most of which include a virtual assistant and service desk function at the minimum.

Unified Endpoint Management

Culmination of many technologies necessitates management: With the proliferation of different devices and applications, device management has evolved from being device-centric to encompassing enterprise mobility management. UEM offers a culmination of PC device management, MDM and EMM. Many EMM and MDM solution vendors are focusing on offering a holistic, unified endpoint management solution. Many security service providers are also providing unified solutions to manage the different endpoints used to access the workplace environment.

Unified Device management is now in demand: A unified approach to manage different devices and endpoints is in demand. It requires centralized solutions for all devices, including smartphones, tablets, PCs, MACs and smart IoT devices.
A one-stop shop for enterprise IT, end users and mobility is expected: Because of enterprise IT’s requirement to manage all devices from one solution and end users’ expectations for self-service, UEM solutions are expected to provide end-user self-service, desktop and PC lifecycle management and endpoint mobility management.

Machine learning and AI usage has increased: Technologies like artificial intelligence and machine learning can monitor traffic at each endpoint and recognize threats in the device ecosystem. Only issues that are not being automatically resolved will be escalated to human agents.
Introduction

Definition

Digital workplace is the defining model for how end users access and collaborate on their work-related data and applications. It is the conceptualized view of a connected, always-on, collaborative, secured workplace that is device and platform independent and built on cognitive, digital and smart technologies. Digital workplace services cover consulting and managed services related to mobility, service desk, unified communication and collaboration.

Our research studies the investigation efforts and buying decisions of typical enterprise clients. When contemplating a significant strategy transformation, such as implementing agile practices or incorporating automation into its environment, an enterprise client will benefit from a study that examines an entire ecosystem for an individual service line. Each focus area is typically made up of four key areas: consulting and advisory services, system integration, development and support. Therefore, the ISG studies are comprised of an analysis of multiple quadrants that cover a variety of services. Vendors are classified into one of four areas, but there are multiple quadrant areas included in this report.
Definition (cont.)

This study on digital workplace services includes six quadrants that represent key services in this space. It includes one quadrant on consulting services and three quadrants on managed services, covering managed workplace services, managed mobile services and combined services for midmarket clients. There is also a quadrant for unified communication and collaboration services. The digital workplace services – verticals quadrants cover leading service providers serving healthcare life sciences, banking financial services and retail industries in the U.S. These quadrants are further defined as follows:

Scope of the Report

- Digital Workplace Consulting: This quadrant assesses firms that provide consulting services for analyzing the workplace environment and defining a roadmap to transform it.
- Managed Workplace Services – Large Market: This quadrant assesses providers that deliver managed services for install, move and change (IMAC), service desk and desktop management.
- Managed Mobile Enterprise Services – Large Market: This quadrant evaluates providers that deliver managed services for mobile device management, enterprise mobility and related activities.
- Managed Digital Workplace and Mobile Enterprise Services – Midmarket: This quadrant assesses providers that deliver managed mobility services to midmarket clients with a user base of less than 2,000.
- Unified Communication and Collaboration Services: This quadrant assesses providers that deliver managed services for UCC. It includes collaboration, enterprise telephony and communication, social media-style community building, enterprise content management, crowdsourcing and productivity suites.
- Digital Workplace Services for Banking, Financial Services and Insurance (BFSI): This quadrant assesses service providers delivering digital workplace services for U.S. clients in the BFSI industries.
- Digital Workplace Services for Health Care and Life Sciences (HCLS): This quadrant assesses service providers delivering digital workplace services for U.S. clients in the HCLS sector.
- Digital Workplace Services for Retail: This quadrant assesses service providers delivering digital workplace services for U.S. clients in the retail industry.
Definition (cont.)

Other Global Digital Workplace Services and Solutions

Some of the service providers evaluated also offer the following services, which are not included in this report but are evaluated at a global level in the ISG Provider Lens™ Digital Workplace of the Future report:

- **Cloud-based VDI Services**: This quadrant assesses providers offering managed services around private and hybrid cloud-based virtual desktops. It involves hosting clients' desktops in the providers' data centers or in a public cloud.

- **Cloud Workspaces-WaaS**: This quadrant assesses providers and vendors offering a complete public cloud-based software solution or having an offering that provides virtual desktops along with device and application management.

- **Unified Endpoint Management**: This quadrant assesses key solution vendors offering unified solutions to manage different endpoints in the workplace environment.
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 have therefore still 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.
Rising Star

Rising Stars are mostly product challengers with high future potential. When receiving the “Rising Star” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “Rising Star” has an 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 12-24 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.
### Digital Workplace of the Future Cross-Quadrant Provider Listing 1 of 3

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Digital Workplace Managed Services (Large Enterprises)</th>
<th>Enterprise Managed Mobility Services (Large Enterprises)</th>
<th>Digital Workplace and Mobility Managed Services (Midmarket)</th>
<th>Unified Communication &amp; Collaboration Services</th>
<th>Digital Workplace Services for HCLS</th>
<th>Digital Workplace Services for BFSI</th>
<th>Digital Workplace Services for Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture</td>
<td><img src="#" alt="L" /> <img src="#" alt="PC" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="PC" /> <img src="#" alt="L" /> <img src="#" alt="L" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="RS" /> <img src="#" alt="RS" /> <img src="#" alt="RS" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>Atos</td>
<td><img src="#" alt="PC" /> <img src="#" alt="L" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="RS" /> <img src="#" alt="RS" /> <img src="#" alt="RS" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>Capgemini</td>
<td><img src="#" alt="PC" /> <img src="#" alt="PC" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>Cognizant</td>
<td><img src="#" alt="PC" /> <img src="#" alt="L" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="L" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>Compucom</td>
<td><img src="#" alt="MC" /> <img src="#" alt="MC" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>Dimension Data</td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>DWG</td>
<td><img src="#" alt="RS" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="RS" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="RS" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="RS" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="RS" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="RS" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>DXC Technology</td>
<td><img src="#" alt="L" /> <img src="#" alt="L" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="L" /> <img src="#" alt="MC" /> <img src="#" alt="L" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="L" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="L" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="L" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="L" /></td>
<td><img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="L" /> <img src="#" alt="Not in" /> <img src="#" alt="MC" /> <img src="#" alt="L" /></td>
<td></td>
</tr>
<tr>
<td>Fujitsu</td>
<td><img src="#" alt="PC" /> <img src="#" alt="PC" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
<tr>
<td>Genpact</td>
<td><img src="#" alt="PC" /> <img src="#" alt="PC" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td><img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="PC" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /> <img src="#" alt="Not in" /></td>
<td></td>
</tr>
</tbody>
</table>

- ![L](#) – Leader / ![PC](#) – Product Challenger / ![C](#) – Contender / ![MC](#) – Market Challenger / ![RS](#) – Rising Star
## Digital Workplace of the Future Cross-Quadrant Provider Listing 2 of 3

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Digital Workplace Managed Services (Large Enterprises)</th>
<th>Enterprise Managed Mobility Services (Large Enterprises)</th>
<th>Digital Workplace and Mobility Managed Services (Midmarket)</th>
<th>Unified Communication &amp; Collaboration Services</th>
<th>Digital Workplace Services for HCLS</th>
<th>Digital Workplace Services for BFSI</th>
<th>Digital Workplace Services for Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getronics (Pomeroy)</td>
<td>L PC</td>
<td>L PC</td>
<td>L PC</td>
<td>L PC</td>
<td>MC PC</td>
<td>MC PC</td>
<td>L PC</td>
</tr>
<tr>
<td>HCL</td>
<td>L L</td>
<td>L L</td>
<td>L Not in</td>
<td>L L</td>
<td>L L</td>
<td>L PC</td>
<td>PC</td>
</tr>
<tr>
<td>Hexaware</td>
<td>L L</td>
<td>L L</td>
<td>Not in</td>
<td>L L</td>
<td>L L</td>
<td>L PC</td>
<td>PC</td>
</tr>
<tr>
<td>IBM</td>
<td>PC PC</td>
<td>PC PC</td>
<td>L PC</td>
<td>PC PC</td>
<td>PC PC</td>
<td>PC PC</td>
<td>PC</td>
</tr>
<tr>
<td>Infinite Computer Solutions</td>
<td>C C</td>
<td>Not in</td>
<td>C Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Infosys</td>
<td>PC PC</td>
<td>PC PC</td>
<td>PC</td>
<td>PC PC</td>
<td>PC PC</td>
<td>MC PC</td>
<td>PC</td>
</tr>
<tr>
<td>ITC Infotech</td>
<td>PC PC</td>
<td>PC PC</td>
<td>PC</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>KPIT</td>
<td>C C</td>
<td>C</td>
<td>C PC</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>LTI</td>
<td>PC PC</td>
<td>PC PC</td>
<td>L PC</td>
<td>RS PC</td>
<td>PC PC</td>
<td>PC</td>
<td>Not in</td>
</tr>
<tr>
<td>Mphasis</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
</tbody>
</table>

# Digital Workplace of the Future Cross-Quadrant Provider Listing 3 of 3

<table>
<thead>
<tr>
<th>Digital Workplace Consulting Services</th>
<th>Digital Workplace Managed Services (Large Enterprises)</th>
<th>Enterprise Managed Mobility Services (Large Enterprises)</th>
<th>Digital Workplace and Mobility Managed Services (Midmarket)</th>
<th>Unified Communication &amp; Collaboration Services</th>
<th>Digital Workplace Services for HCLS</th>
<th>Digital Workplace Services for BFSI</th>
<th>Digital Workplace Services for Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>NIIT Technologies</td>
<td>Not in</td>
<td>C</td>
<td>Not in</td>
<td>PC</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>NTT DATA</td>
<td>L</td>
<td>L</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Stafanini</td>
<td>MC</td>
<td>MC</td>
<td>Not in</td>
<td>MC</td>
<td>L</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>TCS</td>
<td>Not in</td>
<td>L</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
<td>PC</td>
<td>Not in</td>
</tr>
<tr>
<td>Tech Mahindra</td>
<td>Not in</td>
<td>PC</td>
<td>Not in</td>
<td>PC</td>
<td>Not in</td>
<td>Not in</td>
<td>Not in</td>
</tr>
<tr>
<td>Unisys</td>
<td>L</td>
<td>L</td>
<td>Not in</td>
<td>PC</td>
<td>L</td>
<td>PC</td>
<td>PC</td>
</tr>
<tr>
<td>UST Global</td>
<td>C</td>
<td>PC</td>
<td>C</td>
<td>PC</td>
<td>C</td>
<td>PC</td>
<td>PC</td>
</tr>
<tr>
<td>Wipro</td>
<td>L</td>
<td>L</td>
<td>Not in</td>
<td>L</td>
<td>L</td>
<td>L</td>
<td>L</td>
</tr>
<tr>
<td>Zensar</td>
<td>PC</td>
<td>RS</td>
<td>RS</td>
<td>L</td>
<td>PC</td>
<td>PC</td>
<td>PC</td>
</tr>
</tbody>
</table>

Digital Workplace of the Future Quadrants
DIGITAL WORKPLACE CONSULTING SERVICES

Definition

Digital workplace consulting centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture and creating the roadmap, and for validating the business case for transformation. These advisory services are specific to workplace digital transformation. The service typically includes assessing the current workplace environment, designing end-user-focused workplace transformation, defining the business case and return on investment (ROI) and providing a roadmap for implementation.

Source: ISG Research 2018
Digital workplace consulting has gained prominence in recent years. Previously, workplace transformation targeted cost reduction in end-user computing as its main goal, and consulting was confined to fit end users into uniform, enterprise-defined personas. The advent and popularity of digital technologies are affecting end users’ personal preferences, behaviors and expectations in the workplace. Digital workplace consulting services aim to assess the latest cutting-edge technologies and their impact on end users. It also includes assessing the viability of adopting smart automation and analytics technologies and segmenting end users’ needs according to their effect on productivity and experience enhancement.

In the U.S., the number of digital workplace engagements with consulting focus has increased by 26 percent in the last three years; 56 percent of digital workplace contracts signed in the U.S. last year included significant consulting services.

- Accenture leads this market with its strong expertise and experience in business management consulting and strategy development.
- DXC Technology benefits from its strong Microsoft alliance and dedicated consulting framework for Microsoft technology-based transformation initiatives.
- IBM differentiates by using cognitive automation for user persona segmentation and its wide coverage in digital workplace-related transformation.
- TCS takes a consultative and participative approach to clients through its Reimagination Studio. Its consulting services also cover measurable parameters for end-user experience level.
- NTT DATA offers digital workplace consulting services that leverage knowledge through strong partner ecosystem.
- HCL’s Kaleidoscope™ approach aims at segmenting end users by hardware software requirements. It also utilizes gamification and change management as part of its consulting services.
- Wipro recently enhanced its consulting capabilities through its wAssess™ methodology and design-thinking approach.
- Unisys leverages big data, analytics and partnerships to provide consulting-led engagements for digital workplace transformation.
- Digital Workplace Group (DWG) provides a consulting services portfolio that is vendor agnostic and benchmarking oriented. It is strongly gaining traction in the market and has been identified as a Rising Star.
UNISYS

Overview

Unisys takes a consulting-led approach for digital workplace transformation. Its consulting service uses data analytics, key partnerships, usage analytics and the company’s extensive experience in workplace services.

Strengths

Consulting practice in the U.S.: Unisys’s global consulting staff has grown by 62 percent in the last three years, 29 percent of which is based out of the U.S. The client base in the U.S. has grown by 55 percent in the last three years and makes up 29 percent of its global client base. Unisys also uses its global-level partnerships and alliances with partners like ServiceNow, Cylance, Microsoft and VMware when delivering consulting services to U.S. clients.

Data analytics enabled persona segmentation: UMethod is Unisys’ consulting approach and includes segmenting end users based on their system and application usage. It analyzes usage patterns for different workplace elements like devices, applications, app deployment, geographic presence and support systems. This approach uses big-data pattern recognition to identify different personas with similar usage categories in the workplace.

Case examples from U.S.: Unisys has client examples from the U.S. in delivering digital workplace consulting services. It provided an IT governance model along with an improvement roadmap to a public sector client in the U.S.

Caution

Unisys has comparatively fewer examples of engagements with non-IT business heads. It should also build up its capabilities addressing the human resources perspective of digital workplace, which includes gamification and crowdsourcing.

2019 ISG Provider Lens™ Leader

Unisys’ consulting services leverages data analytics and persona segmentation based on similar needs. Its strong U.S. presence makes it a leading provider.
Definition

Managed digital workplace services comprise all managed services related to the digital workplace. The quadrant includes operational services, such as service desk, install, move and change (IMAC), break-fix, self-help, device support, and on-site and field services.
Observations

While “shift-left” strategies for managing incidents are still gaining momentum, the managed services focus is shifting toward cognitive automation and machine learning. Service providers are offering automation-enabled workplace support services to eliminate the need for human intervention for many tasks. The more tasks a provider can automate with managed services, the greater it can differentiate itself from its competitors.

Service providers usually brand their managed service offering under a single IP set or name. Augmented and virtual reality services are disrupting on-site field support and redefining the end-user experience. Service providers are partnering with leading OEM vendors to offer procure-to-retire device lifecycle management services in pay-as-you-go models, which may include offering device-as-a-service. Service providers are also focusing on delivering measurable KPIs on end-user experience management.

Large enterprises often have complex workplace environments. Many are looking to reduce IT support costs and enhance the end-user experience via automation. Because of the complexity of their end-user personas and workplace environment, scale-based parameters like device management and on-site presence also remain important criteria. Large enterprises form the next-generation sourcing clients needing to align their workplace services with their business objectives to create a cost advantage and improve productivity.

In the U.S., the number of digital workplace engagements involving managed services has increased by 11 percent in the last three years. In 2017, 84 percent of digital workplace contracts signed in the U.S. had significant managed services elements.

Compared to last year, a global shift in consulting services is getting deeply ingrained in follow-up managed and implementation services. With the end-user environment transition period getting longer, enterprises expect tangible business outcomes, not just at the end of transition but also during the journey. This expectation compels service providers to provide consultative services across the workplace transformation services spectrum.
Observations (cont.)

- DXC Technology offers a strong managed services portfolio focused on automation, partnerships and the end-user experience. It also leverages its scale and size to serve large enterprise clients.
- IBM brings with it years of experience and unparalleled automation capabilities through Watson.
- Atos has a strategic focus around digital workplace services. It offers intelligent automation and employee experience metrics.
- Unisys provides strong managed workplace services centered on analytics, automation and field support.
- Wipro’s solid expertise in workplace engineering, HOLMES™ automation capabilities and digital focus make it a leader.
- HCL provides an effective suite of solutions targeted at digital workplace transformation, along with managed services through automation and its LUCY superbot.

- Cognizant offers strong, newly branded managed workplace services powered by analytics and automation.
- TCS has consolidated its application and infrastructure services. It also provides experience level agreements and takes a machine-first approach.
- NTT DATA offers automation and analytics with its managed workplace services and has a strong U.S. presence.
- Getronics (Pomeroy) has a solid local presence. Its managed services expertise and extensive reach for on-site support place it as a leader.
- Zensar brings strong focus on business-related KPIs and end-user experience-level measurement. The company is a Product Challenger and has been identified as a Rising Star.
**Overview**

Unisys offers managed digital workplace and field services powered by analytics, intelligent automation and AR/VR focused on end-user experience management (EUEM).

**Strengths**

**Strong managed and on-site field services in the U.S.:** Unisys’ field engineering services manage 1.5 million devices and 1.07 million users for 164 clients in the U.S. It provides on-site support, walk-in tech café support and remote dispatch support through its own resources and through its partnerships with Pinnacle and Tech Systems. Unisys also provides device-as-a-service in global partnership with Dell, which includes Unisys’ managed services delivered over Dell devices.

**Automation-based experience management:** Unisys leverages its IntelliServe™ service desk service platform powered by automation and analytics. It supports more than 1 million contacts across four languages in the U.S. Unisys’ digital transformation strategy employs AI capabilities within its platform to gen-1 clients through its NextIT virtual agents and to gen-2 clients through its IPsoft partnerships. Unisys provides end-user experience management analytics through continuous system and application monitoring. Unisys also employs augmented and virtual reality within its on-site and field support services.

**Strong client-base:** Unisys has a strong client base in the U.S., which accounts for 40 percent of its global managed digital workplace services clients. It has recently signed contracts with clients in state and local government, health-care, commercial and retail industries for workplace modernization and managed support services.

**Caution**

Unisys reports moderate growth in managed workplace services clients over the last two years.
**Definition**

Managed mobile enterprise services include, at the minimum, mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. The services also include larger aspects of enterprise mobility management, like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.
Managed enterprise mobility revolves around enabling mobile users with single sign-on features to securely access productivity apps and data anytime from anywhere. With the introduction of smart wearable devices, the scope of these services has extended to include elements of IoT.

Large enterprises have complex workplace environments with globally distributed workforces, including field workers carrying multiple mobile devices. It is imperative for large enterprises to adopt a secured unified approach to manage diverse devices and platforms. Industry-specific requirements drive the differentiation in managed mobile enterprise services.

In the U.S., the number of digital workplace engagements with managed mobile services has increased at a rate of 44 percent over the last three years. Last year 61 percent of digital workplace contracts signed in the U.S. involved significant managed mobility service elements.

- Accenture leads the market with its mobility-centric consulting and implementation services. It has partnerships with key technology vendors to enable a mobile enterprise.
- TCS has a strong focus toward managed mobility services. It also offers Mobitio, its own productized mobile app, and proactive monitoring services.
- DXC Technology provides complete enterprise mobility management services through partnerships. It also offers industry-specific solutions and analytics around mobility usage.
- Unisys has strong credentials and experience in managing multiple devices in a mobile enterprise. It has a mobile center of excellence (CoE) and offers industry-specific mobility solutions.
- IBM provides strong managed mobility services through its partnerships and its own enterprise mobility management solution, MaaS360.
- Wipro has expertise and experience in managing diverse device ecosystems through its partnerships and has industry-specific solutions.
- HCL, through its LibreSpace™ and MyWorkplace service offerings, provides strong and competitive managed mobile enterprise services.
Cognizant offers managed mobility services through SymphonyWorks and has strong endpoint device engineering and proactive monitoring services.

Zensar, with its continuous focus on business outcomes, end-user experience monitoring across devices and applications, and enterprise mobility management services, is both a Product Challenger and a Rising Star for this quadrant.
Unisys offers a strong device management and mobility management services suite encompassing mobile-based consulting, partnerships with leading vendors and unified endpoint management. Unisys provided managed mobility services to 285,300 end users last year. Unisys also provides unified endpoint management services to 875,000 end users.

Managed mobility services in U.S.: For managed mobility services, Unisys largely caters to large enterprises and multinationals and has a major focus on IT telecommunications and media industry. Its revenue from managed mobility services in the U.S. forms 48 percent of its total managed mobility services revenue.

Services portfolio: Unisys provides unified endpoint management services providing advisory and delivery services for PC and mobile management. It has a mobile CoE, which develops solutions to manage PCs as mobile devices. It has partnerships with leading technology vendors in the EMM and IDAM space. Unisys’ mobile enterprise management (MEM) provides enterprise application integration, asset and expense management, and application containerization.

Industry specific mobility solutions: Unisys has business-oriented mobility management offerings for many industries, including banking, health care, media and the public sector. It provides mobile device management services to many clients in the U.S., including clients in the health-care and media industries.

Unisys’ mobility services cover mobile device and secured access management. To stay competitive, Unisys should also include elements of digital experience design and mobility-effectiveness monitoring in its solution stack.
Digital Workplace of the Future
Digital Workplace and Mobility Managed Services (Midmarket)

Source: ISG Research 2018
Observations

The midmarket is cost sensitive but is also looking for innovative approaches with a quantifiable business impact. Ideally, managed mobile enterprise services for this segment should be highly standardized and provide innovative components. The midmarket client is willing to adopt a 100 percent BYOD strategy and would encourage end users toward a BYOx environment (where x includes applications, data and services). These clients are interested in embracing completely digital and automated solutions for workplace services. Service providers that combine collaborative workplace services with cognitive- and AI-enabled automation will lead this market. Clients in this segment look for a single vendor to provide workplace services strategy, design and deployment services.

- Infosys combines its experience in serving clients in the U.S. with its leading automation capabilities to provide managed services to midmarket clients.
- Zensar offers business-centric, KPI-focused services with strong automation and analytics.
- LTI offers strong managed workplace services and the Mosaic platform to provide machine-learning-based intelligent IT services.
- Hexaware, with its “Automate first” approach and risk-taking appetite, is also leading this market.
- Getronics (Pomeroy) has a strong presence in the U.S. It has extensive coverage of service desk, mobility and on-site support services.
Unified communication and collaboration services are an integral part of the digitized workplace. UCC services include managed services for collaboration, enterprise telephony and communication, social media-style community building, enterprise content management, crowdsourcing and productivity suites. It also includes telephony services like calling and conferencing, desktop video and custom third-party PBX integration.
Observations

Collaboration services increasingly are seen as the face of the connected and automated future workplace. Enterprise social collaboration has transformed from just being a company intranet-centric service to becoming a connected, engaging, device-independent, cloud-enabled, productivity-oriented service. In an end-user-defined environment, a user should be able to access his or her complete workspace in one place and be able to engage with peers and support services from any device, anywhere. This collaborative workplace should provide platforms for idea generation, crowdsourcing and gamification, all of which should enhance productivity.

Intelligent and smart physical workplaces, including meeting rooms, are part of collaboration services. The services contribute to enhancing the end users' experience and provide a digital medium for collaboration.

In the U.S., the number of digital workplace engagements with UCC services has increased by 51 percent in the last three years. Slightly more than half (51 percent) of digital workplace contracts signed in the U.S. last year had significant UCC services elements in scope.

- Atos leads the market with its Unify subsidiary's Circuit and OpenScape offerings and benefits from other strong partnerships in the collaboration space.
- IBM has its own product portfolio that includes Connections, its social collaboration solution. IBM also provides Watson-enabled cognitive intelligence for the collaboration ecosystem.
- DXC Technology offers smart campus connectivity and has partnerships with Microsoft, Google and other collaboration vendors, which has helped make it a strong leader.
- Accenture provides consulting and managed services for the unified communication and collaboration ecosystem through its Avanade joint venture.
- TCS offers its Knome collaboration platform along with gamification, change management and a strong Skype for Business practice.
- HCL takes a gamification and crowdsourcing approach to change management and collaboration technology adoption. It also offers productized IP-based solutions for smart meeting rooms and chatbot services.
- Wipro offers cloud-based unified communication services, along with strong portfolio of services for technology assessment and adoption.
- LTI leverages its unique capabilities for enhancing internal collaboration and executing the required change management and is identified as a Rising Star.
Definition

The quadrant for digital workplace services for the banking, financial services and insurance (BFSI) industry sector evaluates service providers offering digital workplace services for BFSI clients. Sub-segments for the BFSI industry include: asset management, wealth management, retail banking, credit services, governance, risk and compliance, trading, consumer lending, life insurance, property and casualty insurance, annuities and retirement banking.
Observations

BFSI clients want to enable a BYOD environment and the ability to connect end users through mobile banking while also respecting security and regulatory requirements. These clients need data residency, end-user enablement, omnichannel customer experience, cloud-based virtual desktop services and cloud-based workplace services. The BFSI sector has quite significant security and control requirements compared to other industries.

Service providers offer diverse workplace services for BFSI clients. Managed workplace and service desk services help reduce cost and improve operational efficiency. UCC and enterprise content management services enable and improve employee social collaboration. Digital workplace and mobility management services also include banking process digitization and mobile customer relationship initiatives.

- HCL and Cognizant each have dedicated focus on BFSI clients and have developed in-house IP and solutions for the sector.
- Accenture has many successful case study examples of providing BFSI customers a collaborative and connected workplace by leveraging its Avanade joint venture.
- Wipro applies its comprehensive digital workplace services portfolio when servicing BFSI clients, enabling them to achieve workplace collaboration.
- Atos is identified as a Rising Star. Atos has dedicated solutions for the BFSI industry, including Unify's UCC solutions for clients in the banking vertical, where it has won many U.S. contracts.
Definition

The digital workplace services quadrant for the health care and life sciences (HCLS) sector evaluates providers of digital workplace services to health care and life sciences industry clients. HCLS sub-segments include health-care payers, health-care providers, and pharmaceutical and biotech companies, including medical device makers.
Observations

Because of digitization and specialized device proliferation in the HCLS sector, upgrades to workplace design and operations have gained significant traction. Clients are using automation to reduce costs and improve IT support services and workplace service desks. HCLS enterprises are looking for a lean, centrally run and standardized digital workplace structure. The HCLS sector continues to experience extensive M&A activity, and clients are often looking for service provider partners to consolidate disparate workplace environments. Key focus areas for clients in this category are enabling field workers and are supporting patient digital home care, content collaboration for medical representatives and clinical researchers, and document management.

Service providers offer comprehensive managed digital workplace services for health care and life sciences organizations. Service providers have consolidated IT support services and service desks in post M&A scenarios. They also help provide a complete digital health-care solution. Cloud-based workplace services provided include remote diagnosis and management. Managed workplace services help integrate data and applications from diverse devices.

Many providers are also offering services to support innovation at R&D labs and connect biotech crop producers (a focus area for some life sciences companies) to marketers through diverse channels and devices. There is an increasing focus on managing smart IoT devices in the workplace. Service providers offer device and application management services while also providing necessary compliance, such as for HIPAA. Some service providers are also providing human capital and talent management services, along with document management and content collaboration solutions.

- DXC Technology provides dedicated offering for the HCLS sector. It is also a leader in application development and maintenance (ADM) and IoT services in health care and life sciences. DXC Technology combines its industry solutions and comprehensive managed digital workplace offerings.
- Wipro provides customized solutions for the HCLS sector and applies its LiVE workspace solution for the industry.
- HCL offers productized solutions and leads the HCLS sector with its applications and smart device management services.
Digital Workplace Services for HCLS

Observations

- Cognizant benefits from its strong reach in the U.S. market and leadership in ADM and IoT spaces for HCLS. It has experience in providing mobility enabled solutions for health-care and life sciences clients, including virtual desktops.

- Unisys offers dedicated HCLS solutions and strong on-site support services for U.S. clients.

- Rising Star Atos has won significant HCLS clients and is rapidly advancing its position in this space, helped by its acquisition of Anthelio.
Overview

Unisys provides device management, service desk and on-site support services powered by automation and analytics. HCLS clients account for 11 percent of its total digital workplace services revenue. Unisys has dedicated solutions developed for HCLS clients and has strong credentials in delivering workplace services for this sector.

Strengths

**Digital workplace services for medical devices**: ActiveInsights™ MedDevice is a Unisys service that covers asset management, compliance, medical device security and OEM integration for medical devices in a healthcare facility. Unisys also provides tiered virtual desktop capability and associated managed services that are priced per month, per device, which it positions specifically for HCLS clients.

**HCLS value proposition**: Unisys’ ActiveInsights™ PharmaTrack solution uses blockchain technology to connect supply chain and business members to help enable damage-free device shipments and empower end users with data and insights. The solution integrates data from IoT sensors to ensure the right shipping parameters are followed to preventing damage to agricultural produce. Unisys’s InfoImage solution provides enterprise content management, business process management and records management for HCLS clients.

**Strong case examples in the U.S.**: Unisys has recently won major HCLS contracts that include increased scope for existing clients and winning new logos. It has experience delivering automated managed digital workplace, on-site support and device management services for health-care and life sciences organizations in the U.S.

Caution

Unisys has less business from the HCLS sector than its competitors. It should pursue the market more aggressively and leverage its offerings that are differentiated by analytics and automation for clients in this industry.

2019 ISG Provider Lens™ Leader

Unisys takes advantage of its expertise in device management and workplace support services in delivering services for the clients in the HCLS industry.
Digital workplace services for the retail sector include end-to-end enterprise solutions that cover designing a consulting framework and building an infrastructure to ongoing support services. The workplace services are oriented toward helping retailers enhance customer experience, transform point-of-sale (POS) operations, increase in-store productivity and improve in-store service management.

![Digital Workplace of the Future](Image)
Observations

Service providers are offering automation-enabled workplace support services to eliminate the need for human intervention for manual tasks. Workplace solutions can help retailers optimize their supply chain, order management, fulfillment and merchandising functions. Some service providers are branding their retail service offering under a single IP or brand name. Augmented and virtual reality services are disrupting the market and are being used to create in-store customer experiences. Service providers are partnering with leading technology vendors to offer specialized retail services.

Managed mobility solutions play a key role in the retail industry. There has been growth in the acceptance and use of smart devices, and the scope of workplace services has extended to include elements of IoT. Large enterprises have store managers and associates carrying multiple mobile devices for retail operations. It is essential for such organizations to adopt a secured unified approach to manage diverse devices and platforms.

- DXC Technology has a strong retail workplace services portfolio focused on automation, analytics and key partnerships. It is a preferred choice for global retailers with complex and high scale requirements.
- Wipro’s combination of retail solutions focused on automation, its HOLMES™ platform and other applications of digital make it a Leader.
- Cognizant offers a Digital Store of the Future (DSoF) strategy and the RetailMate™ solution platform for its clients.
- Accenture, through its partnerships with Oracle and Salesforce, offers solutions for the retail industry. It has other partnerships with key technology vendors to offer workplace services.
- Getronics (Pomeroy) is well experienced in providing managed workplace services to its retail clients. Its strong presence and reference examples in the U.S. make it a Leader.
- Atos, the Rising Star, is leveraging its digital capabilities through the Worldline Digital Platform and Digital Retail Lab for the retail industry in the U.S.
Methodology
The ISG Provider Lens™ 2018 – Digital Workplace of the Future research study analyses the relevant software vendors and service providers in the German 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 Digital Workplace of the Future
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & 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
Authors and Editors

Mrinal Rai, Author
Principal Analyst

Mrinal Rai is the Principal analyst for Digital Workplace and Social business collaboration. His area of expertise is digital workplace services and enterprise social collaboration both from a technology and business point of view. He covers key areas around the Workplace and End User computing domain viz., modernizing workplace, Enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture. In Social business collaboration, he focuses on enterprise social software, content collaboration, team collaboration, social media management and chatbot platforms. He has been with ISG for last 5+ years and has more than 10 years of industry experience. Mrinal works with ISG advisors and clients in engagements related to workplace modernization, social intranet, collaborative workplace, cloud-based VDI, end user computing and service desk.

Jan Erik Aase, Editor
Director

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.
ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry’s most comprehensive marketplace data.