ISG Provider Lens™

Future of Work - Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

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UNISYS

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Table of Contents

Report Author: Mrinal Rai

U.S. clients are reassessing their future of work strategies.

After adapting to the changes brought upon by the pandemic in the last two years, enterprise clients in the U.S. are reassessing their strategies for transforming their workplaces. The Microsoft Future of Work study 2022 shows that many enterprises in the region are now embracing hybrid work models while maintaining the post-COVID norms.

Hybrid work model is now a reality; however, employees are witnessing both positive and negative effects of working away from their office premises. Although working from office can increase socializing and employee engagement, it has been observed through multiple research studies that employees in the U.S., in general, prefer working from the location of their choice because it is more comfortable and increases self-productivity.

The preference to work from any location is also considered as one of the most important factors driving the "great resignation." A large number of employees in the region have switched jobs starting in the middle of last year because they are seeking more flexibility and work-from-home options. In 2021, around 47 million employees in the U.S. resigned from their jobs. Some termed it as "great reshuffle." The great resignation also resulted in massive skill shortage in the country. Hence, enterprises in the U.S. started offering flexible and collaborative working environments, along with a high focus on employee well-being, to attract and retain talent. These initiatives have led to flattening the unemployment and

Out of the pandemic frypan, into the fire – the great resignation!

unfulfilled jobs curves, although they have still not reached their pre-June 2021 levels.

Apart from the above-mentioned factors, employees belonging to Gen Z (born in late '90s and early 2000s) are either about to enter or have already entered the workplace. There are more than 68 million Gen Zers in the U.S. This generation has grown to be tech savvy and has adapted to the virtual world and social media networking. Therefore, they did not face challenges in transitioning to a virtual and remote working model during the pandemic. They can effectively collaborate and connect with colleagues remotely because this was just like an extension to their existing social media life. However, they are striving to adjust to the restrictive nature of employment, particularly in the age of hybrid working. Also, they find it difficult to collaborate and work with employees belonging to the Gen X or Gen Y categories.

With entry of the Gen Z workforce, there is also an increasing focus on areas related to greater purpose of an organization or workplace other than making profits. This generation is quite expressive and sensitive to social issues and seeks employment in firms that provide equal representation and inclusivity. This generation is also seeking more purpose-driven, organization-wide initiatives such as sustainability, environmental, social, governance (ESG) initiatives and carbon footprint reduction. An organization exhibiting these characteristics can expect better employee retention compared to those that do not. Enterprises in the U.S. are also expected to focus more on sustainability and environmental concerns because of government initiatives such as the Paris agreement and the Biden administration's ambitious goal of carbon pollution-free power sector by 2035.

The increasing focus on employee retention, a tech-savvy workforce, sustainability, and remote and hybrid working has placed enterprise IT and workplace leaders at the center stage of transformation. Enterprise IT that was once only known for "resolving issues" is expected to play an important and key role in redefining the business and operating models of the U.S. enterprises as they tackle these challenges. Modern technologies have the potential to address many of the above-mentioned concerns, and enterprise IT and workplace leaders are exploring possibilities of leveraging them to achieve desired results.

ISG has observed decreasing demand for standalone, end-user computing or technology-only focused deals. Enterprises are increasingly including digital workplace initiatives within their overall business and digital transformation scopes. This has become more apparent after the pandemic, as global organizations are reassessing and rethinking their business models. This does not indicate that traditional-technology-focused services are no longer pursued; . In fact, these services are now part of a broad transformation process with strong focus on employee experience and retention.

With the future of work initiatives in the U.S., we have observed the following trends:

- Enterprises are increasingly seeking assistance **in strategizing their workplace transformation plans.** Clients want to design the workplace technology experience that suites the changing employee or user persona, whether they work from office or from a remote location. In addition, clients want to design their strategy to enable and support the gig and contingent workforce.

- ISG has also observed **a re-focus on traditional-technology-focused managed services outsourcing** to enable a remote and hybrid workforce. As employees are working from locations of their choice, enterprise IT and workplace leaders are strategically investing in end-user technologies that include measuring experience with device and application performance along with adoption of automation-enabled service desk support function. Continuous monitoring and device application performance analytics can also help keep track of carbon footprint.

- The frontline workers working in essential services sector require digital enablement for productivity improvement. With great resignation and increased need to attract talent for these services, clients in the U.S. are considering technology solutions to **enhance the experience for frontline workers** and create a sense of belonging among them.

- **Employee well-being and empathy** has been the major focus areas since the pandemic. Organizations giving importance to these aspects observe high employee retention rates. In the hybrid and remote working model, tackling issues such as digital burnouts and maintaining work-life balance have proved to be a key approach to support employee well-being and showing empathy.

- As many firms have already reopened their offices and are insisting employees to work from office for few days in a week, there is an increased need to improve the office working environment. To achieve this, companies need to invest in technology-enabled, **smart physical workspaces that enhance employee experience**.

- With the advent of latest technologies such as the metaverse, clients are focusing on expanding and exploring on the use of technologies such as virtual realities (VR) for training programs and onboarding.

These trends have expanded the scope of traditional digital workplace technologies as they interact with diverse business functions to provide enhanced employee experience. This is explained in Figure-1 below.

Enterprises in the U.S. are focusing on multiple factors simultaneously, such as enabling hybrid work model, attracting and retaining talent by enhancing employee experience and achieving sustainability goals.

Enterprises in the U.S. are focusing on multiple factors simultaneously, such as enabling hybrid work model, attracting and retaining talent by enhancing employee experience and achieving sustainability goals.

Figure 1: Expanding scope of digital workplace technologies and interaction with other business roles

Digital Workplace Technologies

Human Resources	Facilities Management	Lines of Business/ Chief Digital officer	CXO
Focus on enhancing experience of current workforce, retaining, and attracting talent	Focus on enhancing experience of physical office premises, adapting to new working model and taking sustainability initiatives	Focus on providing business-level differentiation by supporting frontline workers, improving business processes, enhancing collaboration and digital literacy and improving productivity	Focus on adopting corporate level sustainability initiatives, enhancing corporate communications, integrating diversity and inclusiveness, improving company brand image, events

Source: ISG, 2022

Provider Positioning

Page 1 of 4

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Accenture	Leader	Product Challenger	Not In	Leader	Leader
Atos	Product Challenger	Product Challenger	Not In	Leader	Product Challenger
Bell Techlogix	Not In	Product Challenger	Product Challenger	Product Challenger	Not In
Birlasoft	Contender	Contender	Not In	Contender	Contender
Capgemini	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Coforge	Contender	Contender	Product Challenger	Contender	Not In
Cognizant	Market Challenger	Market Challenger	Not In	Market Challenger	Not In
Compucom	Contender	Leader	Leader	Product Challenger	Product Challenger
Computacenter	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Digital Workplace Group	Product Challenger	Not In	Not In	Not In	Not In

Provider Positioning

Page 2 of 4

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
DXC Technology	Leader	Leader	Not In	Leader	Rising Star ★
GAVS	Not In	Product Challenger	Market Challenger	Market Challenger	Not In
HCL	Leader	Leader	Not In	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Leader	Not In	Leader
HPE	Product Challenger	Contender	Not In	Not In	Not In
Infosys	Leader	Leader	Product Challenger	Leader	Leader
ITC Infotech	Contender	Contender	Market Challenger	Contender	Not In
Kyndryl	Leader	Leader	Not In	Leader	Market Challenger
LTI	Product Challenger	Product Challenger	Leader	Product Challenger	Leader

Provider Positioning

Page 3 of 4

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Microland	Contender	Contender	Contender	Contender	Product Challenger
Mindtree	Contender	Product Challenger	Not In	Product Challenger	Contender
Movate	Contender	Contender	Leader	Product Challenger	Contender
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
NTT DATA	Market Challenger	Leader	Not In	Market Challenger	Not In
Pomeroy	Not In	Market Challenger	Market Challenger	Not In	Not In
Ricoh	Not In	Not In	Product Challenger	Not In	Not In
Softtek	Not In	Contender	Not In	Not In	Not In
Stefanini	Market Challenger	Market Challenger	Not In	Market Challenger	Product Challenger

Provider Positioning

Page 4 of 4

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
TCS	Leader	Leader	Not In	Leader	Leader
Tech Mahindra	Product Challenger	Rising Star ★	Leader	Leader	Product Challenger
TEKSystems	Not In	Not In	Contender	Not In	Not In
Unisys	Leader	Leader	Product Challenger	Leader	Leader
UST	Contender	Product Challenger	Product Challenger	Contender	Contender
Wipro	Leader	Leader	Not In	Leader	Leader
YASH Technologies	Not In	Not In	Contender	Not In	Not In
Zensar	Product Challenger	Product Challenger	Leader	Leader	Product Challenger
Zones	Contender	Not In	Not In	Market Challenger	Not In

This study focuses on what ISG perceives as the most critical issues in the U.S. in 2022 for the **Future of Work**.

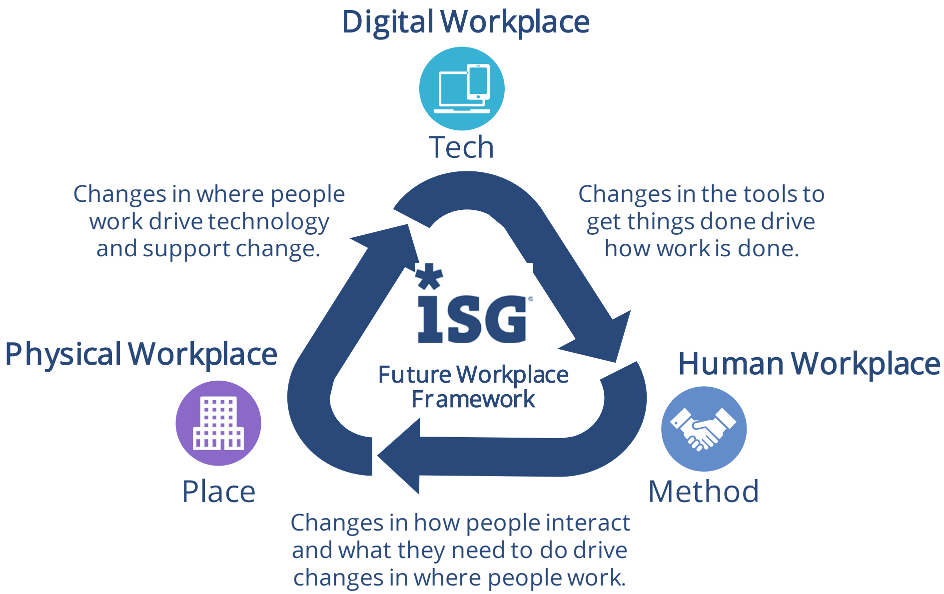
- **Workplace Strategy Transformation Services**
- **Managed Workplace Services - End User Technology - Large Accounts**
- **Managed Workplace Services - End User Technology - Midmarket**
- **Digital Service Desk and Workplace Support Services**
- **Managed Employee Experience Services**

Simplified Illustration Source: ISG 2022

Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and future of work is hybrid. The hybrid future of work, as defined by ISG, is characterized by three kinds of workplaces (Figure 2): the digital workplace, which includes the underlying technology; the physical workplace, which defines the location or place of work and could be both in-office premises and remote; and the human workplace, which describes the methods, processes and cultural aspects.

Figure 1: ISG Future Workplace Framework



Source: ISG, 2022

This future of work will not consider technology in silos. As workplace technologies increasingly permeate the lines of business, clients are noting the correlation between customer experience (CX) and quantified employee experience (EX).

The ongoing talent crunch and the "great resignation," as the wave of people leaving the workforce is being called, are compelling enterprises to provide empowering, engaging, and most importantly, empathic workplace environments to retain employees. At the same time, a work environment that is engaging, technologically advanced and tightly integrated with business requirements will help attract fresh talent. A modern work environment is now neither associated with a physical location (workplace), nor with a single digital entity (workspace); it is now omnipresent, integrated and connected with multiple "spaces" that can be accessed from any location, anytime and over any network. Upcoming and latest technology developments such as the metaverse are influencing this trend in their own ways.

The modern outlook toward work and workplace will also drive and change enterprise expectations from service providers and software solution vendors. Starting at consulting, enterprises will need expert help in defining and strategizing their workplace transformation initiatives that relate to their EX initiatives with CX goals. A combination of remote and in-office workers can enhance the robust and uninterrupted use of technologies to ensure a seamless experience for end users, while ensuring high security. Clients will also be expecting more from their service desk and workplace support service providers including a high level of automation and analytics to ensure employee satisfaction. Enterprises have now increasingly started to consider enhanced employee experience as a prime objective and an expectation from managed service providers and are including requirements for it in the form of measurable experience level agreements (XLAs).

From the software solution vendors' perspective, there will be increasing focus on enabling an all-encompassing unified communication collaboration setup with special focus on employee engagement and productivity. Because devices still form the first entry point and core of employee workplace technology experience, software solutions that can manage a variety of devices uniformly and with the desired security level will also be on enterprises' radars.

The 2022 ISG Provider Lens™ Future of Work study attempts to evaluate managed service providers and vendors that cover the above-mentioned areas of services and solutions.

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Focus on different markets, including global, U.S., U.K., Nordics, Germany, Switzerland, Australia, Singapore and Malaysia, Brazil and U.S. Public sector.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants on Workplace Strategy Transformation Services, Managed Workplace Services – End User Technology, Digital Service Desk and Workplace Support Services, Managed Employee Experience Services.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenge, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

(Continues on next page)

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Workplace Strategy Transformation Services

Who Should Read This

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

In this quadrant, ISG highlights the current market positioning of workplace strategy transformation service providers in the U.S. and how each provider addresses the key challenges faced in the region.

In the past couple of years, workplaces have undergone substantial transformations, which has pushed enterprises in the U.S. to create more flexible, secure and collaborative workspaces for their employees. They are also focusing on driving productivity by enhancing communication and employee well-being and managing the cultural shift across multiple generations. Many enterprises in the U.S. are successfully transitioning toward a modern workplace, and many others are planning to adopt digital workspace transformation to ensure business continuity and growth in this post-pandemic phase.

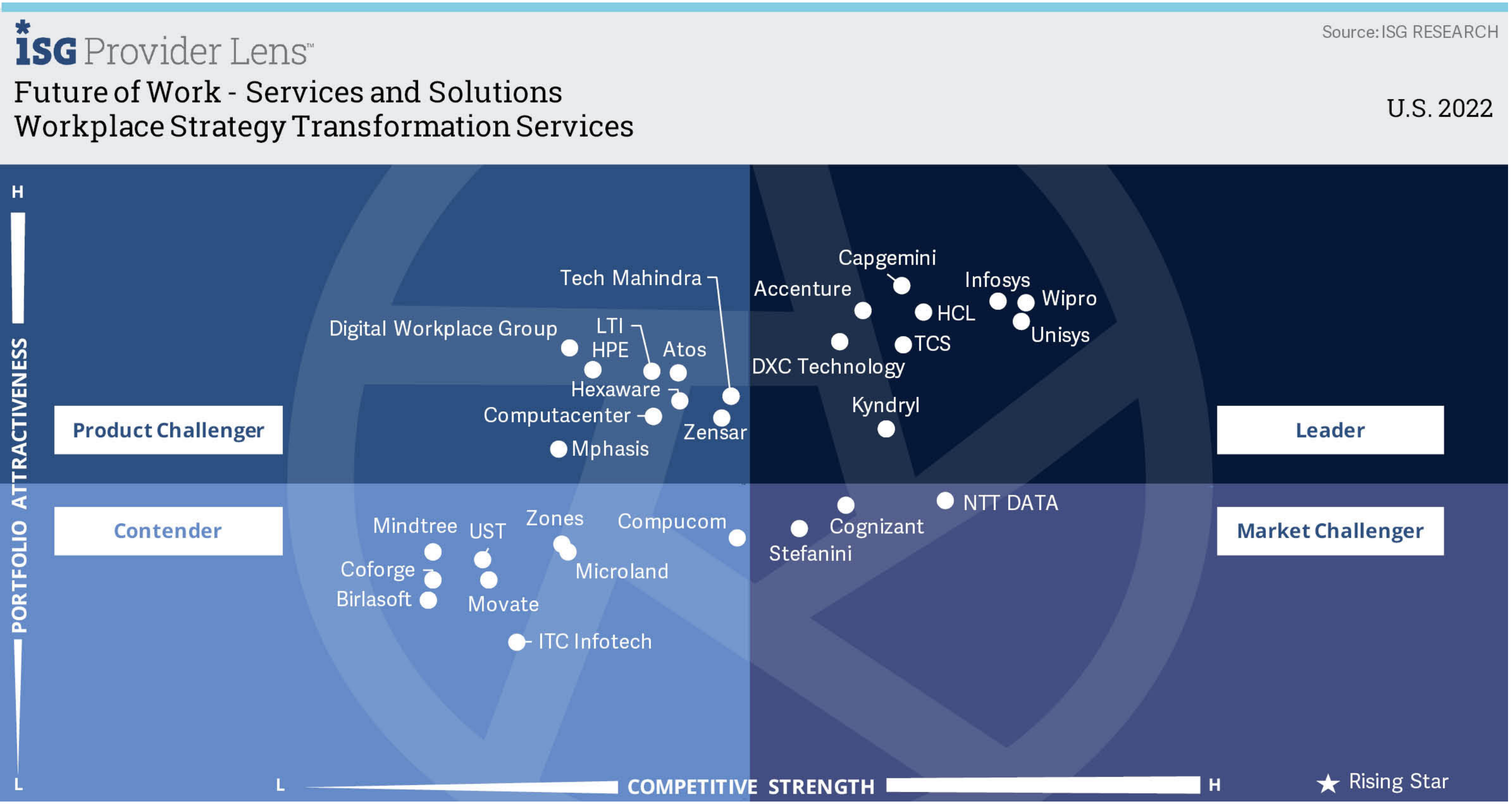
U.S. enterprises are looking for experienced and trustworthy consulting firms that can support them with their digital transformation journeys and help them in rethinking future workforce management. Enterprises in this region are seeking service providers with a strong change management framework, which can further enhance business processes, along with enterprise productivity and efficiency.

Technology professionals, including Infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers to help them plan and select workplace services. The report also shows how the technical and integration capabilities of a provider are compared in the market.

Digital professionals, including digital transformation leaders, should read this report to understand how the providers of workplace strategy transformation services fit their digital transformation initiatives and how they are compared with one another.

CHRO leaders should read this report to know which providers are leading in workplace strategy and transformation in this new age of hybrid working in terms of organizational change management and post-pandemic workplace architecture designing.

Cybersecurity professionals should read this report to see how service providers address the consulting needs for compliance and security, while keeping the employee experience seamless for remote workforces.



This quadrant assesses service providers' ability to help clients **strategize their workplace transformation** initiatives for **attracting and retaining employees and enhancing the experience** of modern workforce with changing market demands.

Mrinal Rai

Definition

This quadrant evaluates service providers that offer transformation-oriented consulting for the future of work. These providers offer workplace strategy formulation, design the post-pandemic workplace architecture and help create roadmaps for the required transformation. These services are an essential part of digital workplace offerings and are provided independently of the associated technology and managed services. These providers also assist clients in transforming their business and operating models and enable the desired organizational changes.

Eligibility Criteria

1. Providers should have a **vendor-neutral approach for transformation consulting and workplace assessment services.** The ability to provide associated managed or implementation/integration services can be a value add but is not a requirement
2. Providers should be **able to define and visualize clients' future of work environment,** covering areas such as hybrid working, involving remote and in-office workers, uberization of the workforce, innovative talent models, cultural adoption, employee engagement, productivity, changing customer experience (CX), associating CX with employee experience (EX), while also enhancing end-user experience
3. Provider should **support technology adoption and organizational change/behavior management services** through its consulting portfolio
4. Provider should offer solutions to address **employee empathy and well-being**

For inclusion in the midmarket and small and midsize business (SMB) quadrant in this space, providers should be able to offer all the above for the said market, with at least 50 percent of its clients from the midmarket/SMB segment. The value of the midmarket/SMB business and associated workplace services contracts can be different across regions and will be explicitly mentioned in the questionnaire.

Observations

There was only a slight shift in provider positioning for this quadrant compared to the last year. The Contenders in this quadrant are primarily traditional end-user computing service providers. These providers analyze workplace as-is state and advise regarding the future state, but as a precursor to their own managed services, and it often does not include additional important strategy elements. The Product Challengers offer pre-implementation assessment. as well as consulting services for areas where their extended portfolio could add value. For example, they focus heavily on employee learning, reskilling and upskilling. Employee experience is a major focus area for these companies. They help clients strategize and implement employee experience. Many of them also focus on supporting environmental and sustainability initiatives. Some specialized providers also offer consulting and strategy services around the future of work mode, leadership changes and change management. The Market Challengers in this quadrant have a strong presence in the U.S. and offer a comprehensive range of digital workplace services. These providers have a strong brand reputation in the market. However, ISG believes that either their strategy consulting portfolio is at the same level as that of the Contenders, or ISG does not have enough information to ascertain their capabilities in modern workplace transformation.

The Leaders of this quadrant provide workplace assessment and strategy consulting services focused on workforce experience, learning, sustainability, change management and technology adoption. They also have a strong market presence.

Of the 100 companies assessed for this study, 30 have qualified for this quadrant with nine being identified as Leaders.

accenture

Accenture moves into the Leader category this year with its established business consulting and advisory services focused on technology and work culture. It showcases strong examples for strategy transformation services it offers to U.S. clients.

Capgemini

Capgemini provides a comprehensive workplace strategy transformation services portfolio that covers an entire spectrum of reinventing work, transforming the workplace technology landscape and ensuring sustainability goals.

DXC Technology

DXC Technology retains its leadership position in the quadrant, although it has low competitive strength. It leverages it analytics and experience-focused consulting services to assist clients in the U.S. in strategizing their workplace transformation initiatives.

HCL

HCL provides workplace experience consulting services that cover the entire spectrum of services, from as-is state assessment and change and technology adoption to formulating return-to-office strategy for clients. It has won several large clients recently in the U.S., with its strategy transformation capabilities and managed services.

Infosys

Leveraging its Wingspan offering, **Infosys** provides digital learning and adoption services in the current scenario of the great resignation, where talent shortage is a challenge. It provides consulting and advisory services for building sustainable and adaptive workplace.

Kyndryl

After completing its spin off from IBM, **Kyndryl** has repositioned itself as a managed service provider that empowers its clients with cocreation and workplace advisory. Its ability to compare clients' maturity with peers from the same industry is a key differentiator, in addition to its Microsoft-technology-focused advisory.

TCS TATA CONSULTANCY SERVICES

TCS' strategy consulting services are a precursor to its managed services and include elements of organization change management, technology adoption, sustainability and employee well-being. It showcases strong examples for the workplace advisory and consulting services it offered to its U.S. clients.

UNISYS

Unisys has a strong brand image and robust consulting practice in the U.S. With its recent acquisition of Unify Square, it can offer communication and collaboration consulting on employee-experience-focused services.

wipro

Wipro leads with its strong workplace consulting practice. The firm witnessed robust growth in its global consulting business and has been engaging with large number of clients with strategy transformation initiatives focused on enhancing employee experience.

Unisys

Leader

"A continued focus on workplace business and strategy transformation consulting are key differentiators for Unisys."

Mrinal Rai

Overview

Headquartered in Pennsylvania, Unisys offers workplace strategy transformation services, which include Unified Communications as a Service(UCaas) consulting, workplace transformation, digital workplace services advisory and adoption, experience design, and persona discovery and design. These transformation services enable enterprises in evaluating and understanding their workplace environments to integrate services on time and within budget, further resulting in reduced cost of operation and improved productivity.

Strengths

Strategic business investments: Unisys has high priority for strategic investments plans to further enhance the future of work services and have created a separate business unit for Digital Workplace Services with specific investments. It also has expertise in tailoring offerings per precise industry needs and is now investing in user-specific personas.

Simplifying complexity with focused consulting services: Unisys transformation services, including UCaaS consulting, focus on the enterprise user journey and effectively address the client's remote working needs. Unisys also partners with external consulting organizations that align with the company's digital workplace vision. It has enhanced its consulting capabilities with the acquisition of Unify Square.

Committed to digital workplace services: Unisys manages 1.4 million users, a more than 50 percent increase from the last year. It also focuses on security consulting services, which are supported by the company's zero-trust security approach.

Caution

Although Unisys has the highest number of workplace transformation strategy consultants in the U.S., it witnessed the lowest percentage increase in number of consultants over the past year compared to other Leaders in this quadrant.

Managed Workplace Services - End User Technology - Large Accounts

Who Should Read This

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

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

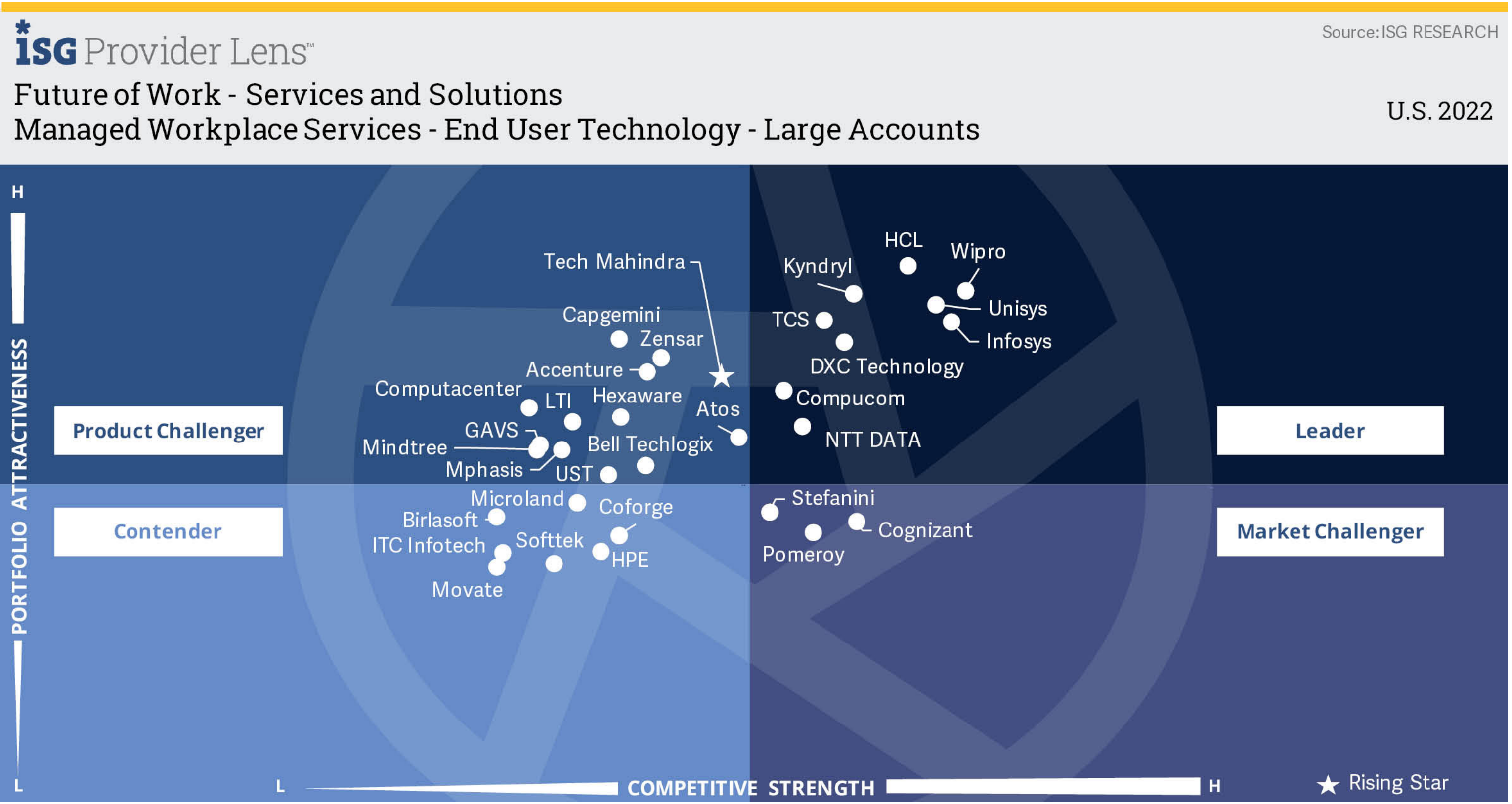
Large enterprises in the U.S. and across the world are heading toward a hybrid business model to thrive in this post-pandemic world. With a huge number of employees, these enterprises continue to face challenges in terms of employee safety, security and well-being. These enterprises are, hence, looking for experienced managed service providers that can transform their traditional workplaces and deliver scalable and more connected workplaces. These large enterprises are also seeking providers that can keep their workplace infrastructure stable, streamline their business operations and optimize their expenses.

With the increasing trend of BYOD, the need for endpoint management and security services has also increased among large enterprises in the U.S. This has also led to the demand for device as a service (DaaS) and the Zero Trust security model to enhance workplace security and create a secure environment for employees. Large enterprises in the U.S. are also focusing on verticalized workplace services to provide a business-oriented workplace to their workforce.

Technology professionals, including 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 digital workplace services.

Procurement professionals, including 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.

Cybersecurity professionals 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 workforces.



This quadrant assesses service providers that provide robust device **management, mobility, endpoint** and other end-user technology services to enable and support **experience-centric** hybrid working.

Mrinal Rai

Definition

This quadrant assesses service providers offering managed services associated with end-user technologies that are typically deployed, provisioned and secured by enterprise IT departments for end users and employees.

These services include end user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility Criteria

1. Provide **endpoint management and security services** supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD) policies, mobility and expense management
2. Provide complete **device lifecycle management services,** including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service for device security, plus support for unified endpoint management (UEM) and mobility program management
3. Demonstrate experience in providing **remote virtual desktop services,** both on-premises and in the cloud
4. **Manage devices in the respective countries** in the study, with at least 25 percent of the devices managed outside the provider's home region
5. Support **endpoint security services** by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
6. Offer services to support **modern network and unified communication** as a foundation for a digital workplace

For the midmarket and small and midsize business (SMB) quadrant in this space, providers should offer all the above for the said market with at least 50 percent of clients from the midmarket/SMB segment. The value of the midmarket/SMB business and associated workplace services contracts deals can be different across regions and will be explicitly mentioned in the questionnaire.

Observations

The Contenders in this quadrant offer either one part of the entire device management services stack or are less focused on device-centric services than others. The Product Challengers in this quadrant offer a comprehensive device management service portfolio with many managing the entire device lifecycle management to support working from the location of choice. These providers also offer predictive analytics and proactive monitoring by leveraging partnerships with digital experience management solution vendors that provide telemetry-based data. The Market Challengers of this quadrant are strongly positioned in the U.S. market with a large client base. They either have similar level of focus on device-centric services like the Contenders, or ISG did not find enough evidence of their ability to provide differentiated end-user technology services.

The Leaders of this quadrant have strong local presence to support large-scale device lifecycle management. They also offer predictive-analytics-led experience measurement and enhancements.

Of more than 100 providers assessed for this study, 32 have qualified for this quadrant with nine being identified as Leaders and one as a Rising Star.

compucom

Compucom moved from Product Challenger last year to a Leader position despite its separation from Office Depot. The major organizational change has provided Compucom more scope to expand and grow. It leverages its strong scale of operations in device management services, powered by analytics, to service clients in the U.S.

DXC Technology

DXC Technology leverages its reach and partnerships in the U.S. to offer strong modern device management capabilities and manage both device lifecycle and endpoints (physical and virtual). It also collects information about the devices and application's performance on the same to generate operational O-level data analytics to measure employee experience.

HCL

HCL offers strong device management capabilities powered by its proprietary tools and solutions. It leverages partnerships with leading software and hardware solution vendors in this space and co-develops value-added solutions to assist clients.

Infosys

With its diverse partners and increased scale, **Infosys** provides endpoint and device management services. The company offers analytics-focused, experience-driven end-user technology services.

Kyndryl

Kyndryl provides robust device management and lifecycle services powered by its virtualization, analytics and its Microsoft partnership. It manages many devices and can provide these services at scale in the U.S.

NTT DATA

NTT DATA provides a comprehensive range of end-user technology services through its Dynamic Workplace platform management services. It manages many devices and provides complete device lifecycle management powered by analytics and service catalog to enhance UX.

TCS provides end-user technology in diverse industry verticals, with a clear focus on employee experience. It manages many devices and virtual endpoints.

Unisys leads the market with its established and well-known device management services. Its workplace as a service offers mobility and end-user technology support, along with complete device lifecycle management.

ISG has observed that **Tech Mahindra** showcased the highest revenue growth in last three years with its digital workplace services, and it is poised as a Rising Star. It offers strong partnership-driven, industry-focused and cloud-provisioned end-user technology services.

Unisys

Leader

"Unisys has extensive experience and a well-established device management services portfolio."

Mrinal Rai

Overview

Unisys is headquartered in Pennsylvania and operates in 24 countries. As a part of its managed workplace services and end-user technology portfolio, Unisys offers device management services, DaaS, end-user security enablement services, virtual desktop support, and software asset management, among other services. It manages 9.2 million devices globally and offers its end-user technology services to about 5 million users.

Strengths

Acquiring capabilities to enhance end user technology services: Unisys acquired Mobinergy, a modern device management professional services firm, to further expand its existing UEM expertise. Unisys's device management services are a key pillar in its digital workplace services portfolio.

Unisys PowerSuite: Unisys provides detailed analytics on device and end-user technology performance through its PowerSuite dashboard. Its Digital Experience Management (DEX) services leverage telemetry and analytics to baseline and monitor and enhance end-user device experience. Unisys partners with 1E for proactive monitoring and predictive analytics resolving device issues before they occur.

Workplace as a service: Unisys provides modern workspace management services leveraging its workplace as a service offering that includes intelligent virtual desktop, cloud-native VDI, device subscription services and managed print services.

Caution

Compared to 2021, Unisys saw a decline in the number of users managed. The number of virtual endpoints managed by Unisys is considerably low compared to other key competitors in this space.

Managed Workplace Services - End User Technology - Midmarket

Who Should Read This

This report is relevant to midmarket enterprise clients across industries in the U.S. for evaluating the providers of managed workplace services – end user technology.

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

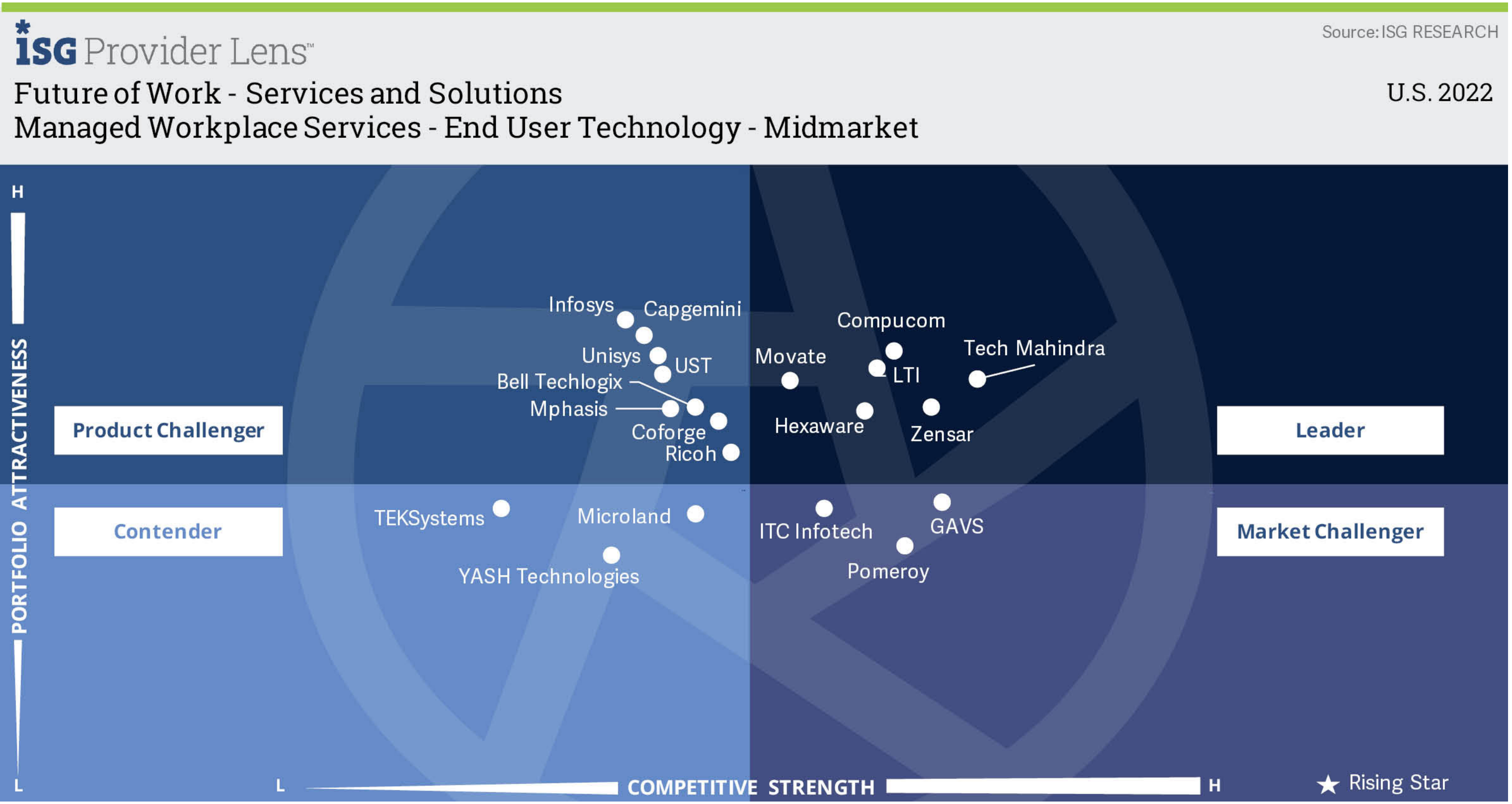
Midmarket enterprises in the U.S. continue to face challenges in terms of declining revenues, enhancing workplace productivity, reducing IT and operational costs, and scalability. These midmarket enterprises are, hence, focusing on managed service providers that can help them in addressing remote-work-related challenges and can equip them with the right technology and processes at affordable prices to meet the current dynamic demands of their workforce.

To stay ahead in this competitive market and keep up with market transformation, midmarket enterprises in the U.S. are looking for providers that can help them in defining effective workplace strategies and managing their hybrid and remote workforces. Virtual desktop infrastructure (VDI), virtualization, device as a service (DaaS), analytics and collaboration are a few of the top priorities for midmarket enterprises in this region.

Technology professionals, including 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 digital workplace services.

Procurement professionals, including 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.

Cybersecurity professionals 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 workforces.



This quadrant assesses service providers that are well positioned to serve the **U.S. midmarket** with their **end-user technology management** services and device management services. A Leader in large accounts for these services need not be the same in this market as well.

Mrinal Rai

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are deployed, provisioned and secured typically by enterprise IT department for end users and employees.

These services include end user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility Criteria

1. Provide **endpoint management and security services** supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD), mobility and expense management
2. Provide **complete device lifecycle management services,** including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service for device security, plus support for unified endpoint management (UEM) and mobility program management
3. Demonstrate experience in providing **remote virtual desktop services,** both on-premises and in the cloud
4. **Manage devices in the respective** countries in the study, with at least 25 percent of the devices managed outside the provider's home region
5. Support **endpoint security services** by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
6. Offer services to support **modern network and unified communication** as a foundation for a digital workplace

For the midmarket and small and midsize business (SMB) quadrant in this space, providers should offer all of the above for the said market with at least 50 percent of clients from the midmarket/SMB segment. The value of the midmarket/SMB business and associated workplace services contracts deals can be different across regions and will be explicitly mentioned in the questionnaire.

Observations

The key criteria for inclusion in this quadrant was that at least 30 percent of end-user technology clients should be from the midmarket segment (5,000 or fewer end users in the U.S.)

The Contenders in this quadrant have presence in the midmarket with at least 30 percent clients for end-user technology from the category. However, their services are not mature enough for a miniaturized offering for midmarket. The Product Challengers in this quadrant have a wide service portfolio suitable for midmarket client requirements, which include predictable pricing, VDI-focused solutions, mobility management and more self-help automation. The Market Challengers in this quadrant have strong local presence and high number of clients from the midmarket segment. However, ISG did not find them a good fit for midmarket transformative requirements.

These providers must further develop their service portfolios with required capabilities to support the midmarket clients.

The Leaders in this quadrant provide highly customized and, in some cases, dedicated offering for midmarket clients, including virtual desktop or flexible pricing. The providers with required experience and transformation-focused service output in the midmarket segment are identified as Leaders.

Of more than 100 providers assessed for this study, 20 have qualified for this quadrant with six being identified as Leaders.

compucom

Compucom retains its leadership position in this quadrant. Its recent separation from Office Depot has provided the company significant flexibility to innovate and grow. It offers device-centric, flexible offerings that are useful for midmarket client segment.

movate

Movate provides unified device management services and support for device procurement and proactive management by leveraging partnerships and automation. It has moved from the Product Challenger position last year to a Leader because of continued focus on increasing client base in the midmarket segment.

Hexaware

Hexaware provides dedicated offerings for midmarket clients, including flexible pricing and modularized solutions. It registered an 18 percent increase in terms of number of midmarket clients in the U.S. and 31 percent increase in scale of operations in terms of devices and users managed.

LTI
Let's Solve

LTI retains its leadership position in this quadrant with a high percentage of clients from this segment. LTI's Canvas, Follow-me-IT and end-user-experience-focused ubiquitous accessible workplace services are well suited to midmarket clients in the U.S.

Tech Mahindra

Tech Mahindra offers a dedicated consumption-based service offering for devices and desktops as a service that provides a predictive costing for midmarket clients. It also registered decent growth in terms of percentage of midmarket clients for its workplace services.

Zensar

Zensar retains its leadership position in the midmarket segment with its device management and partnership-led services. It leverages its SaaS-based frameworks and accelerators to serve midmarket clients.

Digital Service Desk and Workplace Support Services

Who Should Read This

This report is relevant to the enterprises across industries in the U.S. for evaluating the providers of digital service desk and workplace support services.

In this quadrant, ISG highlights the current market positioning of digital service desk and workplace support service providers in the U.S. and how each provider addresses the key challenges faced in the region.

Enterprises in the U.S. are constantly focusing on redefining their IT support and service desk services to offer seamless user experiences and are leveraging automation to drive efficiency and reduce costs. Enterprises here have started realizing that integrating virtual agents, automation and analytics can help them drive efficient transformation. Thus, enterprises in the U.S. are looking for providers with strong service delivery as well as regional language capabilities and that can modernize their support services and increase the first-level resolution rate.

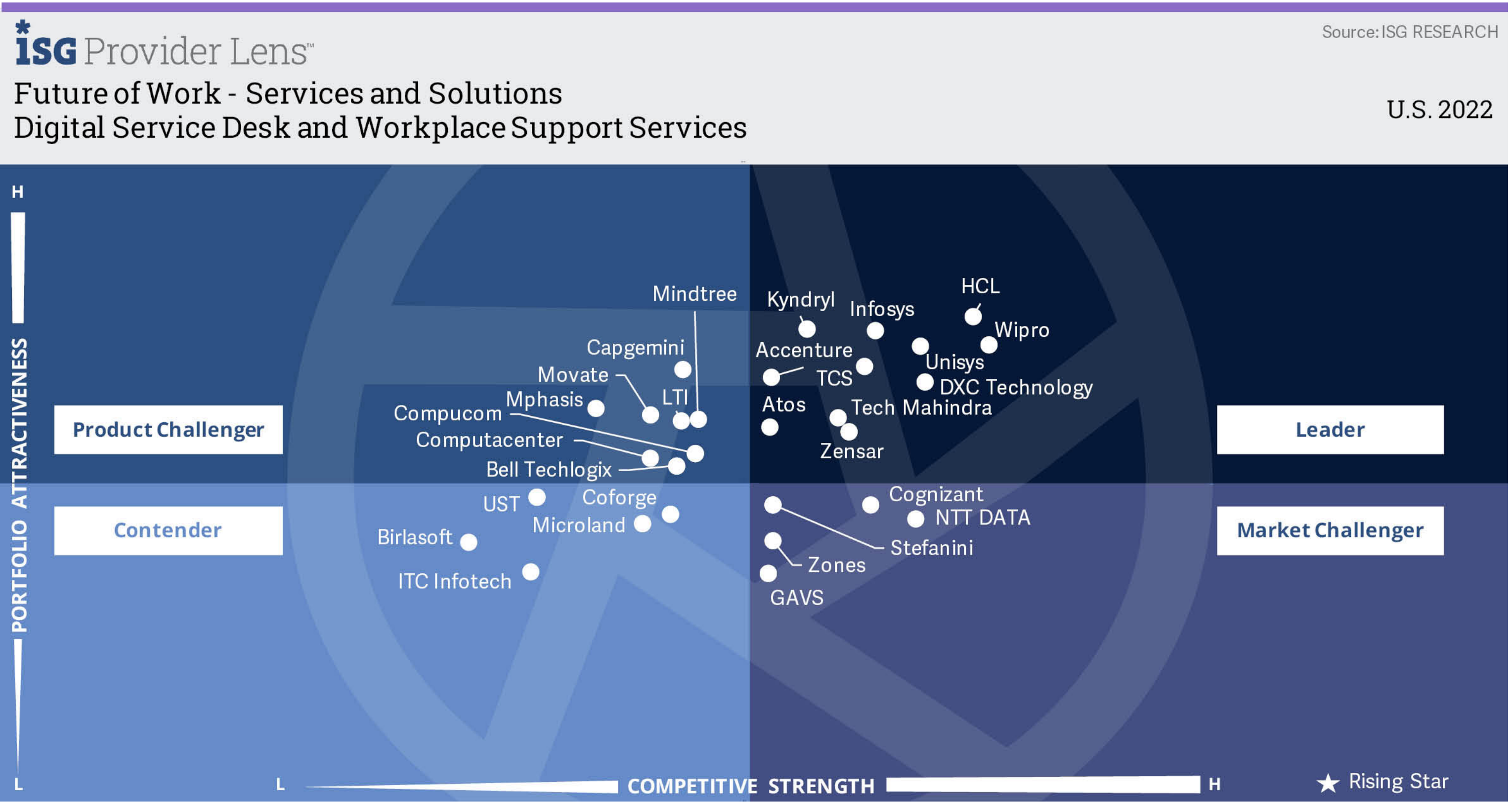
Enterprises in the region also prefer providers that offer experience-focused services, which can help them in delivering personalized experiences to their employees. These enterprises are demanding a data-driven approach to proactively resolve issues even before an employee is impacted.

Technology professionals, including infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them in modernizing service desk and workplace support services.

Digital professionals, including facility managers, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives and how they are compared with one another.

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

Procurement professionals, including sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of digital service desk and workplace support service providers in the U.S.



This quadrant assesses managed service providers that offer not just **new age service desk and support functions** but also provide employee **experience enhancement** leveraging **automation and analytics** with these services.

Mrinal Rai

Definition

This quadrant assesses service providers that offer modernized support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, digilockers, Uber-style field support and automation-enabled omnichannel support for chat and voice. Their services enable work from anywhere at anytime and include device support that encompasses automated proactive technical support and cloud platforms to provision always-on systems. The providers leverage local onsite field support and digitally transformed services through AI and other cognitive technologies for user-facing tasks and help achieve significant cost savings.

Eligibility Criteria

1. Ability to provide managed **service desk and workplace support services** through a hybrid workforce, including virtual agents
2. **Offer remote and onsite field support** plus in-person technical assistance, leveraging augmented reality or virtual reality (AR/VR)
3. Capability to set up and support **self-help kiosks, tech bars, IT vending machines and digilockers**
4. Data-driven **enriched analytics** to support self-service, automatically resolve tickets and generate actionable **insights** among users
5. Provide **automated and contextualized support for end users,** based on their roles and work
6. Ability to **quantify workplace support function performance** beyond traditional service metrics

Observations

The Contenders in this quadrant provide traditional service desk services powered by basic automation. Most providers in this quadrant offer an intelligent virtual agent, compiling insights from telemetry and sentiment analysis on employee interaction. However, these providers could not offer additional support functionality and leverage the latest technologies for experience-enhancing service desk support services. The Product Challengers in this space provide high-level automation, increased self-help and cognitive intelligence services. Some of these providers also provide field and onsite support. Some of them leverage AR for remote assistance. The Market Challengers in this quadrant have strengthened their position with their legacy service desk and automation services and have strong brand positioning in the U.S. They may need to consider workplace support much beyond agents and virtual agent support.

The Leaders in this quadrant offer intelligent service desk and support functionality. They can analyze and incorporate their support insights to define and measure the overall employee experience. These providers can manage large number of deals in the U.S. and have strong market presence and brand image.

Of more than 100 providers assessed for this study, 32 have qualified for this quadrant with 11 being identified as Leaders.

accenture

Accenture provides automation and AI-enabled workplace support services with a broad portfolio. Its deskside of the future services provides omnichannel support for users leveraging automation and predictive analytics. It also offers experience-enhancing self-help services such as digital lockers and remote technology support.

Atos

Atos leads with its strong workplace support and care services powered by analytics and automation. It provides omnichannel support, enhanced productivity and experience. However, there is a growing concern regarding its possible spin off that could lead to uncertainty in its workplace services outlook.

DXC Technology

DXC Technology provides service desk and intelligent support, leveraging multiple channels and applying proactive intelligence on devices and applications. It leverages its UpTime platform to analyzes UX data derived from incidence resolution and user satisfaction.

HCL

HCL provides automation and AI-based contextualized omnichannel support for end users through multiple proprietary tools and solution accelerators. It identifies new and emerging use cases relevant for U.S. clients with respect to digital service desk and field support.

Infosys

Infosys registered strong growth with its service desk and support services. It has developed industry-focused support capabilities, leveraging AR. Its continued focus on training programs is extended to service desk agents as well.

Kyndryl

Kyndryl leverages the strong technical heritage of IBM but provides comprehensive service desk and support services powered by analytics and automation that are no longer exclusively part of IBM Watson. It also provides an intelligent contact center solution that allows clients' own CX support agents to leverage its technology to enhance employee experience.

TCS leverages its ignio and automation capabilities to provide cognitive intelligent support. It also helps its clients mature toward a highly experience-focused delivery model for service desk offerings. Its support services are deeply tied with its focus on employee experience services.

With its large client base and strong automation and experience-centric focus, **Tech Mahindra** provides comprehensive service desk and support services. It also provides continuous training programs to its employees, leveraging the swarm technique.

Unisys is a strong Leader in this space. It leverages automation, analytics, AR-based support, tech café and onsite support services. It has a large base of operations in the U.S. and leverages its local presence to support clients.

Wipro provides automation and service desk and support services focused on improving agent performance. It leverages an intelligent virtual agent for enhancing employee experience through support. It also provides innovative field support services leveraging the collective knowledge of agents and technologies such as virtual reality.

Zensar

Zensar has a strong presence in the managed workplace services market. It offers a wide range of digital support services leveraging automation, proprietary tools, accelerators and virtual reality technology.

Unisys

Leader

"Unisys features intelligent workplace services by leveraging strong partnerships and automation"

Mrinal Rai

Overview

Unisys is headquartered in Pennsylvania and operates in 24 countries. With more than 2,600 field technicians in North America, Unisys also offers proactive monitoring of the workplace to eliminate the need for help in resolving issues. It continues to expand its presence in the U.S. Unisys has service desk locations in Augusta, Georgia, and Salt Lake City.

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Strengths

Strong service delivery capabilities: Unisys has more than 13 service desk locations and four field services locations. It also has nine workplace engineering and consulting centers. Unisys offers services across the globe with strong regional language capabilities. It manages 19 million service desk contacts and supports 19 spoken languages and 81 additional languages via translation. Unisys has automatically fixed 116,000 issues.

Intelligent workplace services: Unisys offers digital support services across devices and applications. Its digital service desk is empowered by automation solutions such as Amelia and contact center vendor, NICE. IT also provides partner-led augmented-reality-based support and onsite services. Leveraging automation, it can resolve up to 26 percent incidents, and 17 percent through user self-help.

High client retention: Unisys continues to be a client-focused company and has and NPS of 72. It has 90 percent renewal rate, which indicates high customer loyalty. Although there are short-term contracts and financial pressure, Unisys has retained most of its clients. The average tenure of Unisys' top 10 clients is about 30 years.

Caution

Unisys still has a large number of client engagements with its fixed-based pricing model. The company must emphasize outcome-based or XLA-based pricing to gain more growth opportunities. Unisys can achieve this by jointly exploring applicable XLAs with clients.

Managed Employee Experience Services

Who Should Read This

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

In this quadrant, ISG highlights the current market positioning of managed employee experience service providers in the U.S. and how each provider addresses the key challenges faced in the region.

In this post-pandemic phase, employees working from any location and collaborating effectively is not just a best practice approach but also a critical business imperative. In such a scenario, managed employee experience services can help enterprises offer seamless experiences to employees and enhance their engagement. Hence, enterprises in the U.S. are focusing more on end-to-end offerings that can help them improve employee experiences by identifying and fixing blind spots during the entire transformation journey. Along with first-level resolution and an analytics-driven approach, enterprises in the U.S. are keen on discovering the correlation between employee experiences and business outcomes.

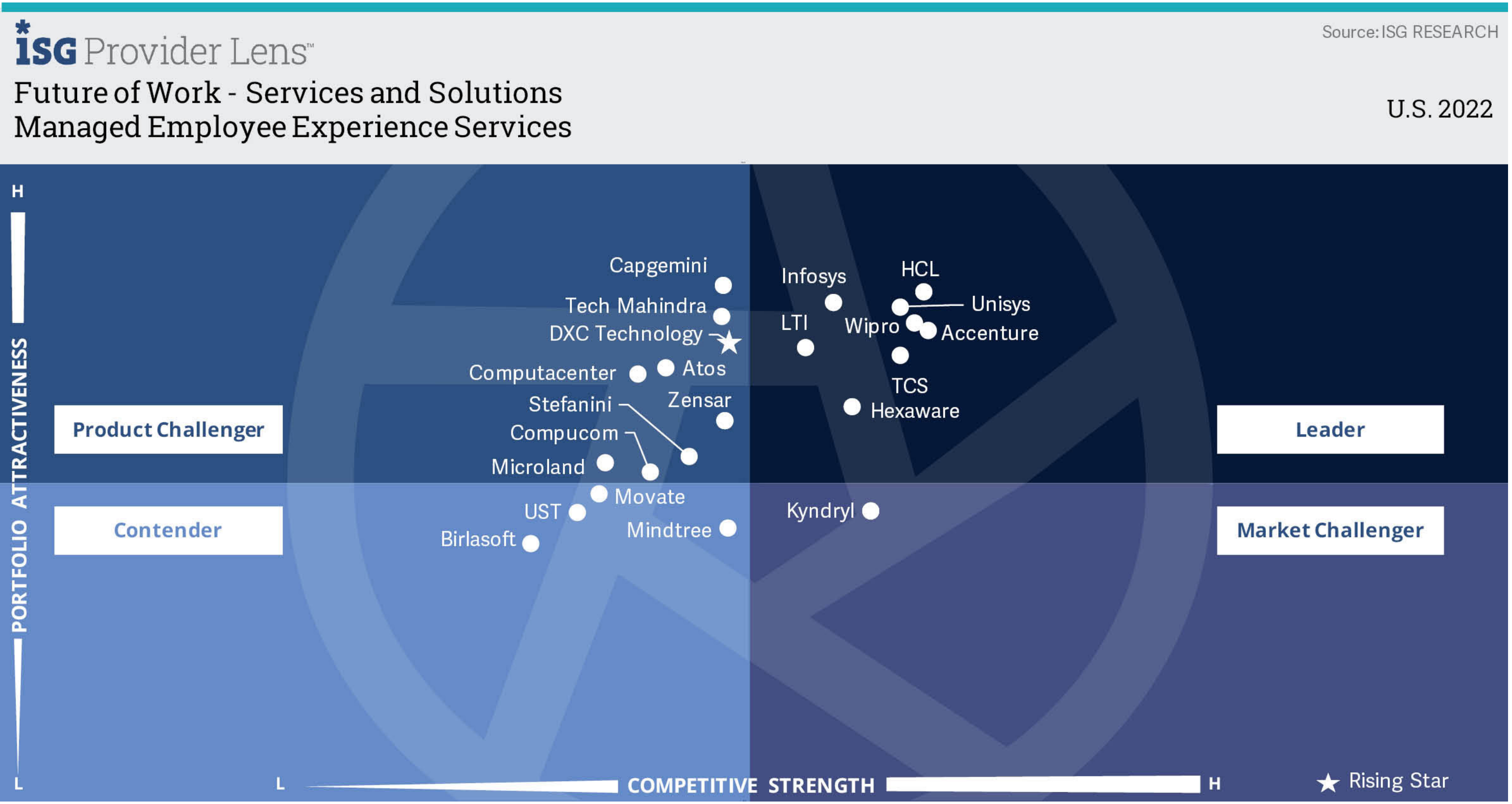
With Great Resignation hitting the U.S. and several people quitting their jobs, enterprises in the U.S. have started exploring metaverse to deliver immersive experiences to their workforce. These enterprises are, hence, seeking service providers with strong metaverse capabilities in the form of smart workspaces, AR/VR-based training and a gamified onboarding process.

CXO leaders should read this report to know about the leading providers that can help them better prepare workforces for the changing business models and dynamics in the post-pandemic world.

Digital professionals, including digital transformation leaders, should read this report to understand how the providers of managed employee experience services fit their digital transformation initiatives and how they are compared with one another.

CHRO leaders should read this report to know which providers are leading in managing experience for employees in this new age of hybrid working, from the talent retention, upskilling and recruitment perspectives.

Technology professionals, including infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them in enhancing employee services.



This quadrant assesses service providers that provide **differentiated employee experience management and enhancement** services **beyond workplace technology enablement** and telemetry-based support.

Mrinal Rai

Definition

This quadrant assesses providers that offer value-added managed services, not only for enabling the workplace technology ecosystem but also for enhancing end-user experience. These providers typically deal with business leaders and line-of-business (LoB) representatives, in addition to CIOs. They offer services that associate employee experience with measurable business results, and help align the digital and physical facets of the future workplace with the human aspects.

Eligibility Criteria

1. Ability to provide services that directly correspond to **user experience associated with device and app access, plus team collaboration, human augmentation to a digital workforce, such as virtual agents, line of business (LoB) employee experience, user productivity and digital dexterity**
2. Offer a seamless experience for **remote-working employees and part-time workers** that include innovative engagement services or solutions for the respective country or region
3. Should have **high number of clients leveraging experience level agreements (XLAs) related key performance indicators (KPIs) and at least 10 percent of clients globally with XLA-based actual pricing (risk and reward) engagements**
4. Provide **managed unified communications and collaboration (UCC), user behavior analysis and user experience measurement beyond workplace technology,** thus extending smart workplace services to other business functions such as human resources and operations
5. Offer **workplace services** that permeate businesses, including smart user and context-specific access through virtualized workspaces
6. Offer **smart facilities and physical on-premises services** that support intuitive capabilities such as hot desking, health assessment and a customized and contextualized experience with a smart devices-supported workplace
7. Offer services to enhance **employee digital dexterity and support technology democratization initiatives** such as low-code/no code development

Observations

The Contenders in this quadrant provide elementary and basic approach for employee experience measurement and management, mostly based on device application performance and support service satisfaction. For these services, they do not have enough client examples to showcase. The Product Challengers in this quadrant provide not only telemetry and support-services-based analysis but also measure experience from other non-conventional sources such as technology adoption, happiness scores, learning, skill development and experience levels (XLs). The Market Challengers have strong presence in the market with a large client base; however, their experience-centric services are based on elementary services.

The Leaders in this quadrant provide differentiated offering for managed employee experience, covering diverse aspects. Most of them are also seeking to leverage the opportunities provided by emerging technologies such as the metaverse.

Of more than 100 providers assessed for this study, 22 have qualified for this quadrant with eight being identified as Leaders and one Rising Star.

accenture

Accenture moves from the Market Challenger position in 2021 to the Leader position this year. Capabilities in analytics-based experience management and metaverse-focused workplace offerings are its major differentiators. It also offers strong physical workspace transformation capabilities.

HCL

HCL provides a strong portfolio of services focusing on multiple areas in employee experience such as engagement, productivity, digital dexterity, metaverse-based onboarding, learning and training on topics such as digital twins. About 85 percent of its clients in the U.S. are already engaged in a XLA-based approach.

Hexaware

Hexaware retains its leadership position because of its comprehensive employee-experience-focused services. Its experience measurement framework, use of AIOps and use of the Microsoft Viva employee experience platform strengthen its position in the market.

Infosys

Infosys provides a broad employee experience management service portfolio led by platforms focused on learning, experience design and collaboration. It also has a structured approach for XLA implementation and smart-workspace-led experience enablement.

LTI
Let's Solve

LTI leverages several experience-centric services to transform its clients' workplace outlooks. It focuses on sustainability and ubiquitous device experience and invests in metaverse-based employee journey solutions. The company has a large client base in the U.S. and is well established in this space.

tcs TATA CONSULTANCY SERVICES

TCS offers a comprehensive portfolio of employee experience services as part of its Cognix for Workspace offering. It assists clients in defining and measuring different aspects of employee experience. In addition, it provides services to enhance digital dexterity and learning.

UNISYS

Unisys provides employee experience management services by leveraging and collecting experience-indicating information from every touchpoint that interacts with end users.

wipro

Wipro offers strong employee experience measurement and management services by collating information from multiple sources to provide a common dashboard view. It also invests heavily in innovative offerings, including the metaverse, to provide differentiated experiences.

DXC Technology

DXC Technology has transitioned from a Product Challenger last year to a Rising Star. It offers a promising portfolio with its Up Time employee experience platform, which provides analytics of experience indicator data from devices, applications, support services, user feedback, learning and collaboration productivity solutions.

Unisys

Leader

"Unisys helps collect, assimilate and analyze experience-indicative information from multiple sources."

Mrinal Rai

Overview

Unisys aims at creating modern workplace for enterprises with its experience-based portfolio, which includes transformation services, seamless collaboration, intelligent workplace services, proactive experience, workplace as a service and modern device management.

Strengths

Focus on end-user experience (EUX): Unisys empowers enterprises in attracting and retaining talent by providing exceptional employee experience. It has launched its new workplace portfolio and expanded solutions focused on EUX. As part of its Unisys Digital Workplace Solutions strategy, it plans to acquire EUX-focused companies to further expand in this market.

Experience-based portfolio: Unisys focuses on measuring EUX with a purpose and has presented XLA2.0, an outcome-based service. XLA1 focuses on PC happiness and people happiness. On the other hand, XLA2.0 focuses on Unified communication and collaboration (UC&C) happiness, personal experience and digital adoption trends. Unisys also offers Experience Engine for different business roles, including R&D and sales.

United experience management (UXM): Unisys leverages its partnership with ServiceNow, 1E, NICE, Amelia, UiPath, Medallia and Qualtrics to deliver a comprehensive experience management framework, namely UXM. It analyzes data from experience data lakes derived from multiple sources.

Caution

With its strong focus on experience management, Unisys now has capabilities to interact with business functions other than enterprise IT. However, it still mostly engages with IT and operations business functions in client organizations. To provide maximum benefits out of its managed experience services, it should engage with technology leaders with transformative mindset.

Appendix

The ISG Provider Lens™ 2022 – Future of Work - Services and Solutions 2022 analyzes the relevant 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

Lead Author:
Mrinal Rai

Editors:
Sajina B. and Grant Gross

Research Analyst:
Sonam Chawla

Data Analyst:
Anirban Chaudhary

Consultant Advisor:
Jim Kane

Project Manager:
Ridam Bhattacharjee

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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 September 2022, 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.

The study was divided into the following steps:

1. Definition of Future of Work - Services and Solutions 2022 market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers and vendors on capabilities and use cases
4. Leverage ISG's internal databases, advisor knowledge and experience
5. Use of Star of Excellence CX-Data
6. Detailed analysis, evaluation of services and service documentation based on the facts and figures received from providers and other sources.
7. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Author

Mrinal Rai
Principal Analyst and Senior Manager

Mrinal Rai is the principal analyst and senior research manager at ISG and responsible for creating research reports for digital workplace, enterprise collaboration, M&A impacts and other emerging technologies initiatives. He is also the official ISG spokesperson for media relations in India. He also leads ISG's voice of customer study program, Star of Excellence. His areas of expertise is digital workplace services, modern unified communication and collaboration, both from a technology and business point of view. He is the U.S. lead quadrant and global archetype analyst for digital workplace and social collaboration in the ISG Provider Lens™ (IPL) program. He covers key areas around the workplace and end-user computing domain such as modernizing workplace, enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture, enterprise social software, content collaboration and team collaboration. He has been with ISG for last 10 years and has more than 15 years of industry experience.

Research Analyst

Sonam Chawla
Senior Research Analyst

Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions and Cybersecurity Solutions and Services. Sonam comes with five years of experience in the market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI. She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights. In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting on research projects.

IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this webpage.

ISG Research™

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready 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. For more information, visit www.isg-one.com.

ISG Provider Lens™

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