ISG Provider Lens™

Future of Work - Services and Solutions

A research report comparing provider strengths, challenges and competitive differentiators

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QUADRANT REPORT | OCTOBER 2022 | U.S. PUBLIC SECTOR

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What was the Future of Work is rapidly becoming the present for many organizations.

Workplace changes that were already underway were vastly accelerated to address the needs triggered by the pandemic, and those organizations that were holding out have now realized that transformation is essential. Organizations have developed a new understanding of the importance of workplace resilience.

A wide range of providers have stepped up to support U.S. public sector clients in understanding, defining and implementing their objectives to achieve workplace resilience. This can mean the ubiquitous ability to work safely from anywhere, to offer swift and effective support when things go wrong, to anticipate problems and correct them or to simply educate employees who lack digital skills.

U.S. public sector organizations, including state and municipal governments, public health providers, educational institutions and non-government organizations (NGOs), are turning to these providers in growing numbers. This is partly in response to the difficulty in attracting and retaining staff and existing employees reaching retirement age. It is also driven by two key business objectives. The first is to concentrate on delivering the best outcomes to citizens, retaining service providers for non-core activities. The second is to learn when and how to embrace new technologies such as AI or the IoT, where there is an acute shortage of skills, and to use the expertise of the providers to enhance both customer and employee experience.

The **U.S. public sector** is showing a new openness to **outsourcing**.

Executive Summary

The U.S. public sector is showing a new openness to outsourcing in what were previously perceived as core functions. While this has been driven by necessity for some organizations, many have recognized that it is time for change and realignment with organizational objectives. This is key to forming strong workplace transformation strategies — it is not sufficient for an organization to be dragged into a change; it must be ready for it and welcome it. The providers listed in this report are all adept at delivering solutions and bringing on board organizations that are reluctant to accept change.

The providers listed are from two areas: management consulting and IT service provision. These providers have converged on an approach that must start with a strategy that identifies the objectives for a new way of working within organizations. Selecting the right engagement model will depend on organizational culture, with a broad range of options, allowing organizations to choose providers that are ideally matched with their requirements. Technology maturity levels will determine whether a classic management-consultancy-led approach or a technical, outcome-driven method will be most suitable.

This report includes the following four quadrants:

- Workplace Strategy Transformation Services
- Managed Workplace Services – End User Technology
- Digital Service Desk and Workplace Support Services
- Managed Employee Experience Services

Each quadrant highlights providers with particularly strong capabilities in that area, suited to the needs of the U.S. public sector. While this report highlights the providers it considers as Leaders, many organizations will find that providers in the other three quadrants may be better matches to their specific needs or organizational styles.

Some U.S. public sector organizations may be looking for services in a particular category, for example, enhancing their service desk capabilities or a mechanism for provisioning end-user devices, while others may be looking for a larger package that includes most or all of these capabilities. While the first step in implementation will definitely be strategic, for the first step toward picking a provider, the organization needs to have a clear view of this choice, whether it be a specific implementation project or a broader engagement.

Some providers have dedicated research units looking at the future of the public sector. Others have dedicated delivery teams that are familiar with the sector and its specific needs, especially regulatory, security and financial constraints.

Beyond the quotidian issues, a remarkably consistent picture emerges of future challenges for the U.S. public sector, including:

- Sustainability and environment
- Digital inclusivity
- Improving all aspects of resilience
- Flexible labor management
- Open data
- Analytics and automation
- Encouraging innovation within services and in the private sector

- Building and rebuilding trust
- Customer experience
- Cybersecurity

Digital workplaces and fully engaged employees are key to rising to these challenges. Ensuring an excellent employee experience is fundamental because workers provided with poor, slow and difficult-to-use tools will not be able to focus their efforts on external challenges. Reliable, fast, easy-to-use services should be available to all users, no matter where they work, as should reliable devices and readily available support services.

The principles of great employee experience extend to physical workspaces, where smart workspaces help employers optimize the use of expensive real estate, while offering safe and effective working areas. Smart workplaces also support sustainability by reducing energy consumption for heating, cooling and lighting.

Smart physical workspaces are an important aspect of employee wellbeing — a topic that has finally made it to the executive table. Ensuring wellbeing by supporting both mental and physical health helps address staff retention issues, as well as represents an important aspect of employee experience beyond the digital aspects. Empathetic organizations can address issues such as digital burnout and work-life balance, and are therefore attractive to potential recruits, and they achieve higher staff retention.

Because we can't change what we can't measure, many of these functions are supported by innovative approaches to analytics and metrics. Providers differ in their approaches, usually based on proprietary frameworks that can be used to assess employee ability, application performance, device availability and other key aspects. Based on information gathered, AI-based tools offer insights, which can then be used to drive change. Continuous monitoring can identify productivity bottlenecks, security breaches, waste and wellbeing issues. Monitoring can also help reduce organizational carbon footprint and operating costs by identifying assets that could be shut down or their consumption reduced.

The providers listed in these quadrants can bring essential expertise and strategic vision to help create the public sector of the future, with options suitable for most budgets. Whether seeking a complete package covering all four quadrant areas, or a single-purpose engagement, clients can use this report as a guide to identify providers that not only can provide the capabilities required, but are also well adapted to work with them.

Public sector organizations have developed a new understanding of the importance of workplace resilience.

Provider Positioning

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Accenture	Leader	Leader	Leader	Leader
Atos	Product Challenger	Not In	Market Challenger	Not In
BCG	Product Challenger	Not In	Not In	Not In
Bell Techlogix	Not In	Not In	Contender	Not In
Capgemini	Leader	Product Challenger	Product Challenger	Leader
CGI	Product Challenger	Not In	Not In	Not In
Compucom	Contender	Product Challenger	Contender	Product Challenger
Deloitte	Leader	Not In	Not In	Not In
Digital Workplace Group	Product Challenger	Not In	Not In	Not In

Provider Positioning

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
DXC Technology	Not In	Not In	Market Challenger	Not In
Fujitsu	Contender	Not In	Contender	Not In
Hexaware	Product Challenger	Product Challenger	Not In	Product Challenger
HPE	Product Challenger	Contender	Not In	Not In
Infosys	Leader	Leader	Leader	Leader
KPMG	Leader	Not In	Not In	Not In
Kyndryl	Market Challenger	Not In	Not In	Not In
Leidos	Product Challenger	Not In	Not In	Contender
LTI	Product Challenger	Product Challenger	Contender	Product Challenger

Provider Positioning

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Matrix42	Not In	Not In	Contender	Not In
McKinsey	Leader	Not In	Not In	Not In
Mindtree	Contender	Product Challenger	Contender	Contender
Movate	Contender	Contender	Contender	Product Challenger
Mphasis	Contender	Not In	Not In	Not In
NTT DATA	Market Challenger	Market Challenger	Not In	Contender
PwC	Leader	Not In	Not In	Not In
Stefanini	Contender	Not In	Not In	Product Challenger
TCS	Leader	Not In	Not In	Not In

Provider Positioning

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Tech Mahindra	Product Challenger	Leader	Leader	Leader
Unisys	Leader	Leader	Leader	Leader
UST	Contender	Product Challenger	Contender	Not In
Wipro	Leader	Leader	Leader	Leader
Workplace from Meta	Not In	Not In	Not In	Contender
Zensar	Product Challenger	Product Challenger	Market Challenger	Product Challenger
Zones	Contender	Contender	Contender	Product Challenger

This study focuses on what is critical in 2022 for **Future of Work in the U.S. public sector.**

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

Simplified Illustration Source: ISG 2022

Definition

This ISG Provider Lens™ Future of Work 2022 study offers IT buyers and decision-makers objective guidance on providers identified as Leaders, Rising Stars, Product Challengers, Market Challengers and Contenders, with experience in developing, selling and supporting digital workplace services for public sector entities in the U.S. Their services include strategic workplace transformation services, managed services to enable and support the digital environments of end users, and digital service desk and support services for workers and constituents being served.

As new digital business realities emerge and are increasingly disruptive, public sector organizations face tremendous pressure to improve how they operate to reduce costs and to modernize overall – all in an environment of reduced funds and diminished staffing. Their IT needs and challenges are similar to those of complex commercial enterprises, but, typically, with more restrictive acquisition, staffing, management, reporting and operational requirements. Objective insights, assessments and guidance are more valuable than ever to these organizations.

ISG's U.S. Public Sector advisory and consulting teams use these reports to help clients understand providers' capabilities and offerings suitable for their requirements. These studies also serve as competitive enablement and support for vendor and provider positioning, key relationships and go-to-market considerations.

Scope of the Report

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

This ISG Provider Lens™ study offers IT-decision makers with the following:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments
- Insights and guidance specific to the U.S. public sector. ISG's U.S. public sector coverage includes state and municipal government agencies; public health, education, and utility organizations; and non-governmental/ community service organizations (NGOs). ISG does not currently include the U.S. federal government in the scope of this study.

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

Provider Classifications

The provider position reflects the suitability of solution vendors 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include a service provider(s) which ISG believes has 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).

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 public sector organizations in the U.S. for evaluating the providers of workplace strategy transformation services.

In this quadrant, ISG highlights the current market positioning of providers that offer workplace strategy transformation services to public sector organizations in the U.S. and how each provider addresses the key challenges they face.

Today's public sector workplaces are radically different than they were two years ago. The way employees connect and communicate has changed, and the U.S. public sector continues to face major changes in terms of workplace transformation, for which the pandemic has acted as a catalyst. Digital disruption, employee expectations and employee retention are a few major challenges faced by the organizations in this region, leading them toward redesigning their ways of working and building a workplace roadmap for current and future scenarios.

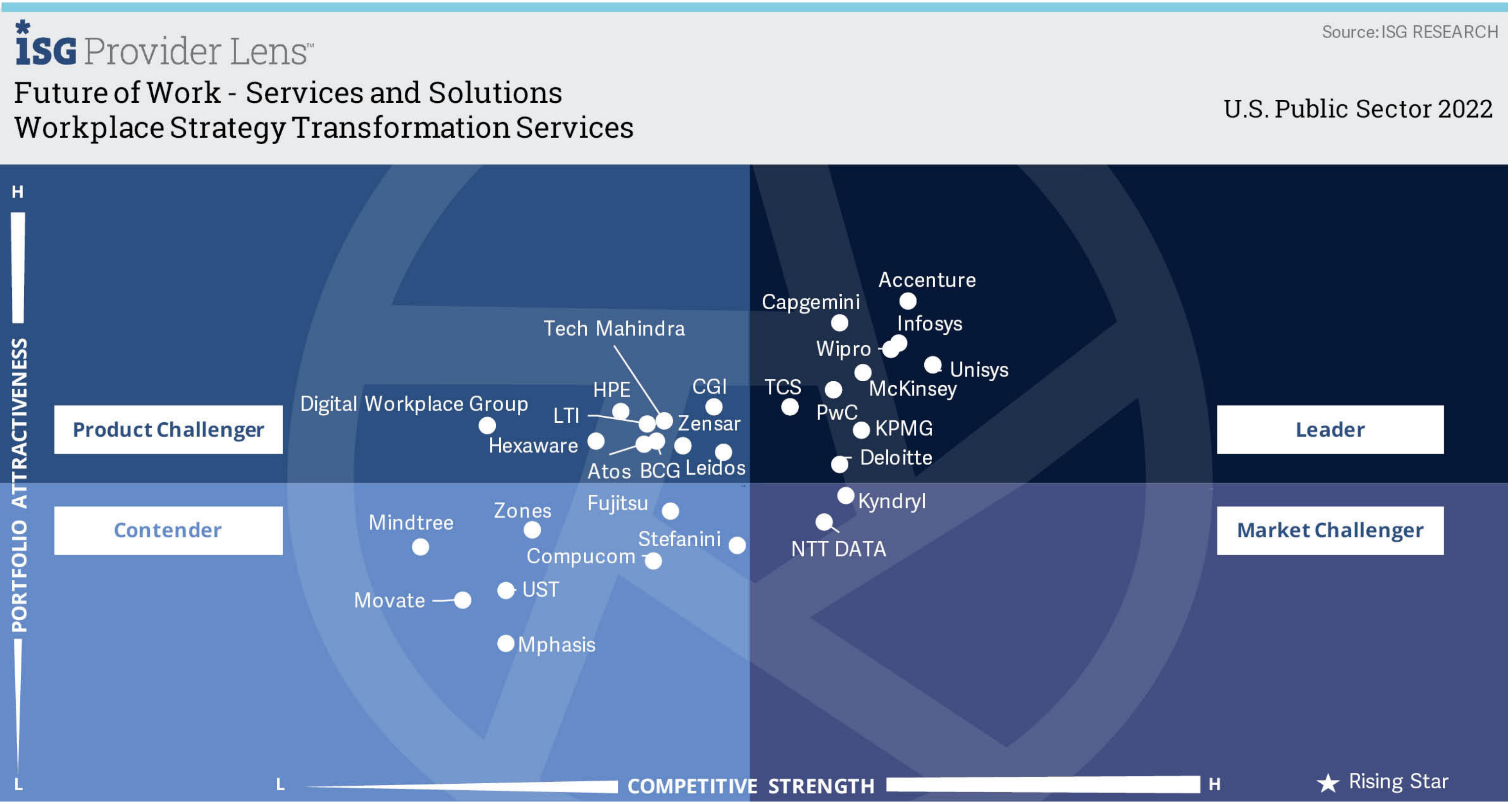
The U.S. public sector is, therefore, looking for service providers that can help them in creating and implementing transformation strategies that are more human centric to meet current and future business requirements. Enterprises here are also looking for service providers that support organizational change management services within their consulting portfolio to enhance business processes and efficiency.

Public sector professionals should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan for workplace transformations and compare and select appropriate digital workplace services and providers.

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

Digital professionals, including digital transformation and facility management 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.

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.



The **rise in demand for workplace transformation** is reflected in the range of providers in the market. **U.S. public sector clients** can choose a provider that is an ideal match for their needs.

Richard Marshall and Bruce Guptill

Definition

This quadrant evaluates providers that offer transformation-oriented consulting services for the future of work. They offer formulate workplace strategies, design the post-pandemic workplace architecture and help create roadmaps for the required transformation. These services are an essential part of their 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 model and enable the desired organizational changes.

Eligibility Criteria

1. Providers should have **a vendor-neutral approach toward transformation consulting and workplace assessment services**. An ability to provide associated managed or implementation or 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 adaptation; employee engagement; productivity; changing customer experience (CX); and associating CX with employee experience (EX), while also enhancing end-user experience.
3. Providers should offer **technology adoption and organizational change management/behavior management** services through their consulting portfolio.
4. Providers should offer **solutions to address employee empathy and wellbeing**.

Observations

The number of providers offering workplace strategy transformation services has grown dramatically over the last few years. While this was accelerated by the pandemic, U.S. public sector organizations were already recognizing that existing approaches were not optimal and had to change. Partly aligning with changes in the private sector and partly taking advantage of new software and infrastructure management tools, organizations need to transform to remain competitive employers and to provide good service to the citizens they serve.

U.S. public sector clients can now choose from a plethora of providers, offering differing approaches to workplace strategy transformation. This variety and richness allows clients to choose service providers that are an excellent match to their requirements — culturally, technically and financially. Organizations in the U.S. public sector can use this report as a guide to identify providers that are suitable for their respective workplaces, bearing in mind that the best match may not have been qualified as a Leader. This means that it is vital for organizations to have a strong grasp on the high-level objectives for workplace strategy transformation, the current operating context and detailed requirements around delivery. Working with short-listed providers to create an agreed statement of work (SOW) will help confirm the level of organizational compatibility.

From the 38 companies assessed for this study, 25 have qualified for this quadrant with 10 being Leaders.

accenture

Accenture has in-depth knowledge of the U.S. public sector, including regulatory requirements, making it a strong competitor in this space, especially for projects that require a large resource pool. A dedicated practice addresses needs specific to the U.S. public sector especially workplace transformations.

Capgemini

Capgemini offers a comprehensive portfolio of workplace strategy transformation services, suitable for the U.S. public sector, covering the entire spectrum of reinventing work, transforming the workplace technology landscape and determining sustainability goals.

Deloitte

Deloitte's public service team identifies key sectorial trends and provides the required services to enable clients to meet these evolving needs. Building resilience is a key theme, and the company works with U.S. public sector clients to create organizations that can readily survive the challenges they face.

Infosys

Infosys has a dedicated public sector practice, offering a broad range of integrated services, including workplace strategy transformation. It has a deep pool of talent, both in skills and size, that allows it to readily scale for large U.S. public sector projects.

KPMG

KPMG has a century of experience in offering consulting services to U.S. public sector clients and has extended its digital transformation portfolio to cover the entire range of managed digital workplace services. This combination makes it a strong provider for organizations renewing their working practices, where it acknowledges their constraints and organizational culture.

McKinsey

McKinsey's dedicated U.S. public sector practice provides deep expertise in work culture transformation. The firm's extensive, in-depth knowledge, and research and thought leadership cover the future workplace, employee experience, and how these can support the future of public service delivery across multiple areas, including health, infrastructure and legislation.

PwC

PwC has combined its extensive U.S. public sector expertise with a pragmatic services approach that uses a business focus to improve outcomes. This method of delivering digital workplace services is built on communication and collaboration, covering both technologies and techniques.

TCS

TCS offers strategy consulting services as a part of its broader managed services portfolio, making it easy to increase the number services consumed by clients. U.S. public sector organizations will find elements of organization change management, technology adoption, sustainability and employee wellbeing particularly useful as they engage with TCS for workplace transformation.

Unisys

Unisys has extended its managed digital workplace services to cover a range of remote operations, communications, experience management and strategic transformation services. A long-term provider of technology to the U.S. public sector, Unisys is now expanding its services portfolio with complementary capabilities.

Wipro

Wipro is a Leader due to its strong workplace consulting practice. The firm has shown strong growth in its global consulting business and has been engaging with an increasing number of U.S. public sector clients with strategy transformation initiatives, focused on improving employee experience.

Unisys

Leader

"Unisys combines workplace technology and strategy transformation consultancy to make it a Leader."

Richard Marshall and Bruce Guptill

Overview

Unisys, headquartered in Pennsylvania, reports an employee strength of 17,000, and it accrued $2 billion in revenue in 2021. The company operates from 13 locations in the U.S. With experience in public sector IT since its inception, Unisys offers workplace transformation advisory services. Unisys partners with external consulting organizations that are aligned with its digital workplace vision.

Strengths

Emphasis on employee experience in a workplace: Unisys believes that the success of a digital workplace reflects employee engagement and satisfaction with available technologies and services. User experience, work performance and tech interfaces and integration are core to Unisys' digital workplace strategy. Experience level agreements (XLAs) are emphasized, as needed, to anticipate workers' needs and expectations as an organization changes over time.

Acquisitions to enhance the digital workplace portfolio and expand market share: The acquisition of Unify Square has added to Unisys' Digital Workplace Service business by enhancing its unified communications as a service (UCaaS) capabilities — critical for enabling and improving collaboration and communication in digital environments.

Change management streamlines digital transitions: Unisys' approach to digital workplace transformation emphasizes organizational and process change management to identify and handle the key cultural, operational and role changes brought about by transformation initiatives.

Caution

Unisys is well positioned among Leaders in this quadrant, but would benefit considerably by improving and expanding its consulting expertise. Acquisitions and partnerships will somewhat alleviate this concern.

Managed Workplace Services - End User Technology

Who Should Read This

This report is relevant to public sector organizations in the U.S. for evaluating the providers of managed workplace services.

In this quadrant, ISG highlights the current market positioning of the providers of managed workplace services to U.S. public sector organizations and how each provider addresses the key challenges they face.

In this new era of hybrid work, the U.S. public sector continues to face challenges in terms of working culture, productivity, efficiency and performance. With the increasing number of security breaches, workplace security is also one of the topmost concerns. U.S. public sector enterprises are focusing more on Zero Trust security in everything, from multi-factor authentication to endpoint security, to reduce vulnerabilities and identify the risks associated with remote working.

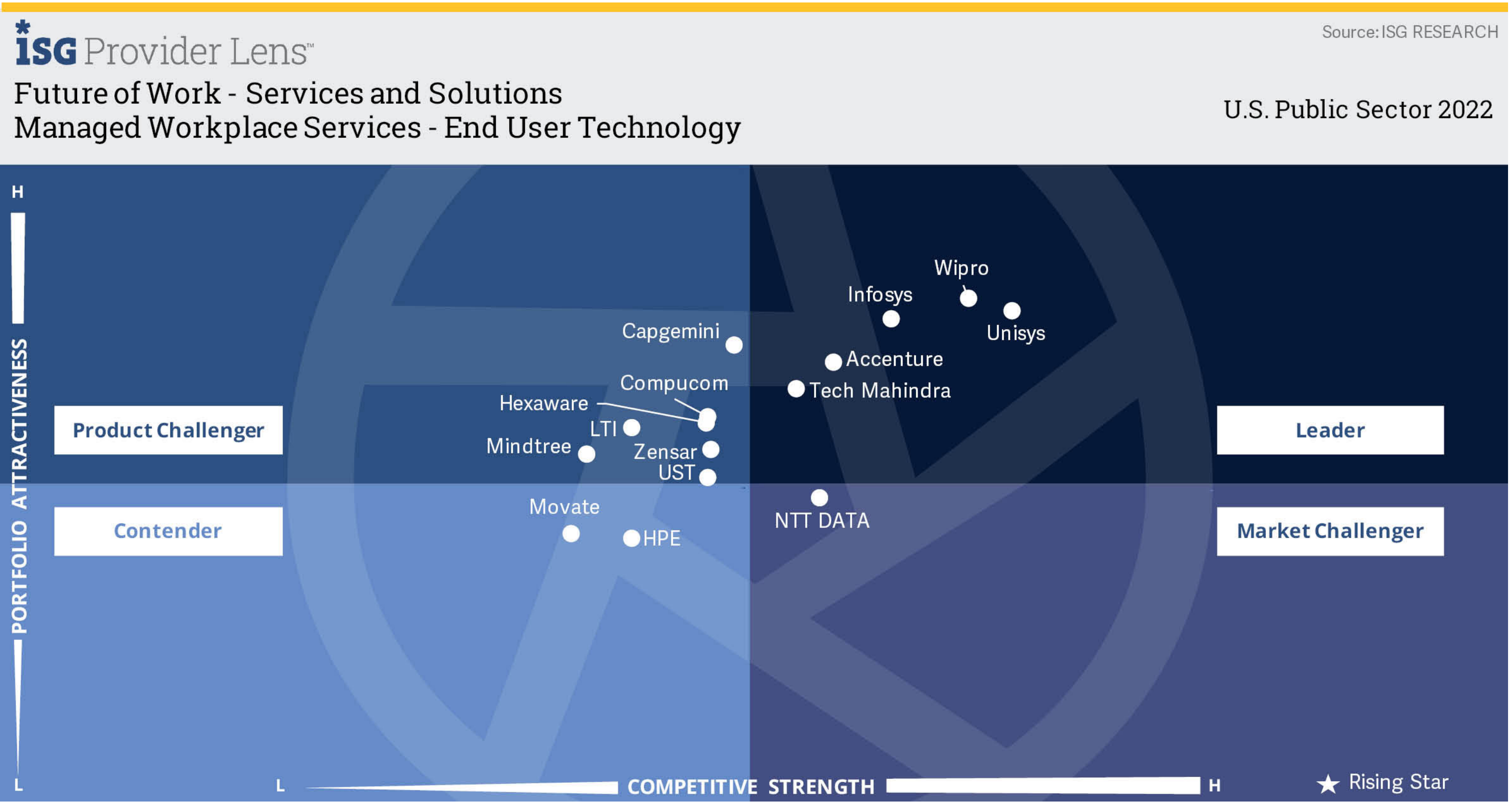
With the Biden government focusing on sustainability and carbon-pollution-free initiatives, the U.S. public sector is also emphasizing the creation of sustainable workplace environments. The sector is, hence, looking for managed service providers offering solutions across smart spaces with ESG capabilities, which can further empower them in reducing their carbon footprint.

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

Public sector professionals, should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select digital workplace services. The report also shows how the technical and integration capabilities of a service provider are compared in the market.

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.

Procurement professionals, including sourcing, procurement and vendor management professionals, should read this report to develop a better understanding of the current landscape of the providers of managed workplace services for the U.S. public sector.



This quadrant assesses providers offering services related to end-user technologies, encompassing device management and mobility to enable **employee-centric, location-independent workplaces**.

Richard Marshall and Bruce Guptill

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies such as:

- Endpoint management
- Application packaging, provisioning and deployment
- Mobility support
- Cloud workspaces
- Leveraging virtual desktop and desktop as a service
- Device lifecycle management
- End user identity and access management.

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 endpoint security services, **supporting a wide variety of endpoint management solutions**, assisting clients with device policies including bring-your-own-device (BYOD), and 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 (DaaS) for device security, 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 multiple, widespread locations**; support endpoint security services by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
5. Offer **services to support modern networks and unified communication (UC) as a foundation for a digital workplace**

Observations

The push to work from anywhere, or indeed everywhere, has led to massive changes in how end-user technology is used. This has, in turn, compelled U.S. public sector organizations to reconsider what types of devices it provisions and how they provision them, while respecting security constraints.

The providers included in this quadrant have service portfolios covering desktops, laptops, mobile phones and other computing equipment throughout their full operating lifecycles. This includes procurement, provisioning, management, security, monitoring and replacement.

New models of working also encompass services related to providing end-user technologies, including the delivery of Device-as-a-Service and consumption-based pricing models. These are attractive options for the U.S. public sector as it shifts costs to operating expenses, making them more predictable and sustainable. Virtual devices also enable the use of AI and analytics, including predictive options, thus reducing support costs by proactively anticipating, detecting and ideally correcting errors.

All providers offer managed workplace services related to end-user technologies as a part of their broader service portfolios, and U.S. public sector clients must consider the optimal engagement model for their needs. At the same time, engaging multiple providers may offer the best technology and culture match, but may result in ugly territorial disputes about responsibility. Using a single provider, too, may result in suboptimal match to requirements, but reduce overall costs and simplify the engagement model. Procurement departments must consult with domain experts to identify the best balance for an organization.

From the 38 companies assessed for this study, 14 have qualified for this quadrant with five being Leaders.

Accenture typically offers end-user technology management services as a part of a larger overall deal. However, it is adept at working with clients to implement such services.

Infosys offers a diverse partner network and huge scale provide endpoint and device management services. The company offers analytics-focused, experience-driven end-user technology services.

Tech Mahindra offers dedicated, consumption-based devices and desktop as a service, thus providing predictable cost models for U.S. public sector clients.

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

Wipro offers end user technology management services as part of its LiVE Workspace offering, which is designed to support secure work from anywhere. Wipro also has a partnership with Apple, allowing it to provide support for its devices.

Unisys

Leader

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

Richard Marshall and Bruce Guptill

Overview

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

Strengths

Acquiring capabilities to enhance workplace services: With the acquisition of Unify Square, Unisys has added market leading UCaaS capabilities to its portfolio. In addition, it further expanded its existing UEM expertise through its acquisition of Mobinergy, a modern device management professional services firm.

Commitment to sustainability: Unisys has three different approaches to ESG that complement each other. These three levels are internal ESG programs, service that supports enterprise ESG goals and ESG-specific services offered by Unisys to enterprises. The company has updated its managed services to empower enterprises to reduce carbon footprint when consuming its services.

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

Caution

Unisys offers advanced technological solutions that may be too complex for U.S. public sector organizations just starting on their managed workplace services journeys.

Digital Service Desk and Workplace Support Services

Who Should Read This

This report is relevant to public sector organizations 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 the providers of digital service desk and workplace support services to the U.S. public sector and how each provider addresses the key challenges faced in the region.

Hybrid working and work-from-anywhere models have led the U.S. public sector to several challenges in terms of workplace support for employees, employee experience and productivity. As a result, these organizations are focusing on adopting the right tools and technologies for their workforces to enhance productivity as well as communication within their teams.

The U.S. public sector is also emphasizing the modernization of its IT service desk and automating processes to enhance end-user experiences and operational efficiency and to achieve better outcomes for their employees as well as citizens.

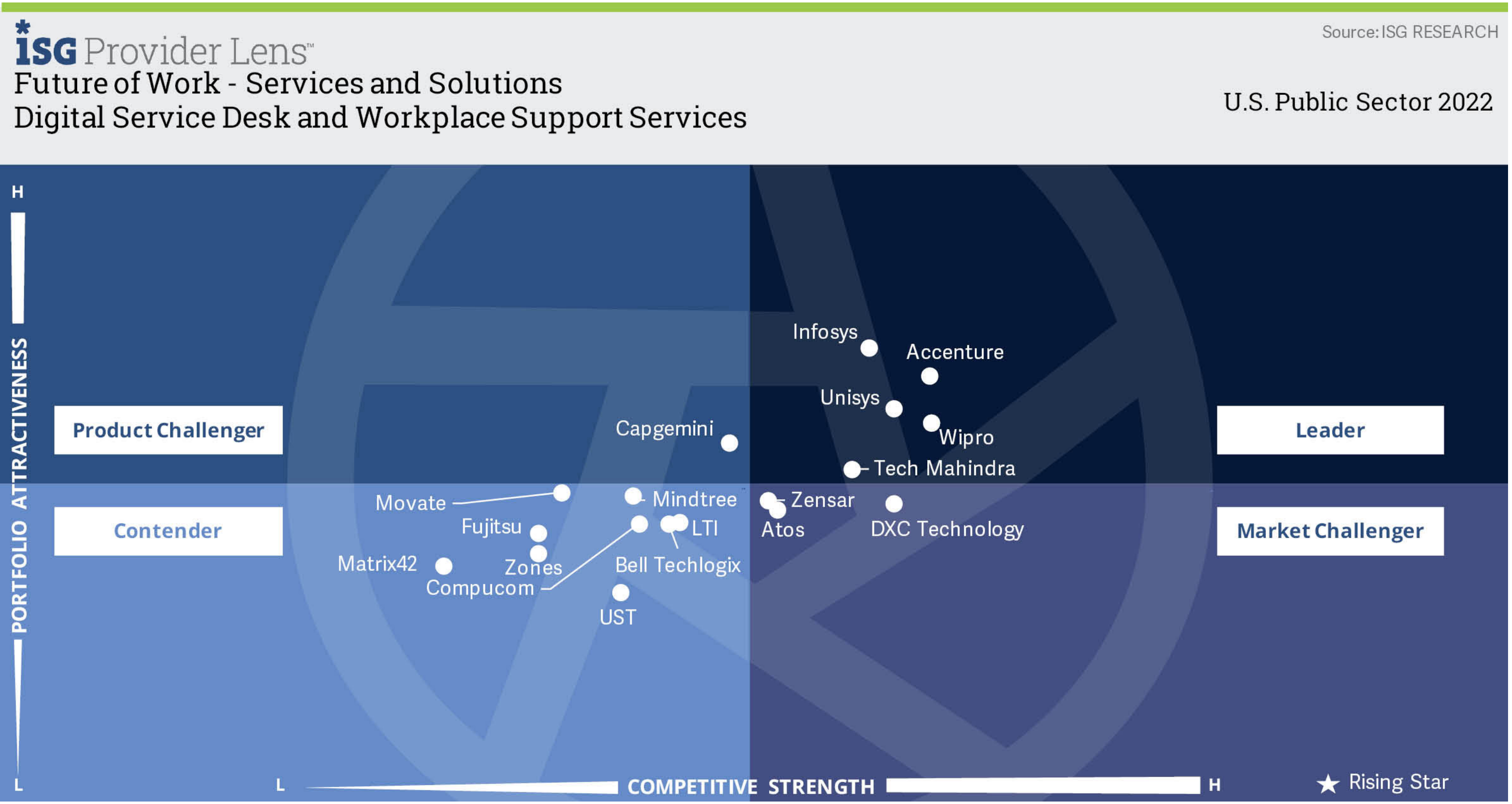
Public sector organizations in the U.S. have started to realize that integrating virtual agents, AI-based chatbots, automation and analytics can help them efficiently drive digital transformation. These organizations are, hence, seeking service providers that offer AI-based analytics capabilities, which can empower them with the data-driven insights required for delivering personalized user services and uncovering service delivery improvements.

Public sector professionals, should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select digital workplace services. The report also shows how the technical and integration capabilities of a service provider are compared in the market.

Digital professionals, including digital transformation and facility management leaders, 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 the digital service desk and workplace support service providers in the U.S.



AI, analytics, automation and connectivity are transforming how service desk support is delivered, empowering and educating employees. **This results in the rare combination of improved service and reduced costs.**

Richard Marshall and Bruce Guptill

Definition

This quadrant assesses service providers that offer modernized support services, including workplace support, service desks, on-site/field support, tech bars and cafés, IT vending machines and automation-enabled omnichannel support for chat and voice. Their services provide the ability to work from anywhere at anytime; device support, including automated proactive technical support; and cloud platforms to provision always-on systems. They leverage digitally transformed services through AI and other cognitive technologies for end-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 as well as in-person technical assistance**, leveraging advanced technologies such as augmented reality/virtual reality (AR/VR)
3. Set up and support **self-help kiosks, tech-bars, cafés and IT vending machines**
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

Support is evolving to a model where issues are, ideally, automatically detected and resolved before end users notice them. Where this is not possible, providers are offering simple self-help tools to enable end users to fix common problems, without the need to wait in the queue for a customer care service agent to become available.

These new techniques are enabled by a powerful mix of AI, machine learning and automation. The best of these tools are smart enough to learn, building a catalog of automated fixes for commonly occurring problems. Chatbots are common and serve as an apt approach to recurring, but simple, concerns such as password changes. These too should be capable of learning and passing the end-user to a human agent in cases where they cannot support the function.

U.S. public sector organizations can use these new techniques to enhance support capabilities, and particularly support users who are working remotely. Many organizations can provide new self-service techniques such as lockers and on-demand delivery to further enhance support capabilities.

In addition to the benefits of new approaches that can include reduced wait times and improve support productivity, clients should check a provider's approach to migration from legacy support systems. Insights gained from analytics tools can aid in ensuring a smooth transition.

From the 38 companies assessed for this study, 18 have qualified for this quadrant with five being Leaders.

Accenture provides automation and AI-enabled workplace support services with a broad portfolio. Its deskside of the future services provide 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.

Infosys augments its advanced support technologies with a continued focus on learning and training programs. This combination helps end users and support agents alike.

Tech Mahindra uses automation and an experience-centric focus to provide comprehensive service desk and support services. Continuous training programs for its employees ensure high-level of agent efficiency.

Unisys is a strong leader in this space. It leverages automation, analytics, predictive support, its Tech Café and onsite support services. It has a large base of operations in the U.S. including support to U.S. public sector clients.

Wipro improves support agent performance through automation. It provides intelligent virtual agents for enhancing employee experience. It also provides innovative field support services, leveraging the collective knowledge of agents and technologies such as virtual reality (VR).

Unisys

Leader

"Unisys offers strong local support options with both onshore personnel and technology enablement."

Richard Marshall and Bruce Guptill

Overview

Unisys, headquartered in Pennsylvania, operates in 24 countries. With more than 2,600 field technicians in North America, Unisys offers proactive monitoring of workplaces to resolve issues. It continues to expand its presence in the U.S. Unisys has service desk locations in Augusta and Salt Lake City, making it suitable for U.S. public sector clients with onshore requirements.

Strengths

Strong service delivery capabilities: Unisys has more than 13 service desk locations and four field service locations. It also has nine workplace engineering and consulting centers. Unisys offers services across the globe with strong regional language capabilities, managing 19 million service desk contacts and reports automatically fixing 11,665,000 issues annually.

Intelligent workplace services: Unisys offers digital support services across devices and applications. Its digital service desk is empowered by automation solutions such as IPsoft's Amelia and the contact center vendor, NICE. It also provides partner-led augmented-reality- (AR) based support and onsite services. Its automation technology can resolve up to 26 percent of incidents, and a further 17 percent through user self-help.

High client retention: Unisys continues to be the client-focused company and has and NPS score 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

Many Unisys client engagements still use a fixed-base pricing model. Clients engaging with Unisys should request outcome-based or XLA-based pricing.

Managed Employee Experience Services

Who Should Read This

This report is relevant to the public sector organizations in the U.S. for evaluating the providers of managed employee experience services.

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

With Great Resignation continuing to hit the U.S. public sector, employee experience is everything, and enterprises are looking for managed service providers that can help them in managing employee experiences from the beginning to the end of their organizational journeys. These enterprises are looking to harness the opportunities of cloud and automation to thrive and continuously innovate.

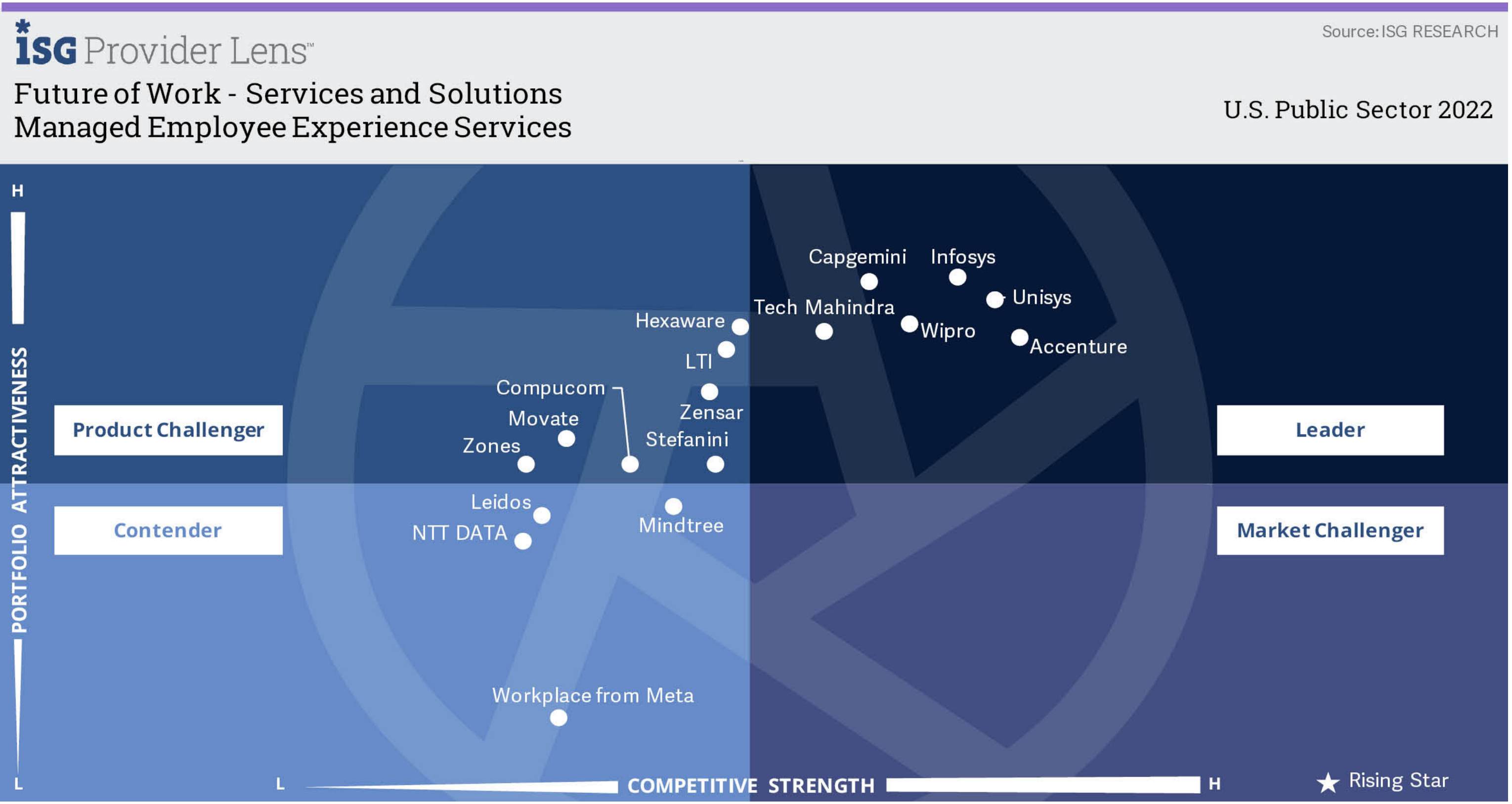
During the last few years, managing employee experiences and overall productivity remained key challenges for the U.S. public sector. Employees today want to feel more valued and achieve self-fulfillment in their work through the use of the right tools and technologies. Thus, U.S. public sector organizations are shifting toward a more holistic approach to employee experience to drive higher employee engagement and retain the best talent.

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

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.

Public sector professionals, should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select digital workplace services. The report also shows how the technical and integration capabilities of a service provider are compared in the market.

Procurement professionals, including sourcing, procurement and vendor management professionals, should read this report to develop a better understanding of the current landscape of managed employee experience service providers serving the U.S. public sector.



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

Richard Marshall and Bruce Guptill

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. Their services help align the digital and physical facets of the future workplace with the human aspect.

Eligibility Criteria

1. Ability to provide **services that directly correspond with user experience** associated with device and app access, plus team collaboration, human augmentation with digital workers such as chatbots, LoB employee experience, user productivity and digital dexterity
2. Offer a **seamless experience for remote-working employees** and part-time workers, as well as provide **work-from-home support and innovative engagement services and solutions** for the respective country or region
3. Should have at least **50 percent clients leveraging experience level agreements (XLAs), related key performance indicators (KPIs)** and at least **10 percent clients globally with XLA-based actual pricing** (risk and reward) engagement
4. Provide **managed unified communications and collaboration (UCC), analysis of user behavior** and measurement of user experience beyond workplace technology, extending smart workplace services to other business functions such as human resource outsourcing (HRO) and operations
5. Offer **workplace services that permeate businesses, including smart user and context-specific access** through virtualized workspaces
6. Offer **smart facilities services and physical on-premises services** that support capabilities such as hot desking, health assessment and customized and contextualized IoT supported workplaces
7. Offer **services to enhance employee digital dexterity** and support technology democratization initiatives such as low/no-code development

Observations

The concept of employee experience (EX) still lags behind customer experience in recognition. However, it is impossible for employees to offer a great customer experience if they have to use poor quality interfaces.

The U.S. public sector is characterized by variable levels of maturity in terms of EX, and clients must assess potential vendors in accordance with their own level of maturity. Able providers work with organizations to ensure a good match of skills.

The broader market for EX technology and services is also relatively immature, resulting in rapidly changing capabilities and expectations. All engagements should, therefore, be based on an agile approach, and be adapting as they progress. U.S. public sector clients signing new contracts should insist on agility and experience level agreements (XLAs) as the basis for an engagement.

From the 38 companies assessed for this study, 17 have qualified for this quadrant with six being Leaders.

Accenture has capabilities in analytics-based experience management and metaverse-focused workplace areas; these are its major differentiators. It also offers strong physical workspace transformation capabilities, based on analytics-derived insights.

Capgemini packages its comprehensive EX offerings in the Connected Employee Experience framework. The elements of this framework are adapted to the specific needs of a client organization through measurement and analytics.

Infosys provides a broad EX 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.

Tech Mahindra uses its flagship framework, FLEX, to offer a complete package of services for rapid and successful workplace digitalization. The TeXLA experience-level framework is used to assess client maturity and define a program to enhance employee experience.

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

Wipro offers strong EX 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.

Unisys

Leader

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

Richard Marshall and Bruce Guptill

Overview

Unisys, headquartered in Pennsylvania and operates in 24 countries. It aims at creating modern workplaces 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. Unisys has significant experience in delivering all these services to the U.S. public sector.

Strengths

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

Experience-based portfolio: Unisys focuses on measuring EUX with a specific purpose. XLA2.0 is an outcome-based service, for example, while XLA1 focuses on tracking PC stability and people happiness. XLA2.0 adds measurement of Unified Communication and Collaboration (UC&C), 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 UXM, a comprehensive EX management framework. It analyzes data from experience data lakes, derived from multiple sources.

Caution

With its strong focus on EX management, Unisys now has capabilities to interact with business functions other than enterprise IT. However, it primarily engages with IT and operations business functions in client organizations. To enable U.S. public sector organizations to derive maximum benefits out of its managed experience services, Unisys should engage with technology leaders with a transformative mindset.

Appendix

The ISG Provider Lens 2022 – Future of Work - Services and Solutions 2022 analyzes the relevant Solution vendors in the U.S. Public Sector market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology

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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 market
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. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Author

Richard M Marshall, PhD

Distinguished Analyst

Richard spotted the potential of smartphone apps very early on and founded Rapid Mobile Media, one of the first specialist firms dedicated to mobile. After 18 years of startups and growth companies, he switched tracks and joined Gartner to run its Application Design and Development team, producing many important Magic Quadrants and research notes and winning Gartner's 2015 awards for both Thought Leadership and Inquiry Excellence.

His post-Gartner career has focused on advising a broad range of emerging technology vendors. He holds a PhD in Computer Science from the University of Edinburgh.

Author

Bruce Guptill

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Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients.

Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change.

He currently leads U.S. Public Sector research for ISG's Provider Lens global research studies, and also leads IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a Masters' degree in Marketing and Finance, and a B.A. combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware, and networking technologies, as well as in mechanical and electrical engineering disciplines.

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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.

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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.

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OCTOBER 2022

REPORT: FUTURE OF WORK - SERVICES AND SOLUTIONS