



## ISG Provider Lens™ Program – Annual Plan 2017

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## ISG Provider Lens™ Program

**A**s we have progressed through the first six months of 2017, we have encountered a few obstacles and have learned a great many things about conducting large research studies and leveraging the collective knowledge of our ISG Advisor colleagues and analysts. We have therefore updated this document and are happy to have individual conversations about our plans for the remainder of 2017 and into 2018.

As previously communicated:

ISG Research continues to expand its portfolio of provider intelligence offerings, we are happy to announce the roll out of our new research offering called ISG Provider Lens™. Aiming to provide deeper analysis, the ISG Provider Lens™ studies focus on provider capabilities and positioning, aiding ISG advisors in delivering successful projects and providing directional output that influences sourcing decisions for enterprise clients.

Over the course of this year, your organization will receive invitations to participate in one or more ISG Provider Lens™ report surveys.

Please send any questions to [isglens@isg-one.com](mailto:isglens@isg-one.com).

Best Regards,

Jan Erik Aase

Director and Principal Analyst – ISG Provider Lens™

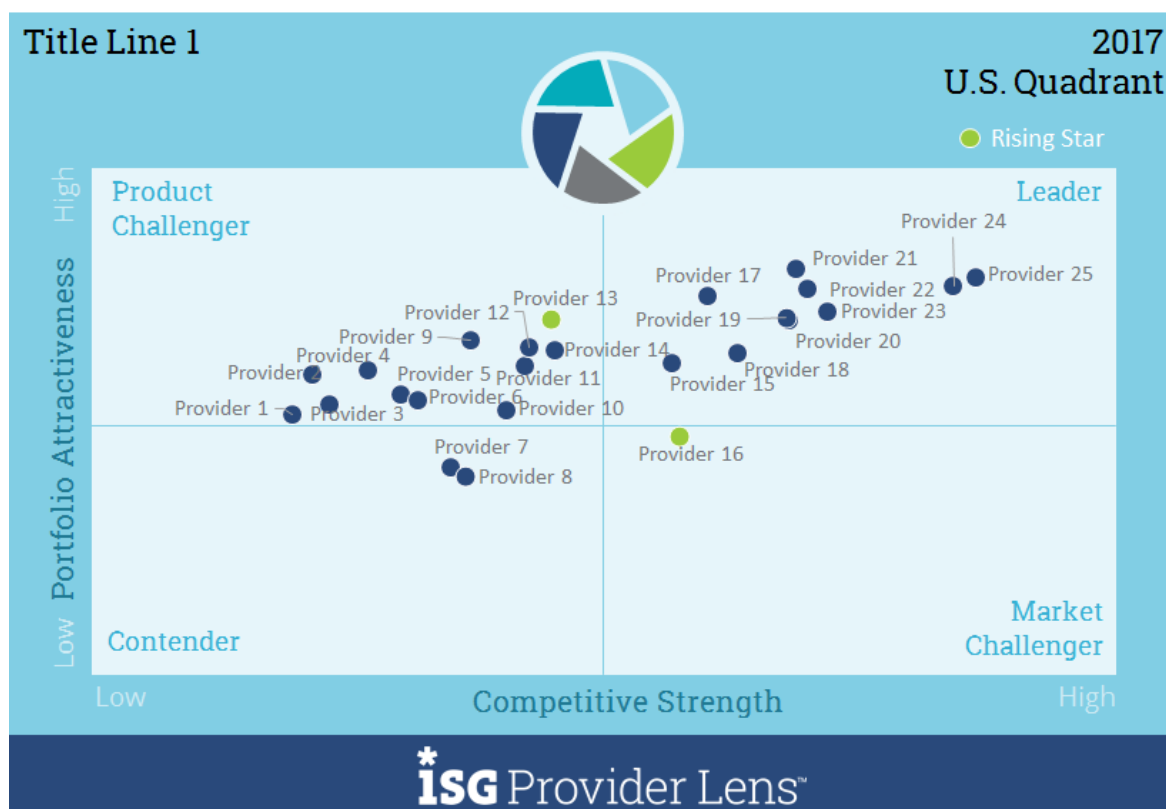
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# ISG Provider Lens™ Quadrant Research Study

ISG Provider Lens™ Quadrant Research are dedicated studies of relevant offerings related to a specific IT topics or service lines in the US market. Leading vendors and service providers are evaluated and positioned, based on a transparent methodology. These quadrant research studies provide IT vendors an informed base of data and research to enable them to compare their own offerings with those of relevant competitors and to reveal strengths and weaknesses as well as competitive differentiators and unique selling points. Our quadrant research serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. Advisors and enterprise clients also leverage information from these reports in evaluating their current vendor relationships and potential new engagements.

Vendor positioning is based on a neutral and independent research and evaluation process. Participation in the study is FREE OF CHARGE. Vendors can purchase rights for the study for marketing, press and sales purposes only AFTER the quadrant research has been completed.



Source: ISG Research 2017

**Archetype Leader**  
Digital Workplace Services

**ISG** Provider Lens™



**U.S. Quadrant Leader**  
ADM Services - Agile Application  
Development and DevOps

**ISG** Provider Lens™



**Independence**

Self-funded benchmarks; vendors many purchase right to market the results at the same time or after the report is published.

**Topical relevance**

Cloud, Social Business, Big Data, Security, IoT are covered.

**Country-specific relevance**

Allows local vendors to be included.

**Practical relevance**

The quadrants do not only account for vendors' information but also for the customer's specific experiences.

**Currency**

Through an annual research process for each quadrant.

**Comparability**

The ISG Provider Lens™ Methodology allows us to position vendors by competitive strength and portfolio attractiveness within each quadrant.

**Company-specific relevance**

For users, weightings can be adjusted for partner and solution evaluation within a project.

# ISG Provider Lens™ Archetype Study

These strategic reports support improved awareness, knowledge, and decision-making regarding IT and business services provider capabilities and positioning.

The new *ISG Provider Lens™* archetype reports provide a means to align sets of ISG-identified client requirements with known provider capabilities in such standard outsourcing areas as ADM, FAO, Workplace Services.

**Figure 1: Sample ISG Provider Lens™ Report Provider Listing**

Traditional Archetype Archetype Leaders	Staff Augmentation Focus	T&M Pricing Focus	Packaged Technology Capabilities	Custom Development Focus
CSC				
HP Enterprise				
Infosys				
KPIT				
L&T Infotech				
Mind tree				
Syntel				
UST Global				

Score 4 out of 4  
 Score 3 out of 4  
 Score 2 out of 4  
 Score 1 out of 4

**Increased Visibility**

It's a channel to increased visibility amongst ISG advisors and enterprise clients.

**Improved Reach**

ISG Advisors, who have worked on around 56,000 Outsourcing Contracts valued at approximately \$400 Billion USD during client engagements. Information is widely used during RFI/RFP engagements.

**Increased Opportunity**

Increased possibility of being shortlisted and getting invited to ISG advised deals.

**Comparability**

The ISG Provider Lens™ Methodology allows us to position vendors by competitive strength and portfolio attractiveness within each archetype.

In these reports, client objectives are organized by “archetypes” that summarize key requirements typical for each point in an enterprise maturity lifecycle. Each report identifies between four and six archetypes that represent common circumstances which we encounter in our work with clients and with services providers.

ISG Provider Lens™ Archetype reports are not prescriptive, nor are they rank-based.

They provide a means to help align buy-side needs with provider-side capabilities to reduce costs for both sides. *These reports simply present services providers’ known capabilities in the context of clients’ typical engagement needs.*

# Course of Project

## Research Phase



During the research phase, vendors can actively participate, complete the questionnaires and engage in briefing interviews with the analysts in charge of the respective project. Active participation increases related benefits for the participating company as well as for ISG, since a more comprehensive and detailed presentation of products and services can be provided accordingly. However, this does not mean that no evaluation is given if a vendor does not participate actively in the research process. In such case, ISG will base their evaluation on existing information and secondary sources, which might be incomplete. Participation within the research phase is free of charge.

## Sneak Previews



Once the research/evaluation phase has been completed, sneak previews will be provided.

Sneak previews are 30-minute telephone conferences with our analysts and account managers to explain the ISG Provider Lens™ research reports' results to the respective vendor or service provider and to present second-window rights and related opportunities related to the benchmark. A fact check will be requested from each provider identified as a leader.

## Press



Upon completion, our ISG Provider Lens™ research reports are published in the media through the following channels:

Press releases, ISG Insights™, ISG Provider Lens Briefs, ISG Research Alerts, ISG Lens360 blogs, ISG website, and social media.

Sources for XXX Provider - Example

2017 Survey	Previous Surveys	Secondary Research	ISG Databases	Advisor Inputs (On Pricing)	Collaterals (Old & New)	2017 Briefings	Previous Briefings
Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

# Schedule – What to Expect in 2017

Study/Research Topics for 2017	17-Jan	17-Feb	17-Mar	17-Apr	17-May	17-Jun	17-Jul	17-Aug	17-Sep	17-Oct	17-Nov	17-Dec	18-Jan	18-Feb	18-Mar	18 - Q2
ADM - Quadrant																
Digital Workplace Service - Archetype																
Digital Workplace Service - Quadrant																
Cloud I - Archetype																
Cloud 1 - Quadrant																
Contact Center - Archetype																
Contact Center - Quadrant																
SIAM/GRC - Archetype																
SIAM/GRC - Quadrant																
IoT - Quadrant																
UCC/Telecom - Quadrant																
SAP HANA - Quadrant																
Intelligent Automation - Archetype																
Intelligent Automation - Quadrant US																
Intelligent Automation - Quadrant Germany																
Engineering Services - Quadrant																
Data Center/Infrastructure - Archetype																
Data Center/Infrastructure - Quadrant																
Cloud II - Quadrant																
FAO Services - Archetype																
FAO Services - Quadrant																
ADM - Archetype																
ADM - Quadrant																

\*SUBJECT TO CHANGE



	Research/Writing Phase
	Sneak Preview/Publish




## Mid-Year Status






Domain	Quadrant	Archetype
ADM	✓	✓
Digital Workplace	In Progress	✓
Cloud	In Progress	In Progress
Contact Center	In Progress	In Progress
SIAM/GRC	In Progress	In Progress
IoT	In Progress	NA

**\*SUBJECT TO CHANGE**

	Analysis Phase
✓	Published

# Descriptions

<p><b>Application Development and Maintenance</b></p> 	<p><b>Application Development and Maintenance (ADM)</b> services include application consulting, designing, custom development, packaged software integration, operations, and testing.</p> <p>Development services are delivered in two ways; Application Development Services (ADS) are contracted resource pools, or Major Development Projects (MDP), which refers to larger-scale development programs that exceed the set of minor enhancement criteria.</p> <p>Maintenance and Support Services are commonly referred to as Application Maintenance Services (AMS), this refers to the support of an application for maintenance, minor enhancement services, bug fixes, patching, dot version upgrades, preventative maintenance, ad-hoc requests, and related testing.</p>
<p><b>Digital Workspace</b></p> 	<p><b>Digital Workspace</b> enable client's end users' to access their enterprise data and applications irrespective of their physical location and device being used.</p> <p>It involves client's end users' desktop and mobile device support constituting their workplace (or workspace, not confining to a physical location) involving but not limited to:-mobile device and application management, application deployment and accessibility as per roles and access policy, e-mail, peer to peer messaging, collaboration services, Level 1/2 Technical service desk support, Desktop virtualization/ desktop as a service, remote support, VIP/ Executive support, software distribution, patch updates, software upgrades and migration, IT asset analytics, automation capabilities for self-help and other services for enhancing end-user experience in a secured and cost-effective way.</p>
<p><b>Cloud I</b></p> 	<p><b>Cloud I</b> - refers to on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned, scaled up/down and released with minimal management effort. This model provides a measured chargeback mechanism and access to resources is available over multiple device types. There are 3 primary service models in the cloud:</p> <ol style="list-style-type: none"> <li>1. IaaS: The capability provided to the customer to provision processing, storage, networks, and other fundamental computing resources where the consumer is able to deploy and run arbitrary software, which can include operating systems and applications.</li> <li>2. PaaS: Infrastructure and software that is provided to the customer for the purpose of developing, testing, and deploying applications. Developers get access to programming languages, databases and other elements of an application development and test environment in a very short period.</li> <li>3. SaaS: The capability provided to the consumer is to use the provider's applications running on a cloud infrastructure. The customer does not have to undertake operational responsibility of the underlying infrastructure and the applications are accessible from various client devices usually through a web browser.</li> </ol>

<p><b>Contact Center</b></p> 	<p><b>Contact Center Outsourcing</b> is contracting out call center services to a third-party provider. Contact Center Outsourcing is primarily done to service customer queries. Contact Center Outsourcing encompasses outsourcing of processes like collections, Sales and services, product support and feedback, track shipments, bill collections, provide IVR and voice services, web services, email, SMS, and chat services, integrate social network, omni-channel services, and other services for enhancing end-user experience.</p>
<p><b>SIAM</b></p> 	<p><b>Service Integration and Management (SIAM)</b> is a collection of frameworks and best practices encompassing the people, processes &amp; tools required to manage end-to-end services through their lifecycle (service strategy; business demand &amp; interfaces; change delivery; operational management; supplier management), to deliver value to the business in a multi-supplier environment.</p>
<p><b>Data Center</b></p> 	<p><b>Datacenter Outsourcing:</b> The practice of outsourcing the responsibility for provisioning, monitoring and management of computing and storage resources to a third-party provider. The datacenter may be owned by the enterprise or by the service provider or a third part colocation provider. Monitoring services are usually provided from service provider locations and referred to as remote infrastructure management. Typical activities include Level 1,2,3 Technical Support, server monitoring, application performance monitoring, storage and database administration, hosting, colocation, disaster recovery testing and execution, defining or setting up architecture, standards, and policies, transformation projects such as virtualization, consolidation, and cloud migration services.</p>
<p><b>IoT/ IloT</b></p> 	<p><b>Industrial Internet of Things (IoT) –</b> The Industrial Internet of Things (IIoT), sometimes called Industry 4.0, focuses on the production process within what we call a smart factory, based on connected and automated machines. The machines typically have sensors that communicate with each other and also with the elements that they process, such as many types of components and resources, which are pre-produced and provisioned through a logistics chain.</p> <p>The Internet of Things, on the other hand, does not have a focus on production, but on the utilization phase of digitalized and connected devices and products, which allows the vendors to communicate with their own products while they are used by the customers and to provide new "digital" customer services such as predictive maintenance.</p>
<p><b>Cloud II</b></p> 	<p>This category of cloud services covers platforms such as Cloud Marketplaces (Self-service platforms provided by independent brokers for procurement of IaaS, PaaS and SaaS services), technologies &amp; access Services such as Cloud &amp; Data Center Security and Hybrid Cloud Management Systems and Managed SAP Hana Cloud (Service providers with cloud-based SAP HANA offerings for professional and standardized SAP HANA BW and S/4 HANA cloud platform operations as a subscription service)</p>
<p><b>Engineering Services</b></p>	<p><b>Engineering services</b> encapsulates conceptualization, design, development, integration, testing, support, maintenance, and customization services in the areas of Embedded Systems and Mechanical. It also includes Product</p>



Lifecycle Management, Plant & Manufacture Engineering viz. Design & Consulting, Prototyping, Application Engineering, Value Engineering, Test and Validation, Engineering Processes Services, Sourcing support, Maintenance, Sustenance & After Market Support, Electrical and Electronics hardware and software, Technical Publications, Detail Engineering, and Asset Information Management.

## Contacts

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# Analyst Biographies



## Jan Erik Aase

Director & Principal Analyst

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### ISG Role

Jan Erik brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 32 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 research director and principal analyst, 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 Experience

Jan Erik worked as an advisor and consultant at ISG from January 2014 until February 2016. His experience spans multiple industry verticals; from life sciences, pharma, engineering, manufacturing, financial services, retail to hospitality. In September 2015, Jan Erik took on the responsibility of research director and is now functioning full time as part of the ISG Insights Leadership team. He has accountability for a team of research analysts who conduct research studies for quadrant and archetype reports within our ISG Provider Lens team. In addition to his leadership roles, Jan Erik is a principal analyst and reports on the key topics of SIAM, Governance, Strategy Frameworks, Operating Model Design, Change Management, and Service Delivery Models.

### Career History

Jan Erik has over 28 years of experience as a client. At both American Express and Ameriprise Financial, he leads vendor management offices and managed strategic outsourcing relationships. As an industry analyst at Forrester Research Inc., he conducted and wrote research on the topics of innovation, the future of outsourcing, sourcing models, risk, governance, captive centers, testing and alternative markets. As a service provider at Infosys, he was accountable for helping clients improve the relationship and value they were getting from their outsourcing engagements. At ISG, he worked as an advisor and consultant assisting clients and service providers in their implementation of service integration and management (SIAM) and the governance processes that support those models. Now as a director and principal analyst with ISG Insights, he continues to research, analyze and write about the industry.

### Education and Credentials

Jan Erik holds Bachelor of Arts degree from the University of Utah in Organizational Communications and Masters of Business Administration from Brigham Young University. He is a Certified Outsourcing Professional (COP) with IAOP.



## **Namratha Dharshan**

Research Manager and Principal Analyst

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### **ISG Role**

At ISG, Namratha Dharshan brings in her extensive research experience to lead a program called Provider Lens that is designed to deliver research on service provider intelligence. She heads a team of analysts and is responsible for delivery of research reports for the Provider Lens Program. Additionally, she is responsible for authoring thought leadership papers and service provider intelligence report in the areas of Contact Center and Information Security. Namratha has authored several research papers on topics such as Omnichannel, PCI in Contact Centers, Cloud Contact Centers and Virtual Contact Centers.

### **ISG Experience**

Namratha has been with ISG for over two years. She has worked on several research efforts such as surveys, market analysis, provider intelligence reports, market trends and competitive analysis. In addition, she has the responsibility to coach, mentor and manage a team of analysts. She was responsible for the overall development of the service provider intelligence program and the improvement received several recognitions from service providers and internal stakeholders. Namratha is also a winner of ISG's premier recognition program The Chairman's Club Award.

### **Career History**

Namratha Dharshan has over 12 years of experience in the field of market research with most of her experience being in primary research such as surveys. She brings in considerable experience in secondary research as well. Her key skills include quantitative and qualitative research, handling analytical and survey platform tools such as SPSS, Qualtrics, kinesis. During her research career, she has worked on statistical analysis and models such as correlations, regressions, factor analysis, cluster analysis etc. She has also authored several research papers in the past on topics such as Information Security, M2M, unified communications etc. Prior to joining ISG, Ms. Dharshan has worked with various analyst firms such as Infonetics Research (Campbell, CA, USA), IDC (both India and San Mateo, CA, USA), Market Probe India, TNS India.

### **Education and Credentials**

Namratha holds her bachelor's degree in science from Bangalore University and MBA from ICFAI University.



## Mrinal Rai

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### ISG Role

Mrinal Rai is the research lead for Digital Workplace. His area of expertise is in and around Workplace services along with the trends and changes it entails both from a technology and business point of view. He covers key areas around the Workplace and End User computing domain viz., modernizing workplace, Enterprise mobility, BYOD, VDI, enterprise collaboration, social software, managed workplace services, service desk and modernizing IT architecture. He has been with ISG for last 4+ years and has a total 9 years of industry experience. Mrinal has written reports including research and provider briefing notes around topics like Digital Workplace, SIAM, IT4IT, Service desk modernization, Desktop Virtualization, etc.

### ISG Experience

Mrinal is with ISG since January 2013. He has handled the research projects around information gathering for different domains. He has also worked on custom Research projects conducted for enterprise clients around Workplace services. He has worked on various engagements with ISG advisors and has been constantly interacting with them on areas related to Digital Workplace. His key skills are quantitative and qualitative research, data analysis, report writing, market analysis, trends prediction, supplier selection and vendor comparison.

### Career History

Prior to joining ISG, Mrinal has worked with Mahindra Satyam (now Tech Mahindra) and HCL Technologies. In HCL Technologies, he worked in Marketing and Research Support for Manufacturing domain. He has worked on Analysts Relations, Marketing collateral development and RFP Responses. Prior to joining HCL, he worked with Tech Mahindra (Mahindra Satyam) as a Presales and Solution Analyst for Media and Entertainment Vertical where he worked on research around IT infrastructure services for Publishing domain. He has also worked on organizing many industry level and analysts level events for the companies he worked with.

### Education and Credentials

Mrinal holds a MBA degree in Marketing from ICFAI Business School, Hyderabad in 2008. He also holds an Engineering degree in Computer Science from Rajasthan University.





## **Pankaj Kulkarni**

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### **ISG Role**

Pankaj Kulkarni is an analyst specializing in research on IT infrastructure services. He is responsible for handling custom research assignments as well as analyst reports pertaining to his focus area. He has authored several thought leadership reports covering topics around infrastructure services outsourcing and competition in the public cloud space. He is also responsible for vendor capability assessments, providing ISG clients with an objective opinion of IT service providers as well as technological and competitive trends in this space.

### **ISG Experience**

Pankaj has worked on numerous client enquiries for custom research assignments and assisted in developing models to evaluate service provider competencies. He has been tracking the cloud services and datacenter outsourcing market and rolled out several surveys to help ISG clients with insights on trends in these areas. His thought leadership pieces provide guidance on infrastructure management challenges and best practices in areas such as managing virtual server sprawl, improving efficiency in operations using machine-learning tools and innovative practices adopted by datacenter outsourcing service providers to differentiate themselves.

### **Career History**

Prior to ISG, Pankaj was part of the digital consulting services division at Genpact and spearheaded the social media insights team. He was responsible for providing consumer insights, conducting brand tracking studies and advising clients on their social media journey. His focus has been technology firms that embark upon a digital outreach program for engaging customers and advancing their business. He has developed frameworks for measuring brand sentiment and reputation.

### **Education and Credentials**

Pankaj holds a Master's Degree in Business Administration with a specialization in Marketing from People's Education Society (PESIT), Bangalore.



## Ashish Chaturvedi

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### ISG Role

Ashish Chaturvedi has over 7 years of rich experience spanning across IT sourcing, technology and industry research. In his current role, Ashish is responsible for authoring thought leadership papers and service provider reports in areas of Application development and maintenance (ADM) and Internet of Things (IoT). He has authored several research papers in the realm of Enterprise applications, Cognitive technologies, and Big Data.

### ISG Experience

Ashish has been working with ISG since December 2013. During his tenure, Ashish has worked on multiple research engagements of varied nature such as provider and market intelligence reports, sourcing market workshops, competitive and risk analysis studies. Ashish has been continuously engaged with Service Providers through briefings, events, research days to understand their service offerings thereby, providing key insights and informed assessment of the IT outsourcing and technology market to ISG's Enterprise clients. Ashish's core skills include report writing, quantitative analysis, market analysis, secondary research, and benchmarking.

### Career History

Prior to joining ISG, Ashish was an Analyst at Infiniti Research, where he was responsible for executing multi-disciplinary custom research projects across industry verticals predominantly in the IT & Telecom, Automotive, and Industrial Manufacturing space. At Infiniti Research, he handled multiple Fortune 500 client accounts based out of Europe and the US.

### Education and Credentials

Ashish holds a MBA degree from Edith Cowan University (Australia) in Marketing and an engineering from Nagpur University (India) in Computer Technology. Ashish has certifications in Six Sigma and OOP programming language. He is a member of IDG Influencer Network (CIO.com). Ashish was named among the Top 10 innovators within ISG in 2016.

## Other Lead Analysts



### **Stanton Jones**

Director of Research  
and Principal  
Analyst,  
ISG Insights

**Expertise: Digital  
Workplace and  
Cloud**



### **Alex Bakker**

Research Director,  
ISG Insights

**Expertise: Digital  
Workplace and  
Analytics**



### **Charlie Burns**

Vice President,  
ISG Insights

**Expertise: Cloud**



### **Ron Exler**

Research Director,  
ISG Insights

**Expertise: Internet of  
Things (IoT)**



### **Jim Hurley**

Research Director,  
ISG Insights

**Expertise: Security**

# Advisors Speak



## Prashant Kelker - Partner, North Europe – DACH

“Problem statements in an enterprise are often complex and need various solutions carefully knit together to address the multiple issues. However, most reports today seek to benchmark and lost out the available offerings in the market. Putting these offerings together in the correct way is left to the imagination and experience of the buy side of the enterprise.

ISG's archetype driven approach brings Design Thinking to provider benchmarking. It seeks to address this by starting with the problem statement instead of the offering itself - most common problem statements bundled together in usage archetypes. Providers are then graded on their ability to provide end to end solutions to particular archetypes.

This has a dual advantage: Enterprise Buy sides no longer need to guess regarding how individual offerings come together; while providers can use ISG archetypes to provide end to end solutions to distinct problems and "jobs to be done"”.



## Steven Hall - Partner, Digital Advisory Services

“Global delivery has significantly expanded over the last 20 years. The ISG Provider Lens goes well beyond the Top 10 providers most organizations can name. By focusing on the entire Service Provider landscape and intentionally seeking competitive differences, ISG provider Lens provides deeper insights into business and technical domains missing from other sources.”



## Philipp Glatz - Consulting Manager, North Europe - DACH

“I have used ISG Provider Lens™ Reports – in particular, the Big Data Vendor Benchmark – to gain a market overview on Service Providers for myself, but also to be able to provide this information to my clients. My clients were very pleased with the provided insights and used this information to inform their sourcing decisions and process.”