

Future of Work - Services

A report comparing provider capabilities to help
decision-makers in sourcing services



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From the future of work perspective, 2023 will be a year of stabilization. After the disruptions and challenges posed by the pandemic and the “Great Resignation” that followed, global businesses have started adjusting to new realities and acknowledging the importance of employee experience (EX). EX transformation is now every business leader’s priority, along with adapting to changing customer demands, evolving technologies and becoming more conscientious and environmentally focused.

According to the new Future of Work technology landscape, technologies that support work from anywhere are only one of the components as shown in figure 1.

While other ISG Provider Lens research covers the topics of Connectivity and Security, this research will focus on all the other aspects of the landscape.

The Future of Work services landscape becomes wider as enterprises need assistance implementing and supporting an EX-centric technology model. As new decision makers get involved in tech investments that enable and engage with employees, clients must analyze the capabilities offered by different service providers in underlying technology enablement and maintenance, workplace tech support and overall experience transformation. As organizations take a holistic approach to EX transformation, strategy and consulting become an integral part of the approach. Hence, ISG has decided to merge this area with other services covered in the research this year. Another accompanying research study on technology providers will cover the solutions part for these services.

For the 75% that can Work in a Hybrid Manner, the **Key Components of the Future of Work** are.....

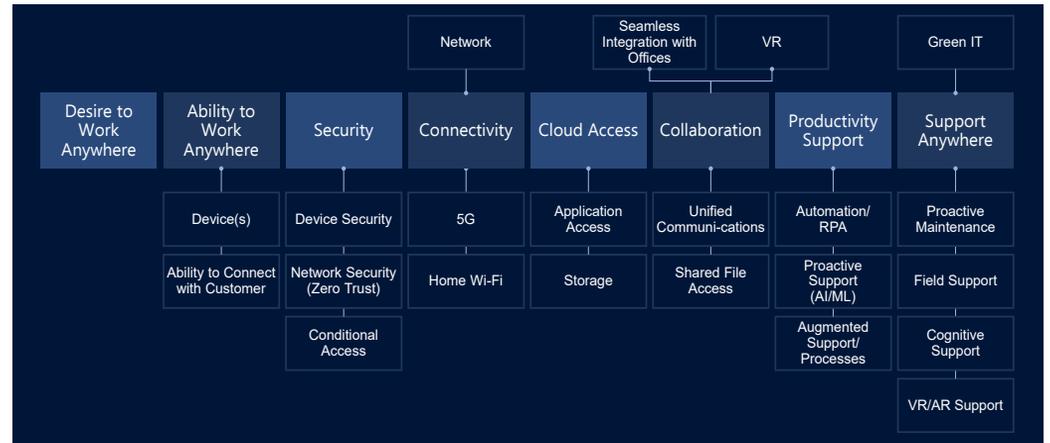
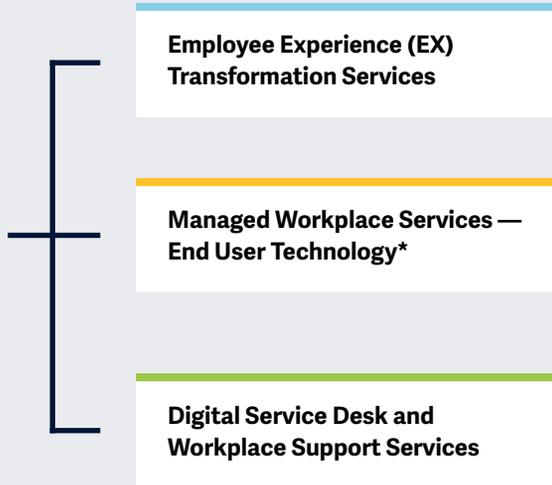


Figure 1: Key components of the Future of Work technology landscape



This study evaluates **MSPs' capabilities** around the key **Future of Work services** across different regions

Simplified Illustration Source: ISG 2023



Scope of the report

The ISG Provider Lens™ Future of Work - Services 2023 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the U.S., U.K., Germany, Switzerland, Brazil and Australia.

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.

***Quadrant to be split into two: one covering large accounts and another for local specialists as applicable in the respective regions**



Managed Workplace Services – End User Technology

Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are typically deployed, provisioned and secured by enterprise IT departments for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in the managed services space offer complete end-user computing (EUC) technology services that form the core of the digital workplace. These include device management, patch management, device and application provisioning, virtualized desktops access, device lifecycle management, support for bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and managing the entire IT infrastructure behind an EX-centric workplace design. Provisioning, managing and securing the devices remain the first basic step to enabling a digital workplace and enhancing EX.

The increasing focus on EX is transforming these services to be more focused on enhancing the experience and catering to the client's respective industry. While these services are typically associated with traditional computing devices and tablets, their scope can be extended to include some industry-specific devices such as point-of-sale devices for retail and medical equipment devices for healthcare.

Eligibility Criteria

1. Provide **support for** unified endpoint management (**UEM**) and mobility management. Also, support application provisioning, patch management and enterprise mobility management (b)
2. Provide complete **device lifecycle management services**, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling (**Device-as-a-Service**). Services should cover device sourcing and logistics and Device as a Service for security
3. Demonstrate experience in providing **remote virtual desktop services** on-premises and on the cloud (**Desktop-as-a-Service**)
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. **Strong local presence** with a majority of workplace engagements around **EUC services**



Digital Service Desk and Workplace Support Services

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. These services encompass automated proactive technical support and cloud platforms to offer 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.

Service desk and support services are typically outsourced as part of overall managed workplace services and as standalone services. Traditionally, these services depended solely on the skills of human agents who would take call support requests. The agents' performances were tracked via service level KPIs such as average call handling time. However, with increasing usage of automation, ML and contextual AI, support services have gone through a complete transformation with less dependent on voice and increasing support

from automated chatbots, knowledge articles, peer support and implementation of the latest technologies such as augmented and virtual realities. These services also include field and onsite support that require expert technicians to visit the location of the employee to fix the devices and issues. This calls for a strong local presence via own staff or through partnerships to provide the required hands and feet support. Organizations with large office campuses also deploy services such as IT vending machines and tech bars to provide in-person support.

Eligibility Criteria

1. Provide **managed service desk and workplace support services** through both human and virtual agents
2. Offer **remote and onsite field support plus in-person technical assistance**, leveraging augmented reality **and/or** virtual reality (AR/VR)
3. Ability to set up and support self-help **kiosks, tech bars, IT vending machines and DigiLockers**
4. Use **data-driven enriched analytics** to support **self-service, automatically resolve tickets** and generate actionable insights.
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
7. Have **strong local presence** with a majority of workplace engagements around support services



Employee Experience (EX) Transformation Services

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, line-of-business (LoB) representatives and chief information officers (CIOs). They offer services that associate EX with measurable business results and help align the digital and physical facets of the future workplace with the human aspects.

As global organizations realize the increasing importance of managing and enhancing EX, they partner with service providers offering EX transformation services that leverage workplace technologies. EX transformation goes beyond technology enablement and includes professional services promoting and enhancing technology adoption. Service providers providing EX transformation services engage with their clients in an outcome-focused model and follow an XLA approach.

These models leverage the analytics and data from workplace technology usage and technologies such as digital employee experience (DEX) to collect information and focus on actionable insights.

The use of collaboration and productivity solution stack highly influences EX transformation. Support services covering modern workplace and team collaboration, audio/video conferencing, unified communication collaboration (UCC) and productivity applications are key to EX transformation.

EX transformation also extends to services supporting return-to-office initiatives with a smart campus and intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. Ability to **define and visualize EX transformation** models with technology transformation, technology adoption and organizational change/behavior management services, employee engagement, productivity and associating CX with EX
2. Address **employee empathy and well-being**
3. Have considerable percent clients **leveraging XLAs** in the respective geography
4. **Support UCC, productivity stack and extend smart workplace services** to other business functions such as HRO and operations
5. 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 smart device-supported workplace
6. Have **strong local presence** and partnerships



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants of Future of Work - Services 2023:

Quadrant	U.S.	U.K.	Germany	Switzerland	Brazil	Australia
Managed Workplace Services – End User Technology	✓	✓	✓	✓	✓	✓
Digital Service Desk and Workplace Support Services	✓	✓	✓	✓	✓	✓
Employee Experience (EX) Transformation Services	✓	✓	✓	✓	✓	✓



In this report, ISG identifies and classifies the typical buyers of Future Of Work services that now include transformational capabilities. Enterprises aspiring to transform their workplace environments exhibit different characteristics per their digital maturity.

Traditionalists Archetype

These clients have weathered the world of hybrid work and believe in or need to have employees back in the office for various reasons. They have invested in limited technologies to provide hybrid work due to the nature of their business or a lack of management buy-in to the concept.

Office-First Hybrid Experimenters Archetype

These clients have adopted some form of hybrid work but require significant office presence. They typically provide employees with the basics to move from the traditional day-a-week-at-home scenario to one or two days a week at home. They have limited investment in innovative technology, resulting in an office-first approach with some form of hybrid work deployed to prevent talent loss.

Hybrid Workplace Transformers Archetype

Having realized that the “Great Resignation” was real, clients in this level have heavily invested in technology and understood that pre-pandemic physical infrastructure does not work well with the post-pandemic digital architecture. They typically revamp office space while empowering employees to serve customers wherever best suits them. This includes testing and adopting new digital processes and technologies focusing on collaboration.

ESG-Focused Remote Evangelists Archetype

Once Archetype 3 level has been achieved, we see a group of clients where a social or sustainability-focused agenda has permeated service supply and delivery. These clients have undertaken sustainability assessments and realize they can have significant environmental impacts by moving to a remote-first approach, rationalizing accommodation and using digital technology to monitor and manage their environmental scope 1-3 information for themselves and suppliers.

Immersive Experience Re-Imaginators Archetype

Our final group of clients comprises those that fully embrace the future. They have implemented XR technologies, including metaverse and augmented delivery, and use AI/ML and cognitive technologies to predict or design services. This includes using augmented support, VR collaboration and fully interactive service deliveries, such as augmented shopping or interactive virtual manufacturing.



The research phase falls in the period between March and April 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2023.

Milestones	Beginning	End
Survey Launch	March 20, 2023	
Survey Phase	March 16, 2023	April 17, 2023
Sneak Previews	July 2023	
Press Release & Publication	September 2023	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to the instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com



Contacts For This Study



Mrinal Rai
Lead Analyst,
Global, U.S.



Kevin Turner
Lead Analyst,
U.K.



Iain Fisher
Lead Analyst,
Archetype



Angelia Kho
Regional Support
Analyst



Roman Pelzel
Lead Analyst,
Germany



Craig Baty
Lead Analyst,
Australia



Sonam Chawla
Research Analyst



Gabriel Sobanski
Research Analyst



Jochen Steudle
Lead Analyst,
Switzerland



Cristiane Tarricone
Lead Analyst,
Brazil



Khyati Tomar
Research Analyst



Pooja Rani Nayak
Senior Data
Analyst



Contacts For This Study



Tishya
Selvaraj
Data Analyst



Swathi
Amin
**Global Project
Manager**



ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Jason
McAuliffe

Principal Consultant



Iain
Fisher

Director, Research



Jim
Kane

**Director, Technology
Modernization**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Accenture

Algar Tech

All for one Group

AppSphere

ASG Group

Atea

Atos

Aveniq

Bechtle

Bell Technlogix

Birlasoft

Brennan IT

Cancom

Capgemini

Capita

Coforge

Cognizant

Compucom

Computacenter

Connectis

Data#3

Datacom

Dedalus Prime

Deutsche Telekom

Digital Workplace Group

DXC Technology

ELCA

EveryWare

Fujitsu

GAVS

Getronics

HCLTech

Hexaware Technologies

HPE

ilegra

Infosys

Innofactor

Insight

IPNET

isolutions

ITC Infotech

JMC Software

Kinetic IT

Kyndryl

Leidos

Logicalis

LTIMindtree

Microland

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Multiedro

NCS

NEC

NNIT

NTT DATA

Orange Business Services

Pomeroy

Processor

Ricoh

SantoDigital



Invited Companies

Softtek
SONDA
Sopra Steria
SS&C
Stefanini
Swisscom
TCS
Tech Mahindra
TEKSystems
Telefonica
Telia
Telstra Purple
TET
Tietoevry
TIVIT

Trianz
Unisys
UST
Venha Pra Nuvem
Visolit
Vodafone
Wipro
World Wide Technologies
XMA
YASH Technologies
Zensar
Zones
Long View Systems
Genpact
CDW

SHI
Presidio
Softchoice



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 offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about iSG Research subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

iSG

iSG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, iSG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., iSG employs more than 1,600 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 isg-one.com.





MARCH, 2023



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