

Future of Work - Services

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



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Introduction

As new digital business realities emerge that are increasingly disruptive, public sector entities, especially state, local and educational (SLED) organizations, face tremendous pressure to improve the way they operate and modernize their whole environment to reduce costs and staff. Their IT needs and challenges are similar to those of complex commercial enterprises, but typically with more restrictions on acquisition, staffing, management, reporting and operations. SLED organizations need objective insights, assessments and guidance more than ever.

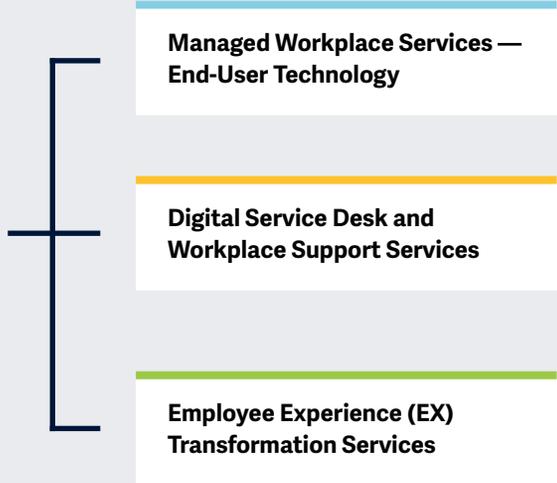
This ISG Provider Lens™ Future of Work 2023 study offers IT buyers and decision makers objective guidance on providers identified as Leaders, Rising Stars, Market Challengers, Product Challengers, and Contenders, with experience in developing, selling and supporting digital workplace services for public sector entities in the U.S. Their services include managed workplace services to enable and support end users' digital environments, digital service desk and workplace support services for workers and constituents being served, and employee experience transformation services.

ISG clients use these reports to gain market insights and understand provider intelligence that help expand their views about markets, providers and solutions. ISG U.S. public sector advisory and consulting teams use these reports to help clients understand provider types, capabilities and offerings suitable for their requirements. This study also provides competitive enablement and support for vendor and provider positioning, key relationships and go-to-market considerations.



This study assesses and evaluates **MSPs and vendors** that cover the four quadrants.

Simplified Illustration Source: ISG 2023



Scope of the report

ISG Provider Lens™ Future of Work — Services 2023 study offer 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 the U.S. Public Sector market.

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.



Managed Workplace Services – End-User Technology

Definition

Most digital work environments involve many potentially costly and complex end-user devices, software, data resources, networking and support needs across changing remote and centralized work environments. All these need to be organized and managed effectively to achieve the least costly and most sustainable digital work environments,

SLED organizations lack the ability to achieve this objective.. The number of IT staff is scarce and continues to decline. SLED's ability to acquire and support an essential mix of leading-edge digital end-user work solutions is very limited. Outsourcing IT-related tasks to managed service providers is key to affordable, efficient, and sustainable management of such devices in changing and sometimes uncertain work environments.

Providers assessed in this space offer comprehensive end-user computing (EUC) technology services that form the core of the digital workplace. This quadrant assesses providers that offer managed services

associated with end-user technologies that are typically deployed, provisioned and secured by IT departments for end users/employees. Portfolios vary, but such services typically provide and support end-user enablement through: endpoint management, application packaging, provisioning and deployment; mobility support; cloud workspaces; virtual desktop environments; device lifecycle management; and increasingly end-user identity and access management (IAM).

Eligibility Criteria

1. **Established presence and experience** in public sector entities
2. Providing **endpoint management and security** services with device policies related to bring-your own-device (BYOD), mobility and expense management
3. Providing **complete device lifecycle management** services, including support for procurement, enrollment, app provisioning, device support, and support for unified endpoint management (UEM) and mobility program management
4. Demonstrating experience in providing **remote virtual desktop services**, both on-premises and in the cloud
5. Managing **devices in multiple, widespread locations**
6. Supporting endpoint security services with technologies such as **secure access service edge (SASE)** and biometric authentication with a zero-trust approach
7. Supporting modern networking and **unified communication** as a foundation for a digital workplace



Digital Service Desk and Workplace Support Services

Definition

Supporting workers in an environment that encompasses a variety of devices, network types, and software is challenging. Even more challenging is doing so in a shifting, often unpredictable mix of centralized, remote, and mobile digital workplaces. It is also beyond the capabilities of many public sector entities – and adds significantly to these entities' IT and labor management costs.

Outsourcing such services is increasingly sensible for budget-challenged public sector organizations with limited IT resources. Outsourcing enables cost-effective worker support within and across almost any types of digital work environment. It does so while enabling and enforcing uniform usage and support policies, standardized resource access by workers, and predictable service and support levels and response timeframes. And such services are able to react and respond quickly to changes in business, organization, and technologies being used.

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 and 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. **Established presence and experience** in public sector entities
2. Ability to provide managed **service desk and workplace support** services through a hybrid workforce, including virtual agents
3. Offering remote and on-site field support plus in-person **technical assistance**, leveraging augmented reality and/or virtual reality (AR/VR)
4. Ability to set up and support **self-help** kiosks, tech bars, IT vending machines and DigiLockers
5. Enriched **data-driven analytics** to support self-service, automatically resolve tickets and generate actionable insights among users
6. Providing automated and **contextualized support** for end users, based on their roles and work
7. Ability to quantify workplace support function performance **better than traditional** service metrics



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 department leaders, agency representatives and CIOs.

They offer services that associate employee experience with measurable business results and help align the digital and physical facets of the future workplace with the human aspects.

As global organizations realize the increasing importance of managing and enhancing the employee experience, they partner with service providers that offer EX transformation services leveraging workplace technologies. EX transformation goes beyond technology enablement and includes professional services for 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.

EX transformation is highly influenced by the usage of the collaboration and productivity solution stack. Support services covering modern workplace and team collaboration, audio/video conferencing, unified communication and collaboration (UCC) and productivity applications are key to EX transformation.

EX transformation also extends to services that support return-to-office initiatives with smart campus and intelligent physical workspace while also focusing on the ESG initiatives.

Eligibility Criteria

1. **Established presence and experience** in public sector entities
2. Ability to visualize and define an EX transformation model with technology transformation, technology adoption and **organizational change management** (OCM)/behavior management services, employee engagement, productivity and associating CX with EX.
3. Ability to address **employee empathy** and well-being
4. Making clients **leverage XLAs**
5. Supporting the unified communications and collaboration (UCC) and productivity stack and extending **smart workplace services** to other business functions such as HRO and operations.
6. Offering smart facilities and physical on-premises services that **support intuitive capabilities** such as hot desking, health assessment and customized and contextualized experience with a smart device-supported workplace.
7. 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 on Future of Work - Services 2023 study:

Quadrant	U.S. Public Sector
Managed Workplace Services — End-User Technology	✓
Digital Service Desk and Workplace Support Services	✓
Employee Experience (EX) Transformation Services	✓



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



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Sonam
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Senior Research
Analyst



Tishya
Selvaraj
Data Analyst



Khyati
Tomar
Research Analyst



Swathi
Amin
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



Randy
Meek

**Director,
Public Sector Services**



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

Atos

BCG

Bell Techlogix

Capgemini

CGI

Cognizant

Compucom

Computacenter

Deloitte

Digital Workplace Group

DXC

Fujitsu

HCLTech

Hexaware

HPE

IBM

Infosys

KPMG

Kyndryl

Leidos

LTIMindtree

Matrix 42

McKinsey

Movate

Mphasis

NTT Ltd.

PwC

Stefanini

TCS

Tech Mahindra

Unisys

UST

Wipro

Workplace (Meta)

Zensar



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™

iSG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. iSG Research delivers guidance that helps businesses accelerate growth and create more value.

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.





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