

Future of Work - Solutions

A report comparing technology provider capabilities to help decision makers in evaluating vendors



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From the future of work perspective, 2023 will be the year of stabilizing. After the disruptions and challenges of the post-pandemic world and the Great Resignation that followed, global businesses started adjusting to the new realities and acknowledging the importance of employee experience. Employee experience transformation is the top agenda item of every business leader along with adapting to changing customer demand and evolving technology and becoming more conscientious and environmentally focused.

The key components of the future of work enable hybrid working for most of the global workforce. Technologies that support anywhere working are only one of the components in this landscape. Other components include access to the applications, collaboration solutions and uninterrupted technology access to ensure productivity. Proactive maintenance, support and technology that understands users' context and enhances experience are essential parts of this ecosystem.

The future of work solutions landscape consists of multiple categories of technology service providers or solution vendors. These solutions can be categorized into two main categories: EX-enabling technologies that enable and manage the underlying technology backbone and EX-enhancing technologies that directly interact with employees and impact their productivity and collaboration. These can be further segmented into two subcategories based on the requirements of large enterprises and midmarket or SMBs. The areas covered in this research are shown in the figure on the right.

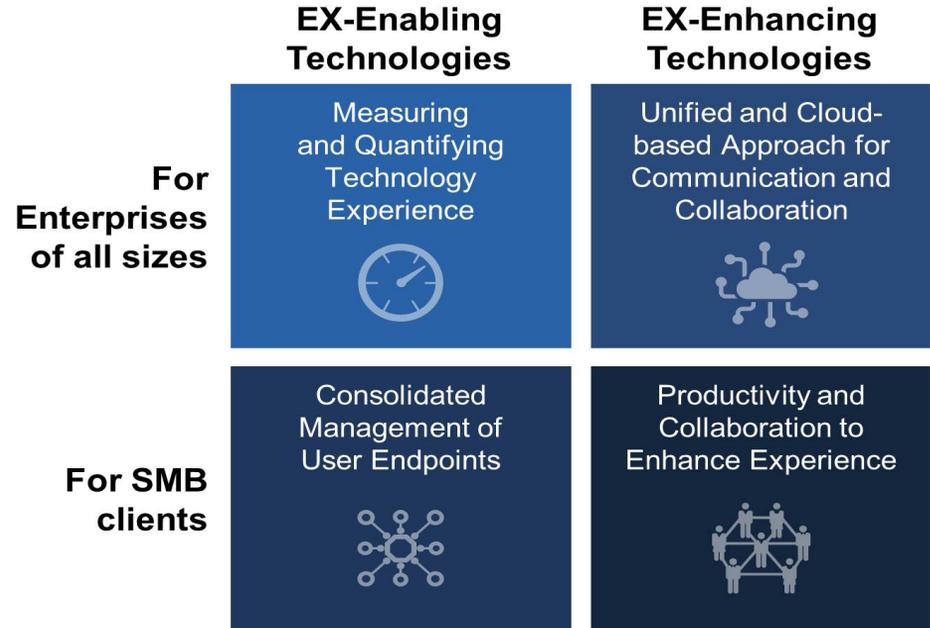


Figure 1: EX impacting technology landscape areas Another accompanying research study will cover the associated services aspect for this study.



This study evaluates technology service providers and vendors offering solutions that influence and impact the employee experience.



Simplified Illustration Source: ISG 2023

Scope of the report

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

- Transparency on the strengths and weaknesses of relevant technology providers
- A differentiated positioning of technology providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the global market

The 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 this study to evaluate their current vendor relationships and potential engagements.



Digital Employee Experience (DEX) Solutions

Definition

This quadrant assesses global technology providers that provide a DEX capability. Also known as end user experience management (EUEM) solutions, DEX solutions aim to measure, analyze, benchmark, manage and enhance the employee experience with technology. These solutions analyze information by collecting data from endpoints used by employees, such as devices, network points and applications. DEX solutions typically deploy an endpoint agent that collects this information, and IT teams can combine this with direct user feedback. Data collected through a DEX solution provides insights enabling the enterprise digital workplace or IT organization to take actions to improve the overall employee experience with the technology. These solutions also offer automated and assisted issue remediation.

DEX solutions have become popular among large enterprise clients, especially in the post-pandemic world because of an increasing number of hybrid and remote workers. As employees work from locations of their choice and use various devices and endpoints to

access their workplace, enterprise IT needs tools to ensure device security, technology performance and enhanced EX.

DEX solutions also assist enterprise IT support function and service desk to support user issues with comprehensive information in real time. This helps support agents resolve those issues with speed and efficiency. By proactively and automatically resolving issues, these solutions help clients achieve high level of employee productivity with uninterrupted technology performance.

Eligibility Criteria

1. Software solution that offers **DEX separately** or as part of an existing IT management solution
2. Solution that continuously **monitors endpoints**, such as **devices, applications, network touchpoints**, and so forth, leveraging an **endpoint agent**
3. Solution providing **telemetry-based insights** into technology estate impacting employee experience with the entire workplace technology ecosystem
4. Solution that offers **automated resolution and remediation** for issues that cannot be automatically resolved
5. Solution also **supports user self-help** to resolve issues at their end
6. **Global presence** with clients in all major geographies



Unified Endpoint Management (UEM) for SMBs

Definition

This quadrant only assesses global technology providers that provide a unified endpoint management (UEM) software product. These solutions help enterprises manage smartphones, tablets, laptops, PCs and smart devices. A UEM solution should primarily provide complete enterprise mobility management (EMM), covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM), and take a unified approach to manage devices through a single console. It should support both on-premises and cloud deployments, remotely manage and configure devices and provide application and device analytics. It should also offer mobile security, endpoint security, identity and access management and PC/desktop integration management.

The SMB clients are often understaffed compared with a large enterprise client IT department and are price sensitive. While leveraging separate tools such as MDM or enterprise mobility management (EMM) is still prevalent among SMB clients, there is

an increasing interest in adopting a single all-encompassing endpoint management solution. These clients look for tools that can easily integrate with their existing technology ecosystem. A full-blown UEM solution catering to large enterprise clients may have many additional functionalities, such as DEX, which may not be the focus area for an SMB client. These clients also look for solutions that require the minimal need for professional services and hence look for vendors that offer those capabilities as an add-on.

Eligibility Criteria

1. Ability to offer an **independent software solution for UEM** with diverse capabilities such as MDM, enterprise mobility management (EMM), MCM, mobile application management (MAM), secure user access and profile management
2. Manage devices in **diverse OS environments**
3. Provide **integration with enterprise security** and user policies through **identity access features** and **endpoint security**
4. Provide native support for modern **endpoint security** such as **endpoint detection and remediation (EDR)** and **zero-trust capabilities**
5. **Global presence with strong focus on the SMB** or the midmarket segment



Unified Communications and Collaboration as a Service

Definition

This quadrant assesses global technology providers of unified communications and collaboration as a service (UCCaaS) software solutions. UCCaaS is a cloud-based software solution that enables business communication and collaboration across multiple channels and devices. It combines voice over Internet Protocol (VoIP), enterprise messaging, online meetings (web, video and audio), team collaboration, application integration and presence on a single integrated cloud platform. It can be accessed from any device such as desktops, laptops, tablets or mobile phones. The solution enables large businesses and IT departments to cut costs and achieve greater scalability, security and reliability.

A UCCaaS software solution can also enable online communication and interaction by combining messaging, supporting content sharing and providing audio and video meetings. These solutions often follow protocols to protect information online through encryption and compliance with globally accepted security and privacy standards.

While on-premises unified communication (UC) and cloud-hosted unified communications as a service (UCaaS) are well established in the market, ISG adds a “collaboration” aspect to UCaaS. While some UCCaaS solutions offer in-house collaboration capabilities, others can support popular collaboration solutions. UCCaaS providers offer VoIP telephony either by supporting a public switch telephony network (PSTN) or “bring your own carrier (BYOC)” capability.

The UCCaaS providers offer APIs and SDKs to integrate with increasing enterprise business applications enhancing experience. In addition, many UCCaaS providers also increasingly offer contact center as a service (CCaaS) capabilities natively or in partnership.

Eligibility Criteria

1. Support private branch exchange (PBX) **telephony integration**, built-in **VoIP** and toll-based audio calling options
2. Provide **audio/videoconference controls** and the ability to invite guests to meetings
3. Provide meeting features such as **chat, remote access and desktop and application sharing**
4. Enable **integration with enterprise applications** such as CRM and marketing
5. Support **different endpoints**, from room systems to personal computers, laptops, smartphones and tablets
6. Offer **in-built collaboration features** and/or integrate with collaboration solutions such as enterprise file sync and share
7. Offer **communication platform as a service (CPaaS)** contact center solution is a plus
8. **Global presence** with client bases in all major geographies



Productivity and Collaboration Solutions for SMBs

Definition

This quadrant assesses technology provider solutions that offer productivity collaboration capabilities and enhance employee productivity for the SMB market. The software products include, but are not limited to, unified communication, productivity software, meeting/conferencing, business communications, workflow management and automation, plus team- and content-centric collaborations. These can also extend to providing groupware, knowledge management, email, conferencing, activity streams, microblogging, talent and skills management.

The requirement for SMB or the midmarket differs from large enterprise clients. These clients tend to maximize value with minimal investments. Productivity and collaboration solutions for SMBs tend to provide a single consolidated tool or integrate with a diverse set of tools to drive employee productivity and team collaboration. These clients typically do not have a large user base and want to

invest in a technology stack or single solution that drives communication, collaboration, office productivity and engagement for their employee base.

These software solutions support productivity enhancements for end users, offering them new and improved ways of communicating with peers and continuous improvements to the enterprise knowledge base. They ensure that team or project employees are connected, regardless of device or location. These solutions can also offer communication and meeting conferencing features natively included and/or can be integrated with leading UCCaaS solutions. The objective is to enhance employee engagement and business communication, which also contributes to improving user productivity and digital dexterity.

Eligibility Criteria

1. Provide a **single software solution** or **support integration** to provide/support **office productivity applications** and **team collaboration**
2. **Global presence** with a sizable client base in all major geographies
3. Must have a **high percentage of clients in SMBs** with a high brand recall value for this market segment
4. Support **communications and collaboration over chat, audio/video meeting/conferencing** with **abilities to scale** as needed
5. Provide **native solutions/ integrate or support existing productivity applications** to create documents, spreadsheets and presentations, and others
6. Provide **native capabilities or integrate with existing task/project management capabilities**, support for workflow management and employee engagement is a plus



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants of Future of Work — Solutions 2023 study:

Quadrant	Global
Digital Employee Experience (DEX) Solutions	✓
Unified Endpoint Management (UEM) for SMBs	✓
Unified Communications and Collaboration as a Service	✓
Productivity and Collaboration Solutions for SMBs	✓



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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Data Analyst



Khyati
Tomar
Research 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



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.

42Gears	Google	ManageEngine	Snow Software
8X8	GoTo	Matrix42	Sophos
Alcatel-Lucent	HappySignals	Micro Focus	SOTI
Allot	HCL Connections	Microsoft	SysTrack
Atlassian	HCL Software	Mitel	Trianz
Baramundi	Hexnode	Nexthink	Unily
BlackBerry	IBM	Nextiva	VMware
BlueJeans by Verizon	Igloo	Quest KACE	Vonage
Catchpoint	Ivanti	RingCentral	Windstream
Cisco	Jamf	Rocket.Chat	Workplace from Meta
Citrix	Jive	Salesforce	Zoho
Dialpad	Jostle	Sangoma	Zoom
Dynatrace	Kaspersky	SAP	
Fuze	Kissflow	Simplr	
Glassbox	LumApps	Smarp	



*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.





MARCH, 2023



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