

# Intelligent Automation – Services and Solutions

A research report comparing provider strengths,  
challenges and competitive differentiators



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The Intelligent Automation Services and Solutions study focuses on the capabilities of automation service providers and global system integrators (GSIs) to offer consulting, implementation and support services across enterprise portfolios. The evaluation covers the GSIs' and service providers' ability to harness automation for transforming business services, corporate functions and the IT landscape, with proprietary solutions and accelerators and using a lifecycle management approach.

Intelligent automation (IA) services are advancing into a critical maturity phase to design solutions for complex business processes and industry focus areas. IA is expanding across boundaries and silos of IT, business and functional regions to drive service providers to build proprietary platforms. These services are evolving rapidly, accommodating internal and external components and elevating the quality and capability of existing solutions.

## QUADRANTS

**Intelligent Enterprise Automation**

**Artificial Intelligence for IT Operations (AIOps)**

**Next-Gen Automation**

## AREAS COVERED

### Integrated Proprietary Solutions

**Corporate**  
(Organizational Ops)

**Business**  
(Biz Ops)

### Integrated Proprietary Solutions

Infrastructure

Application

Cloud

### Resolving Customer & Industry Challenges (Present & Future)

Change Mgmt. and Design Thinking

Skill Development and Roadmap

Bot Sustainability and Future Value Delivery

**Generative AI**  
(Strategy – capability – Partnerships – Roadmap)

## EXECUTION & VALUE

*Intelligent Automation Services and Solutions Blueprint*



The IA services market is becoming more competitive and consolidated as leading players expand their capabilities across the IA stack and offer end-to-end solutions for enterprise-wide automation. The market proliferates as service providers leverage their domain expertise, technology partnerships and delivery models to provide value-added services for IA implementation, integration, management and optimization.

Generative AI has emerged as a significant trend, leading many service providers and GSIs to invest heavily in developing and facilitating the integration of generative AI capabilities for enterprise clients. These advancements hold tremendous potential for enhancing business productivity and uncovering untapped value within organizations. Currently, service providers and GSIs are aggressively partnering with hyperscalers and specialized generative AI ISVs to train large language models (LLMs) for enterprise use.



Focus on the service provider's ability to **automate** and **transform** the **IT landscape**, **business services** and **corporate functions**.

Simplified Illustration Source: ISG 2023

**Intelligent Enterprise Automation**

**Artificial Intelligence for IT Operations (AIOps)**

**Next-Gen Automation**

**The ISG Provider Lens™ Intelligent Automation Services and Solutions 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. and Europe.

For providers, 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.



## Intelligent Enterprise Automation

### Definition

This quadrant analyzes providers for services offered across business process outsourcing and corporate functions using automation and proprietary AI platforms, solutions and frameworks, along with associated services that enable enterprises to augment their respective workforce's capabilities. These solutions and platforms can be implemented in any area of an enterprise, thus expanding the scope of automation from business services to internal corporate functions that involve repetitive and manual processes but are primarily used in finance and accounting (F&A), HR, procurement and supply chain functions. The solutions supplement automation with advanced analytics and AI technologies, such as computer vision, ML or deep learning and NLP to digitally transform an enterprise's business operations at scale. They aim to eliminate inefficiencies and facilitate reduced

costs, increased productivity, improved data accuracy and enhanced employee and customer experiences. As generative AI capabilities in the form of text, image and code generation can enhance operational efficiency and business outcomes, service providers and GSIs are avidly exploring opportunities to improve their core competencies in intelligent enterprise automation.



### Eligibility Criteria

#### 1. **Proprietary automation AI platform:**

Must offer a proprietary automation AI platform and solutions, along with packages specific to industries and functions, as well as perpetual support

#### 2. **End-to-end business and corporate function transformation:**

Capability to design, develop and deploy solutions using next-gen technologies such as automation, AI and advanced analytics

#### 3. **Integration with enterprise data and applications:**

Must support integration with different enterprise applications such as CRM and ERP systems for access to customer data, finance and existing IT infrastructure

#### 4. **Customization and personalization of solutions:**

Capable of offering out-of-the-box APIs, multi-tenancy and secure deployment of platforms

#### 5. **Automation opportunity**

assessment capabilities: Must facilitate automation with strong advisory abilities for internal buy-in and guide through business transformation journey, showcasing how advisory expertise and pre-trained models can result in positive business outcomes

#### 6. **Industry- or function-specific solutions and packages:**

Must have experience in advising, developing and deploying industry-focused and function-specific (for example, finance, procurement and HR) automation/AI proprietary solutions

#### 7. **Demonstrate generative AI capabilities:**

Must have generative AI capabilities across various enterprise use cases. Solutions must either be in the beta phase or currently leveraged with the existing corporate and business enterprise operations

#### 8. **Showcase generative AI strategy and partnerships:**

Must highlight the current strategy to use generative AI and emphasize any partnerships with hyperscalers or ISVs. Should have invested in R&D and made road maps for future applications and development

\*Note 1: Associated services include consulting, advisory, implementation and ongoing support for proprietary offerings.

\*Note 2: By 'proprietary solution,' we mean a solution built or grown by own effort, assembled of products and services, that might be open source or under commercial license but not predominantly tied to a specific vendor.

DISCLAIMER: ISG automation and other standalone intelligent automation players are not considered in this quadrant.



## Artificial Intelligence for IT Operations (AIOps)

### Definition

This quadrant analyzes IT service providers that offer proprietary AIOps solutions, platforms and frameworks that enable enterprises to monitor a distributed IT infrastructure, understand IT behavior under dynamic conditions and orchestrate workflows or automated corrections. AIOps is a solution and framework that facilitates the understanding of a company's multicloud IT workloads and analyzes data to facilitate automated operations. It also offers real-time, minimal-cost solutions that allow companies to detect issues before they cause an adverse effect on the business. Such solutions and frameworks redefine the model of an IT operation by combining data patterns and human intelligence to provide full visibility into the IT landscape of an enterprise. Generative AI applications use text, image and code generation to aid algorithms in improving anomaly detection, observability, predictive maintenance, log analysis and event correlation. These capabilities aim to maximize the performance of distributed, heterogeneous, multicloud IT workloads, reducing costs and ensuring compliance and security with higher efficiency.

### Eligibility Criteria

- 1. Proprietary AIOps platform and framework:** A custom-built solution to manage and administer IT infrastructure, application and CloudOps
- 2. Event management and exception-handling ability:** Must consolidate events from all sources (alerts and incidents) and categories and classify, evaluate and take predefined intelligent actions, including resolution, assignment and related subsequent steps
- 3. AI-driven scalable prebuilt solutions:** Provide companies with highly scalable, real-time data, along with an AI-driven prescriptive and proactive analysis to provide visibility into an IT landscape
- 4. Data visualization and projection capabilities:** Must offer data injection through multiple sources and provide automated pattern discovery and detection through the big data platform
- 5. Solution identification and recommendation:** Apply AI and ML in automated services to improve resilience and reduce the mean time to repair (MTTR)
- 6. Touchless IT operations:** Must act as a smart orchestration engine in workflow creation for a company's managed IT infrastructure, with a nearly zero- and one-touch approach
- 7. Solution customization and personalization:** Out-of-the-box APIs for multicloud and multitenancy and secure deployment of platforms
- 8. Demonstrate generative AI capabilities:** Generative AI capabilities across various enterprise use cases. The solution must either be in the beta phase or currently leveraged by the existing IT operations
- 9. Showcase generative AI strategy and partnerships:** Must highlight the current strategy of using generative AI and emphasize any partnerships with hyperscalers or ISVs, any R&D investment already made and a road map for future applications and development

\*Note 1: This quadrant encompasses solutions/platforms/ecosystems/frameworks developed by IT service providers by investing in AI, ML and big data capabilities to help companies ensure that their multicloud workload operation can be supported autonomously.

\*Note 2: By "proprietary solution," we mean a solution built in-house and includes products and services that might be open source or under commercial license but not predominantly tied to a specific vendor.

DISCLAIMER: ISG Automation and other standalone intelligent automation players are not considered in this quadrant.



## Next-Gen Automation

### Definition

The Next-Gen Automation quadrant assesses providers' approaches to building a sustainable automation road map, covering innovation, organizational adoption of automation and bot development using the latest technologies and frameworks. It also encompasses using low-code/no-code (LCNC) development platforms, tools and software. This quadrant concentrates on the human aspect in terms of emerging skills to enhance the benefits of automation, thus safeguarding resource interest. This quadrant also evaluates the service providers' ability to augment organizational change management, education and technology upgrade in sync with the new releases on platforms. Next-gen automation readiness, which is a pathway to a sustainable automation strategy, includes technology, social and business objectives to build a sustainable operating model. Providers should have a design thinking approach toward automation solution provisioning to establish

a structured path for innovation. They should also have platform certifications, functional knowledge, industry expertise and a clear road map and strategy for resource upskilling and cross-skilling via partner training programs. As generative AI, in the form of text, image and code generation, continues to evolve with emerging new use cases, providers should also have a strong viewpoint and/or emerging offerings around generative AI.

### Eligibility Criteria

- 1. Organizational change management frameworks:** A seamless transition across users and stakeholders ensures that external (clients) and internal (employees) entities are well-managed and educated on the automation activity
- 2. Demonstrate ability to innovate through various frameworks:** Ability to build future-ready solutions, leveraging the latest technologies
- 3. Implementation and integration capabilities:** Ability to drive these capabilities using the latest, innovative technologies
- 4. Frameworks, methodologies and reference architecture:** Uses these to develop bots (DevOps, CI/CD and LCNC)
- 5. Generative AI:** Ability to design and incorporate generative AI solutions across portfolios, including business and technology domains. Generative AI includes text and image generation capabilities
- 6. Showcase generative AI strategy and partnerships:** Must highlight the current strategy to use generative AI and emphasize any partnerships with hyperscalers or ISVs, any R&D investment already made and a road map for future applications and development
- 7. Security tools:** Ability to use frameworks and practices that ensure both security and governance, risk and compliance (GRC)



## Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we will assess the following three quadrants on Intelligent Automation Services and Solutions 2023.

Quadrant	U.S.	Europe
Intelligent Enterprise Automation	✓	✓
Artificial Intelligence for IT Operations (AIOps)	✓	✓
Next-Gen Automation	✓	✓



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

Milestones	Beginning	End
Survey Launch	July 3, 2023	
Survey Phase	July 3, 2023	August 18, 2023
Sneak Previews	November 2023	
Press Release & Publication	December 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 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](mailto:ISG.star@isg-one.com)



## Contacts For This Study



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**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 consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure 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 consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant 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



Wayne Butterfield

**Partner,  
ISG Automation**



Jeff Augustin

**Partner,  
ISG Automation**



Anurag Saxena

**Partner,  
ISG Automation**



## 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.**

\* Rated in previous iteration

Accenture\*

All for One Group\*

Almato\*

Arvato Systems\*

Axians\*

Birlasoft\*

CANCOM\*

Capgemini\*

Capita\*

Coforge

CGI\*

Cognizant\*

Computacenter\*

DATAGROUP\*

Datamatics\*

Deloitte\*

DXC Technology\*

Eviden (Atos)\*

Exela Technologies\*

EXL\*

EY\*

Firstsource

Fujitsu\*

GAVS\*

Genpact\*

HCLTech\*

Hexaware\*

IBM\*

Infosys\*

KPMG\*

LTIMindtree\*

Marlabs\*

Microland\*

Movate\*

Mphasis\*

NTT DATA\*

Persistent Systems\*

PwC\*

Softtek\*

Sonata Software\*

Sopra Steria\*

Sutherland\*

TCS\*

Tech Mahindra\*

Tietoenvy\*

T-Systems\*

UST\*

Visionet

Wipro\*

WNS Vuram\*

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.

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### 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](http://isg-one.com).



**JULY, 2023**

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