

# Organizational Change Management (OCM) Platforms and Tools

A research report focusing on providers' platforms and tools to address OCM challenges



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In recent years, enterprises have faced changes on a global scale due to several factors and causes. Enterprises have ramped up their OCM efforts to meet the increasing challenges resulting from these changes. These include the changes that require immediate and continuous attention, typically manual monitoring and resulting in a platform-driven approach. Enterprises increasingly focus on making these efforts more scalable through OCM platforms.

By providing a centralized and streamlined approach to change management, these platforms can be valuable tools for delivering OCM. They facilitate communication, collaboration and training, while also providing insights into how individuals and groups respond to change.

Therefore, the ISG Provider Lens™ study Organizational Change Management (OCM) Platforms and Tools 2023 takes an agnostic approach and focuses on the platforms used to manage organizational changes. The following components are delivered via various platforms:

- Methodologies and frameworks: There are several change management methodologies in the market, and it is vital that the right method and associated framework are chosen.
- OCM services: End-to-end OCM services cover the entire value chain, from strategy and vision to execution, ensuring change is sustained and embraced.
- Training services: These are delivered as part of a larger change management program or as a standalone service; training is fundamental for changing employees' behaviors and mindsets.
- Leadership development: Across the market, there are capabilities that focus on executive and leadership support, coaching and mentoring that promise top-down change, and personal growth.



# Key focus areas of OCM platforms that support organizational change, training and communication



Simplified Illustration Source: ISG 2023

## Scope of the report

The 2023 ISG Provider Lens™ study on OCM providers aims to evaluate providers and vendors across each of the categories mentioned above to offer decision makers the following:

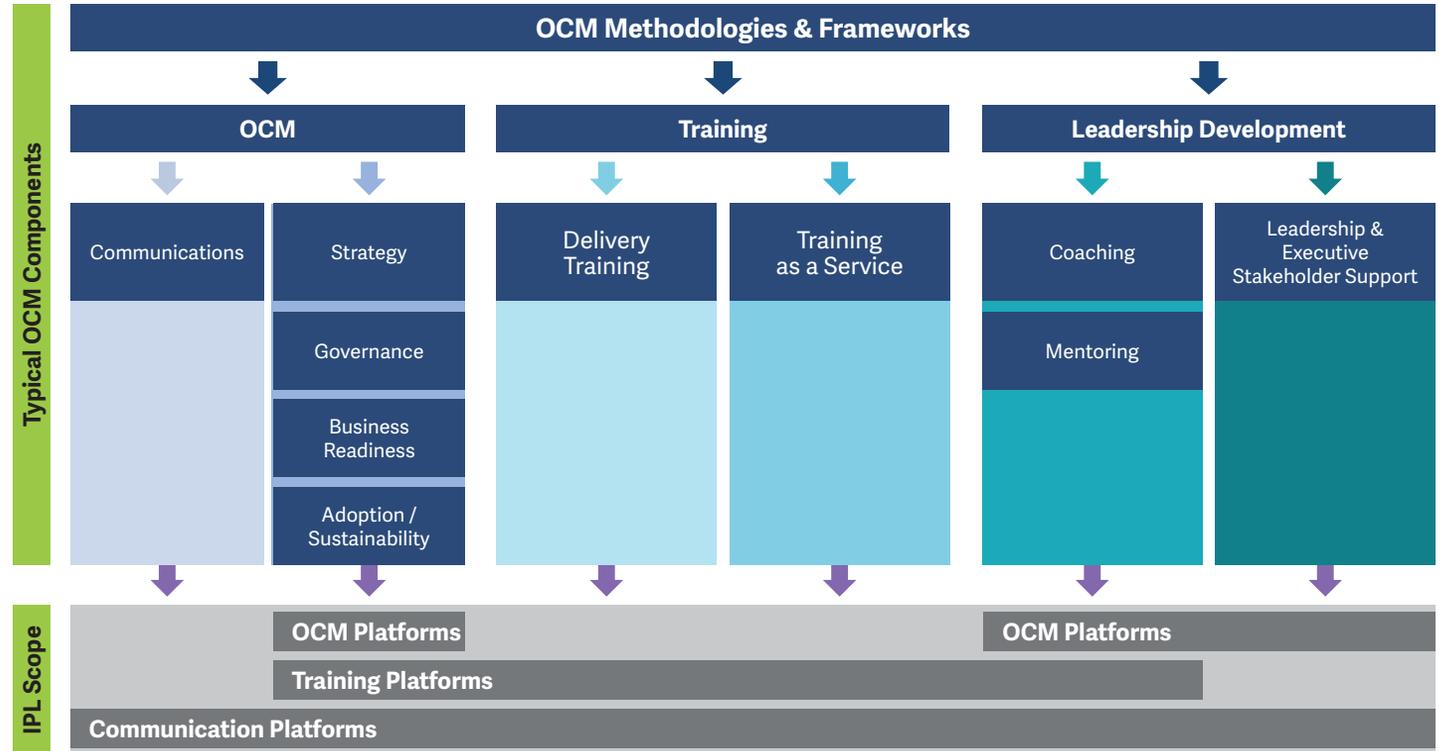
- Transparency on the strengths and weaknesses of relevant providers
- An independent view on providers' positioning in the market
- A focus on the global market

Our study serves as an important decision-making tool 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.



Graphic: Organisational Change Management (OCM)

## Organizational Change Management (OCM)



## OCM Platforms

### Definition

This quadrant evaluates vendors that offer OCM platforms. Overall, OCM platforms help enterprises manage change more effectively, reduce risk and achieve strategic goals. However, successful change management also requires strong leadership, effective communication and a culture that embraces innovation and continuous improvement. Better outcomes can be achieved with the adoption of robust technology platforms for managing enterprise-wide change. Organizational change is complex and challenging to manage without a structured approach. OCM platforms provide the tools and processes to effectively manage change, reduce the risk of failure and minimize business disruption. However, to enable effective change management and ensure continuous improvement across an enterprise, these platforms must be intuitive and user friendly, promote collaboration and stakeholder engagement, and help generate critical data and informative reports.

Designed to improve productivity and efficiency, OCM platforms provide tools to systematically manage change, increase the chances of business success and minimize the required time and resources. As change initiatives often require collaboration across teams and departments, OCM platforms provide the tools to facilitate this, while also improving stakeholder engagement and communication. With a centralized location for sharing information, ideas and feedback, team members can collaborate and manage change more effectively. This can then be reviewed, measured and reported upon to ensure that strategic goals are achieved, progress is tracked and potential roadblocks are mitigated.

### Eligibility Criteria

1. Offer platforms with proven ability to be **customized** and exhibit **flexibility** to meet challenges during the implementation of organizational change
2. Offer **an intuitive interface** ensuring **ease of use** and **effortless navigation** without extensive training
3. Ability to **facilitate collaboration** and **communication** among team members in the change management process
4. Offer robust **reporting** and **analytics capabilities**
5. **Seamlessly integrate platforms** with **business systems** and **applications**, including **project management** and **HR systems**, and scale to meet evolving enterprise needs



## Training Platforms

### Definition

This quadrant assesses the providers of OCM platforms in the area of training.

Industry-leading training platforms are easy to use, with customizable pricing and features. They should have seamless integration and industry-standard interoperability with other systems within an enterprise to ensure that data is effectively exchanged between systems. To be effective, training platforms need to be simple to use, with a user-friendly interface and UX.

An effective training platform generates robust reports and analysis to track and forecast the progress of change initiatives and identify areas for improvement, which may include elements of AI-driven personalization and adaptive learning features to enhance the effectiveness of the training programs. These features make training modules a critical component of OCM platforms, helping ensure consistency, increase adoption, reduce resistance, improve productivity and enhance employee engagement.

One of the key components of these platforms is training modules. These modules are critical as they provide employees with the knowledge and skills needed to adapt to new processes, technologies and organizational structures. By investing in training modules, enterprises can help employees adapt to change and achieve their goals more effectively.

### Eligibility Criteria

1. Offer platforms that demonstrate strong **integration capabilities and compatibility with other systems**
2. Offer platforms that feature a **user-friendly, personalized and adaptive interfaces**
3. Offer platforms with **scalability and adaptability to accommodate various organizational changes**
4. Offer platforms that demonstrate the ability to offer **customizable reporting options, including comprehensive reporting and analysis capabilities**
5. Offer platforms with versatile **content creation and customization tools** with **AI-driven personalization and adaptive learning features**
6. Ability to offer **support and community resources**
7. Demonstrate expertise in **complying with industry standards**, such as **SCORM and xAPI**
8. Provide **cost-effective pricing**, offering a reasonable **balance of features** at a **competitive cost**



## Communication Platforms

### Definition

This quadrant assesses providers that offer communication platforms that can be integrated with or are part of OCM platforms. OCM platforms often include various communication tools to help facilitate effective communication and collaboration between stakeholders across several channels and groups during enterprise-wide change. Having communications in one place, managed in an effective and controlled fashion, enables enterprises to manage messages, impacts and outcomes. Such platforms typically link customers, employees and enterprises and can integrate everything from email to instant messaging forums and social media.

Success comes from analyzing the use of communication platforms to gain insights into user sentiment, outcomes and effectiveness. Combined with AI, it can be used to forecast planned campaigns' outcomes. Modern communication platforms harness the power of technology and are technology, country and language agnostic.

They are becoming a universal way to communicate with large groups of people with different needs and concerns. In short, OCM platforms facilitate effective communication and collaboration among many diverse stakeholders on organizational change.

### Eligibility Criteria

1. Empower clients with a **competitive advantage** through **functionality and features**, including **mobile apps, single sign-on and API capabilities**
2. Enable **rapid implementation** with pilot opportunity and **quick platform/service deployment** after contract signing
3. Proven **measurement capabilities**, including **tracking communication effectiveness**, through metrics such as **open rate and click rate**
4. Demonstrate ability to offer **24/7 customer support** via email, phone and chat, catering to **region/country-specific requirements**
5. Offer **flexible cost models** with options for annual, monthly, multi-year, flat-rate or per-user pricing



## Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Organizational Change Management (OCM) Platforms and Tools 2023:

Quadrant	Global
OCM Platforms	✓
Training Platforms	✓
Communication Platforms	✓



ISG archetypes provide characteristics and needs for various environments, industries and provider types. They offer a simple framework to assess user needs and provider capabilities, reflecting current marketplace knowledge, buyer goals, resources and initiatives. Archetype characteristics evolve via advisory work, consulting and global market research programs.

### **Basic Cost Driven**

Users such as small business owners may need an OCM platform to manage the change to their business processes and systems, but they may not have large budgets to accommodate them. They may be looking for a simple, easy-to-use platform that provides basic project management tools and communication features to manage their change initiatives.

### **Multi-Stakeholder Cost Focused**

Enterprises such as non-profits may require an OCM platform to manage funding and program delivery process changes. They may be looking for a platform that provides basic project management tools, communication features and stakeholder engagement management capabilities.

### **Basic Change Adopters**

Midsized enterprises may have larger budgets and more complex needs than small business owners. They may be looking for an OCM platform that offers advanced project management and reporting tools and training and education capabilities to help manage change across the enterprise.

### **Complex Change Driven**

Large enterprises have highly complex IT infrastructures and may require an OCM platform that integrates with their existing systems. They may require a highly customizable platform with advanced analytics and reporting capabilities and robust training and support resources.

### **Specialized Complex Change Driven**

Enterprises such as government agencies may require an OCM platform to manage change to their IT systems and business processes. They might require a platform that meets strict security and compliance requirements and has advanced reporting and analytics capabilities to ensure transparency and accountability.



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

Milestones	Beginning	End
Survey Launch	May 24, 2023	
Survey Phase	May 24, 2023	June 21, 2023
Sneak Previews	October 2023	November 2023
Press Release & Publication	November 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



Iain  
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**Lead Analyst -  
Global**



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Khyati  
Tomar

**Research Analyst -  
Global**



Sonam  
Khanna

**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



Brice  
LeBlance

**Principal Consultant -  
Enterprise Change**



## 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.**

AdaptiveU from Anywhere Tools

Adobe Captivate from Adobe

Articulate 360

Assima

Atlassian

Basecamp

Beekeeper

BlueJeans

Camtasia from TechSmith

Changefirst

ChangeScout from Deloitte

Chatter from Salesforce

ClipChamp

Composica

Cornerstone OnDemand

Crowd Wisdom from Community Brands

EdApp from SafetyCulture

EnableNow from SAP

Flock

GoToMeeting from GoTo

Guru from Guru Technologies

Happeo

HipChat from Atlassian

Interact

Jive from Jive Software

Jostle

jTask Pulse from jTask

Knowbly

Loop

Mattermost

OrgMapper Influence

Poppolo

ProfPros

Quinyx

Scribe

Slack Connect from Slack/A Salesforce Company

Slack Enterprise Grid from Slack/A Salesforce Company

Slack from Slack/A Salesforce Company

Slackline from Slack/A Salesforce Company

Smartsheet

Teams from Microsoft

The Change Compass

The Change Shop

Trello from Atlassian

uPerform from ANCILE Solutions

Viima from Viima Solutions

Vmaker from Animaker

Walkme

Webex from Cisco

Whatfix

Workplace from Facebook

Workvivo from Zoom

Yammer from Microsoft

YOOBIC

Zebra Reflexis from Zebra Technologies

Zipline

Zoom



### 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](#).

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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).





**MAY, 2023**

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