

Future of Work – Services

A research guide to evaluate providers' strengths,
challenges and differentiators in the modern workplace



Introduction	3	Contacts for this Study	16
About the Study		Advisor Involvement	
Quadrants Research	4	Advisor Involvement - Program	17
Definition	5	Description	17
Quadrants by Regions	11	Advisory Team	17
ISG's Future of Work Framework	12		
Schedule	13		
Client Feedback		Invited Companies	18
Nominations	14		
Methodology & Team	15	About our Company & Research	20

State and local government and educational (SLED) organizations must ensure consistent, collaborative and seamless digital work environments to attract and retain workers. Such an environment ensures an efficient and secure delivery of services that constituents and citizens expect today and in the future.

SLED environments are unique because internal work systems and environments typically extend well into user, constituent and citizen environments, and vice-versa. UX and EX must be up to date and foster teamwork while remaining separate but integrated on the backend. Collaboration and communication are crucial and involve internal and external tools such as AR, VR and extended reality (XR). AI, especially generative AI (GenAI), can enhance efficiency in system operation, data management, integration and security. This advancement will allow employees to focus more on human-optimized tasks as roles evolve.

This improvement requires flexible and adaptable access to essential work tools and data using compliant approaches and technologies. It also needs robust reliability and security with modernized infrastructure and platforms. Solutions and services must be customized and managed for each organization and domain, using broad and sometimes vague RFI and procurement parameters. This expertise requires knowledgeable and innovative providers with proven SLED expertise. The report focuses on providers offering solutions that enable these while offering measurable, ongoing business improvement without limiting workplace adaptability.



This study evaluates provider capabilities in delivering key **future of work services** for clients in the U.S. public sector, especially SLED organizations.

Simplified Illustration Source: ISG 2025



The ISG Provider Lens™ Future of Work – Services 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. 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.



Workplace Strategy and Enablement Services

Definition

In this quadrant, ISG evaluates providers offering workplace strategy and enablement services in the U.S. public sector across industries. Providers tailor their advice and strategies according to the U.S. public sector, market direction, and organizational responsibility, offering strategic capabilities for both agencywide and government workplaces.

Providers consider modern business models and talent approaches while offering guidance, compliance and strategies collectively suited to human, digital and physical workplaces. Their services include:

- Market changes and new business models
- Digital capabilities impacting workplaces
- New talent models
- Integration of local and remote physical workplaces
- Physical asset strategy and assessments
- Workplace-driven sustainability strategies

While some providers develop strategies, minimizing potential issues requires work on procurement and CX, project and change management and effective workplace strategy delivery. Tailoring these capabilities is crucial, as regulations vary by industry.

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Provide **advisory services and new business model designs**
3. Have a vendor-neutral approach for **workplace transformation-led business delivery models**
4. Offer **advisory services for human, digital and physical workplace strategies**
5. **Adopt new talent models** that integrate diversity, equity and inclusion and eliminate modern slavery risks
6. **Integrate local and remote physical workplaces** to ensure **experience parity**
7. Deliver **asset strategy and assessments**, including property and infrastructure usage and bottom-line performance
8. Have **experience and references in delivering workplace-driven sustainability strategy**
9. Have **industrywide case studies for workplace strategy** leading to human, digital and physical workplace benefits



Collaboration and Next-gen Experience Services

Definition

In this quadrant, ISG assesses providers that enhance end-to-end CX and EX and offer managed services for workplace technology ecosystems. Providers enable business leaders, line-of-business representatives and CXOs to enhance collaboration and improve experience. They align digital workplace transformation initiatives with human needs and measurable business results.

Next-generation experience services promote technology adoption. Providers engage with clients in outcome-focused models using XLA approaches. Experience management office (XMO) capabilities gather actionable insights through data, sentiment analysis, ML and change management.

Providers enhance and support communication, collaboration and productivity stacks using AI and GenAI for organizations. They offer consulting and advisory services for HR and operations, guiding change management and technology adoption.

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Adopt an **XLA-focused delivery approach** to enhance collaborative experiences
3. **Leverage AI and GenAI** to provide value-added experience transformation services
4. **Deploy collaboration solutions** such as Teams, Cisco and Zoom and manage them by monitoring analytics from deployed hardware
5. **Support unified communication, collaboration and productivity stacks**
6. **Provide services to support the needs of other business functions**, such as human resources outsourcing (HRO) and operations
7. Provide **services that enable proper change management and technology adoption**, leveraging the latest technologies such as Copilot
8. **Support XMO and associated capabilities**
9. Provide **services to support digital dexterity, learning and skills evolution and deploy integrated AR and VR capabilities**



Managed End-user Technology Services

Definition

In this quadrant, ISG evaluates service providers that manage technology for SLED IT departments to support end users. Provisioning, managing and securing devices are the primary steps to enabling digital workplaces. Managed infrastructure services in the digital workplace include end-user enablement through devices, applications, cloud workspaces and endpoint security.

Providers offer complete end-user computing (EUC) services, including device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. They support BYOD initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX), providing devices with integrated collaboration and productivity capabilities. These services can also be tailored to specific SLED domains, such as taxation, licensing, transportation and human services.

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Provide **connected, always-on and updated end-user devices** for secure collaboration and productivity
3. Support **unified endpoint management (UEM), organizational mobility management, application provisioning and patch management**
4. Offer **complete device lifecycle management services**, such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
5. Provide **DEX solutions for automated issue resolution**
6. Demonstrate **experience in providing virtual desktop services on premises and on cloud** (desktop as a service)
7. Offer **related field services**, IMAC (Install, Move, Add and Change/Configure) and break or fix services
8. Provide **remote and onsite field support and in-person technical assistance**
9. Include **end-user technology services management** in at least 75 percent of regional contracts



Continuous Productivity Services (Including Next-gen Service Desk)

Definition

In this quadrant, ISG assesses service providers supporting the productivity needs of next-generation, human and hybrid workplaces. Today's workforce prefers the flexibility to work from anywhere and anytime, requiring a different IT operating model driven by changes in business models and market channels.

Providers must offer enhanced support capabilities, making traditional service desk offerings less appealing but still available. Next-generation services include sentiment analysis, automated DEX triage, AI-powered health monitoring and emerging technologies such as AR and VR. Providers must also leverage AI and cognitive technologies for user-facing tasks to save costs.

Providers enable measurable success through XLAs linked to SLED business outcomes rather than SLAs. They improve outcomes by leveraging automation and offering remote and self-service options, including AR self-fix, workplace support, service desk, tech bars, DigiLockers and omnichannel chat and voice support.

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Provide **deliver-anywhere autonomous workplace support**
3. Offer **fully integrated analytics and automation** for issue resolution
4. Deliver **contextualized AI support** for workplaces
5. Provide **service desk augmentation**
6. Offer **XLA-driven support** instead of SLA-driven decisions
7. **Set up and deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers
8. Provide **automated and contextualized support for end users** based on their roles and work
9. **Quantify workplace support function performance** beyond traditional service metrics
10. Have a **robust local presence** with workplace engagements around service desk services



Smart and Sustainable Workplace Services

Definition

In this quadrant, ISG assesses providers supporting smart, IoT-enabled workplaces and helping clients achieve sustainability goals. Modern workplaces blend human, digital and physical elements for remote, hybrid or in-person collaboration and productivity. Office buildings must also be integrated, inclusive and sustainable.

With changing office and organizational space utilization issues, providers must collaborate with SLED leaders to create holistic office strategies. Leveraging technology and sustainability, they should design, implement and manage spaces that enhance operational efficiency, employee well-being and environmental responsibility.

Providers must build environments with smart meeting and facility management solutions. They must also integrate experience parity capabilities, unified communications and smart collaborative workspaces. Their services must include IoT-enabled functionality for smart campuses, focusing on ESG initiatives.

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Support **smart office spaces** and provide workplace analytics, hot desking, smart building and facility management **by leveraging IoT and the latest technologies**
3. Support **asset efficiency and address energy management requirements**
4. Provide **inclusive, adaptable, responsible and integrated hybrid working solutions** and spaces
5. Provide **services to reduce carbon emissions** from workplaces
6. Assist in aligning client **strategies and metrics for ESG reporting**, particularly focusing on workspace utilization within the social and governance dimensions



AI-augmented Workforce Services

Definition

In this quadrant, ISG evaluates providers of advanced agentic solutions using AI and ML as autonomous digital agents. These agents enable proactive decision-making, contextual learning and seamless organizational interaction. They act as active participants in the workplace ecosystem, autonomously managing workflows, optimizing processes and providing personalized support to boost productivity and efficiency. These AI-driven agents reshape job roles, decision-making and organizational culture, requiring robust change management and adoption frameworks.

Providers must present U.S. public sector-specific evidence of their solution's impact, including successful deployment, measurable business outcomes, robust integration with organizations' systems and workforce empowerment through change management and adoption.

This quadrant specifically focuses on agentic solution providers, enabling organizations to evaluate them based on the measurable business value delivered by their intelligent, self-governing agents.

Eligibility Criteria

1. Intend to create or already have an established **business presence in public sector** entities, especially U.S. SLED organizations
2. Offer services with **autonomous functionalities** that comprise proactive, context-aware and continuously self-improving actions **beyond scripted routines** and **traditional automation**, differentiating them from conventional managed services or broader workplace strategies
3. Ensure **deep integration with existing digital workplace ecosystems** for seamless operations
4. Have achieved **outcome-driven impact** with **verifiable** gains
5. Support **workforce transition** by offering comprehensive **training and upskilling** to drive adoption and enable effective collaboration with digital agents
6. Adhere to **ethical governance** standards, ensuring fairness, accountability and transparency in AI deployment
7. Provide services incorporating robust **feedback mechanisms** for **continuous evaluation and adjustment**
8. Offer **U.S. public sector-specific case studies** demonstrating **scalability, relevance** and adaptability to local market demands



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following six quadrants on Future of Work – Services 2025

Quadrant	U.S. Public Sector
Workplace Strategy and Enablement Services	✓
Collaboration and Next-gen Experience Services	✓
Managed End-user Technology Services	✓
Continuous Productivity Services (Including Next-gen Service Desk)	✓
Smart and Sustainable Workplace Services	✓
AI-augmented Workforce Services	✓



ISG's Future of Work Framework

Key characteristics of the proprietary framework:

- Encapsulates what enterprises are doing across the Future of Work market and helps connect them to digital solutions
- Represents the entire value chain of supply and demand within the market
- Highlights themes of enterprise objectives in the inner tiles
- Showcases initiatives in the outer tiles
- Beneath each outer tile lies a specific set of capabilities with unique market-leading providers and solutions
- Indicates where ISG Software Research will produce a Buyers Guide in 2025 with green tiles



The research phase falls in the period between March and September 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2025.

Milestones	Beginning	End
Survey Launch	March 24, 2025	
Survey Phase	March 24, 2025	April 14, 2025
Sneak Preview	August 2025	
Press Release & Publication	October 2025	

The collection of client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) as CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 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!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Future of Work-Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

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:
star@cx.isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2025 – Future of Work – Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.



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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 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	Coforge	HPE	Mphasis
Allied Digital	Cognizant	IBM	NTT DATA
Atos	Compucom	Infosys	Persistent Systems
AVASO	Computacenter	Insight	Pomeroy
BCG	CVA Consulting	ITC Infotech	PwC
Bell Techlogix	Deloitte	KPMG	Red River
Birlasoft	Dexian	Kyndryl	Ricoh
Blackbox	Digital Workplace Group	Leidos	SHI
Brillio	DXC Technology	Lenovo	Softchoice
Capgemini	Fujitsu	Long View Systems	SoftwareONE
CDW	GAVS Technologies	LTIMindtree	Stefanini
CGI	Happiest Minds	Microland	TCS
Citrix	HCLTech	Milestone Technologies	Tech Mahindra
Cloud4C	Hexaware	Movate	TEKSystems





Invited Companies

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Unisys

UST

Wipro

WWT

Zensar Technologies

Zones



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 (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





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