ISG Provider Lens™
Digital Workplace of the Future 2019

Definition

Digital workplace enables clients' end users to access their enterprise data and applications irrespective of their physical location and the device being used. It covers the entire spectrum of services and solutions focused on end users experience management and improving their productivity. It typically includes support for devices and applications constituting the workplace including, but not limited to, mobile device and application management, application deployment and accessibility as per roles and access policy, e-mail, peer to peer messaging, unified communication, collaboration services, Level 1/2 technical service desk support, onsite field support, desktop virtualization/desktop-as-a-service, remote support, VIP/executive support, software distribution, patch updates, software upgrades/ migration, IT asset analytics, proactive monitoring, automation capabilities for self-help and other services for enhancing end-user experience in a secured and cost-effective way.

As many top decision-makers recognized, the smartphone, tablet and recently the smart devices revolution, together with apps have changed business models across practically all industries. But the lack of integration with workflows and back-end systems has always been a barrier for mobile productivity. Mobile Enterprise continues to be a major contributor to business productivity beyond devices and communication. To get the full benefit, companies need to start digitizing, mobilizing and automating entire workflows. Therefore, an increasing number of clients are now looking up to their vendors and service providers for strategic advice on implementing productivity services and solutions. At the heart of all such solutions and offerings is the end user's persona and an outlook towards enabling human-centric technology.

Due to its growing importance, ISG will evaluate the market for "Digital Workplace of the Future" in 2019 again.

The ISG Provider Lens™ study offers IT-decision makers:
- Transparency of strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus towards different markets including global, Pan America, USA, Germany, UK, Pan Europe, Brazil and Australia

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG Advisors and enterprise clients also leverage information from these reports in evaluating their current vendor relationships and potential new engagements.

Quadrant Research

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following quadrants on Digital Workplace of the Future:

Simplified presentation

Digital Workplace (Horizontals)

	Digital Workplace Services						Digital Workplace Solutions		
ALL REGIONS	Digital Workplace Consulting Services	Digital Workplace Managed Services (MNC focus)	Enterprise Managed Mobility Services (MNC focus)	Digital Workplace and Mobility Managed Services	Virtual Desktop Services	Unified Communication and Enterprise Collaboration	ALL REGIONS	Workplace as a Service (WaaS)	Unified Endpoint Management Solutions
ONLY GERMANY	Enterprise Managed Mobility Services for Mid – Market			Digital Workplace Managed Services for Mid – Market			ONLY GERMANY	Enterprise Mobility Management Solutions	

Source: ISG 2018

Simplified presentation

Digital Workplace (Verticals/functional areas)

Vertical (US region only)			Functional Areas/Role based Services (ALL REGIONS)			
Digital workplace services for HCLS	Digital workplace services for Banking	Digital Workplace services for Retail	Digital Workplace Office Worker (White Collar)	Digital Workplace for Mobile Sales (White Collar)	Digital Workplace for Production (Blue Collar)	Digital Workplace for Field Service (Blue Collar)

Source: ISG 2018

Digital Workplace Consulting

Digital workplace consulting centers on workplace optimization strategies. Modules include the support for defining a workplace strategy, designing the architecture and the roadmap and for validating the business case for transformation. ISG asks for a standardized methodology for segmenting and optimizing requirements based on personas, both for devices and for applications, to support digital and mobile workflows.

Digital Workplace Managed Services

Managed Digital Workplace Services encompass a range of services including the service desk, lifecycle management, user management, EMM services, IMAC, break-fix, hardware and software maintenance, kiosk services, troubleshooting, change management and transition management. Innovation and automation in the service desk domain based on artificial is a key area of focus. Consulting services and Desktop-as-a-Service are explicitly excluded.

Managed Mobile Enterprise Services

Managed Mobile Enterprise Services focuses on lifecycle management, user administration, troubleshooting, change management, transition management and support. The core proposition enables mobile users with single sign-on features to securely access productivity apps and data anytime and anywhere. It also includes mobile policy configuration and mobile security.

Managed Workplace and Mobility Services for Midmarket

The mid-market has fewer users, low capital and thus distinct requirements. Key ingredients for solutions include price competitive cloud-based propositions, service automation and AI related techniques to enable their end users to work from home or on the move. Service providers that combine collaborative workplace services with cognitive- and AI-enabled automation and mobility will lead this market.

Virtual Desktop Services

Cloud based virtual desktop services involve hosting clients' desktops in the providers' data centers. These could be delivered through all types of cloud infrastructure, from public via hybrid to private models. Service providers provide managed services in a user-based license model.

Unified Communication and Collaboration

Unified Communication and collaboration services are an integral part of the digitized workplace. UCC services include managed services for collaboration, enterprise telephony and communication, social media-style community building, enterprise content management, crowdsourcing and productivity suites.

Workplace as a Service (WaaS)

The Cloud workspace or WaaS is a highly standardized and productized offering that is delivered through the public cloud and provided on a "pay-as-you-go or pay-per-user basis.

Unified Endpoint Management Solutions

Unified endpoint management solution is converging to encompass smartphones, tablets laptops and PCs. Centralized solutions include:

- Integrate key ITIL processes across all physical, virtual, mobile and cloud-based workspaces (incident management, problem management, change management, request fulfillment, service asset & configuration management, service level management, service portfolio management, IT service catalog management).
- Self-provisioning with integrated approval process and internal Enterprise App Store.
- Provision of essential MDM features.

Verticals/Functional Areas

Providers that have developed specialized solutions, or customized the services, to meet vertical market demand or for productive needs of workers that perform specific functions.
The vertical industry evaluates suppliers that serve the Financial, Health and Retail markets with mobility solutions, whether for the safety and legal and regulatory compliance requirements of the vertical industry, or that have solutions specific to those markets.

Functional expertise assesses office worker mobility, applied mobility in sales functions, specialization in factory floor mobility solutions, and field service management solutions such as maintenance and support.

Archetype Research

In this study, we identify and classify the typical buyers of Digital Workplace of the Future 2019 Services of Solutions.

Digital Workplace of the Future 2019				
Ad-hoc	Transformation Oriented	Cloud-Enabled	Digital	Next-Gen Sourcing
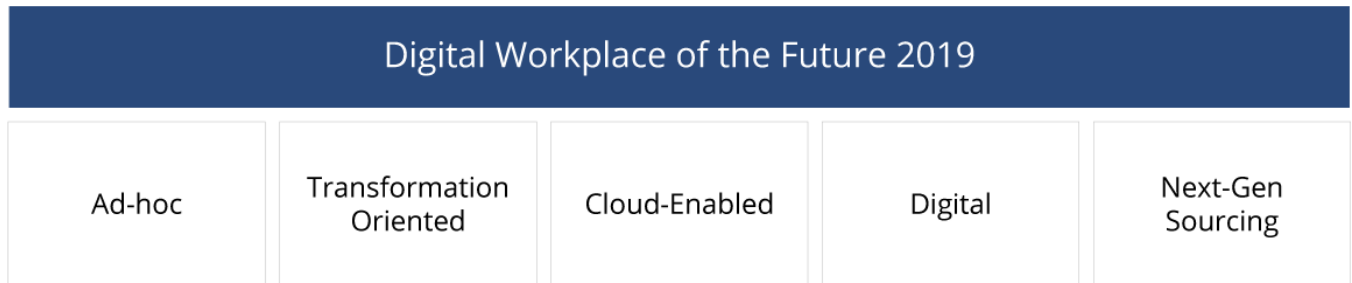
Ad-hoc client archetype

These clients usually have a legacy-heavy enterprise IT function that has multiple silos and is disjointed from the business. For these organizations, enterprise IT is usually a cost center, not a value generator. A digital workplace would represent a great new resource for such organizations, but these organizations often are not well prepared to leverage digital workplace technology.

Transformation Oriented archetype

These clients adopt digital workplace initiatives to improve their service delivery and operational efficiency. Their IT organizations may have a silo structure and be disjointed. For these clients, an efficient IT service delivery and tech support, driven by analytics and automation can act as initial steps towards digital transformation.

Cloud-Enabled archetype

These clients are more receptive towards usage of cloud-based technologies in their workplace environment. They prefer to host their applications (legacy or otherwise) over private or public cloud.

Cloud-based workplace, unified communication and workplace productivity tools will be key areas of importance for these clients.

Digital Archetype

These clients aim at developing an extremely customized personal and smart workplace for every end user with extensive usage of modern automation technologies, like artificial intelligence, robotics, etc. End users for these clients can work from anywhere, any device and anytime and can get the same seamless experience. This archetype is focused towards providing every employee an experience of having a digital personal assistant.

Next Gen Sourcing Client

These are large enterprise clients with deep experience in sourcing their workplace services. They do not have a disjointed IT operation but rather one that enables business differentiation. These clients will look for a digital workplace solution that is oriented to achieving business objectives and enabling business growth. These clients will take best of the other four archetypes and will look for a digital workplace solution which would aim at business enablement achieving business objectives.

Schedule

The research phase is between **April and May 2018** during which survey, evaluation, analysis and validation will take place. Selected results will be presented to the media in **September 2018**.

We will roll out the survey on an online platform called Qualtrics. The invites will be sent with links to fill in the responses and submit.

Milestones	Beginning
Launch	March, 2018
Survey (questionnaire)	April 16, 2018 – May 22, 2018
Sneak previews	August 06, 2018
Content provisioning	September 13, 2018
Press release	September 20, 2018

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About ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, 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; technology 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 1,300 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.