*iSG Provider Lens™

2022

Future of Work - Services and Solutions 2022

imagine your future®

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 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 1,300 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 www.isg-one.com.

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Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and future of work is hybrid. The hybrid future of work, as defined by ISG, is characterized by three kinds of workplaces (Figure 1): the **Digital Workplace,** which includes the underlying technology; **Physical Workplace** that defines the location or place of work that could be both in-office premises and remote; and the **Human Workplace** that describes the methods, processes and cultural aspects. This future of work will not consider technology in silos. As workplace technologies increasingly permeate the lines of business, clients are noting the correlation between customer experience (CX) and quantified employee experience (EX).

Figure 1: ISG Future Workplace Framework
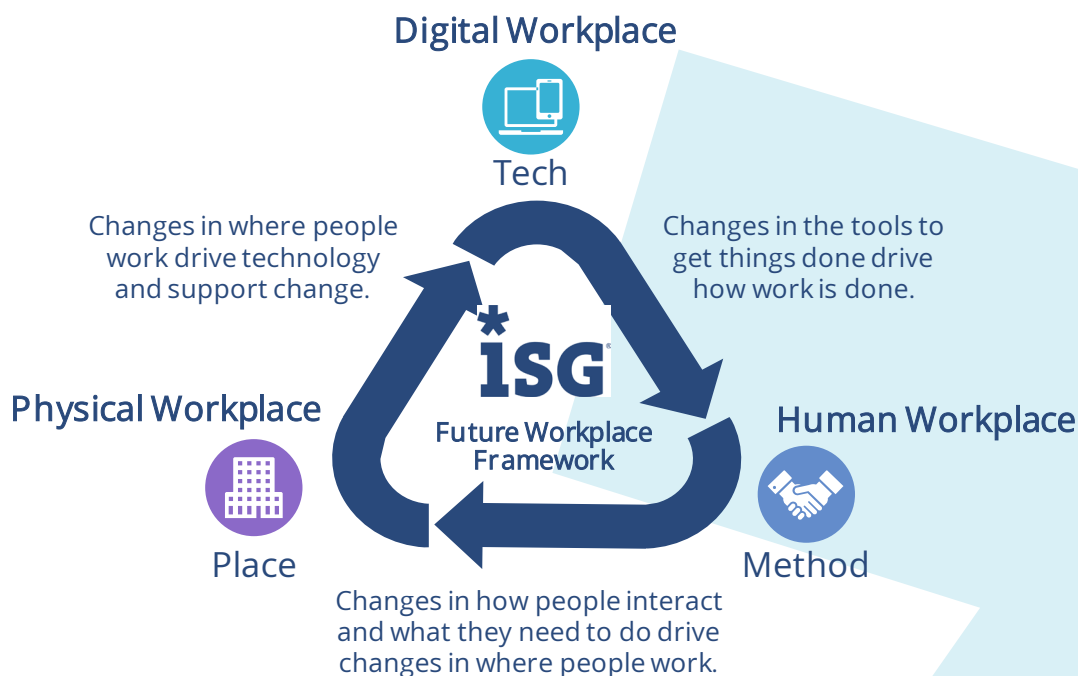
The ongoing talent crunch and the "Great Resignation," as the wave of people leaving the workforce is being called, are compelling enterprises to provide empowering, engaging, and most importantly, empathic workplace environments to retain employees. At the same time, a work environment that is engaging, technologically advanced and tightly integrated with business requirements will help attract fresh talent. A modern work environment is now neither associated with a physical location (workplace), nor with a single digital entity (workspace) — it is now omnipresent, integrated and connected with multiple "spaces" that can be accessed from any location, anytime and over any network. Upcoming and latest technology developments such as metaverse are influencing this trend in their own ways.

The modern outlook toward work and workplace will also drive and change enterprise expectations from service providers and software solution vendors. Starting at consulting, enterprises would need expert help in defining and strategizing their workplace transformation initiatives that relate to their EX initiatives with CX goals. A combination of remote and in-office workers would enhance the robust and uninterrupted use of technologies to ensure a seamless experience for end users, while ensuring high security. Clients will also be expecting more from their service desk and workplace support service providers in terms of leveraging a high level of automation and analytics to ensure employee satisfaction. Enterprises have now increasingly started to consider enhanced employee experience as a prime objective and an expectation from managed service providers, and are including requirements for it in the form of measurable experience level agreements (XLAs).

From the software solution vendors' perspective, there will be increasing focus on enabling an all-encompassing unified communication collaboration setup with special focus on employee engagement and productivity. Because devices still form the first entry point and core of employee workplace technology experience, software solutions that can manage a variety of devices uniformly and with the desired security level will also be on enterprises' radars.

The 2022 ISG Provider Lens™ Future of Work study attempts to evaluate managed service providers and vendors that cover the above-mentioned areas of services and solutions.

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers;

- A differentiated positioning of providers by segments;

- Focus on different markets, including global, U.S., U.K., Nordics, Germany, Switzerland, Australia, Singapore & Malaysia, Brazil and U.S. Public sector.

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.

Quadrant Research

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following seven quadrants on Future of Work - Services and Solutions:

Simplified illustration

Future of Work - Services and Solutions 2022			
Services	Workplace Strategy Transformation Services		
	Managed Workplace Services – End User Technology*	Digital Service Desk and Workplace Support Services*	Managed Employee Experience Services
Solutions	Unified Endpoint Management	Unified Communications and Collaboration as a Service (UCCaaS)	Employee Engagement and Productivity

* - to be segmented into SMB and large account quadrants for each country/region as applicable   Source: ISG 2022

Workplace Strategy Transformation Services

This quadrant evaluates service providers that offer transformation-oriented consulting for the future of work. These providers offer workplace strategy formulation, design the post-pandemic workplace architecture and help create roadmaps for the required transformation. These services are an essential part of digital workplace offerings and are provided independently of the associated technology and managed services. These providers also assist clients in transforming their business and operating models and enable the desired organizational changes.

Eligibility criteria

- Providers should have a vendor-neutral approach for transformation consulting and workplace assessment services. The ability to provide associated managed or implementation/integration services can be a value add but is not a requirement

- Providers should be able to define and visualize clients' future of work environment, covering areas such as hybrid working, involving remote and in-office workers, uberization of the workforce, innovative talent models, cultural adoption, employee engagement, productivity, changing customer experience (CX), associating CX with employee experience (EX), while also enhancing end-user experience

- Provider should support technology adoption and organizational change/behavior management services through its consulting portfolio

- Provider should offer solutions to address employee empathy and well-being

For inclusion in the midmarket and small and midsize business (SMB) quadrant in this space, providers should be able to offer all the above for the said market, with at least 50 percent of its clients from the midmarket/SMB segment. The value of the midmarket/SMB business and associated workplace services contracts can be different across regions and will be explicitly mentioned in the questionnaire.

Managed Workplace Services – End User Technology

This quadrant assesses service providers that offer managed services associated with end-user technologies, that are deployed, provisioned and secured typically by enterprise IT department for end users/ employees. These services include end user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility criteria

- Provide endpoint management and security services supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD), mobility and expense management

- Provide complete device lifecycle management services, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service for device security, plus support for unified endpoint management (UEM) and mobility program management

- Demonstrate experience in providing remote virtual desktop services, both on-premises and in the cloud

- Manage devices in the respective countries in the study, with at least 25 percent of the devices managed outside the provider's home region

- Support endpoint security services by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero trust approach

- Offer services to support modern network and unified communication as a foundation for a digital workplace

For the midmarket and small and midsize business (SMB) quadrant in this space, providers should offer all the above for the said market with at least 50 percent of clients from the midmarket/SMB segment. The value of the midmarket/SMB business and associated workplace services contracts deals can be different across regions and will be explicitly mentioned in the questionnaire.

Digital Service Desk and Workplace Support Services

This quadrant assesses service providers that offer modernized support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, DigiLockers, uber-style field support and automation-enabled omnichannel support for chat and voice. Their services enable work from anywhere/ anytime and include device support that encompasses automated proactive technical support and cloud platforms to provision always-on systems. The providers leverage local onsite field support and digitally transformed services through AI and other cognitive technologies for user-facing tasks and help achieve significant cost savings.

Eligibility criteria

- Ability to provide managed service desk and workplace support services through a hybrid workforce, including virtual agents

- Offer remote and onsite field support plus in-person technical assistance, leveraging augmented reality and/or virtual reality (AR/VR)

- Capability to set up and support self-help kiosks, tech-bars, IT vending machines and DigiLockers

- Data-driven enriched analytics to support self-service, automatically resolve tickets and generate actionable insights among users

- Provide automated and contextualized support for end users, based on their roles and work

- Ability to quantify workplace support function performance beyond traditional service metrics

Managed Employee Experience Services

This quadrant assesses providers that offer value-added managed services, not only for enabling the workplace technology ecosystem but also for enhancing end-user experience. These providers typically deal with business leaders and line-of-business (LoB) representatives, in addition to CIOs. They offer services that associate employee experience with measurable business results, and help align the digital and physical facets of the future workplace with the human aspects.

Eligibility criteria

- Ability to provide services that directly correspond to user experience associated with device and app access, plus team collaboration, human augmentation to a digital workforce; such as virtual agents, line of business (LoB) employee experience, user productivity and digital dexterity

- Offer a seamless experience for remote-working employees and part-time workers that include innovative engagement services/solutions for the respective country or region

- Should have at least 50 percent clients leveraging experience level agreements (XLAs) related key performance indicators (KPIs) and at least 10 percent of clients, globally, with XLA-based actual pricing (risk and reward) engagements

- Provide managed unified communications and collaboration (UCC), user behavior analysis and user experience measurement beyond workplace technology, thus extending smart workplace services to other business functions such as HRO and operations

- Offer workplace services that permeate businesses, including smart user and context-specific access through virtualized workspaces

- Offer smart facilities and physical on-premises services that support intuitive capabilities such as hot desking, health assessment and a customized and contextualized experience with smart devices-supported workplace

- Offer services to enhance employee digital dexterity and support technology democratization initiatives such as low-code/no code development

Unified Endpoint Management (UEM)

This quadrant only assesses global software solution vendors that provide a unified endpoint management (UEM) software product. These solutions help enterprises manage smartphones, tablets, laptops, PCs and smart devices. An UEM solution should primarily provide full enterprise mobility management (EMM), covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM), and take a unified approach to managing 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.

Eligibility criteria

- Ability to offer an independent software solution for UEM that can be purchased separately

- Offer software solution to provide MDM, EMM, MCM, MAM, secure user access and profile management

- Offer solution to integrate with systems managers such as Microsoft Endpoint Configuration Manager to manage devices from different platforms

- Manage devices in diverse OS environment such as Windows 10, Android, iOS, macOS, Chrome OS and Samsung Knox

- Ability to measure end-user experience through the use of analytics to determine device performance, app usage and user behavior, and to proactively monitor issues and threats

- Provide integration with enterprise security and user policies through identity access features and endpoint security

- Provide native support for modern endpoint security such as endpoint detection and remediation (EDR) and zero trust capabilities

- Have a global presence and at least 20 percent of its user base in each of these three regions: U.S.; U.K. and Europe; and Oceania (Australia, New Zealand) and/or rest of Asia Pacific

*This quadrant will be covered at a global level. However, data will be collected for the purpose of evaluating major regions for the ISG Candidate Provider Qualification (CPQ) process.

Unified Communications and Collaboration as a Service (UCCaaS)

This quadrant assesses software solution vendors of unified communication and collaboration as a service (UCCaaS) software products. UCCaaS is a cloud-based software product that enables business communication and collaboration across multiple channels and devices. It combines voice, telephony, 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 businesses and IT departments to cut costs and achieve greater scalability, security and reliability.

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

Eligibility criteria

- Ability to provide cloud-based audio and video meeting and conferencing; solutions may also have an on-premises deployment option

- Provide native softphone capabilities or private branch exchange (PBX) telephony integration, built-in voice over Internet Protocol (VoIP) and toll-based audio calling options

- Provide videoconference host access to moderator controls, ability to invite guests to meetings and integrate with conference room systems

- Provide meeting features such as chat, remote access and desktop and application sharing

- Enable integration with enterprise applications such as customer relationship management (CRM) and marketing, IT and collaboration apps

- Provide meeting recording, replay and sharing capabilities for future reference and integrate drawing tools with virtual whiteboard capabilities

- Support different endpoints, from room systems to personal computers, laptops, smartphones and tablets

- Offer in-built collaboration features and/or enable integration with supporting collaboration solutions such as enterprise file sync and share

- Offering communication platform as a service (CPaaS), network services and/or contact center solution is a plus

- Global presence and at least 20 percent of its user base in each of the three major regions: U.S.; U.K and Europe; and Oceania (Australia, New Zealand) and/or the rest of Asia Pacific

* This quadrant will be covered at a global level. However, data will be collected for the purpose of evaluating major regions for the ISG CPQ process.

Employee Engagement and Productivity

This quadrant assesses software solutions that enhance user productivity and employee engagement. The software products include, but are not limited to, enterprise social networks, next-generation intranet solutions, business communications, workflow management and automation plus team- and content-centric collaborations. They can also extend to providing groupware, knowledge management, email, conferencing, activity streams, microblogging and talent and skills management. These software solutions support productivity enhancements for end users, offering them new and improved ways of communicating with peers, along with continuous enhancements to the enterprise knowledge base. They ensure that employees in a team or a project are connected, irrespective of device used or location. The solutions can also offer communication and meeting conferencing features natively included and/or can 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. These cloud-based software solutions can be used by both midsize and large enterprises.

Eligibility criteria

- Ability to reduce email usage and/or complement intranet usage

- Demonstrate a focus on enterprise-wide information sharing and team/content-based collaboration

- Provide technology differentiation with a focus on measurable productivity enhancements

- Cover elements in a converged service stack of enterprise social collaboration offerings such as file sharing collaboration, instant messaging, news feed, enterprise application integrations, reporting and analytics

- Offer standard features such as blog support, calendars, discussion forums, document management, employee directory, employee engagement, wiki support and workflow customization and approval

- Offer a solution for enhanced employee engagement and effective business communication

- Offer a solution that often serves as the first entry point for the entire digital workspace

- Solution to improve digital dexterity and support technology democratization efforts such as low-code/no code development

- Has a global presence and at least 20 percent of its user base in each of these three regions: U.S.; U.K and Europe; and Oceania (Australia, New Zealand) and/or the rest of Asia Pacific

* This quadrant will be covered at a global level. However, data will be collected for the purpose of evaluating major regions for the ISG CPQ process.

Quadrants by Region

Quadrants	Global	U.S.	U.K.	Nordics	Germany	Switzerland	Brazil	Australia	Singapore & Malaysia	U.S. Public Sector
Workplace Strategy Transformation Services		√	√	√	√	√	√	√	√	√
Managed Workplace Services – End User Technology*		√	√	√	√	√	√	√	√	√
Digital Service Desk and Workplace Support Services*		√	√	√	√	√	√	√	√	√
Managed Employee Experience Services		√	√	√	√		√	√	√	√
Unified Endpoint Management	√									
Unified Communications and Collaboration as a Service	√									
Employee Engagement and Productivity	√									

* To be segmented into midsize and large account quadrants for each country/region as applicable

Archetype Report

In this report, ISG identifies and classifies the typical buyers of future of work services that now include transformational capabilities. Enterprises that are aspiring to transform their workplace environments exhibit different characteristics in accordance with their digital maturity. ISG will classify enterprise behavior into different archetypes around workplace transformation based on workplace environment complexity and level of enterprise IT integration with businesses.

An example of this classification is illustrated below:

Fire-fighting	Recover and Resolve	Competitive & Resilient	The New Future

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Workplace Transformers
- End-to-end understanding of the business
- Focused on resiliency rather than efficiency
- Making wholesale change to physical, digital and human workplaces
- Has transformation front of mind
- Property is smart enabled
- Real-time hoteling and facilities management
- Biopassport integration and tracking of employees
- Virtualisation of community facilities
- No difference between home office and "the office"

4

Human Workplace Re-Imaginators
- Focused on an employee centric model
- Has a clear understanding of what employees need
- Has deployed technology to supports people rather than for the sake of it
- Enables full global collaboration
- Provides support to enable people to work where, when and how they want

3

Experience Evangelists
- Realise that the employee is as important as the end customer
- Join up delivery from end customer right through to suppliers
- Measure CX/EX constantly
- Provide technology which enhances experience not just for the sake of it
- Knows the cost of failure

2

Business Model Adaptors
- Data driven approach
- Clear view of business and how customers interact with them
- Beginning to transition into the CX world
- Looking to get competitive edge in market

1

Cost & Change Challengers
- Simple change programmes
- Focused on cost recovery
- Process simplification to reduce costs

Schedule

The research phase falls in the period between **April and May 2022,** during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **September 2022.**

Milestones	Beginning	End
Launch	April 25, 2022	
Survey Phase	April 25, 2022	May 20, 2022
Sneak Preview	July 2022	
Press Release	September 2022	

Please refer to the link to view/download the ISG Provider Lens™ 2022 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!

ISG Star of Excellence ™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the "Voice of the Customer" concept. 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 ISG Provider Lens (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 (Nominate for providers) 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@isg-one.com

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 work identified by the 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 to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of 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.

Partial list of companies being invited for the survey

Are you on the list, or do you see your company as relevant provider that is missing from the list?
Then feel free to contact us to ensure your active participation in the research phase.

42Gears	Brennan IT	Deutsche Telekom
Accenture	Cancom	Devoteam Alegri
ActioNet	Capgemini	Digital Workplace Group
adesso Schweiz AG	Capita	DXC
All for One	Capterra	EBC Group
ALSO Schweiz AG	CGI	ELCA
Appsphere AG	Citrix	Entelgy
Aproda Digital Workplace	Claranet	Evolvous
Arvato	ClearBox Consulting	EY
ASG	CMTech	Fujitsu
Atea	Coforge	GAVS
Atos	Cognizant	General Dynamics
Avanade Schweiz	Compasso UOL	Gentrop
Aveniq	Compucom	Getronics
Axians	Computacenter	GIS
Baramundi	Connectis	Globant
Baymetrics	CSSCorp	Google
BCG	CTC	Happiest Minds
Bechtle	Data#3	HCL
Bell Techlogix	Datacom	Hexaware
Birlasoft	Dedalus	HOM
BlackBerry	Dell	HPE
BMC	Deloitte	HSO

Partial list of companies being invited for the survey

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Then feel free to contact us to ensure your active participation in the research phase.

IBM	LTI	Pomeroy
ilegra	ManageEngine	Processor
Infogain	Materna	PwC
Infosys	Matrix42	QI Network
innobit ag	McKinsey	Qintess
Innofactor	Meta	Quality S.A.
Insight	Micro Focus	Quest KACE
Insight Technology Solutions GmbH	Microland	Ratiodata
	Microsoft	Red Thread
Intelogy	Mindtree	Ricoh
IPNet	Mphasis	SAIC
Iron Service Global	MTF	SantoDigital
isolutions AG	Multiedro	Snow Software
ITC Infotech	Netexperts	Softline
ITConcepts Schweiz	Nexa Tecn	Soleil IT
Ivanti	nexplore	Solo Network
Jamf	Niteo	Somos Nuvem
Kaspersky	NNIT	SONDA
Kinetic IT	novaCapta GmbH	Sophos
KPMG	NTT DATA	Sopra Steria
Kyndryl	Orange Business Services	SOTI
Leidos	Orbit	SS&C
Littlefish	Penso Tecn	Stefanini
Logicalis		

Partial list of companies being invited for the survey

Are you on the list, or do you see your company as relevant provider that is missing from the list?
Then feel free to contact us to ensure your active participation in the research phase.

Swiss Cloud Workplace	Trivadis
Swisscom	Unisys
TCS	UST
Tech Mahindra	Venha Pra Nuvem
Tecnocomp	Vexia
TEKSystems	Visolit
Telefonica	VMware
Telia	Vodafone
Telstra Purple	Wipro
TET	WNDYR
TietoEVRY	XMA
TIVIT	YASH Technologies
TPS IT	Zensar
Trianz	

Contacts for this study

Mrinal Rai
Lead Analyst, Global, U.S., Archetype

Elaine Barth
Lead Analyst - Brazil

Kevin Turner
Lead Analyst, U.K. and Nordics

Richard Marshall
Lead Analyst – U.S. Public Sector

Jochen Steudle
Lead Analyst, Switzerland

Craig Baty
Lead Analyst – Australia, Singapore & Malaysia

Roman Pelzel
Lead Analyst, Germany

Phil Harpur
Co-Lead Analyst – Australia, Singapore & Malaysia

Do you need any further information?

If you have any questions, please contact us at isglens@isg-one.com.

Contacts for this study

Sonam Chawla
Research Analyst

Angie Kho
Research Analyst

Keanu Ghrab
Research Analyst

Ridam Bhattacharjee
Project Manager

Do you need any further information?

If you have any questions, please contact us at isglens@isg-one.com.

ISG Provider Lens QCRT Program Description

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 & 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 providers inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study

Jim Kane
Director

Deepraj Emmanuel
Director

Jason McAauliffe
Principal Consultant

Do you need any further information?

If you have any questions, please contact us at isglens@isg-one.com.