ISG Provider Lens™

2022

Intelligent Automation – 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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Introduction

Intelligent automation is now a mainstream strategy, leading to digital business transformation. Process modernization and workflow optimization are the primary objectives of automation initiatives. With the aim of doing away with siloes, enterprises are focusing on scaling capabilities across technology, business and corporate portfolios. Automation is now the customer- and employee-focused business strategy, helping enterprises to enhance the ability to process and deliver outcomes. Emerging technology service teams and functions are gaining prominence to drive productivity and efficiency. These teams are building deep connections with industry verticals and service lines to support business processes and workflows.

Business leaders and emerging technology heads face the dilemma of choosing the perfect service partner to support and drive intelligent automation initiatives. This involves faculties such as data analytics, machine learning techniques, business process acumen and the ability to innovate on solutions to build sustainable digital assets.

The Intelligent Automation Services study focuses on the capabilities of automation service providers and global system integrators (GSIs) offering consulting, implementation and support capabilities across enterprise portfolios. The evaluation covers the GSI/service provider's ability to harness automation to transform business services, corporate functions, and the IT landscape, with proprietary solutions and accelerators and by utilizing the lifecycle management approach.

Automation platform vendors are expanding their portfolios and enhancing product performance to deliver the desired outcomes for enterprises. Agile application design and solutions on cloud platforms is the latest area of interest for OEMs, which, in turn, is driving GSIs and service providers to simultaneously develop the competency to complement the new capabilities by aligning resources and the workforce accordingly.

Experience and expertise in assembling automation centers of excellence for incumbent clients and operationalizing control objectives is noted as a rising trend. These centers are the nucleus for controlling and guiding strategic initiatives, including developing innovative and futuristic solutions, with a focus on sustainability for seamless operations. Organizational change management and GRC compliance by function and domain are gaining traction at scale. The prioritization of environmental, social and governance issues (ESG) is leading to the development of focused solutions. GSIs are investing in building proprietary platforms that connect and converge automation and emerging technologies components, solutions and products to design a custom business solution for enterprise clients. It will be interesting to observe the emerging technology services market and its growth trajectory in 2022.

This study on intelligent automation services is aimed at understanding enterprise requirements and provider capabilities in meeting these demands.

The ISG Provider Lens™ study offers IT and business decision makers:

- A differentiated positioning of service providers based on competitive strengths and portfolio attractiveness

- A perspective on different markets, including the U.S., U.K., Nordics, Germany and Brazil

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 three quadrants on intelligent automation services.

Intelligent Automation - Services and Solutions 2022

Intelligent Enterprise Automation

Artificial Intelligence for IT Operations (AIOps)

Next-Gen Automation
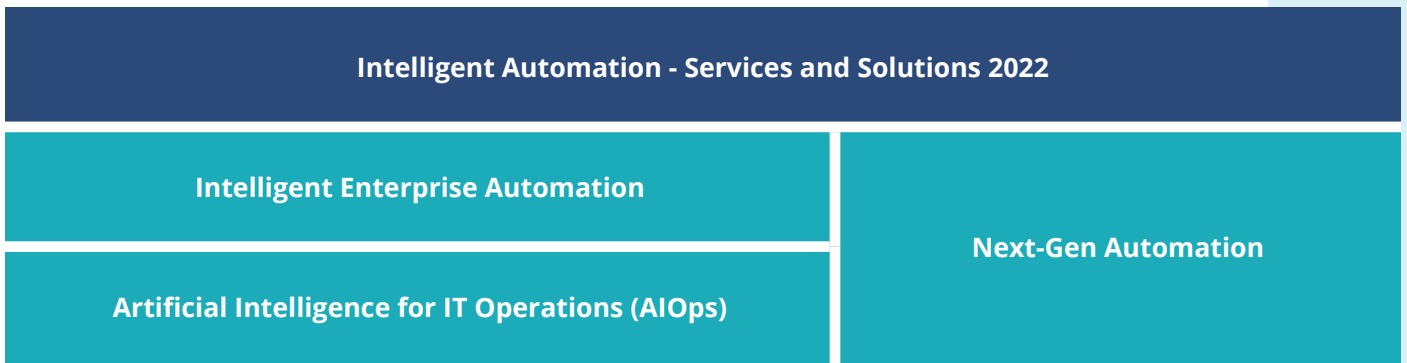
Source: ISG 2022

Intelligent Enterprise Automation

This quadrant analyzes providers for services offered across business process outsourcing and corporate functions, with the use of automation and proprietary AI platforms, solutions and frameworks, along with associated services to enable enterprises to augment the capabilities of their respective workforce. These can be implemented on 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 compute vision, machine or deep learning and natural language processing (NLP) to digitally transform the business operations of an enterprise, at scale. They are aimed at eliminating inefficiencies and paving the way for reduced cost, high productivity, improved data accuracy and enhanced employee and customer experience.

Eligibility criteria:

- **Proprietary automation AI platform:** Must offer a proprietary automation AI platform and solutions, alongside packages specific to industries and functions and then provide ongoing support

- **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

- **Data visualization and projection capabilities:** Must have the competency to support integration with various enterprise applications, for example, CRM systems for customer data or ERP systems for various portfolios, industries and functions (finance and existing IT infrastructure)

- **Customization and personalization of solutions:** Capable of offering out-of-the-box APIs, multi-tenancy and secure deployment of platform

- **Breadth and depth of industry verticals and functions:** Must have business process knowledge, service lines and corporate functions to build and deliver industry focused solution packages

- **Automation opportunity assessment capabilities:** Must have the capability to facilitate automation with strong business advisory abilities to support enterprises in internal buy-in and guide them through a business process transformation journey. This demonstrates how advisory expertise (business case, blueprints and KPIs) and assets (pre-trained models and connectors) translate to a positive business outcome

- **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

Note1: Associated services include consulting, advisory, implementation and ongoing support for proprietary offerings.

Note2: By "proprietary solution" we mean, a solution built or grown under 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)

This quadrant analyzes IT service providers that offer proprietary AIOps solutions, platforms and frameworks, enabling enterprises to monitor a distributed IT infrastructure, allowing them to understand IT behavior under dynamic conditions and orchestrate workflows for automated corrections. AIOps is a solution and a framework that facilitates an understanding of a company's multicloud IT workload and analyzes data to facilitate automated operations. AIOps also offer real-time, minimal cost solutions that allow companies to detect issues before they can have an adverse effect on 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. These are aimed at maximizing the performance of distributed, heterogeneous, multicloud IT workloads, reducing costs and ensuring compliance and security.

Eligibility criteria:

- **Proprietary AIOps platform and framework:** A custom-built solution to manage and administer IT infrastructure, application and cloud ops

- **Event management and exception handling ability:** The solution must have the ability to consolidate events from all sources (alerts, incidents) and categories, and classify, evaluate and take predefined intelligent actions, including resolution, assignment and related consequent steps.

- **AI-driven scalable prebuilt solutions:** Ability to provide companies with highly scalable, real-time data, along with an AI-driven prescriptive and proactive analysis to provide visibility into an IT landscape

- **Data visualization and projection capabilities:** Ability to offer data injection through multiple sources, and provide automated pattern discovery and detection through the big data platform

- **Solution identification and recommendation:** Ability to apply AI and machine learning in automated services to improve resilience and reduce mean time to repair (MTTR)

- **Touchless IT operations:** Ability to act as a smart orchestration engine in workflow creation for a managed company's IT infrastructure, with a nearly zero- and one-touch approach

- **Customization and personalization of solutions:** Out-of-the box APIs for multicloud and multi-tenancy, and secure deployment of platform

Note1*: This quadrant encompasses solutions/platforms/ecosystem/frameworks developed by IT service providers by investing in AI, machine learning and big data capabilities to help companies ensure that their multicloud workload operation can be supported in autonomous way.

Note2*: 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

The Next-Gen automation quadrant assesses provider's approach to building a sustainable automation roadmap, covering innovation, organizational adoption of automation and bot development, using the latest technologies and frameworks. This quadrant concentrates on the human aspect, in terms of emerging skills, to enhance the benefits of automation, thus safeguarding resource interest. This quadrant evaluates service providers' ability to augment organizational change management, education and upgrade of technology, in sync with the new releases on platforms. Next-gen automation readiness — 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 simultaneously have platform certifications, functional knowledge, industry expertise and cross-skilling strategy, which is a growing focus area for enterprise clients.

Eligibility Criteria:

- **Organizational change management frameworks:** For a seamless transition across users and stakeholders ensures that external (clients) and internal (employees) entities are well managed and educated on the automation activity

- **Design-thinking practice:** This is to facilitate process redesign before and during the end-to-end automation of a process

- **Demonstrate ability to innovate through various frameworks:** Ability to build future-ready solutions, leveraging the latest technologies

- **Roadmap and strategy for resource upskilling and cross-skilling:** Offer partner training programs to build resource pools across platforms

- **Tools and technology certifications:** Necessary accreditations, recognizing the provider's technical, functional and business skills

- **Expertise in designing and developing automation solutions (Bots):** Uses low-code/no-code development platforms, tools and software

- **Implementation and integration capabilities:** Ability to drive these with the latest, innovative technologies

- **Frameworks, methodologies, and reference architecture:** Uses these to develop bots (DevOps, CI/CD, LCNC)

- **Security tools:** Ability to use frameworks, alongside having the practices to ensure bot security and governance, risk and compliance (GRC)

Quadrants by Region

Quadrant	Global	U.S.	U.K.	Nordics	Germany	Brazil
Intelligent Enterprise Automation	Overview	✓	✓	✓	✓	✓
Artificial Intelligence for IT Operations (AIOps)	Overview	✓	✓	✓	✓	✓
Next-Gen Automation	Overview	✓	✓	✓	✓	✓

Schedule

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

Milestones	Beginning	End
Survey phase	June 16, 2022	July 22, 2022
Sneak previews	September 29, 2022	October 28, 2022
Content provisioning	September 29, 2022	October 13, 2022
Press release	November 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 at the ISG website, 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 a leading independent recognition of service delivery excellence based on the concept of "Voice of the Customer." This ISG program collects client feedback regarding service providers' performance in demonstrating the highest standards of client service, excellence and customer centricity.

The global survey examines services associated with IPL studies, providing ISG analysts with a benchmark for measuring client sentiment and insight into the customer experience. This information complements advisor feedback that IPL leverages in its practitioner-led consulting approach.
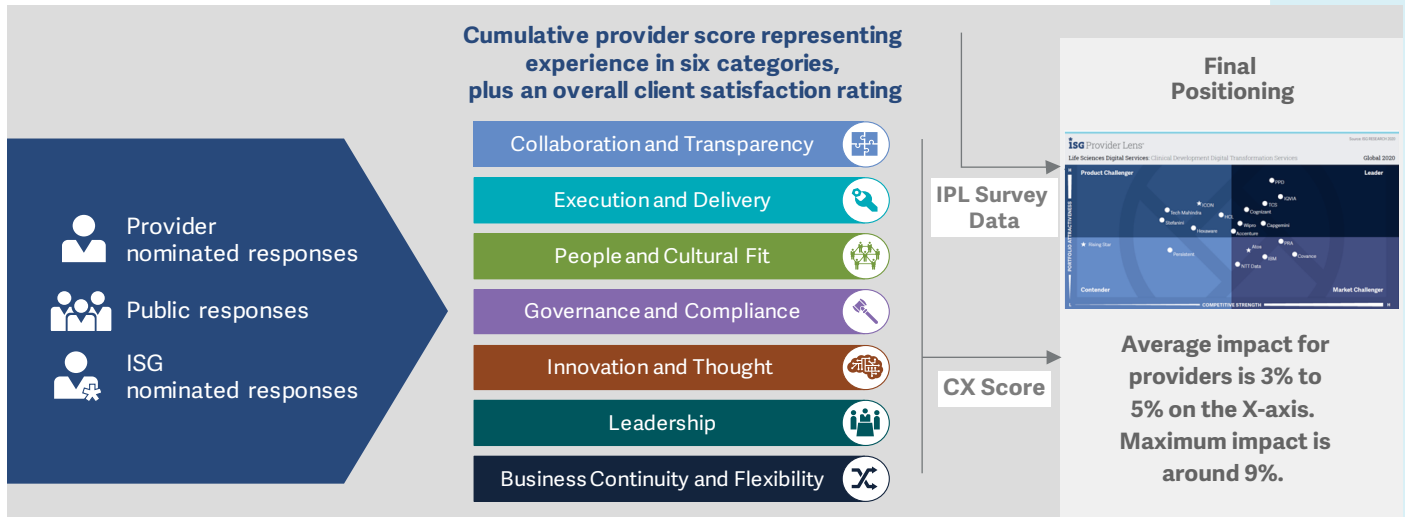
Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG will notify both parties. ISG anonymizes all customer data and does not share it with third parties.

To ensure your selected clients complete the feedback for your nominated engagement, please use the Client nomination section on the Star of Excellence website.

Direct any questions or provide comments to star@isg-one.com. This email will be checked daily; please allow up to 24 hours for a reply.

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 in the list or do you see your company as relevant provider that is missing in the list? Please contact us to ensure your active participation in the research phase.

Accenture	DXC	Persistent
AeC	Exela	Softtek
Algar Tech	EXL	Sonata Software
All for One Group	Fujitsu	Sopra Steria
Almato	GAVS	Stefanini
Arvato	Genpact	Stoque
ASC	Google	Sutherland
Atos	HCL	TCS
Axians	Hexaware	Tech Mahindra
Birlasoft	IBM	TietoEVRY
CANCOM	INDRA	TIVIT
Capgemini	Infosys	Turbotic
Capita	Integris	UST
CGI	LTI	Wipro
Cognizant	Microland	WNS
Computacenter	Mindtree	Zensar
CSS Corp	Mphasis	
DATAGROUP	NTT DATA	

Contacts for this study

Ashwin Gaidhani
Lead Analyst, U.S.

Florian Scheibmayr
Lead Analyst, Germany

Mark Purdy
Lead Analyst, U.K. and Nordics

Mukesh Ranjan
Enterprise Context and
Global Overview Analyst

David de Paulo Pereira
Lead Analyst, Brazil

Phani KR
Global Project Manager

Do you need any further information?

If you have any questions, please do not hesitate to contact us at ISG.ProviderLens@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 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 providers' inclusion and 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

Wayne Butterfield
Partner, Automation, ISG

Mary Ellen Cutshall
Business Development Executive, U.S.

Jeff Augustin
Partner, ISG

Paul Schreiner
Partner, Insurance, U.S.

Scott Furlong
Partner, ISG

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.