



***ISG** Provider Lens™

2022

Retail Services

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 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, Connecticut, 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.



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Introduction

The retail industry, which was already reeling under pressure due to new-age digital players and ecommerce disruption, was further hit by the COVID-19 pandemic. This unprecedented disruption served as a much-needed catalyst to accelerate the transformation that retailers were seeking. To navigate through the pandemic, retailers had to quickly evolve and adapt to the changing consumer behavior by expanding ecommerce and embracing newer touchpoints such as click-n-collect [buy online, pickup in-store (BOPIS), curbside pickup, etc.], while also adhering to government guidelines on social distancing and sanitization among other mandates.

Unlike earlier, where neither consumers nor retailers felt an urge to adopt digital technologies for a better shopping experience, the pandemic has pushed consumers toward using new channels and retailers to envision one experience across stores and digital channels – Phygital. This is compelling retailers to not only bring about a change on the consumer front but also internally to benefit from the changing shopping landscape.

Today, retailers across the segments are re-inventing their business model. They are trying to become more agile and scalable to reach customers across possible and new touchpoints, while also managing and re-distributing the costs effectively. This has led to a technology transformation across the board, giving retail IT service providers a crucial and active role to play for the next few years.

Retail IT service providers are seeing an increased demand in areas such as customer experience transformation for a unified experience, platform migration (primarily toward cloud) and an uptick in managed services with vendor consolidation as a major theme. Innovation through the adoption of newer technologies such as AI and automation, IoT, robotics and blockchain is increasing rapidly in terms of use cases across business functions.

Critical applications such as ERP, supply chain management and inventory management are equally looked at from a transformation perspective to support a free flow of information on a real-time basis and achieve increased collaboration, productivity and transparency.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- A perspective on key markets, which include the U.S. and Europe (including the U.K.)

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 new engagements.

Quadrants Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Retail Services:

Simplified illustration



Source: ISG 2022

CX Transformation Services

Consumer behavior has altered permanently. Offerings such as online commerce, BOPIS and lockers, which were still getting tested, are starting to become a part of mainstream business. The overall interaction with stores has changed, wherein social distancing, frequent sanitization and minimal contact requirement have become norms leading to digital payments, endless aisles and contactless checkout. Furthermore, the changes that retailers brought about to navigate through the pandemic in 2020-2021 need a strategic fit into the business model across geographies.

Service providers typically offer services under the big “T” & small “t” transformation initiatives in areas such as in-store engagement, website UI/UX enhancements, inventory and warehouse automation, omnichannel point of sale (POS), ecommerce, and hyper-personalization using analytics for effective marketing push. This ensures a seamless and consistent omnichannel experience across all touchpoints of retailers.

Eligibility criteria:

- CX Transformation Services offering:
 - Vision and strategy
 - Revenue, year-on-year growth and customer base
 - Partnerships and alliances
 - Investment and innovation
 - Proprietary framework and solution assessment by leveraging digital technologies
 - Commercial models
 - Regional presence and support
 - Success stories

- Experience delivered across various functions:
 - Unified commerce — building a single source of truth on customer data such as profile, purchase history, search and wish list from various systems to provide a 360-degree customer view
 - ecommerce; for example, building an immersive and personalized website
 - In-store transformation; for example, self-checkout, kiosks, QR codes and in-store navigation
 - Store operations; for example, in-store analytics and inventory tracking and fulfillment and store associate digital enablement
 - Back-end operations; for example, predictive analytics and warehouse automation
 - Personalization; for example, a different website homepage for each user, marketing and promotion alerts in the store and on website, and loyalty management
 - Omnichannel POS; for example, BOPIS; buy online, return in-store (BORIS); curbside; lockers; buy in-store and deliver; and real-time inventory updates
 - Advanced technology implementation:
 - AR/VR
 - Blockchain
 - IoT
 - AI and automation
 - Voice commerce
 - Big data and analytics
 - Robotics
 - Metaverse
- 

Platform Migration Services

With the growing need for availability and uptime and the integration between business functions and various touchpoints for customers, retailers are re-platforming and modernizing their IT landscape with cloud playing a critical role.

Retailers are seeking to keep their landscape agile, while modernizing critical business applications and remain platform agnostic with a view to reduce IT run costs through the platform-as-a-service model. They want to ensure that applications or platforms are API and microservices driven and cloud native to be able to access information in real time across business functions and from anywhere.

Service providers in this area help retailers to not just migrate from one platform to another or to cloud but also envisage their vision toward an agile IT ecosystem with certain IP-based, tailor-made accelerators and tools across the vendor ecosystems such as SAP, Oracle, Salesforce and ServiceNow for faster migration.

Eligibility criteria:

- Provide a solution consulting or solution assessment approach
- Experience across vendor ecosystems such as SAP, Oracle and Salesforce
- Experience with hyperscalers
- Cloud migration experience
- New software implementation and re-platforming capabilities
- Implement microservices-based architectures
- Understand cost dynamics, process changes and third-party integrations
- Data migration competence and experience
- Partnerships (vendor partnerships)
- Technical expertise (certifications and average employee experience)
- Revenue, growth and customer base
- Practice maturity
- Accelerators built for popular platforms
- Regional presence and support
- Success stories

Managed Services

Managed services provider typically takes over the entire IT-Run landscape that includes application development and maintenance, infrastructure, and service desk to help companies focus on core, save on costs and manage the IT complexities.

Today, the approach of service providers is driven by AIOps that enable significant automation and predictive healing for achieving extreme efficiencies through the application of automation and AI. They are also expected to innovate solutions that address business challenges using disruptive emerging technologies in the market. It is pertinent for them to prove their agility in terms of reacting quickly and managing the ever-changing requirements for software, network, infrastructure and hardware in as-you-go model.

Eligibility criteria:

- Experience in fixed-capacity multiyear managed services engagements
- Transition methodology
- Consulting and industry sector competency (retail-specific IP)
- Assessment of application management frameworks
- Assessment of application modernization capabilities
- AIOps implementation experience
- Cross-tooling experience
- ERP, CRM and business process management (BPM) competency
- Regional coverage and scale of operations
- Cloud vision and as-a-service offerings
- Technology partnerships (center of excellence, level of partnership and accelerators developed)
- Success stories
- Integration capabilities
- Delivery model (onshore/nearshore/offshore capabilities)
- Innovation and continuous improvement
- Storage management, managed security, workspace collaboration and application support services
- Offer commercial models such as fixed price, time and material (T&M), outcome-based, and revenue sharing

Quadrants by Regions

This inaugural ISG Provider Lens™ study on Retail Services includes the following regions:

Quadrant	U.S.	Europe (including the U.K.)
CX Transformation Services	√	√
Platform Migration Services	√	√
Managed Services	√	√

Schedule

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

Milestones	Beginning	End
Launch	January 12, 2022	
Survey Phase	January 12, 2022	February 09, 2022
Sneak Previews	May 2022	
Press release	June 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!

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.

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 program is 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. 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@isg-one.com.



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

Accenture	EPAM	Retail Assist
Adesso	Epicor	ScienceSoft
Arvato Systems	Expleo Group	Sigma Software
Aspire Systems	Fingent	Softtek
Atos	Fujitsu	Sopra Steria
BeMyEye	Genpact	Stefanini
Birlasoft	Globant	Sutherland
Capgemini	Happiest Minds	Symphony Retail
Capita	HCL	Synoptek
Cegeka	Hexaware	TCS
CGI	Hitachi Solution	Tech Mahindra
CI&T	IBM	thoughtworks
Cigniti	Infosys	TietoEVRY
Coforge	Integrella	Trianz
Cognizant	KFP Total IT Solutions	Tryzens
Compucom	LiveArea	TTEC
Concentrix	Logic Info	Unisys
CSS Corp	LTI	UST
Cybage	Mindtree	Virtusa
Digital River	Mphasis	Wipro
Digital Space	NTT data	Wunderman Thompson
dunnhumby	Periscope (McKinsey)	Xicom
DXC	PMC Retail	Yash Technologies
Elinfochips	Publicis Sapient	Zensar

Contacts for this study



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Lead Analyst



Riya Munjal
Research Analyst



Sidhanth Prasad
Research Analyst



Pragathi Thimmaiya
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ISG Provider Lens™ QCRT Program Description

ISG Provider Lens™ offers market assessments by incorporating practitioner insights, reflecting regional focus and conducting 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) that 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



Sunder Pillai
Advisor - Global



Ashish Chaturvedi
Program Lead (Custom Research) and Principal Analyst

Do you need any further information?

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