

*ISG Provider Lens™ Annual Plan 2022



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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 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.

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Message from the Global Head of ISG Provider Lens™



I send greetings to you from the entire ISG Provider Lens™ (IPL) team.

As the business world comes to terms with new ways of working and weighs the pros and cons of bringing its employees back to office premises, I'm happy to report that the IPL team is back on the road. We were excited to participate in your live events and in recent events sponsored by ISG. In the last two months, ISG held a set of in-person events in Chicago, Dallas, London and Germany. The Dallas and London Sourcing Industry Conferences (SIC) had record attendance as did our accompanying IPL Awards ceremonies. Over the next few months, we will also be hosting IPL Awards ceremonies in France, Brazil, and Australia.

During the SIC events, I hosted overview sessions to highlight the continued evolution of IPL in 2022. These changes involve the expansion of existing studies to more existing countries, the introduction of ten new studies, the expansion to four new countries Benelux, Canada, Singapore and Malaysia and our venture into U.S. Public Sector.

We took steps in 2021 to integrate Star of Excellence into each of the IPL studies, this is still a work in progress. We are looking forward to a virtual celebration with a group of you on December 16th, 2021. Congratulations for being recognized by your clients for creating the best customer experience. More details are coming about the event. We are confident that the new year will see a much larger participation in Star of Excellence.

Speaking of the new year, we are in the process of revamping the look and feel of our IPL reports. Thanks to all of you who gave us feedback about the new design. It will be leveraged for all 2022 reports. You will notice that this 2022 Annual Plan document carries the design elements of our new report format.

Also new in 2022, ISG will evaluate how service providers account for Environmental, Social and Governance (ESG) and environmental responsibility internally as well as whether they offer services to help clients establish and improve such programs. Clear strategies, programs and recognition will improve positioning.

Our advisors have played a very important role in making IPL studies a success and we are happy to report that advisor participation continues to grow each year. Your support and feedback on the IPL research process have also been very important and has given us confidence to grow the IPL program. We continue to seek your participation as we chalk out our plans for next year. Review the annual plan in the following pages and reach out to us for more details and clarity on what to expect from IPL in 2022.

Happy IPLing.

Jan Erik Aase

Partner and Global Head – IPL

What to expect in 2022

1 IPL reports with a new look

2 Inclusion of the U.S. Public Sector

3 Entry of new regions such as Benelux, Canada, Singapore and Malaysia

4 Introduction of "10" new studies

5 Expanded custom project portfolio



Research Calendar 2022

Study Name	Quarter	Launch Month	Publish Month	Archetype	Australia	Benelux	Brazil	Canada	Europe	France	Germany	Global	Nordics	Singapore & Malaysia	Switzerland	UK	US	US Public Sector	
Salesforce Ecosystem	Q1	Oct-21	Mar-22				✓				✓						✓		
Procurement BPO and Transformation Services		Oct-21	Mar-22		✓								✓		✓				✓
Procurement Software Platforms and Solutions		Oct-21	Mar-22										✓						
Engineering Services*		Nov-21	Apr-22							✓								✓	
Enterprise Service Management – ESM		Oct-21	Mar-22															✓	
ServiceNow Ecosystem		Oct-21	Apr-22		✓		✓					✓			✓			✓	
Mainframe Services		Oct-21	Apr-22					✓	✓									✓	
Microsoft Ecosystem		Oct-21	Apr-22		✓		✓					✓			✓	✓	✓	✓	✓
Retail Software and Services		Dec-21	May-22							✓								✓	
Private Hybrid Cloud – Solutions and Services		Q2	Jan-22	Jul-22	✓	✓	✓	✓			✓	✓		✓	✓	✓	✓	✓	✓
Cybersecurity – Solutions and Services	Jan-22		Jun-22		✓		✓				✓	✓		✓	✓	✓	✓	✓	✓
Network – Software Defined Solutions and Services	Jan-22		Jun-22	✓	✓						✓	✓		✓	✓		✓	✓	
IoT – Solutions and Services	Feb-22		Jun-22				✓					✓						✓	
SAP Ecosystem	Feb-22		Jun-22	✓			✓				✓	✓		✓			✓	✓	
Payroll – Solutions and Services*	Feb-22		Jun-22										✓					✓	
Utilities/Energy – Solutions and Services	Feb-22		Jun-22														✓	✓	
Marketing Technology (Martech) – Solutions and Services	Feb-22		Jul-22				✓											✓	
Google Cloud Partner Ecosystem*	Feb-22		Jun-22		✓		✓			✓								✓	
Banking Technology/Platforms	Feb-22		Jun-22							✓			✓						

* = New study New region/report

Research Calendar 2022 (continued)

Study Name	Quarter	Launch Month	Publish Month	Archetype	Australia	Benelux	Brazil	Canada	Europe	France	Germany	Global	Nordics	Singapore & Malaysia	Switzerland	UK	US	US Public Sector	
Cloud-native Services & Solutions	Q3	May-22	Sep-22						✓								✓		
Contact Center – Customer Experience Services		Apr-22	Sep-22	✓	✓		✓		✓			✓		✓				✓	
Contact Center as a Service		May-22	Sep-22						✓			✓						✓	
Next Gen ADM – Solutions and Services		Apr-22	Aug-22	✓								✓		✓			✓	✓	
Future of Work (Workplace) – Solutions and Services		May-22	Sep-22	✓	✓		✓					✓			✓	✓	✓	✓	✓
Finance and Accounting (FAO) BPO Services		Mar-22	Sep-22	✓						✓			✓						
Workday Ecosystem*		Apr-22	Aug-22							✓								✓	✓
Consumer Goods Industry – Solutions and Services*		Mar-22	Aug-22							✓								✓	
HR Outsourcing and Transformation Services*		Mar-22	Sep-22															✓	
Media, Technology and Communications*		Apr-22	Sep-22															✓	
Banking Industry BPO Services		Apr-22	Sep-22									✓		✓		✓	✓	✓	
AWS – Ecosystem	Q4	Jun-22	Nov-22		✓		✓				✓						✓	✓	
Digital Business Enablement and ESG Services		Jun-22	Nov-22	✓	✓		✓				✓		✓				✓	✓	
Public Cloud – Solutions and Services		Jun-22	Dec-22	✓	✓		✓				✓	✓		✓		✓	✓	✓	✓
Analytics Platforms and Services		Jun-22	Nov-22				✓					✓						✓	
Manufacturing Industry Services		Aug-22	Dec-22									✓						✓	
Insurance BPO Industry Services		Jul-22	Oct-22	✓	✓													✓	
Intelligent Automation – Solutions and Services		Jun-22	Nov-22				✓					✓		✓			✓	✓	
Healthcare Digital Services		Jul-22	Nov-22									✓						✓	
Life Sciences Digital Services		Jul-22	Nov-22							✓								✓	
Oracle Ecosystem*		Jun-22	Nov-22									✓						✓	✓
HCM Technology Platforms*		Jul-22	Dec-22															✓	
Travel and Hospitality Solutions and Services	Jul-22	Dec-22							✓								✓		

* = New study New region/report

Study Descriptions (alphabetical)



Analytics Platforms and Services

Overview

The ISG Provider Lens™ Analytics Platforms and Services report is focused on technologies such as cloud computing, IoT, data science, machine learning and deep learning that create opportunities for improvements in business performance. With the large volumes of data being generated, companies are looking for service providers with the expertise to do more with the data they have access to such as reduce the complexity and glean better insights, thus enabling businesses to succeed.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Data Science Services
- Data Engineering Services
- Data Lifecycle Management Services
- Self-Service Analytics and BI Platforms
- Data Preparation and Integration Platforms



AWS – Ecosystem

Overview

The ISG Provider Lens™ AWS Ecosystem report is focused on providers of technologies and services that leverage AWS to develop and deliver an array of enterprise IT and business services. This specialist group of certified partners addresses all types of customer queries related to architecture and strategy consulting, implementation, migration and the professional use of solutions, based on AWS infrastructures and platforms.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- SAP Workloads
- Data Analytics and Machine Learning
- IoT
- Migration
- Managed Services
- Consulting Services



Banking Industry BPO Services

Overview

The ISG Provider Lens™ Banking Industry BPO Services report is focused on analyzing companies in the areas of consultative and professional services. Banks are seeking service providers to help them embrace innovation and deal with the ever-changing challenges of the digital world, while trying to stay competitive and attracting/retaining customers. They are undergoing large transformation programs to build resilience in capital, talent and, most importantly, technology respectively infrastructure.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Core Modernization and Integration Services
- Banking Governance, Risk and Compliance (GRC) Services
- Transformational Services for Digital Banking
- Payment and Card Processing Services

Study Descriptions (continued)



Banking Technology/Platforms

Overview

The ISG Provider Lens™ Banking Technology/Platforms report analyzes relevant vendors, offering software solutions for the banking industry. Increasing agility, fast decision-making by flattening hierarchies and empowering employees, together with introducing flexible workplaces and workforces, are some of the core actions being taken by banks toward sustainability. This involves changing the core banking applications.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Core Banking Platforms
- Open Banking Solutions
- Payment Processing Platforms
- Digital Banking Engagement Solutions



Cloud-native Services and Solutions

Overview

The ISG Provider Lens™ Container – Solutions and Services report is focused on cloud-native technologies and related service providers. Enterprises take a variety of approaches to adopt containers. Some choose to work with managed service providers and system integrators that offer managed container services, backed by skilled employees who can help configure the platforms for cloud-native applications, migrate legacy workloads to containers and build new applications for enterprises to run on the platform. Others choose to directly procure container management capabilities, either by turning to independent software vendors for packaged Kubernetes platforms or by using the container services offerings from hyperscalers to serve as the foundation for their future.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Managed Container Services
- Container Platform Solutions
- Hyperscale Cloud Container Platforms
- Cloud Native Observability Solutions
- Cloud-native Security Platforms



Consumer Goods Industry – Solutions and Services

Overview

The ISG Provider Lens™ study, Consumer Goods Industry – Solutions and Services, will analyze the challenges the industry is facing, its technology requirements and the capabilities of service providers to future proof the IT landscape. The report will help companies identify the right partner for their transformation journey and stay relevant for consumers.

The growing need for a truly agile supply chain that is transparent and sustainable, direct-to-consumer channel (anytime, anywhere), ultra-personalized marketing, product co-innovation and health consciousness is driving transformation in the industry. Technology will play a pivotal role in this context.

The quadrants ISG will focus on – with respect to the said ecosystem and its requirements – will be published at the time of the study launch.

Study Descriptions (continued)



Contact Center — Customer Experience Services

Overview

The ISG Provider Lens™ Contact Center – Customer Experience Services report is focused on outsourcing services and the associated aspects of contact centers, including strategies and technologies that improve end-to-end Customer Experience (CX).

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Digital Operations
- Work From Home Services
- AI & Analytics
- Social Media CX Services



Contact Center-as-a-Service

Overview

The ISG Provider Lens™ Contact Center-as-a-Service report is focused on cloud-based platforms and contact center solutions. While assessing providers, and correspondingly the independent software vendors, the study considers their platform capabilities; open architecture; and AI and machine learning capabilities, including the speed, reliability, scalability, embedded analytics and overall quality of the solutions offered.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Contact Center as a Service (CCaaS)



Cybersecurity – Solutions and Services

Overview

The ISG Provider Lens™ Cybersecurity – Solutions and Services report is focused on professional service providers and technologies, alongside independent software vendors, in the context of the immense, and often horizontally integrated, challenge of securing IT/OT systems that are increasingly being connected to public networks. This involves strategy development, special technical competencies and solutions such as that for user authentication, as well as secure operation of enterprise-grade solutions within the framework of appropriate risk and compliance management.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Advanced Endpoint Threat Protection, Detection and Response (AETPDR)
- Identity & Access Management (IAM)
- Data Leakage/Loss Prevention (DLP)
- Technical Security Services
- Strategic Security Services
- Managed Security Services

Study Descriptions (continued)



Digital Business Enablement and ESG Services

Overview

The ISG Provider Lens™ Digital Business Enablement and ESG Services report is focused on analyzing strategy consultants as well as providers of special services involved in the creation and transformation of a digitalized portfolio of products and services, including systems for digital accessibility and authentication of transactions. To ensure an enhanced customer experience, companies need to increasingly consider overhauling the supply chain, which may also imply value creation in terms of becoming carbon neutral, which, in turn, compels the market stakeholders to make fundamental changes in the way they function.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Business Consulting Services
- Customer Experience Services
- Supply chain Transformation Services
- The Sustainability and ESG Services
- Digital Reality Services



Engineering Services

Overview

The ISG Provider Lens™ Engineering Services report is focused on all the relevant phases in product lifecycle management and engineering services. Digital engineering services encapsulate conceptualization, design and consulting, prototyping, application engineering, value engineering, test and validation, engineering process services, sourcing support, maintenance, sustenance and after-market support, electrical and electronics hardware and software, technical publications, detail engineering, and asset information management. Digital aspects require efficient leveraging of digital tech-stacks such as machine learning algorithms and digital twins for rapid prototyping and, consequently, not only a rapid go-to-market approach but also the ability to enhance features and functions incrementally.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Product & Service Development
- Connected/Intelligent Operations – Discrete Industries
- Connected/Intelligent Operations – Process Industries
- Integrated Customer/User Engagement and Experience



Enterprise Service Management (ESM)

Overview

The ISG Provider Lens™ Enterprise Service Management (former ITSM) report is focused on the services and solutions that help enterprises with the technical integration of different data sources, software solutions and products. This report encompasses services for building and executing/implementing a holistic (enterprise-grade) approach that integrates and controls IT-based services and products across business units. The goal is to enable enterprises to rely on self-service by translating business requirements into IT-SLAs – through manual intervention, case-by-case, as required, if workflows are not automated – thus ensuring deep integration of all enterprise departments into existing IT processes.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- ESM Transformation Consulting Services
- ESM Implementation & Integration Services Providers
- ESM Tool Providers
- ESM Managed Service Providers
- ERP Vendors

Study Descriptions (continued)



Finance and Accounting (FAO) BPO Services

Overview

The ISG Provider Lens™ Finance and Accounting Outsourcing – BPO Services report is focused on FAO engagements as they evolve from transactional to becoming more holistic, in keeping with changing business and technological needs. Service providers work with enterprises willing to transform their finance and accounting (F&A) operations and embrace digital technologies to make their processes more efficient, increase productivity, improve data accuracy, reduce costs and enhance customer experience.

Automation and analytics have been an integral part of every contract signed for finance and accounting outsourcing (FAO) services in the last two years, thereby empowering CFOs with real-time insights and meaningful information to enable quick decision-making and, subsequently, help finance departments function more efficiently.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Procure to Pay (P2P)
- Order to Cash (O2C)
- Record to Report (R2R)
- Financial Planning and Analysis (FP&A)



Future of Work (Workplace) – Solutions and Services

Overview

The ISG Provider Lens™ Future of Work (Workplace) – Solutions and Services report is focused on professional service providers and independent software vendors that enable an enterprise to improve digital dexterity and employee productivity – enabling them to connect and collaborate with co-workers efficiently, and increasingly in a remote and virtual way. In this context, service partners help customers in their workplace transformation journeys – to create or review workplace strategies based on best practices, to assess their workplace environment, manage the entire technical environment and provide support by leveraging the latest and emerging technologies.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Workplace Strategy Transformation Services
- Managed Digital Workplace Services
- Managed Employee Experience Services
- Managed Future of Work Services – Public Sector
- Unified Endpoint Management
- Unified Communications and Collaboration-as-a-Service (UCCaaS)
- Employee Engagement and Productivity
- Cloud VDI/Desktop-as-a-Service



Google Cloud Partner Ecosystem

Overview

The ISG Provider Lens™ Google Ecosystem report is focused on identifying the top partner companies that can provide differentiated services with regard to all solutions Google and its cloud platform offer. The focus is on partnerships with Google, along with their specialization, certification and industry background to unlock the next level of business growth for clients. It considers partners that have achieved specialization in a solution area, have an established Google Cloud Services practice, have seen consistent customer success, have proven technical capabilities, and employ certified personnel that have gained technical knowledge and advanced skills to address all clients' needs through implementing Google Cloud technologies.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Implementation & Integration Services
- Managed Services
- Data Analysis & Machine Learning Services
- SAP Workloads

Study Descriptions (continued)

HCM Technology Platforms

Overview

The ISG Provider Lens™ HCM Technology Platforms study focuses on HCM technology suites designed to support the full spectrum of HR processes and facilitate the employee journey. With the “way of working” evolving rapidly, firms of all sizes are increasingly seeking out and adopting cloud-based HCM technology solutions to modernize employee experience, digitalize and transform HR operations and enable greater organizational agility to support strategic growth. HCM technology providers are meeting this rapid change with advanced digital HCM solutions, specifically designed to innovate and define the future of work.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- HCM Full Suite Capability
- Talent Management Capability
- Employee Experience Solutions
- People Analytics, Workforce Planning and Insights Capability

Healthcare Digital Services

Overview

The ISG Provider Lens™ Healthcare Digital Services report is focused on service providers working in all segments of the healthcare industry as they are expected to comply with new regulations, integrate the changes brought about by competitive M&A and adapt to the needs of an aging population. The service providers also advise and undertake costly, but required, integration efforts. Also, consumers expect advanced and convenient digital service delivery. Digital transformation services help payer and provider segments evolve to better serve their constituents.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Payer Digital Transformation Services
- Provider Digital Transformation Services
- Payer BPaaS Services
- Healthcare Cloud Migration Services
- Healthcare Interoperability Services and Solutions

HR Outsourcing and Transformation Services

Overview

The ISG Provider Lens™ HR Outsourcing and Transformation Services study focuses on providers offering advanced cloud HCM technology enabled managed services to transform HR operations. Employers, globally, are increasingly seeking transformative solutions for greater HR operational effectiveness and organizational agility and resiliency. Thus, HR transformation has become a key strategic investment area across sectors, with firms seeking to engage managed HR service providers capable of supporting large-scale HR transformations by leveraging advanced cloud HCM technology investments through a consult-to-operate service model.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- HR Transformation Services and Solutions
- Multi-process HR Services and Solutions
- HCM Technology Platform Deployment and Support Solutions

Study Descriptions (continued)



Insurance BPO Industry Services

Overview

The ISG Provider Lens™ Insurance BPO Industry Services report is focused on how insurance companies outsource some of the technology and business processes that support their operations. It includes both providers that offer life and retirement (L&R) products, including individual and group supplemental products, and the ones that offer property and casualty (P&C) products. The outsourcing landscape is changing and is no longer limited to backend services. Instead, enterprises seek to establish partnerships with providers and strategically align themselves, for their businesses to transform and grow in the current digital-oriented world.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Life & Retirement Insurance BPO Services
- Property and Casualty Insurance BPO Service
- BPaaS/TPA Insurance Services



Intelligent Automation – Solutions and Services

Overview

The ISG Provider Lens™ Intelligent Automation – Solutions and Services report is focused on evaluating the transformational sourcing options centered on intelligent automation, which enables software bots to interact with unstructured data and includes the following capabilities: image recognition, natural language processing (NLP), cognitive reasoning and conversational AI. Enterprises worldwide are focused on building intelligent automation capabilities into their robotic process automation (RPA) initiatives, with the growing need to stay competitive with next-generation technologies. Well-orchestrated intelligent automation technologies, combined with rapid improvements in process discovery and task mining technologies, are enabling enterprises to automate processes once considered as “un-automatable” and deliver high productivity, reduced costs, improved data accuracy and enhanced customer experiences.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Intelligent Business Automation
- Artificial Intelligence for IT Operations (AIOps)
- Intelligent Document Processing Technology Vendors
- Process Discovery and Mining Technology Vendors
- Conversational AI Technology Vendors



IoT – Solutions and Services

Overview

The ISG Provider Lens™ Internet of Things – Solutions and Services report is focused on services related to the Internet of Things (IoT) – defined as a cluster of functions such as consulting and implementation (planning, cost analysis and business case development), technology integration and execution (device, platform, analytics, application and security) and overall IoT ecosystem management (managed services). It refers to the interaction and exchange of a large volume of data through fast and active network connectivity, and the analysis of such data produces meaningful insights that support decision making. Sensors collect the data, and applications, software and platforms build on the data in a secure way, to help make useful business cases across industries.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- IoT Consulting and Services
- Managed IoT Services
- Connected Mobility Consulting and Services
- AI on the Edge
- IoT Endpoint Security
- IT/OT Tech Data Convergence

Study Descriptions (continued)



Life Sciences Digital Services

Overview

The ISG Provider Lens™ Life Sciences Digital Services report is focused on service providers who are accelerating clinical development, ensuring patient engagement, offering manufacturing supply chain services, adhering to pharmacovigilance and regulatory guidelines, and offering medical devices and MedTech products. Participating service providers are evaluated on how they are an extension of a client's technology organization and involved in creating blueprints, architecture frameworks and management processes. They are also evaluated on factors such as brand recognition in the markets under study, market reach and the number and quality of clients. Also, they are evaluated on thresholds of annual revenue, assigned professionals (resources) and R&D investments.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Clinical Development Digital Transformation Services
- Patient Engagement Digital Transformation Services
- Manufacturing Supply Chain Digital Transformation Services
- Pharmacovigilance and Regulatory Affairs Digital Transformation Services
- MedTech Digital Transformation Services



Mainframe Services

Overview

The ISG Provider Lens™ Mainframe Services report is focused on evaluating service providers that can modernize mainframe applications and offer mainframe outsourcing and Mainframe-as-a-Service (MFaaS). These service providers also help enterprises comply with digital business requirements, modernize their mainframe applications and introduce Agile methods, DevOps, application programming interfaces (APIs) and microservices that improve agility and integrate mainframes with private and public clouds. This report also assesses the software vendors that offer automation tools for refactoring, rehosting, replatforming, rewriting and reengineering applications. Lastly, it assesses service providers that modernize applications to run in the cloud, using automation and advanced AI tools to ensure quality outcomes.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Mainframe Modernization Services
- Mainframe-as-a-Service (MFaaS)
- Mainframe Operations
- Mainframe Application Modernization and Transformation Services
- Mainframe Application Modernization Software



Manufacturing Industry Services

Overview

The ISG Provider Lens™ Manufacturing Industry Services report is focused on tracking and analyzing offerings around engineering and R&D – from the intricacies of 3D simulation to shop floor robotics. The report examines the role of service providers across the entire value chain of product and manufacturing engineering – from virtual layout or simulation of the shop floor and ergonomics for machinery and IT/OT convergence, to aftermarket services such as leveraging digital twin to check the condition of machinery reaching the wear-out period of the wear curve.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Digital Engineering – Transportation
- Digital Engineering – Hi-Tech
- Digital Engineering – Industrial
- Mobility Security Solutions
- OT Security Solutions

Study Descriptions (continued)



Marketing Technology (Martech) – Solutions and Services

Overview

The ISG Provider Lens™ Marketing Technology (Martech) – Solutions and Services report is focused on examining the service providers that work with digital marketing professionals to develop marketing technologies. New technologies and new consumer behaviors (they are already experiencing digital transformation in their daily lives) demand a new approach to marketing that involves more of a transformation of mindsets than of tools. By combining creativity with the ability to develop digital campaigns to meet the expectations of digital customers, with digital tools and methodologies such as design thinking and agile processes, Martech companies are growing everywhere with a wide scope of services.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Digital Presence and Digital Ads
- Social and Content
- Digital Experience
- E-commerce
- Analytics and Intelligence



Media, Technology and Communications

Overview

The ISG Provider Lens™ Media, Technology and Communications study is focused on providers that can customize their offerings to meet the needs of this tech savvy industry. Consumer behavior, and environmental and market dynamics are challenging for these companies, trying to change and adjust to new opportunities and market realities. The report will examine how service providers are creating solutions across the value chain.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Digital Transformation
- Streamline of Customer Engagement
- Content Monetization
- Operational Control and Automation
- Royalty Rights and Management
- Broadcast to Cloud
- Consumer Intelligence Platforming



Microsoft Ecosystem

Overview

The ISG Provider Lens™ Microsoft Ecosystem report is focused on evaluating service providers in Microsoft's partner ecosystem. The increasing complexity of integration, with expanding use areas, is leading to a dynamic market for professional services in the areas of consulting, design, integration, implementation and managed services for Microsoft and its offerings. The Microsoft ecosystem, one of the largest in the world, comprises thousands of partner companies that support enterprise users of all sizes, and across industries, across the globe.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Azure Managed Services
- SAP on Azure
- Microsoft 365
- Dynamics 365
- Power Platform

Study Descriptions (continued)



Network – Software Defined Solutions and Services

Overview

The ISG Provider Lens™ Network – Software Defined Solutions and Services report is focused on examining the different kinds of global network offerings related to software-defined networking. These include SD-WAN (consulting, implementation and managed services) SD-WAN (DIY) equipment and service supply and core-branch, branch-edge core, and mobile technology suppliers and service offerings related to those segments. The report also looks at the managed SD-WAN market offerings and the rapidly growing and the increasingly important segment of Integrated Secure Enterprise Networks (ISEN), also known as SASE. In addition, the report covers Edge technologies and services, including IoT, Universal/Virtual customer premises equipment (u/vCPE) and SD-LAN, and finally focuses on the rapidly growing area of enterprise 5G solutions being offered within private and campus network environments.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- SDN Transformation Services (Consulting & Implementation)
- Managed SD-WAN Services
- SD-WAN Equipment and Service Suppliers (DIY)
- Edge Technologies and Services
- Enterprise 5G Solutions
- SASE Solutions and Services



Next Gen ADM – Solutions and Services

Overview

The ISG Provider Lens™ Next Gen ADM – Solutions and Services report is focused on evaluating provider offerings and their ability to work with enterprises embarking on a journey toward agile modernization and transformation. Service providers are augmenting their traditional application development and maintenance (ADM) offerings with advanced technologies (AI in operations or microservices-based development) and tailor-made roadmaps (combining digital, operational and technology goals) to meet their clients' objectives. ISG calls such contracts next-gen ADM contracts. This report focuses on the recent developments that have taken place across the three de facto components of ADM, namely, application development, application maintenance and quality assurance.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Agile Development and DevOps
- Application Managed Services and Automation
- QA and Testing
- Low Code & No Code Platforms



Oracle Ecosystem

Overview

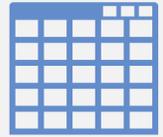
The ISG Provider Lens™ Oracle Ecosystem report is focused on identifying and rating the most relevant, and therefore leading, partner companies. The community of partners that has grown over the years will be particularly valuable in terms of expertise in topics such as enterprise performance management, enterprise resource planning (ERP), human capital management (HCM), Oracle Cloud platform, Oracle E-business suite, Oracle Exadata Database Machine and supply chain and manufacturing.

Since ISG will be covering the Oracle ecosystem for the first time through IPL, the scope will be somewhat narrow toward the main implementation and integration work and managed services clients typically receive through the hands of workday partners.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Oracle Cloud Implementation & Integration Services
- Managed Application Services
- Exadata (Database) Services

Study Descriptions (continued)



Payroll – Solutions and Services

Overview

The ISG Provider Lens™ Payroll – Solutions and Services report focuses on technology and managed services providers, offering modern digital solutions to enable payroll operational transformation worldwide. Firms of every size, and in all sectors and geographies have recognized that payroll is a critical and foundational element of employee experience and a key asset to a business. Thus, firms are now seeking advanced digital capabilities and managed services to elevate the critical payroll process for increased organizational value and future-proof related operations for greater agility, resiliency and continuity.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Multi-country Payroll Services
- U.S. Payroll Services
- Digital Payroll Enablement Solutions and Services
- Global Employer of Record Solutions and Services



Private Hybrid Cloud – Solutions and Services

Overview

The ISG Provider Lens™ Private Hybrid Cloud – Solutions and Services report is focused on evaluating providers of outsourcing, hosting, colocation and managed services, alongside respective vendors/independent software vendors in the context of private cloud deployments and operations. The scope of their offerings is in keeping with security and governance requirements, large data volume management and the need for tight integration with other enterprise applications and workflows. In this scenario, the data center may be owned by the enterprise, service provider or a third-party colocation provider. A hybrid cloud combines the best of on-premises, private and public cloud infrastructure. Here, the goal is to combine services and data from a variety of cloud models to create a unified, automated and well-managed computing environment.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Managed Services
- Managed Hosting
- Colocation Services
- Hyperconverged Systems
- Hybrid Cloud Management Platforms



Procurement BPO and Transformation Services

Overview

The ISG Provider Lens™ Procurement BPO and Transformation Services report is focused on evaluating business process outsourcing providers and the way they are helping to change enterprise-side procurement functions, from managing procurement and overseeing transactional activities to more holistic participation within an enterprise. The transition requirements have become more inclusive for digitally agile business environments and covered by an approach that enables optimization (and ideally future-proofing) of enterprise procurement, while minimizing direct enterprise investments in new software, infrastructure, tools and capabilities.

The report, therefore, looks at services providers in two ways: Procurement BPO providers that enable efficient and sustainable procurement functionality and operation; and providers of services that transform traditional procurement into a future-ready, digitally agile function that provides improved value to enterprises.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Procurement BPO Services – Large Enterprises
- Procurement BPO Services – Mid-sized Enterprises
- Procurement Digital Transformation Services – Large Enterprises
- Procurement Digital Transformation Services – Mid-sized Enterprises

Study Descriptions (continued)



Procurement Software Platforms and Solutions

Overview

The ISG Provider Lens™ Procurement Software Platforms and Solutions report is focused on analyzing independent software vendors that offer software platforms, solutions and tools to help enterprises improve the way procurement works and enable its transformation into digital business realities. This enables enterprise business agility, reduces the negative impacts of supply chain disruptions, improves processes and reduces business costs.

These solutions accelerate improvement through automation, integration, and streamlining and management of procurement functions and operations, along with business management software and organizations.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Procurement Optimization and Transformation Platforms and Tools for Large Enterprises
- Procurement Optimization and Transformation Platforms and Tools for Mid-sized Enterprises



Public Cloud – Solutions and Services

Overview

The ISG Provider Lens™ Public Cloud – Solutions and Services report is focused on evaluating providers on their public cloud expertise. Thus, the report evaluates the partners of the hyperscalers in terms of their consulting and managed service expertise and the hyperscalers themselves for their IaaS and PaaS offerings. ISG, in particular, looks at the qualifications from the respective partner programs to ensure that the partners meet customers' multicloud requirements and have the appropriate expertise in all main platforms. In addition, the study includes vendors/independent software vendors that offer FinOps solutions for financial management across multiple public clouds.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Managed Public Cloud Services
- Secure Enterprise Filesharing Services (only DACH region)
- Hyperscale Infrastructure and Platform Services
- SAP HANA Infrastructure Services
- Multicloud FinOps Platforms (global)



Retail Software and Services

Overview

The ISG Provider Lens™ Retail Software and Services report is focused on identifying, analyzing, and rating the leading technology firms (and their platforms) and IT service providers catering to retailers' technology requirements. The quadrants covering technology firms delve into areas such as digital commerce, order management, retail planning and assortment and supply chain management. On the other hand, the quadrants covering IT service providers evaluate their service competence, quality, and experience in the areas of platform migration, managed services, omnichannel integration, performance engineering, data analytics, and custom development capabilities such as building a microservices-based commerce platform and progressive web applications (PWAs).

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Ecommerce Platforms
- Merchandise Management & Planning Software
- Retail Transformation Services
- Platform Migration Services
- Managed Services

Study Descriptions (continued)



Salesforce Ecosystem

Overview

The ISG Provider Lens™ Salesforce Ecosystem report is focused on identifying leading partner companies. ISG examines various offerings around the Salesforce platform, where a basic distinction is made between implementation services (the Change Business) and the managed application services focusing on operational support for productive applications (the Run Business). In both these basic segments, a further distinction is made between large enterprise clients and the midmarket due to the significantly greater need for Salesforce integration into the complex application landscape of large enterprise clients. Furthermore, these clients primarily have globally operating businesses that require corresponding delivery capabilities from the service providers.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Multicloud Implementation & Integration Services (Large Enterprises)
- Implementation Services for Core Clouds (Midmarket)
- Implementation Services for Marketing Cloud (Midmarket)
- Managed Application Services (Large Enterprises and Midmarket)
- Implementation Services for Analytics on Salesforce



SAP Ecosystem

Overview

The ISG Provider Lens™ SAP Ecosystem report is focused on identifying the top SAP partner companies that can provide differentiated client services and deliver the best results from S/4HANA investments. The study also covers customer experience services related to SAP S/4HANA. By leveraging the best partners, clients can optimize their operating expenses and achieve high ROI.

For clients that have adopted S/4HANA, this report assesses managed service providers that can contribute to superior application performance, including offering stability, availability and security. Cloud migrations and technology innovations are also assessed. For support services, AI and machine learning are incorporated into application maintenance and operations.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- SAP S/4 HANA System Transformation
- Managed Application Services for SAP ERP
- Managed Platform and Cloud Services for SAP ERP
- SAP Business Technology Platform (BTP) Services



ServiceNow Ecosystem

Overview

The ISG Provider Lens™ ServiceNow Ecosystem report is focused on identifying and rating the prime ServiceNow partner companies offering workflow-enabled service management software solutions. For end-users to fully utilize ServiceNow's broad functionalities requires professional services from process (re)design – through software implementation and integration – to application management services and training. The various offerings and certifications indicate the focus of the partner companies, ranging from full-scale lifecycle support to focused services for specific tasks. For managed service providers, the ServiceNow platform is the ideal base for building additional functionalities or for integrating it with industry specific frameworks to support enterprise operations. Some of the other aspects of relevance here are security related activities and capabilities to support the platform and tool usage for cloud management.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- ServiceNow Consulting Services
- ServiceNow Implementation and Integration Services
- ServiceNow Managed Services Partner

Study Descriptions (continued)



Travel and Hospitality Solutions and Services

Overview

The ISG Provider Lens™ Travel and Hospitality Information Technology (IT) Services report is focused on the way travel, hospitality and logistics companies outsource some of the technology and business processes that support their operations. It includes providers that offer services and products to airlines, hotel chains, casino & gaming companies, cruise companies, transportation organizations, tour operators, travel agencies, travel distributors and those involved in logistics. The outsourcing landscape is evolving and these enterprises seek partnerships with providers that strategically align themselves to their business imperatives that enable them to transform and grow in the current digital-oriented world.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Airlines, Transportation and Travel Distribution IT Services
- Hospitality, Cruises, Casinos & Gaming IT Services
- Shipping and Logistics IT Services
- Trav Tech product providers



Utilities/Energy – Solutions and Services

Overview

The ISG Provider Lens™ Utilities/Energy – Solutions and Services Industry report is focused on evaluating the offerings and capabilities of providers that have deep expertise in the utility and energy industries, as well as in related digital technologies and innovation capabilities. Companies in this industry are making significant investments to modernize aging infrastructure, transform distribution and storage systems, leverage smart grid technologies and predictive analytics, transition to renewable energy, and address climate change – all while needing to reduce operational and maintenance costs. The COVID-19 pandemic has changed customer expectations; stringent regulatory guidelines are also forcing utilities to seek transformative sourcing options to improve their processes.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Intelligent Business Process Management Services
- Next-Gen IT Services
- Digital Transformation Services and Solutions



Workday Ecosystem

Overview

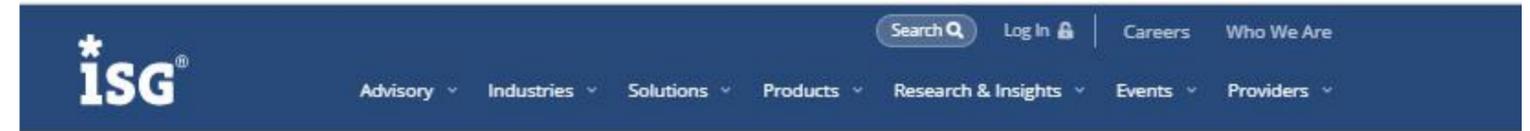
The ISG Provider Lens™ Workday Ecosystem report is focused on identifying the relevant, leading partner companies. Workday's Service Partners enable efficient workday deployments as well as adoption of new capabilities, while the implementation partners ensure seamless integration, enabling information to flow from Workday to internal systems, cloud applications and third-party services. Beyond pure technology implementation, this ecosystem is critical for assisting enterprise clients in reducing the complexity of implementation and migration to next-generation solutions – creating comprehensive roadmaps for implementations, streamlining internal business processes, managing internal and external stakeholder expectations, crafting new strategies to minimize disruption to critical business operations, and ensuring the implementation of the solution stays within budget and time.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Consulting & Strategy Services
- Implementation and Integration Services
- Managed Service

Points to Note:

1. Please note that the quadrant names mentioned in this plan may not be final. These are subject to change based on market dynamics, advisors' inputs, client inputs and analysts' views.
2. With the start of the research phase for each study, the launch email will include a project brochure that will contain final quadrant names, descriptions of the topics and analyst names for each region.
3. The timeline is indicative and is subject to change.
4. The dates of research phase will be included in the project brochure.
5. Project brochures will also contain the names of the project manager who will be the key liaison between providers and analysts. They will be the first point of contact for all providers during and after the research phase.
6. For further details please visit [ISG website](#)



ISG Provider Lens

Service Provider Comparison

ISG Provider Lens™ is a practitioner-led service provider comparison, empowered by ISG's advisory experience and data-driven research. Research reports provide independent vendor evaluations and enterprise buying behavior segmentation. Provider positioning is based on a neutral and independent research and evaluation process; participation in the study is **FREE OF CHARGE**. Your participation in these studies is just a click away. You can now use our IPL Portal for submitting information. If you have not enabled your credentials, please use your email ID as UserName and generate your individual password by clicking "forgot password" option. If you haven't ever registered with ISG Provider Lens™, send an email to our project management team and we will contact you shortly to establish your credentials.

Service provider data, from primary and secondary research, translate into different outputs, categorized as:

- [ISG Provider Lens™ Quadrant Reports](#)
- [ISG Provider Lens™ Archetype Reports](#)

Our 2021 research agenda will provide continuous research and covers both ITO and BPO areas. To view and participate in this program, click [here](#) to download the 2021 Research Agenda.

[Download Agenda](#)

[Subscriber Reports](#)

[Subscription Request](#)

About ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research and consulting services across business processes, IT services and technology. These reports are focused on providing independent vendor/service provider evaluations, outlining strengths and weaknesses of the companies that are positioned relative to their peers in the market. These reports provide influential insights to enterprises and are widely accessed by our large pool of advisors who are actively supporting enterprises to transform and optimize their operational environments.

Often a starting point of discussion, ISG Provider Lens™ reports play a vital role as decision influencers for enterprises looking to outsource to a suitable service provider or find the right technology partner. To enable these insights and decisions, the data captured from providers through primary or secondary research will translate into ISG Provider Lens™ Quadrant Reports and ISG Provider Lens™ Archetype Reports.

Why ISG Provider Lens™ ?

ISG Provider Lens™ is uniquely positioned to deliver a well-rounded research, leveraging a vast ecosystem of multiple stakeholders to gather intelligence and provide insights. Adopting a 360-degree approach, ISG Provider Lens™ gives several reasons for your company to participate in our research.

- 

Growing pool of well-connected and industry leading analysts
- 

Vast coverage of topics spanning IT, BPO and industry verticals that helps highlight niche capabilities
- 

800+ ISG advisors bring practitioners' views and insights to complement our findings
- 

Create lasting impressions with our corporate marketing social presence that has 30k+ connections
- 

Country level research to help enterprises establish local partnerships and identify localized capabilities
- 

Our new 'Star of the Excellence' program integrates with ISG Provider Lens™ and feeds our research with enterprise client insights and feedback
- 

Reports are extensively leveraged by ISG advisors to support client engagements
- 

Research leverages ISG's proprietary databases for provider evaluation and analysis

ISG Provider Lens™ – Research Coverage

2100+	40+	300+	15	275+	30+	1500+	6	12
Service providers and technology companies analyzed	Service lines and technology topics covered	Research reports published by geography	Geographies covered	Quadrant reports	Archetype reports	Individual quadrants and archetypes published	Months intense research cycle	Months annual publication

Quality and Consistency Review Team (QCRT)

ISG Provider Lens™ research involves ISG advisors from various industry and technology practices from around the world. ISG advisors help private and public sector organizations transform and optimize their operational environments through research, benchmarking, consulting and managed services, with a focus on information technology, business process transformation, program management services and enterprise resource planning. Advisor involvement supplements the research conducted on the service providers. The Quality and Consistency Review Team (QCRT) is the ISG program that involves, on average, three advisors in each study. In 2022 the program is expanding, adding more region-specific advisors to each study. As part of each study team, the QCRT works with analysts to help define the study, select the appropriate survey questions, validate service providers to be invited, participate in briefings and review analysis.

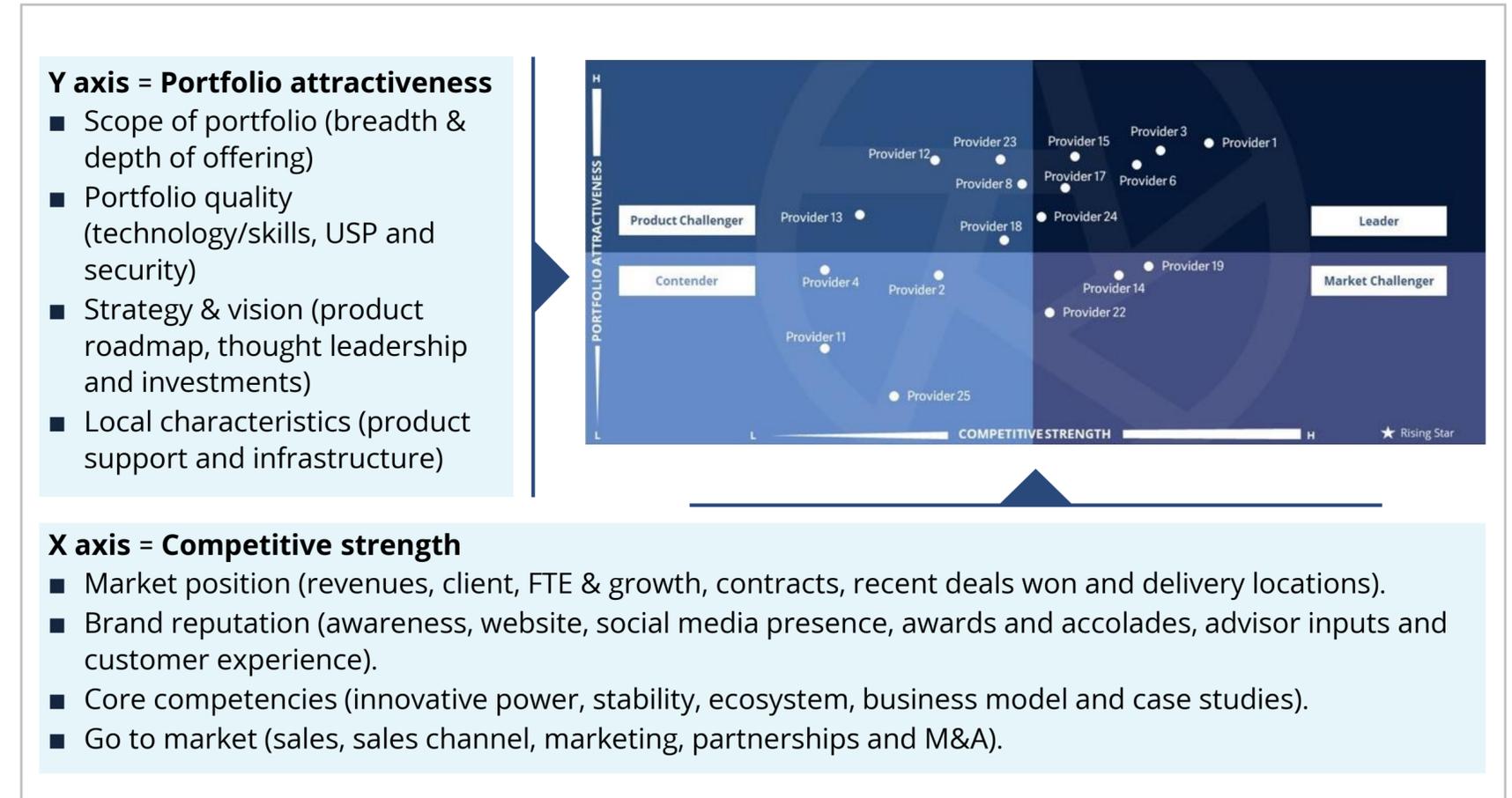
Quadrant Methodology

ISG Provider Lens™ quadrant evaluation framework is robust and adopts a systematic approach to arrive at the final scoring. Based on the scoring and relative positioning, the companies are identified as Leaders, Challengers, Contenders or Rising Stars.

ISG compares and positions service providers in a graphical presentation based on the strength of their service portfolio and market competitiveness. These studies are conducted on multiple regions and for multiple service lines in ITO, BPO respectively industry-specific and partner ecosystem domains.

NOTE: The key parameters are highlighted as per the standard methodology. There will be variations in parameters, depending on the topic of evaluation. ISG does not disclose the weightage for any of the parameters; it depends on individual analysts and studies.

ISG Provider Lens™ Quadrant Reports

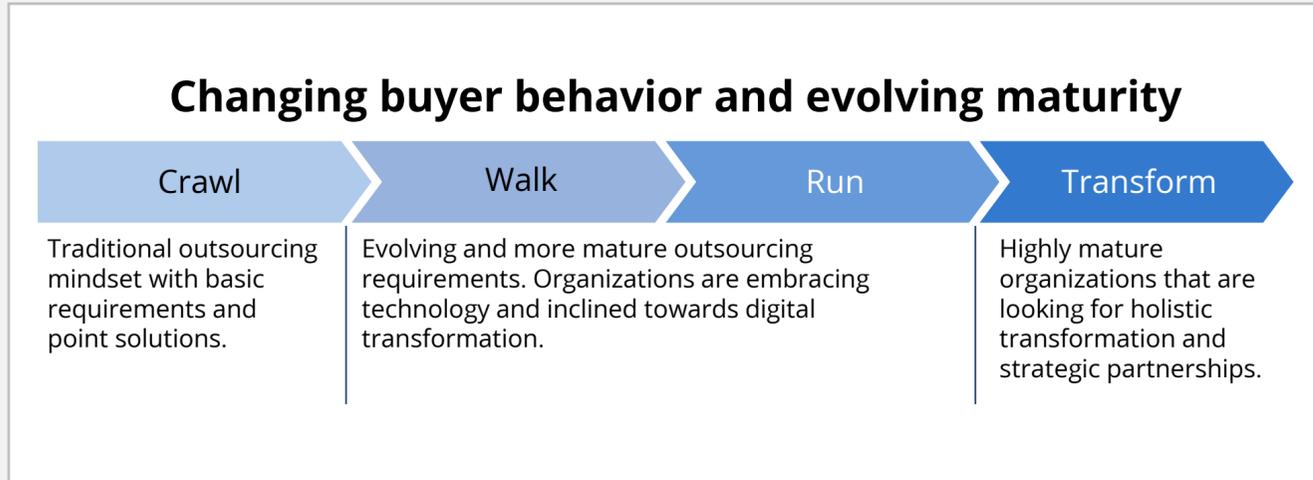


Quadrant Report Characteristics

- Each report identifies a maximum of 5 to 6 quadrants
- Topics span across ITO, BPO respectively industry-specific and partner ecosystem domains.
- Complemented with global overview summarizing global enterprise trends
- Transparent methodology that follows the market definition and criteria
- Region and country focus
- Highlights local and niche players effectively

Archetype Methodology

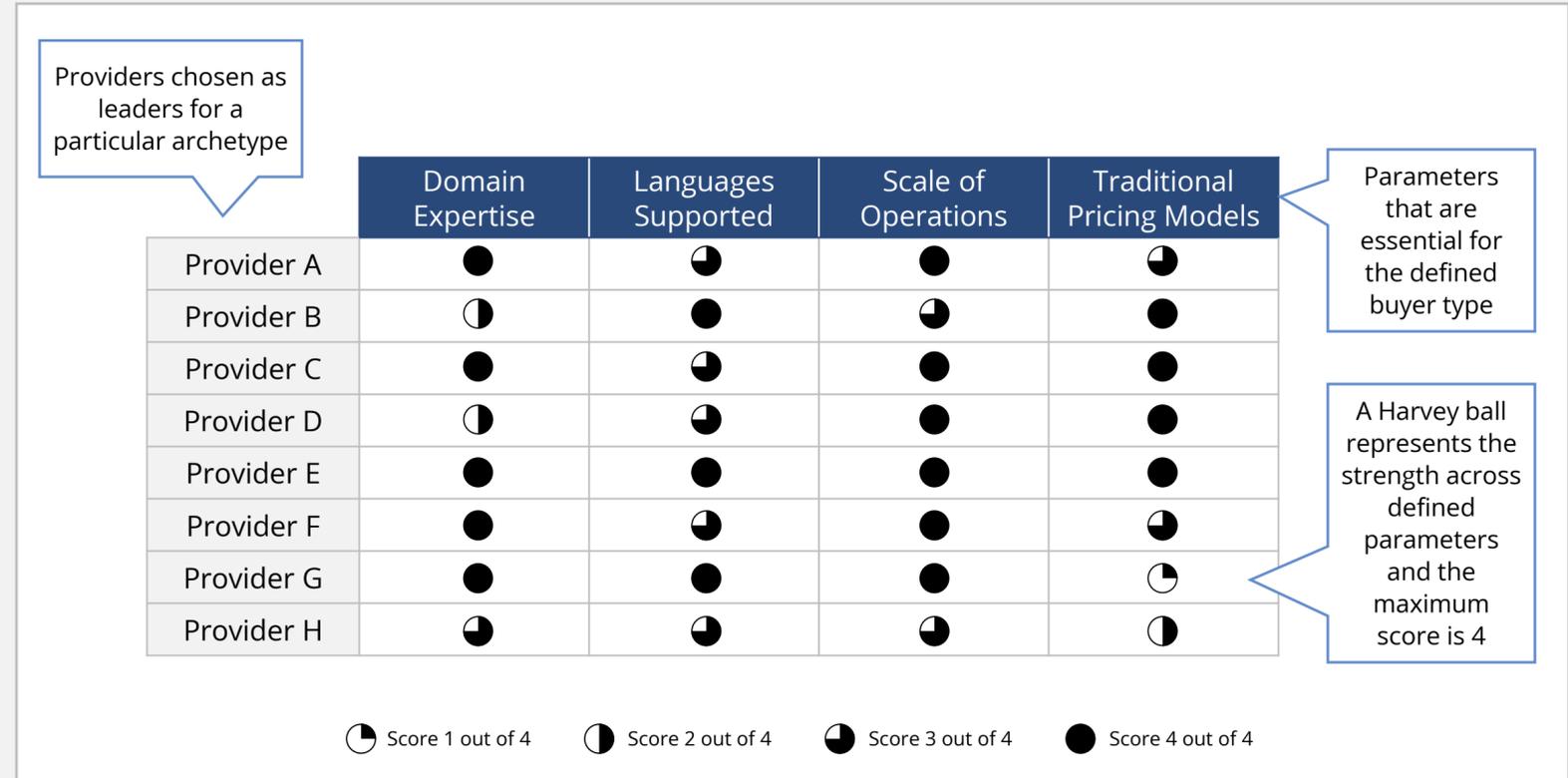
ISG Provider Lens Archetype report segments enterprise clients based on their unique buying behaviours when they outsource for technology services. It classifies differing buying characteristics, known as 'archetypes', highlighting their key objectives and resonating capabilities of service providers that could partner with them. It calls out unique club of providers, called 'Leaders', who are best suited to serve each archetype.



The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their service requirements and from working with services providers to understand how these buyer requirements influence the development of suitable solutions and go-to-market strategies. The characteristics of each archetype is not constant – while the core requirements rarely change, the relative importance of the requirements can vary based on business and/or changes in the technology environment.

Archetype Report Characteristics

- Each report identifies 3 to 5 archetypes/buyer characteristics
- Globally focused reports
- Unique to ISG, archetypes derived represent ISG advisor perception
- Archetype reports are neither prescriptive nor rank-based
- Covers both ITO and BPO service lines
- Reports are capability driven and highlight emerging players



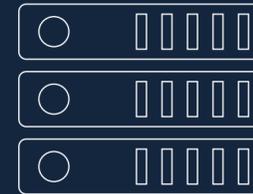
Largely based on portfolio and capability data such as vision, strategy, technology, service offerings, products, partnerships and pricing models, the Leaders chosen are the ones that qualify across all defined parameters for a particular archetype. The average score across various parameters are used to define the leaders of an archetype.

ISG Provider Lens™ – Our Data Sources

ISG Provider Lens™ research studies analyze relevant software vendors/service providers in a particular market, based on a multi-phased research and analysis process, and positions these providers based on the ISG research methodology. For both quadrant and archetype reports, the evaluation framework takes the following into consideration:

- Primary research: Survey input from service providers/vendors
- Secondary research: Desk research on publicly available data
- Advisory input: Thoughts/inputs of ISG advisors
- Star of Excellence: Client feedback about the company on multiple parameters
- ISG internal, proprietary database such as deal information

Some service providers/vendors may choose not to or are unable to provide primary data to ISG, and therefore the research team must rely 100% on the other four data sources to complete the analysis. ISG does not reveal which service providers/vendors fall into this category.



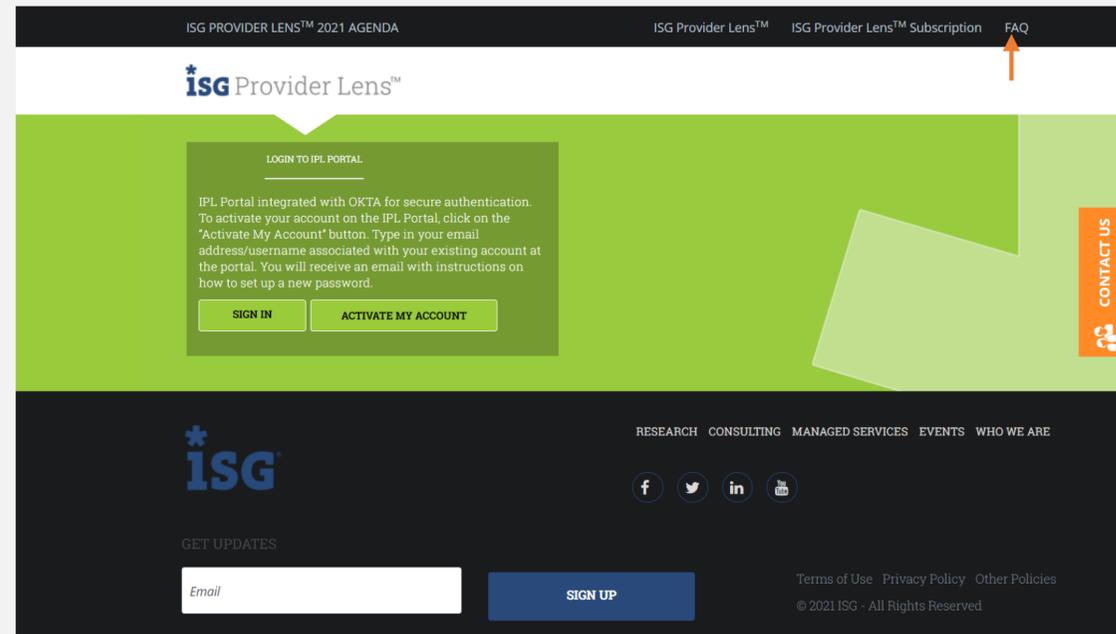
ISG Provider Lens™ – Our Data Sources



ISG Provider Lens™ Portal

ISG Provider Lens™ launched the data collection portal to provide continuous access to providers responding to our surveys and enable increased collaboration. This uniquely designed portal allows users to respond to our surveys more effectively by giving them complete visibility and control over data through the year.

In addition to enabling over 800 ISG advisors with the latest data points, the portal also engages with and offers a self-service-platform that providers can use to submit or simply update IPL-study-related information in terms of revenue, team size, qualifications, service- and product capabilities, case-studies-related references, and roadmap items.



Click on FAQ to learn about the portal and how to make best of use of it. This page also answers some of the commonly asked questions.

Note:

- **Advisors do not access the portal:** Our internal advisors do not have access to the portal. All data requests are channeled via CPQ and Provider Lens program. CPQ and ISG Provider Lens analysts work closely to address advisor requests in the most plausible way.
- **Access:** By default, SPOCs registered with us are given access to the portal. Multiple users can be granted access and the same will be done upon request.
- **Research phase:** The data entry window for a study is typically open for a period of six weeks. Once the submission of data is completed on the portal, the **SUBMIT** button changes to **UPDATE**. This implies that you are welcome to update any data point, any time of the year. However, the updated data will **NOT** be considered for evaluation post the closure of the research phase.

Portal Benefits

Access to excel questionnaires

We understand that excel is still a critical survey instrument for the purpose of internal data collection. Thus, the excel questionnaires are made available on request and can be used for internal distribution. However, the final submission of the responses must be done on the portal.

24/7 access

Respondents can access the portal anytime through the year and are also allowed to make changes to the survey through this period.

Visibility

The IPL Portal dashboard is designed to give complete visibility about the studies, participation, and new launches.

Preloaded data from last cycle

For studies that are repeated year on year, responses from the previous cycle are made available to the respondents when the studies are launched again. This feature will save a user's time significantly by allowing them to update the data wherever necessary.

Latest and greatest data

The portal allows users to update the data with latest information throughout the year. This helps us to provide the latest data to our advisors for their client engagements. This portal is a great medium to keep our analysts and advisors updated with the latest information about your company.

Candidate Provider Qualification Program

The Candidate Provider Qualification (CPQ) process is a key component of the ISG FutureSource™ methodology. The objective of the CPQ process is to identify providers qualified to provide in-scope services for a client and facilitate strong conversations between an ISG advisor and their clients on providers that should be included in the ISG FutureSource™ process. As a part of this program, ISG advisors are provided with a list of relevant service providers to create an initial recommendation or longlist for their enterprise engagements. Based on the requirements and maturity of enterprise clients, the CPQ team highlights the related strengths and weaknesses of the selected service providers along with their profiles, case studies and market experiences to support their recommendations.

How Does It Work

After gaining an understanding of clients' objectives via the CAS Outcome and Scope phase of the FutureSource™ process, the ISG Project Director submits a request to the CPQ team.

- The CPQ and ISG project teams collaborate to understand the nuances of scope of work, incumbents and enterprise expectations.
- Providers with the right set of capabilities, market experience and track record of client success are identified using the research insights described on the right.
- Typically, a longlist includes approximately 20 service providers and serves as the base for subsequent discussions to create a shortlist.
- If required, the CPQ team conducts additional research to support the specific needs of a client — this may include reaching out to a provider's advisor relations team for additional information.

The CPQ team provides the ISG project team with a client-facing deliverable that is used to support shortlisting discussions with an enterprise client.

ISG Research has **rich data** to support longlisting and shortlisting discussions with enterprise clients.

ISG Research tracks more than **1,200 providers** across multiple service lines.

No one **knows** the provider market as well as ISG.



The CPQ Process Leverages a Variety of ISG Data Sources to Identify Qualified Providers, and Answers 3 Primary Questions

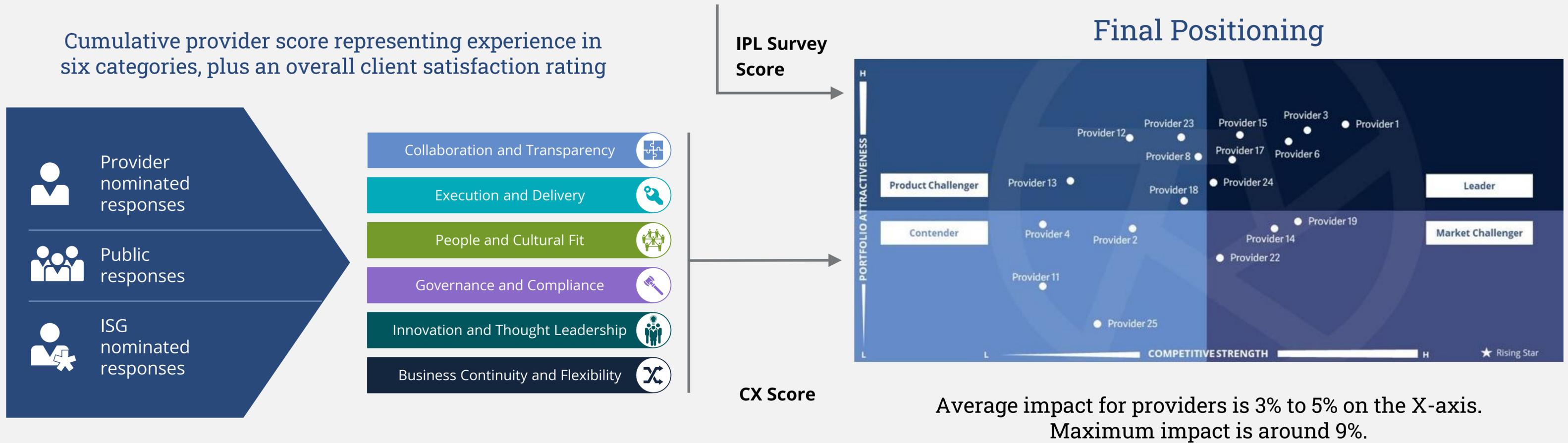
	Who has the capabilities to deliver for my client?	<ul style="list-style-type: none"> ■ ISG Provider Lens™ research studies; 40+ studies planned for 2022 ■ Analyst and advisor briefings ■ ISG advisor experience and peer insights 	1
	How often and where have they delivered similar services?	<ul style="list-style-type: none"> ■ ISG Contracts KnowledgeBase™ ■ ISG Research tracks more than 190,000 contracts signed between enterprises and service providers 	2
	How well have they performed when delivering similar services?	<ul style="list-style-type: none"> ■ Digital Case Study Awards ■ Case studies from ISG Provider Lens™ surveys 	3

References

Note: ISG Provider Lens™ reports and data collected actively support the initial qualifying phase of the CPQ process — identifying providers with the capabilities to deliver for a client. Participation in the ISG Provider Lens™ research studies significantly increases your company's visibility among ISG advisors and enterprise clients. Also, participation increases the likelihood of you being included in longlists when your firm's capabilities align with a client's needs. Please note that participation does not automatically guarantee an inclusion in the final recommendations to an enterprise client. The shortlisting of companies is left to the discretion of advisors and enterprise clients.

ISG Star of Excellence Program and IPL Influence

Upcoming ISG Provider Lens studies will include data from the Star of Excellence program as part of their provider evaluation criteria. This independent survey of enterprise technology services users provides an in-depth look at provider delivery capabilities and will inform analysis of competitive strength. The ISG Star of Excellence program recognizes providers with exceptional client experiences. As part of the program, ISG collects direct feedback from service provider clients about their general experience with service providers and those providers' technology, industry, regional and emerging tech capabilities.



ISG Star of Excellence Program and IPL Influence

Why participate?

Star of Excellence results offer an independent view on your clients' experience and can be used to improve your services and relationships. Furthermore, these data offer actionable insights down to satisfaction with specific services, which can be used to precisely improve client experience. Providers will be given an overview of their relevant Star of Excellence results as part of the IPL Sneak Preview process since all the 2022 IPL studies will incorporate Star of Excellence results into their evaluation of providers' competitive strength.

In addition to incorporating these results into IPL evaluations, providers that offer superlative experiences will be given awards for their achievement. For being eligible to receive an award, providers must have:

- 30+ total responses
- At least 30% of total responses from public client submissions
- Responses covering at least two topic/context areas (ADM, Cloud, etc.)
- Responses from at least two geographies

Detailed information about the program and award-related criteria can be found [here](#).

How to engage with ISG

Please visit the [nomination page](#) on the IPL Research Portal to nominate your clients. Once you submit client details, a customized email invitation along with the small survey will be sent to your clients and you will be notified. The responses submitted after the deadline will be considered for the next year's rewards program and be included in the relevant IPL evaluations.

Providers can nominate their clients to participate in the survey using [this link](#). For more information, contact Phani K R at star@isg-one.com.

Data Usage and Privacy

Clients participating in the survey will have their data anonymized. All client data submitted as part of this program are confidential. ISG will not share your data and/or client-related data with any third party. Only anonymized enterprise data gets transferred into the IPL research process and consequently into the advisory community's sourcing projects.

All you need to know about the ISG Provider Lens™ Report Process



Kick-off and Research Phase

- ISG Provider Lens™ analysts, in collaboration with ISG advisors, determine the quadrant definitions and the eligibility criteria for the study with inputs from providers in the space.
- This collaboration exercise, called the Communities of Interest, involves ISG soliciting feedback from various communities.
- Launch emails are sent with login details for the portal and study brochures are developed with all the details pertaining to the study like quadrant names, timelines, analysts and eligibility criteria.
- Providers are given 4 weeks to submit information via structured questionnaires.
- During this phase, the providers are encouraged to proactively suggest dates for briefing to avoid probable delays.
- Once the data has been submitted on the portal, this represents the data that will be considered for evaluation.
- Briefing calls and decks add significant value to research and report writing.



Sneak Previews

- The primary purpose of the sneak preview is to announce and present the results of the study and ensure the textual facts about the vendor/service provider are represented correctly. A fact check window will be open and each provider who is identified as a leader/Rising Star will be allowed to make any recommended changes for their content within 72 to 120 hours (3 to 5 days), post which the write-ups will be considered final, and no further changes will be entertained after the window gets closed.
- Sneak previews are 30 to 60 minutes telephonic conferences with the ISG analysts and account managers to explain the ISG Provider Lens™ study results for the respective quadrant or archetype leaders/Rising Stars.
- All results, calculations and assumptions presented within the sneak previews are business secrets of ISG; they are protected accordingly, based on the Act Against Unfair Practices, and by copyright law. No ISG content is allowed to be published on any company websites or in any marketing documents/events, etc. without intimation to ISG, IPL account managers and taking necessary permissions and adhering to the ISG norms.

Please note that Sneak Previews are not intended to dispute the ratings/positioning on the quadrant or archetype or to provide additional data to complete the survey responses. Such data will not be considered for evaluation but will be updated in the provider profiles.



Press Release and Media Publish

Upon completion, our ISG Provider Lens™ studies are published in the media through the following channels:

- Press releases, IPL™ Enterprise Subscription, ISG website, and social media.
- Providers can purchase reprint rights to the report and have the opportunity of being included in our Press Release via a landing page link. Copies of the full report can also be purchased for internal use.
- Please reach out to your respective IPL account managers for being part of the ISG Press Releases.

ISG Provider Lens™ Custom Research Program

ISG Provider Lens™ Custom Research Program strives to address the bespoke enterprise/provider clients' research requirements. The clients get access to our experienced and market-facing analysts to achieve various objectives such as gain market and industry knowledge, ensure product/service validation, benefit from thought leadership, harness competitive intelligence, accrue knowledge from market surveys, take advantage of joint point of view (POV) research.

The standard offerings under the ISG Provider Lens™ Custom Research Program include joint webinars, joint research papers, briefing notes, competitive/strategy workshops, podcasts and survey-based thought leadership papers.

Details around some of the primary custom research offerings are given below:

Offering Type	Competitive Workshop	Briefing Notes	Thought Leadership Papers	Research papers (White papers)	Webinars	Offering Type	Competitive Workshop	Briefing Notes	Thought Leadership Papers	Research papers (White papers)	Webinars	
Overview	ISG Analyst provides an overall assessment of the provider's performance with IPL and compares it with three top competitors (of their choice) on key parameters.	ISG's assessment of a vendor/provider's business focus or offering.	ISG's analysis and perspective on a technology area or market development, often accompanied by an enterprise survey. This survey deep dives into current adoption and initiatives, challenges, opportunities and outlook.	ISG's assessment of the market space, current market dynamics, and how the vendor/provider offering caters to the market demand.	Joint presentation covering market dynamics/trends and vendor/provider narrative.	Scope coverage	<ul style="list-style-type: none"> Key trends in that market Provider vs. competition participation level Provider vs. competition – Comparison on four key evaluation parameters each on the x- and y-axis Pointers covered around strengths, continued efforts, need attention A SWOT Analysis 	<ul style="list-style-type: none"> ISG's understanding of the provider offering(s) or business initiative or focus area The value proposition on offer Differentiators at a vendor or offering level The ideal buyer and how it can benefit Guidance concerning the offering/solution 	<ul style="list-style-type: none"> Prevailing market dynamics Survey findings – market analysis on various aspects (adoption, solutions, opportunities, challenges and outlook) followed by ISG inferences and conclusions Summarizing the overall findings Commentary around provider/vendor offering in the space 	<ul style="list-style-type: none"> Prevailing market dynamics/trends Highlight what enterprises are looking for The problem statement(s) The business case for the proposed solution – The industry challenge it solves Determine if the newfound focus or service offering is in sync with market demand A summary of the proposed solution 	<ul style="list-style-type: none"> The provider/vendor highlights its understanding, solutions and case studies (can vary based on the purpose). The ISG analyst contributes by adding market data, ISG's PoV on the subject in the presentation. 	
Deliverable Format	PowerPoint	Word + PDF file	Word + PDF file	Word + PDF file	PowerPoint + Video-based engagement		Length/magnitude of deliverable	<ul style="list-style-type: none"> 60 to 90 minutes (4 hours/half day if it is delivered physically, onsite) 	<ul style="list-style-type: none"> 1200 to 1800 words Around 4 pages 	<ul style="list-style-type: none"> 2500 to 3500 words 10 to 14 pages (inclusive of charts/graphs) 	<ul style="list-style-type: none"> 2200 to 2600 words 8 to 10 pages (all-inclusive) 	<ul style="list-style-type: none"> Typically, 1 hour (with 15 minutes Q&A)
Objective	<ul style="list-style-type: none"> Competitive intelligence Provider education and market awareness 	<ul style="list-style-type: none"> Endorsement Target Marketing 	<ul style="list-style-type: none"> Understanding market behavior and potential Showcasing promising and relevant work of provider/vendor in a market space 	<ul style="list-style-type: none"> Establishing thought leadership Indirect marketing 	<ul style="list-style-type: none"> Enterprise education and marketing 							
Delivery Timeline	A preparation time of minimum 2 weeks	The final output is generated within 3 weeks from the briefing	The output can take 8 to 10 weeks depending on the scope (including running the enterprise survey)	The output can take 5 to 7 weeks depending on the scope	4 weeks (including the time taken by the vendor to market the webinar)							

At the same time, the ISG Provider Lens™ team can work with clients on customized research agendas, including location assessment, provider intelligence, vendor identification and selection and benchmarking exercises.

Digital Innovator Series

The “Digital Innovators” series of reports highlights niche and innovative technology vendors in an industry, service line or technology area. The report educates the enterprise ecosystem about the potential of existing technologies and how they can be leveraged to shape the future. The purpose of the report is not to cover the entire vendor landscape, but to showcase a few upcoming and promising vendors.

A “Digital Innovator” is a vendor, offering solutions that are: technologically advanced, which are built on emerging technologies; innovative, which solve business challenges; market-ready, which find real-world client implementations; unique, with a limited number of competitors; and forward-looking, which bets big for the future.

The Digital Innovators studies cover the following aspects for a selective set of vendors:



Vendor Overview: Area of expertise, presence and solution(s)



Solution Overview: Features, characteristics and business impact



Value Proposition: Target customer and effectiveness



ISG Analysis: Assessment of offering, future potential and key challenges

The report is aimed at:



Enterprises looking to solve long-standing industry challenges or trying to achieve a competitive advantage through technology.



Service providers and large software firms seeking partnerships and/or potential M&A targets.

Eligibility Criteria

A participating technology vendor should conform to the following:

Annual revenue should not exceed **US\$100M**

Less than **200 employees**

Founded in the past **10 years**

Environmental, Social and Governance

Environmental, Social and Governance (ESG)

An overriding goal of ESG is creating a culture in which each employee feels included and that their contribution is valued. That culture profile recognizes and respects the full spectrum of human qualities, so that the unique talents of all employees are distinguished with equitable access to opportunities and an ability to contribute to the mission. But leaders need the expertise and tools to change working environments. In 2020 and 2021, the focus on ESG in organizations reached unmatched levels. Enterprises expect service providers to assist them in developing and implementing ESG programs as part of human resources and future of work initiatives. Service providers are also evolving their own ESG initiatives to meet shareholder and market expectations. As part of service provider positioning, ISG will evaluate their commitment to advancing ESG in every aspect of work, and at all levels of the organization:

- Respect for human rights with advocacy across genders, LGBTQ, ethnicities, religions, disabilities and cultures
- Fair operating and labor practices with trust, transparency and pay equity
- Inclusion and collaboration within and across teams
- Accountability of leaders at all levels to create and sustain a culture of equality
- Training and support for everyone
- Community engagement
- Supplier diversity

Environmental Responsibility

Organizations are incorporating prominent environmental practices into their business strategies and operations, while cultivating environmental awareness and responsibility amongst their people, clients, suppliers and other interested parties. ISG will evaluate as part of service provider positioning their commitment to:

- Initiatives to drive reductions in environmental impacts and apply leading technology innovations and expertise to address global environmental challenges
- Carbon neutrality and commitments to net-zero carbon emissions as a core element of a growth strategy using science-based target setting
- Advocacy with clients, partners, suppliers and other stakeholders
- Helping clients meet their sustainability goals

List of Analysts for 2022



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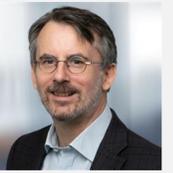
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A Glimpse into ISG Provider Lens™ Award Ceremony



***ISG** Provider Lens™

Annual Plan 2022

www.isg-one.com

