



## **ISG Case Study Research**

Case Study Submission Form



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## ISG Case Study Submission Questionnaire

The ISG Case Study Research Submission is a centralized, unified platform designed to capture high-quality case studies through a single, streamlined submission process. This unified channel serves multiple ISG research and recognition programs, including ISG Provider Lens™ studies and ISG Paragon Awards, ensuring that provider-submitted case studies are consistently evaluated and leveraged across ISG’s research ecosystem.

By bringing multiple programs under one submission framework, ISG enables greater consistency, efficiency, and analytical rigor—both for providers sharing their transformation stories and for ISG analysts evaluating real-world impact at scale.

### Case Study Research Submission

I hereby acknowledge and affirm that I understand and agree to the case study submission, validation, evaluation and award process terms and conditions for participating in this program. Please read the Case Study Research Agreement for more details.

**Select one of the options below to indicate where you would like to submit your case study –**

Please note,

This platform supports submissions for both ISG Provider Lens™ (IPL) evaluations and ISG Recognition Programs. Please select the option that aligns with the purpose of your submission:

- **Option 1: ISG Provider Lens (IPL)**  
Select this option if you are submitting case studies for a specific IPL study. This is a shorter submission, focused only on IPL evaluation requirements, and does not require client validation.
- **Option 2: ISG Recognition Programs (Case Study Standouts / Paragon Awards)**  
Select this option if you are submitting case studies for Case Study Research or Paragon Awards. This requires additional program-specific details and mandatory client validation.

**All submissions captured through this platform may also be used as credentials for relevant ISG Provider Lens studies.**

**Row:**

- ISG Provider Lens (IPL)\*
- ISG Recognition Programs (Case Study Standouts / Paragon Awards)

### Your contact details

Mandatory fields

- Name \_\_\_\_\_
- Email \_\_\_\_\_
- Name of alternate contact \_\_\_\_\_
- Email address of an alternate contact \_\_\_\_\_
- Provider company name\* \_\_\_\_\_



- ISG relationship contact (Write “none” if you do not have one)

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**The ISG Case Study Research Framework is utilized for both the ISG Paragon Awards and ISG Case Study Standouts. The ISG Paragon Awards recognize both the client and the provider, identifying potential winners. To be considered for a Paragon Award, we need your permission to name the client company in press releases and during the awards ceremony. For Case Study Standouts, you have the option to allow ISG to name the client in the published case study. Alternatively, ISG can use a general description to anonymously refer to your client, such as “a major retailer” or “a regional bank.”**

Please select most appropriate

**Paragon awards**

- Yes, I’d like to participate in the Paragon Awards. ISG may name my client in a press release and during an in-person ceremony (You have the option to keep the client’s name anonymous at a later stage)
- No, I do not want this case study to be considered for the Paragon Awards

**Case Study Standout**

- Yes, ISG may name my client in both press releases and for the ISG Case Study Standout recognition program
- Yes, ISG will use a general description to anonymously refer to your client in the final case study, such as “a major retailer” or “a regional bank” for the ISG Case Study Research Standout recognition program
- No, I do not want this case study to be considered for the ISG Case Study Standout recognition program but for ISG Research including CPQ Process

**Client name\***

(This is necessary for ISG’s internal use. Please write the full name of the company and not an anonymous description.)

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**Do you have a preferred anonymous general description for your client that ISG should use?**

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### Location\*

Select the regions where the scope of this case study impacted the business of the client. This is NOT the locations where the engagement was delivered from. You may select one or more regions or indicate that the work had a “Global” focus if it impacted four or more regions.

- Asia Pacific excluding India
- Australia and New Zealand
- DACH and Eastern Europe
- India
- Middle East and Africa
- North America
- South America
- South Europe (France, Italy, Spain and Portugal)
- UK, Ireland, and Scandinavia
- Global

### Industry\*

(Which market was primarily impacted by this work.)

- Banking and Financial Services
- Business Services
- Communications
- Consumer Products
- Energy
- Healthcare and Life Sciences
- Insurance
- Manufacturing
- Media and Entertainment
- Public Services
- Publishing and Education
- Retail
- Technology
- Travel and Logistics
- Utilities

**Your case study will be shared with the analysts who lead specific ISG Provider Lens studies. ISG Provider Lens™ reports evaluate independent vendors and providers across a range of capabilities by topic and region. This mapping will also help the ISG team to better classify your client work for the candidate provider qualification (CPQ) process. Please select all the studies for which this case study will represent your credentials.**

For this case study to be a valuable input, it is important that you include appropriate details as part of your submission. Please select the most appropriate study from the list.\*



- Advanced Analytics and AI Services
- Aerospace & Defense Services and Solutions
- Agentic AI Services and Solutions
- AI Services in Healthcare Industry
- AI Services in Life Sciences Industry
- AI-driven ADM Services
- AI-Ready Hardware Solutions
- Amazon Connect Ecosystem
- Automotive & Mobility Services & Solutions
- AWS Ecosystem Partners
- Cloudera Ecosystem
- Contact Center – Customer Experience Services
- Cyber Security – Services and Solutions
- Databricks Ecosystem
- Digital Engineering Services
- Digital Sustainability
- Duck Creek Services Ecosystem
- Enterprise Managed Network Services (MNS)
- Enterprise Service Management –Services (ESM)
- Finance and Accounting Outsourcing (FAO) – Services
- Financial Services – Banking Services
- Future of Work (Workplace) – Services
- Generative AI Services
- Global Capability Center (GCC) Services
- Google Cloud Partner Ecosystem
- Guidewire Services Ecosystem
- Healthcare Digital Services
- High-Tech and Semiconductor Industry — Services and Solutions
- Insurance Industry Services
- Intelligent Automation Services
- Intelligent Robotics & Physical AI Services
- Life Sciences Digital Services



- Mainframe Services and Solutions
- Manufacturing Industry Services and Solutions
- Medical Device Digital Services
- Microsoft AI and Cloud Ecosystem
- Multi Public Cloud Services and Solutions
- Network – Software Defined Solutions and Services
- Oil and Gas Industry – Services and Solutions
- Oracle Cloud and Technology Ecosystem
- Palantir Ecosystem Partners
- Payroll Managed Services
- Power & Utilities Industry – Services and Solutions
- Private/Hybrid Cloud – Data Center Services and Solutions
- Procurement BPO Services
- Public Sector Services and Solutions
- Salesforce Ecosystem Partners
- SAP Ecosystem
- ServiceNow Ecosystem Partners
- Snowflake Ecosystem Partners
- Supply Chain Services
- Telecom, Media and Entertainment Industry Services and Solutions
- UKG Ecosystem
- Workday Ecosystem
- Not applicable

**Please mention the relevant quadrant(s) where this case study aligns best\***

- Quadrant 1 \_\_\_\_\_
- Quadrant 2 (Optional) \_\_\_\_\_
- Quadrant 3 (Optional) \_\_\_\_\_
- Quadrant 4 (Optional) \_\_\_\_\_



**Annual Revenue (USD)**

**(Select the most appropriate one)**

- Less than \$250 million
- \$250 million - \$500 million
- \$500 million - \$1 billion
- \$1 billion - \$3 billion
- \$3 billion - \$5 billion
- Greater than \$5 billion

**Select the regional Paragon award program where you would like to contest:**

**(Select the most appropriate one)**

- Paragon North America
- Paragon LATAM
- Paragon Europe

**The ISG Paragon Awards honors providers and clients across six categories.**

**(Select the most appropriate one)**

- **Excellence** This category recognizes outstanding delivery and excellence by a technology or service provider in the provision of services to a client or clients.
- **Innovation** Recognizing the importance of imagination in helping organizations to future-proof their businesses as well as the entrepreneurial spirit needed to help them make a change in how they serve their customers. Nominees can include individuals, organizations or a combined client and provider team.
- **Transformation** This category recognizes the fundamental transformation of an organization or key business function. It rewards both client and service provider.
- **Sustainability** This category recognizes exceptional implementation of Environmental, Social, and Governance (ESG) strategies that have delivered measurable outcomes for clients, consumers, communities and/or employees.
- **AI Pacesetter** This category recognizes substantial business impact through the adoption of AI.
- **Partnership of the Year** – This category celebrates partnerships that demonstrate exceptional collaboration and mutual success, contributing to outstanding customer outcomes.

Please note: The AI and Sustainability categories focus on specific, outcome-driven initiatives, providing an additional lens comparing to the broader categories of Excellence or Transformation submissions. This can further strengthen the overall evaluation of a case study and support its competitiveness in the final selection.



## SECTION 1: CASE STUDY OVERVIEW

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### Case study summary

Provide a short description of the case study (scope, objectives, and summary of outcomes).

Do not exceed 400 characters.

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### Engagement Model\*

Please select one

- Staff Augmentation
- Managed Capacity
- Managed Service
- BPO / BPaaS
- Virtual / Hybrid GCC
- Other (please specify) \_\_\_\_\_

## SECTION 2: CLIENT ENGAGEMENT CONTEXT AND COMPLEXITY

**Describe the client's business context and strategic priorities.\***

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**Outline the client's key challenges and business pain points that triggered the engagement.\***

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**Based on this, how would you describe your client's strategic objective?**

Please select all that apply

- Operational transformation or process optimization
- Digital transformation or modernization
- New customer or employee experience
- Innovation enablement
- New/disruptive business model



- Market expansion or growth
- Risk reduction and business resilience
- Sustainability / ESG impact
- Cost optimization / value realization
- Other (please specify) \_\_\_\_\_

### SECTION 3: SOLUTION DESIGN AND EXECUTION

**Describe the proposed solution and its alignment to the client’s objectives.\***

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**List any proprietary IP, accelerators, partner technologies and platforms or frameworks used**

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**How is the delivery distributed across - onshore/offshore/hybrid?\***

Sum should add to 100%

Row:

- Onshore
- Offshore
- Hybrid

**Describe the commercial model adopted (e.g., outcome-based, consumption-based, fixed, hybrid).**

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**To what extent was this solution standardized or repeatable across other clients?**

- Highly Customized
- Partially customized
- Plug and play accelerators with minimal customization
- Others (Please Specify) \_\_\_\_\_

### SECTION 4: BUSINESS IMPACT AND OUTCOMES



**What were some of the measurable outcomes achieved? Describe some of the non-tangible benefits delivered – driving cultural change, improved employee experience, better brand visibility, risk reduction).\***

Quantify on a yearly basis, if the engagement is new then quantify on half yearly basis.

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## **SECTION 5: ENGAGEMENT MATURITY AND PARTNERSHIP**

**How long have you been working with this client?**

Please consider today's date for reference

- Years \_\_\_\_\_
- Months \_\_\_\_\_

**Describe how the relationship has evolved from tactical to strategic?**

Outline any strategic goals achieved.

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**How did the partnership demonstrate transparency, mutual accountability, alignment of goals and adaptability throughout the engagement?**

Explain how both parties established a shared vision and aligned their individual and collective objectives. Include any formal mechanisms (e.g., joint planning sessions, shared KPIs) used to maintain alignment throughout the engagement.

Provide examples of how open communication was maintained, how roles and responsibilities were clearly defined, and how the partnership adapted to changes in client needs or market conditions. Highlight any continuous improvement practices or governance models used.

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## **SECTION 6: INNOVATION AND DIFFERENTIATION**

**Describe introductions of emerging technology, if any – like AI/ Agentic/ Other led enhancements introduced during this engagement and outline the outcomes / improvements delivered specific to these introductions.**

**Were any co-innovation initiatives undertaken with the client or ecosystem partners?**



**SECTION 7: SUSTAINABILITY AND CHANGE MANAGEMENT**

**Describe how you ensured long-term adoption and change management (training, communication, stakeholder buy-in).**

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**Highlight any sustainability or ESG-related initiatives embedded in this engagement (e.g., energy efficiency, inclusion, carbon footprint).**

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**Client contact for case study validation**

**(Please check for spellings correctness)**

- Client contact name \_\_\_\_\_
- Client job title \_\_\_\_\_
- Client contact email \_\_\_\_\_

**Attach related documents.**

Please note: Only one attachment, maximum 5MB. If needed, you can zip multiple attachments into a single file to upload. No password protected files or attachments. Supported file extensions for upload: .pdf, .xlsx, .pptx, .docx

- Context for attachment

**Provide related links that are publicly accessible.**

(ISG will not access any links with access controls.)

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**Would you like to nominate this client to also participate in the Star of Excellence program?**

- Yes
- No

Thank you for your interest in Star of Excellence (SoE) program. Please [click here](#) to continue.

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For more details, please write to [Case Study Research Team](#)