ISG Provider Lens™

2022

ServiceNow Ecosystem Partners 2022

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006 and based in Stamford, Conn., ISG employs more than 1,300 professionals operating in more than 20 countries — a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

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Introduction

The ServiceNow Ecosystem Partners 2022 study examines the extensive, global and complex partner network of one of the leading workflow management software solutions. The broad acceptance of ServiceNow's offerings among the user community has led to exponential growth for the company. Enterprises seek professional services to fully utilize its broad functionalities — from process redesign through software implementation and integration to application management and training. Various offerings and certification levels indicate the focus of partner companies, ranging from full-scale lifecycle support to laser-focused services for specific tasks.

ISG Provider Lens™ ServiceNow Ecosystem Partners 2022 study analyses the services and offerings of ServiceNow partners in the U.S., Brazil, Germany, Singapore, Malaysia and Australia in selected segments. The findings from the analysis help assess the service providers operating in the defined segments in terms of the strength of their respective portfolios and their competitiveness in the market.

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

- Transparency on the strengths and weaknesses of relevant providers.

- A differentiated positioning of providers by segments.

- Focus on different markets, including the U.S., Brazil, Singapore, Malaysia, Australia and Germany.

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Quadrants Research

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

ServiceNow Ecosystem Partners 2022
ServiceNow Consulting Services
ServiceNow Implementation and Integration Services
ServiceNow Managed Services Providers

Source: ISG 2022

ServiceNow Consulting Services

This quadrant assesses the providers of consulting services that help clients prepare for the use of workflow management services. While reference models and assessments are key to understanding a client's maturity and prevailing challenges, a broad understanding of the current technical capabilities and plans for the future help differentiate the ServiceNow partners. Helping clients understand what efforts toward transformation have to be made to optimize the investments made on ServiceNow and deliver a robust migration path distinguishes consultants from one another.

Eligibility criteria:

- **Use of reference models, templates and frameworks:** Best practices in opportunity identification and assessments for new ServiceNow competencies. Availability of frameworks, tools for ServiceNow investment planning and roadmaps, ROI and business case development, value realization metrics and benchmarks (by industries and functions).

- **Experience in broad workflow and service management:** Designing client roadmaps with long-term strategic plans to use ServiceNow as an integrated "platform of platforms" for all major corporate business operations, IT services and integration with GRC and security policies.

- **Capabilities to predict long-term technological developments:** Tools and methodologies to gather market intelligence. Part of tech community and knowledge forums to seek insight on advancements.

- **Knowledge about ServiceNow capabilities and other tools:** Knowledge about workflows functional and business processes within enterprise services supported by ServiceNow, ITSM and IT operations management and areas such as customer service management, human resources, finance and accounting, facility management and security.

- **Possesses relevant certifications:** ServiceNow certifications, ITIL 4 expertise, COBIT, DevOps and ESM-related accredited experience.

- **Experience with organizational change principles and practice:** Planning, delivering and supporting organizational change with proven case studies and client storyboards from various industries, as relevant.

ServiceNow Implementation and Integration Services

This quadrant assesses providers specializing in implementing ServiceNow. As ServiceNow's solutions do not run in isolation in most companies, knowledge of integration with different software tools is an essential differentiating factor among partners. The experience of service providers ensures that installation and integration are seamless. At the same time, they should also focus on the maintenance of the installed solution.

Eligibility criteria:

- **Use of predefined solutions, accelerators and templates:** Experience in agile project management (PMP Certifications, SaFE and Scrum), continuous integration/continuous development and DevOps best practices and toolchains, containerization platforms, application performance monitoring and platform-specific ops management tools.

- **Experience with emerging technologies:** E2E management of machine learning techniques, natural language processing (NLP) and AI capabilities, paired with cognitive computing to enable digital service management (DSM), virtual agents and self-service.

- **Knowledge about ServiceNow usage and value in specific client scenarios:** Enterprise-shared services/BPO, cloud and multi-cloud integration; knowledge of development and deployment and operations of industry specific solutions (for example, healthcare, telecom) on the ServiceNow platform.

- **Speed of adoption and value realization:** Deploy new features, modules and enhancements on the ServiceNow platform, in a cost-effective and efficient manner.

- **Ability to offer maintenance support:** Support in installations, upgrades and new feature/module release management, migration, patch management, lifecycle management of ServiceNow instances, maintenance experience in post ServiceNow release migration.

- **Size and capabilities of local and global delivery teams:** This includes relevant ServiceNow technologies expertise such as API development, JSON and Python.

- **Experience in system, data and process integration:** Integration with the hub and spoke model (starter, standard, professional and enterprise levels).

- **Customer Satisfaction Measurement:** Ability to gather voice of customer, service satisfaction index, ServiceNow score, and NPS (net promoter score).

ServiceNow Managed Services Providers

This quadrant assesses providers for their capability to offer managed services for maintenance and support functions, including monitoring, remote support, and centralized management of the Now Platform, workflows and the applications that run on this platform. When analyzing the providers in this quadrant, maintenance, data quality management, data security, and compliance-related aspects are considered. Due to the complexity of workflows that need to be supported, providers have to deliver services in global reach and cross-organizational usage. In addition, the service providers have to support a highly sophisticated and integrated application landscape and prove how they operate or integrate with a multi-vendor environment.

Eligibility criteria:

- **Experience with support:** This includes ServiceNow's Now Platform, workflows, third-party applications, integrators and accelerators, newly released features/ modules and upgrades.

- **Delivery capabilities:** with proximity to clients.

- **Existing technology partnerships** with key software providers and breadth of application management service (AMS)-related portfolio.

- **Service integration and management (SIAM) and delivery models:** Manage platform and have experience to use ServiceNow in broader frameworks such as AIOPs, MLOps, ITOps, etc.

- **Maturity of delivery and contract models:** Ability to manage multiple vendors and dependencies between toolchains and support SLAs.

- Broad customer base and local use cases and references.

- **Intelligent, adoptive and evolutive maintenance:** This is in sync with upgrades, functionality enhancements from ServiceNow and tech ecosystems, from Service providers and service integrators, in-house engineering teams and external partners and specialist tool providers.

- **Ability to manage decentralized deployment inside the organization:** Adoption of low-code, - no-code and citizen developer techniques, training for identification and delivery and user knowledge updates on new releases, versions, features and modules.

In addition to the criteria mentioned above, the following evaluation criteria apply to all the quadrants:

- Unique differentiators

- Economic stability

- Market position

Quadrants by Region

Quadrants	U.S.	Brazil	Germany	Singapore & Malaysia	Australia
ServiceNow Consulting Services	✓	✓	✓	✓	✓
ServiceNow Implementation and Integration Services	✓	✓	✓	✓	✓
ServiceNow Managed Services Providers	✓	✓	✓	✓	✓

Schedule

The research phase falls in **November and December 2021**, when survey, evaluation, analysis and validation will take place. The results will be presented to the media in **Apr 2022**.

Milestones	Beginning	End
Launch	Nov 23, 2021	
Survey Phase	Nov 23, 2021	Dec 30, 2021
Sneak Preview	Feb 2022	
Press Release	Apr 2022	

Please refer to the link to view/download the ISG Provider Lens™ 2022 research agenda:

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations.

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

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

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: ISG.star@isg-one.com

Partial list of companies being invited for the survey

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

AC3	Cask, LLC	Enable Professional Services
Accelare	CDW Logistics, Inc.	entrago
Accelerate ITS	Cerna Solutions	Epicon IT Solutions
Accenture	Certsys	EPI-USE
Acorio	CloudGo	Ernst and Young LLP
Advance Solutions Corporation	COFORGE Limited	Evergreen Systems
Aeritae	Cognizant Technology Solutions	Extreme Digital Solutions
AHEAD, Inc.	CompuCom Systems	Fujitsu Services
Alcor Solutions Inc.	Computacenter	Fully Managed
Algar Tech	Computer Design & Integration, LLC (CDI)	FX INNOVATION
Alpar Tecnologia (Alparservice)	Computer Systems Australia (CSA)	Genpact
Aoop	Concurrency, Inc.	GlideFast Consulting LLC
ASGN (ECS)	ConfigureTek	Globalweb
Aspire Systems	Contender Solutions	Globant
Atomic Solutions	Coreio	Grapeway
Atos	Covestic, Inc.	HandCloud
Baymetrics Tecnologia	CPQi Group	Hatchit Studios
BDO Advisory	Crayon	HCL Technologies Ltd.
Beck	Creative Systems and Consulting, LLC	Hexaware Technologies Inc
Big House	Crossfuze	HGC Technologies
BitKnights	Deloitte	Highmetric
Bravium Consulting Inc.	Deloitte	Hitachi
BT Automation	Digisystem	HPE
BusinessNow P/S	DXC Technology	IBM
CAI (Computer Aid, Inc.)	Edgile	ICF
Capgemini		Imperium Solutions

InfoBeans

Infocenter

Infosys

Inmorphis

Inok Systems

INRY (IntegRhythm Inc.)

InSource Inc

Intellibliss

iTech AG

ITS Partners

ITSM Group

JDS Australia

Keyrus

Kinetic IT

Kloves Inc.

KPMG

Leidos

Logicalis

LTI

Maryville Consulting Group

Mastermind Group

Mercer

MobiChord, LLC

NCS

ND and Co

Ness Digital Engineering

NTT DATA

Nuvolax

Nuvolo

Open Tecnologia

Orange Business Services

P1 Consulting

Pathways Consulting Group

Pharicode LLC

Plat4mation

ProV International

Proven Optics

Quint Technology

RapDev

Rapid Technologies

RSM US LLP

RXP Services (Acq. by Capgemini)

SAIC

Savli Group

Service IT

Service Line Solutions (Acq. by Thirdera)

Serviceberry Technologies Pvt Ltd

Sgital Pte

Sigital LLC

SilverStorm Solutions SL

Softtek

SoftwareONE

Solugenix

Spencer Thomas Group (STG)

Stefanini

Stefanini

SuMO IT Solutions Inc.

Sysintegra

TCloud

TCS

Tech Mahindra

The Anti

Thirdera

TIVIT

TMlabs

Trianz

T-Systems

Unisys

Unisys Corporation

UST

VA Expert

ValueFlow IT

Veracity (Acq. By RGP)

Virtusa

Volteo

Wipro Limited

World Wide Technology

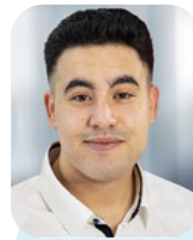Yash

Zensar Technologies

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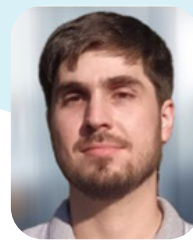& Malaysia, Australia

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ISG Provider Lens™ QCRT Program Description

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

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

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

Quality & Consistency Review Team for this study

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EMEA Lead, Digital Platforms and Solutions
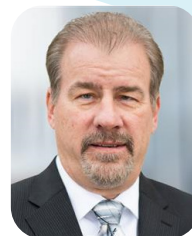
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Do you need any further information?

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