

ServiceNow Ecosystem Partners

An analysis of ServiceNow ecosystem, including providers' portfolio attractiveness and competitive strengths



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ServiceNow just announced for its third quarter, 2022, subscription revenues of \$1,742 million which translates to a 22% year-over-year growth and is a clear demonstration, that the ServiceNow Platform fits well to the market demands for a transformation, based on improved and engaging customer experience.

ServiceNow Partners are benefiting from the growth, once every dollar spend on subscription licenses, levers into substantial revenue for the ServiceNow Ecosystem.

The ServiceNow Ecosystem 2023 study examines the extensive, complex global partner network of one of the leading software solutions that allows companies to digitalize, connect and automate siloed processes to make workflows smoother. The broad acceptance of ServiceNow's offerings among the user community has led to the exponential growth of the company across the globe. Enterprises

seek accredited and reliable professional services to fully utilize ServiceNow's broad functionalities — from process redesign and software implementation and integration to application management and training. Various offerings and certification levels indicate the focus of partner companies, covering full-scale lifecycle support and laser-focused services for specific tasks.

Digital transformation is powering the future of organizations that are exploring new ideas, innovating at scale and realizing value faster by empowering people to do their best in a rapidly changing world, and the ServiceNow platform accelerates that journey.

The ISG Provider Lens™ ServiceNow Ecosystem 2023 study analyzes the services and offerings of ServiceNow partners in the U.S., Brazil, Germany and Australia, in selected segments. The findings from the analysis help assess

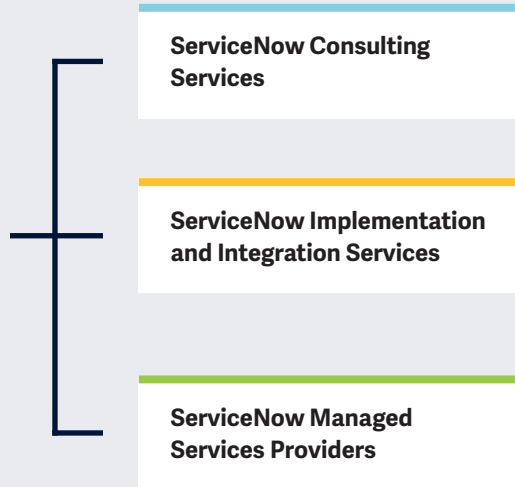


the service providers operating in the defined segments for the strength of their respective portfolios and their competitiveness in the market.



Key focus areas for ServiceNow Ecosystem 2023

Simplified Illustration Source: ISG 2022



The ISG Provider Lens™ ServiceNow Ecosystem 2023 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on markets such as the U.S., Brazil, Germany and Australia

The 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 this study to evaluate their current vendor relationships and potential engagements.



Definition

This quadrant assesses the providers of consulting services that help clients prepare for the use of workflow management services. With ServiceNow's growth regions and new offerings, on the one hand, and the new economic realities, on the other hand, ServiceNow consulting services are gaining traction. Many clients will face budget restrictions, with the preservation of already-taken investments playing a bigger role. However, clients can expect to get the biggest benefit from the platform.

Designing client roadmaps to use ServiceNow as the main engagement platform to intelligently connect different systems will be an architectural challenge, especially when new functionalities come with each release. New potential uses cases in the areas of customer services, facility management, field services and ESG compliance are envisioned, which

requires the roadmaps to be designed in a way that the platform delivers the highest value to clients.

Clients may prefer consulting companies that have already invested in reference models and assessment methodologies, understand clients' maturity and prevailing challenges, and have a broad understanding of ServiceNow's technical capabilities and future releases, which can help design solutions and deploy roadmaps. Helping clients understand what efforts toward transformation have to be made and that they need to have a robust change management offering and benefit realization plan in place can be a differentiating factor for consulting providers.

Eligibility Criteria

- 1. Use of reference models, templates and frameworks:** Best practices in opportunity identification and assessments for new ServiceNow competencies; availability of frameworks, tools for ROI and business case development, value realization metrics and benchmarks
- 2. Experience in broad workflow and service management:** Designing client roadmaps to use ServiceNow as an integrated "platform of platforms" for all major corporate business operations and IT services, ESG, and the integration with GRC and security policies
- 3. Capabilities to predict long-term technological developments:** Tools and methodologies to gather market intelligence; being a member of technology communities and knowledge forums
- 4. Knowledge of ServiceNow capabilities and other tools:** Knowledge of different releases, the functional and business processes supported by ServiceNow, and ITSM and ITOM and expertise in areas such as CSM, HR, F/A, facility management, ESG and security



5. Knowledge of ServiceNow application and value in specific client scenarios:

Knowledge and active development of industry-specific solutions, for example, healthcare and telecom

studies and client storyboards from various industries

6. Possess-relevant certifications:

ServiceNow certifications and workflow badges, ITIL 4 expertise, COBIT, DevOps and ESM-related accredited experience

7. Experience with organizational change principles and practice:

Planning, delivering and supporting organizational changes with proven case



Definition

ServiceNow is often seen as the central system that brings together external and internal client requirements that need to be fulfilled, without adding to an organization's internal complexity. Implementing such an intelligent workflow platform in a complex enterprise requires expertise and experience, as well as special capabilities to integrate with other applications, software and tools. The integration should be as seamless as possible, with minimum data reformation.

To succeed, service providers need to have solid methodologies and an agile workforce, trained with modern methods, that can be easily scaled up and down. They also need outstanding capacities in system architecture, deep coding experience for low/no-code developments, and a deep understanding of AI and machine learning. The high complexity of multicloud, multi-tenant

architectures and growing concerns about cybersecurity both force clients to look for service providers with high efficiency. Service providers also need to focus on certifications to prove their credibility to clients.

Eligibility Criteria

- 1. 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
- 2. Experience with emerging technologies:** Enterprise-shared services/BPO; cloud and multicloud integration; E2E management of machine learning techniques; and NLP and AI capabilities paired with cognitive computing to enable digital service management (DSM), virtual agents and self-service
- 3. Speed of adoption and value realization:** Deploy new features, modules and enhancements on the ServiceNow platform in a cost-effective and efficient manner
- 4. Ability to offer maintenance support:** Support with installations, upgrades and new feature/module release management, migration, patch management, the lifecycle



ServiceNow Implementation and Integration Services

management of ServiceNow instances and maintenance after ServiceNow release migration

ServiceNow score and net promoter score (NPS)

5. Size and capabilities of local and global delivery teams:

Expertise in relevant ServiceNow technologies, such as API development, JSON and Python

6. Experience in system, data and process integration:

Integration with the hub and spoke model (starter, standard, professional and enterprise levels)

7. Customer satisfaction

measurement: Ability to gather voice of customer, service satisfaction index,



ServiceNow Managed Services Providers

Definition

This quadrant assesses providers for their capability to offer managed services for maintenance and support functions, including monitoring; remote support; and the centralized management of the Now platform, workflows and the applications that run on the platform.

With the growing popularity of the DevOps method, managed service providers are expected to comply with a new set of requirements. These providers need to be prepared for the continuous evolution of the platform, which can challenge the status quo of the existing solution, and the management of two new releases in a short period.

Considering the complexity of workflows that need to be supported, providers have to deliver services with global reach and cross-organizational use. They also need to support a highly sophisticated

and integrated application landscape and prove how they operate in or integrate with a multi-vendor environment.

When analyzing the providers in this quadrant, maintenance, data quality management, data security and compliance-related aspects are considered. Managing multi-cultural aspects when nearshore/offshore delivery is involved is as important as offering different deployment options, considering potential data privacy and residency concerns. Also important is different pricing options due to the new economic situation in many countries.

Eligibility Criteria

- 1. Experience with support:** Includes ServiceNow's Now platform, workflows, third-party applications, integrators and accelerators, newly released features/modules and upgrades
- 2. Delivery capabilities:** Efficient delivery with proximity to clients
- 3. Technology partners:** Partnerships with key software providers and breadth of application management service (AMS)-related portfolio
- 4. Service integration and management (SIAM) and delivery models:** Experience in managing ServiceNow in broader applications, such as AIOps, MLOps and ITOps
- 5. Maturity of delivery and contract models:** Ability to manage multiple vendors and dependencies between toolchains and support SLAs
- 6. Broad customer base:** Includes local use cases and references
- 7. Intelligent, adoptive and evolutive maintenance:** In sync with upgrades and functionality enhancements from ServiceNow and



technology ecosystems, as well as with service integrators, in-house engineering teams, external partners and specialist tool providers

8. 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 parameters apply to all the quadrants:

- Unique differentiators
- Economic stability
- Market position



Quadrants By Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on ServiceNow Ecosystem Partners 2023:

Quadrant	U.S.	Brazil	Germany	Australia
ServiceNow Consulting Services	✓	✓	✓	✓
ServiceNow Implementation and Integration Services	✓	✓	✓	✓
ServiceNow Managed Services Providers	✓	✓	✓	✓



The research phase falls in the period between November 2022 and January 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in April 2023.

Milestones

Survey Launch

Beginning

November 16, 2022

End

Survey Phase

November 16, 2022 Dec 20, 2022

Sneak Previews

February 2023

Press Release & Publication

April 2023

Please refer to this [link](#) to view/download the ISG Provider Lens™ 2023 research agenda.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to the 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

ISG Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” 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 Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments. To ensure your selected clients complete the feedback for your nominated engagement, please use the client nomination section on the Star of Excellence [website](#).

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



Contacts For This Study



**Tapati
Bandopadhyay**
**Lead Analyst,
U.S.**



**Phil
Hassey**
**Lead Analyst,
Australia**



**Hema
Gunapati**
Data Analyst



**Florian
Scheibmayr**
**Lead Analyst,
Germany**



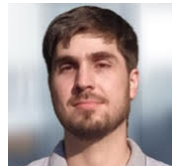
**Arjun
Das**
**Research Analyst,
U.S.**



**Ridam
Bhattacharjee**
Project Manager



**David
Pereira**
**Lead Analyst,
Brazil**



**Gabriel
Sobanski**
**Research Analyst,
Brazil**



ISG Provider Lens™ Advisors Involvement Program

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.

ISG Advisors to this study



Yadu Singh

EMEA Lead, Digital Platforms and Solutions



Bill Huber

Partner, Digital Platforms and Solutions



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

AC3*	ASGN (Glidefast)*	CAI (Computer Aid, Inc.)	Computer Systems Australia (CSA)
Accelare	Aspire Systems*	Capgemini*	Concurrency, Inc.
Accelerate ITS	Atlasnet	Capture Europe	ConfigureTek
Accenture*	Atomic Solutions	Cask*	Contec-X GmbH
Acorio	Atos*	CDW Logistics	Contender Solutions
Advance Solutions *	Baymetrics Tecnologia	Certsys*	Coreio
Aeritae	BDO Advisory	CGI*	Covestic, Inc.
agineo *	Bechtle*	Clientfocus GmbH	CPQi Group
AHEAD	Big House	CloudGo*	Crayon
akquinet AG	BitKnights	CloudStratex	Crossfuzze
Alcor Solutions Inc.	Booz Allen Hamilton Inc.	COFORGE Limited	Deloitte*
Algar Tech	Bravium Consulting Inc.	Cognizant*	DEVOTEAM*
Alpar Service*	BT Automation	CompuCom Systems	Digisystem*
AOOP*	BusinessNow P/S	Computacenter*	direkt gruppe GmbH
ASGN (ECS)	c1secure	Computer Design & Integration, LLC (CDI)	Discover Tech



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* Rated in previous iteration

DO IT WISE

DXC Technology*

Edgile

Enable*

entrango

Epicon*

EPI-USE*

Evergreen Systems

everis

Evora IT Solutions

Exccon AG*

Extreme Digital*

EY*

Fast lane*

Fujitsu*

Fully Managed

FX INNOVATION

Genpact*

Globalweb

Globant

Grapeway

GuideVision s.r.o

HandCloud

Hatchit Studios

HCLTech*

Hexaware*

HGC*

Hitachi Vantara

HPE

IBM*

ICF

InfoBeans

Infocenter

Infosys*

Inmorphis

INRY*

InSource Inc

Intellibliss

IOS

ISM

iTech AG

ITS Partners

ITSM Group*

JDS Australia*

Keyrus*

Kinetic IT*

Kloves Inc.

KPMG*

Kyndryl

Leidos*

Logicalis

LTi*

Maryville Consulting Group*

Mastermind Group

Media Solutions GmbH

Memora

Mercer

Mindtree*

MobiChord, LLC

ND and Co



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* Rated in previous iteration

Ness Digital Engineering
 NewRocket (Highmetric)*
 NTT DATA*
 nuvolax*
 Nuvolo
 OpenTec*
 Orange Business Services
 P1 Consulting
 Pathways Consulting Group
 Periscope7
 Planhorizon*
 Plat4mation*
 Proserv GmbH
 ProV*
 Proven Optics

Quint Technology
 RapDev
 Raytion
 RSM US LLP
 SAIC
 Savli Group
 Service Informatica
 Service IT
 Silpion ITSM
 SilverStorm Solutions SL
 Softline Group
 Softtek
 SoftwareONE
 Solugenix
 SOLVvision GmbH

Sopra Steria*
 Spencer Thomas Group (STG)
 Stefanini
 SVA System Vertrieb Alexander GmbH
 Synoptek
 syscovery Solve & Serve GmbH
 Sysintegra
 TCloud
 TCS*
 Tech Mahindra*
 The Anti
 Thirdera*
 TIVIT*
 TMLabs
 Trianz*

T-Systems*
 Unisys
 UST
 VA Expert
 ValueFlow IT
 Virtusa
 Volteo
 Wipro *
 World Wide Technology
 WSP-Consulting*
 Yash*
 YSSY*
 Zensar Technologies



*ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

*ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

*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. For more information, visit www.isg-one.com.





NOVEMBER, 2022

REPORT: SERVICENOW ECOSYSTEM PARTNERS