iSG Provider Lens™

2020

SIAM/ITSM 2020

imagine your future®

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Definition

Service integration and management (SIAM) is a collection of frameworks and best practices encompassing the people, processes and tools required to manage end-to-end services through their lifecycle (service strategy, business demand and interfaces, change delivery, operational management, and supplier management) to deliver value to the business in a multi-supplier environment. In the past, many companies have outsourced multiple towers to large system integrators. This required some coordination to ensure those service providers were well integrated into the technology landscape of the company, most often on the infrastructure side of the house. In today's environments, it is common to see that multiple service providers, both large and small, are no longer just in the infrastructure space but also in application development and maintenance (ADM), business process outsourcing (BPO), and non-traditional spaces such as finance, marketing and legal. The SIAM market is currently undergoing some fundamental changes due to the use of new technologies by solution providers, especially in the areas of using big data volumes and new analysis features. Forward-looking maintenance and faster restoration of services will lead to higher service qualities. The use of bots and technologies such as natural language processing (NLP) changes the way services can and will be delivered in the future.

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

- Transparency of strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segments

- Focus on different markets including the U.S. 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 leverage information from these reports for evaluating their current vendor relationships and potential new engagements.

Quadrant Research

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following six quadrants on SIAM/ITSM.

Simplified illustration

SIAM/ITSM (2020)			
System Integrators for ServiceNow Products	Business Value Service Management	Sourcing Information Management	System Integrators for BMC Software Products
	Service Design & Transition	Service Operation & Delivery	
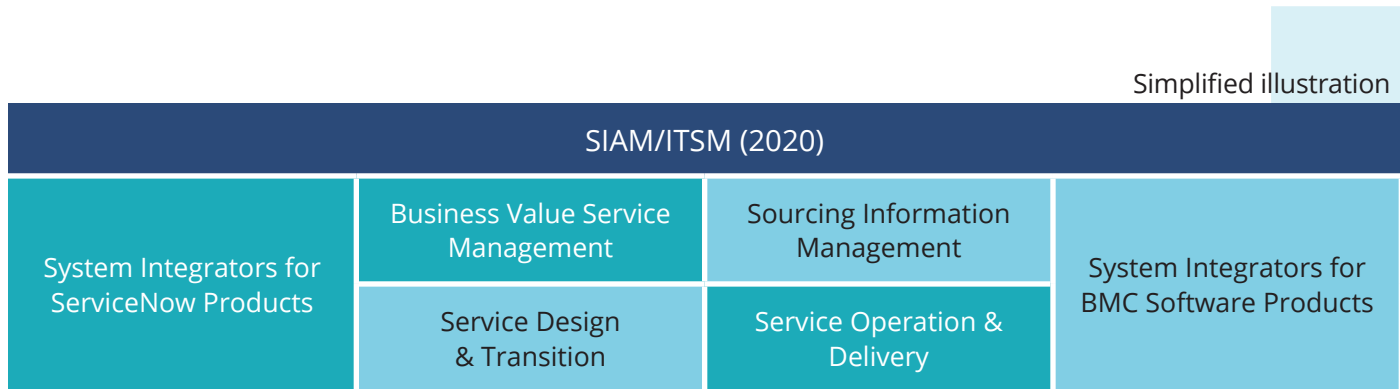
Source: ISG 2019

System Integrator Quadrants

A key challenge for IT customers is the implementation and adaptation of sophisticated tools and broad platforms in the complex process setup of IT service management. Due to the uniqueness of each client situation, the implementation and customization of such solutions often strains user organizations.

The market is currently dominated by two different platform systems. ServiceNow with its product offerings in its current "New York" release and BMC Software with the Helix and TrueSight offerings account for around 65 percent of the ITSM market.

The system integrators and other solution partners of the two dominant vendors are often tasked to support IT clients when transforming the management approach. The goal of such transformations is a high degree of automation paired with robust but flexible process blueprints. Minimizing manual tasks in operating complex IT environments is more important as the requests for change from business units are increasing in terms of volume and complexity. While the digital transformation of companies requires a new dimension in flexibility while implementing new business solutions, IT should ensure a continuously running infrastructure. Hence, the use of IT4IT paired with the complex delivery ecosystem is a growing challenge for most user organizations. System integrators and other support and consulting organizations are required to support the client in ensuring that quality of service.

System Integrators for ServiceNow Products

This quadrant compares companies that support clients in building and implementing ServiceNow products. The offerings range from assessments to design and implementation consulting to full-scale implementation and operation services. Besides the breath of the offerings, the key criteria in this quadrant are the partner status itself, longevity of the status, various platform modules supported, number of relevant certified resources, and topicality with respect to the various platform releases.

System Integrators for BMC Software Products

This quadrant assesses companies that support clients in building and implementing products from BCM Software. The offerings range from assessments to design and implementation consulting to full-scale implementation land operation services.

Besides the breath of the offerings, the key criteria in this quadrant are the partner status itself, longevity of the status, products supported from the Helix and TrueSight suites, number of certified resources for different products, and the topicality with respect to the various product releases.

Business Value Service Management

This quadrant covers the scope of outbound and forward-looking processes of IT service management as well as the more managerial issues. Understanding client demands and generating and managing the service portfolio form the core of this quadrant. Financial management processes and customer satisfaction are part of this group as they require direct client access and feedback. The process is grouped in four clusters:

- Managing the service demand of clients through demand forecasting, financial and

- consumption management, financial planning, and chargeback and showback activities

- Managing the service portfolio and related service catalogs

- Dealing with "regular" service requests and managing non-standard requests

- Full management of the complete customer satisfaction process

A focus of this quadrant is the use of social media to enhance the level of communication between IT and their clients. Customer satisfaction will leverage the information from social media channels to automatically come up with information about the status. Turning data into information with the use of artificial intelligence (AI) and big data will support the financial analysis and chargeback process. Seamless integration of the various processes will lead to a much more customer-oriented service portfolio management, placing the client in the center of the activities.

Service Operation & Delivery

This quadrant addresses the areas of IT service operations and delivery to the end client. Service operations comprise processes involved in delivering defined IT services to the end client in a robust manner. The processes are focused on three main areas:

- Event and incident management to automatically identify changes in the environment that need to be managed

- Problem management, including user helpdesk, to manage the process of finding and fixing problems and communicating with the client

- Post-event that includes reporting, SLA management to ensure quality of the service delivered and continuously improve it

Facility management is also part of this process group. Besides the more "classical" automation of process functions, this area of the solution market is currently undergoing a fundamental change due to the enhanced technical capabilities available. Big data and analytics, combined with AAI and cognitive computing, offer a wide range of enhanced functionalities that allow for a much higher level of automation. Internet of things (IoT) and smart metering along with intelligent sensors allow vendors to offer products that enable their customers to establish services that become will personalized and continuously available. ISG's clients that are currently looking for products and solutions in this market or are already active in this space are expected to double their investments for new technologies such as RPA, autonomics, virtual customer agents, NLP and machine learning. In this market segment, we see companies that:Besides the breath of the offerings, the key criteria in this quadrant are the partner status itself, longevity of the status, products supported from the Helix and TrueSight suites, number of certified resources for different products, and the topicality with respect to the various product releases.

- Build the tools and provide the solution either through a classical on-premise installation or as a SaaS delivery model

- Build the tools and provide the solution as a pure-play SaaS environment

- Utilize existing solutions and provide the implementation services dedicated to this solution

- Utilize existing solutions, develop specific extensions and provide implementation

Service Design & Transition

This quadrant addresses the areas of IT service design and service transition into operations. While service design mainly addresses topics such as the required service availability and capacity as well as service continuity and security issues, the transition part is focused on three key areas:

- Transition of a service from planning into operation with change and change evaluation management

- Validation of changes and services

- Necessary processes to deploy a change or service and the management of various release levels

In this part of the IT SIAM framework, integration with business value and service management (BVSM) is essential to design services that are aligned with customer needs. BVSM, as the direct interface and "product marketing" of the IT service organization, the information about customer satisfaction, current services and new demands. The use of historical and current information about service consumption is essential for designing and building the services. Reporting and AI along with big data and analytics will be required in the future. New technologies will support clients while dealing with the go-live activities of new or updated services. Machine learning and AI will help clients in the future to better understand the implications of changes in order to avoid any drawbacks on existing services. In this market segment, we see companies that:

- Build the tools and provide the solution either through a classical on-premise installation or as a SaaS delivery model

- Build the tools and provide the solution as a pure play SaaS environment

- Utilize existing solutions and provide the implementation services dedicated to this Solution

- Utilize existing solutions, develop specific extensions and provide implementation services for a variety of solutions

Sourcing Information Management

The implementation and operation of IT services are only as good as the information base on which all process automation is being built. This quadrant is focused on the information management framework. Building and maintaining the configuration database is the core activity of the information framework. While building the database requires the use of technologies to support IT personal through intelligent auto discovery, maintaining the database was historically the bigger issue. After the configuration management database (CMDB) is designed, built and populated, it already becomes outdated when it went live. Social media, NLP and AI along with machine learning and enhanced sensoring will be used in the future to keep such databases mostly automatically in a current state.

Consequently, tools that support processes such as asset management and identity and access management are part of this information management quadrant. As most of this data is attached to objects in the CMDB, intelligent grouping and data extraction will provide functionalities to support these activities. Finally, knowledge and data management use the underlying information to draw conclusions, feed operational processes, and enhance the quality of data. While these areas of the operations framework were often neglected in the past as there were no monetary benefits, they have become increasingly important for the new, data-driven process framework. IT clients had suffered due to the lack of co-operation from the IT user side and the inability to keep the data up-to-date on their own. The use of new technologies such as AI will help to execute such process in a much more qualitative way. In this quadrant, we will mainly focus on vendors that build applications for process automation on top of the CMDB and support clients while implementing such tools based on a robust process design.

Schedule

The research phase is between **December 2019 and May 2020** during which survey, evaluation, analysis and validation will take place. Selected results will be presented to the media in **June 2020**.

Milestones	Beginning	End
Launch	December 11, 2019	
Survey Phase	December 11, 2019	January 24, 2020
Sneak preview	March 05, 2020	
Press release	April 2020	

Please refer to the link below to view/download the ISG Provider Lens™ 2020 research agenda:
https://isg-one.com/docs/default-source/default-document-library/ipl-annual-plan-2020.pdf?s-fvrsn=4948c631_2

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.

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Do you need any further information?

We will be happy to answer any questions you may have by sending an email to isglens@isg-one.com.

Partial list of invited companies for the survey

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

4me	Bearing Point	Conyx IT Solutions
abhra, Inc.	BECK Strategies	Coreio
Accelare, Inc.	Blue Medora	CoreSphere, LLC
Accenture	BMC Software	Coupa Software
Accudata Systems, Inc.	Bomgar	Covestic, Inc.
ACL Services Ltd	Booz Allen Hamilton	Crowe Horwath
Acorio LLC	BPMonline	CRS AG
Advance Solutions Corporation	BT Global	Cura Software
Aeritae	Buchanan & Edwards, Inc.	Dell
Agiloft	CA Technologies	Deloitte
agineo	Capgemini	Determine
Ahead LLC	Carahsoft	Devoteam
Alcor Solutions Inc.	CareWorks Tech	Digital Fuel
Alemba	Centrify Corporation	Dun & Bradstreet
Alfresco Software AG	Cerna Solutions	DXC
Allgress	Cerrix	E&Y
Alloy Software	Cetan Corp	EasyVista
Apptio	CGI	EchoStor Technologies
Aptris, Inc.	ChangeGear	EMC
Aspire Systems, Inc.	Cherwell Software	Enlighta
AT&T	Cisco	Entry Software
Atlassian	Clausmark GmbH	EPAM Systems, Inc
Atos	Clientfocus GmbH	Ernst & Young
Avasant	Cloudaction	Evergreen Systems
AxiomSL	Cognizant	exccon AG
Axios Systems	CompuCom Systems	FIS Global
Basis Code	Computacenter	Fiserv

FreshService	Jade Global Inc.	OMNINET GmbH
Freshworks	JIT	Omnitracker
FrontRange Solutions	Kinetic Data Inc	OpenText
Fujitsu	Kloves Inc.	OpsHub, Inc.
Fusion Global Business Solutions	KPMG	Optiv
General Dynamics	L&T	Oracle
General Networks Corporation	LANDesk	Pacxa
Genpact	Leidos Holdings Inc	Parametric Technology GmbH
GlideFast Consulting LLC	Lime Collar Group Inc	Partner IT
HanseVision GmbH	Logicalis, Inc	Pathways Consulting Group
HCL	Logicgate	PCM Inc
Hexaware	LTI	Perspecta Enterprise Solutions
HGC Technologies	Lumagent	Perspectium
Highmetric	Maclear	Pharicode LLC
Hitachi Consulting	Maryville Consulting Group	Planhorizon
Hornbill	Materna	Planview Enterprise
IBM	Matrix42 AG	Plat4mation
Iceberg Networks	MediTract	POOL4TOOL
Ideagen	Mercer (US)	Precision Task Group, Inc.
Incentive Technology Group	Microsoft	Prevalent
InfoBeans	Mindtree	Process Unity
Infosys	Mobile Reach	ProcessMAP
InSource, Inc.	Mphasis	Project Remedies Incorporated
IntegRhythm Incc	NetHelpDesk	ProKarma
ITC Infotech	NewRocket, Inc.	ProV International, Inc
ITinvolve	Norima Consulting	PwC
ITS Partners	NovoScale	QSC AG
ITSM Group	NTT Data	Qualys
IVIS Technology	Nuvolo	QuickNexus

Quint Technology	Sopra Steria	Turbonomic
Randstad Technologies	Sovereign Systems	Ultimo
RapDev.io	Sparta Systems	Unisys
Rapid Technologies	Spencer Thomas Group	Vantage Technology
Rego Consulting	Sphera Solutions	Ventech Solutions, Inc.
Resolve Systems	Spiceworks	Veracity
Resolver	Stefanini	Verterim, Inc.
Rivo Software	SuMO IT Solutions Inc.	Vertiv
Rsam	Sunrise Software	Victor Ops
SAIC	SunView Software	VIPCON GmbH
Sailpoint Technologies, Inc.	Symantec	VisionFlow
SalesForce	Symphony Summit	Vivantio
SAP	SynerTrade	Volteo LLC
SAS	Syntel	V-Soft Consulting, Inc.
Savli Group Inc	SysAid Technologies	Vyom Labs
Scanmarket	SYSUSA, Inc	Wendia
SDG Corporation	TAUBER Business Solutions UG	Westbury Analytics
ServiceAide	TB Consulting LLC	Whitespace Studios
Serviceberry Technologies	TCS	Windward Consulting Group
ServiceNow	TeamDynamix	Wipro
SHAW Data Security LLC	Tech Mahindra	World Wide Technology
Sigital LLC	Technologent	Xceltrait Inc
SilverStorm Solutions SL	Telekom	xMatters
Simbus360	Telos Security	Yansa Labs, LLC
SNOW Software	The ANTI	Zendesk
Software AG	TIBCO Software	ZL Technologies
SolarWinds	TOPdesk	Zoho
Soltrix Technology Solutions	Trintech	Zycus
Solugenix Corporation	TriPoint Solutions	
SOLVVision GmbH	T-Systems	