

# Future of Work Services

A research guide to evaluate providers' strengths, challenges and differentiators in the modern workplace

**SWEET SPOT REPORT | OCTOBER 2024 | GERMANY**



Customized report courtesy of:

**Lenovo**

Executive Summary 03

## Introduction

Definition 10

Sweet Spot 12 – 14

## Appendix

Methodology & Team 16

Author & Editor Biographies 17

About Our Company & Research 19

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### Flexibility transforms an office into a competitive advantage to attract and retain talents

**Convergence:** The current socioeconomic climate in Germany is characterized by significant challenges that affect companies and employees. The ongoing war in Ukraine, the Israeli – Palestinian conflict and continuing challenges posed by migration are increasing the complexity of the already volatile economic environment.

Germany's economy, renowned for its robust industrial base and export-oriented model, is navigating a period of adaptation and resilience. Rising energy costs, regulatory burdens and other challenging economic conditions are prompting some German companies to relocate. Meanwhile, researchers from Gallup state that a significant portion of Germany's workforce is actively seeking or open to new job opportunities. Gallup estimates the annual cost of employee disengagement in

the German economy between €132 billion and €167 billion. According to Gallup's State of the Global Workplace report, approximately 14 percent of employees in Germany consider themselves engaged, reflecting a dynamic job market driven by the desire for better working conditions and enhanced flexibility.

Germany's shrinking working-age population further exacerbates the skills shortage. Moreover, changes to the country's social welfare system pose a potential threat to addressing the shortage of skilled workers. These changes are criticized for sending wrong signals to (re) integrate people into the labor market.

Amid these disruptions, German businesses are also navigating the transition to remote work, driven by the necessity to adapt to new realities. Post-pandemic recovery efforts continue to impact business strategies, with companies balancing the need for stability against pursuing innovation and growth. As companies embrace digital transformation to stay competitive, the shift toward remote work has altered traditional office dynamics, compelling businesses to cope with the changed expectations of today's workforce.

The **future of work** will happen beyond the confines of the office desk.



The rapid adoption of hybrid and flexible work arrangements in recent years has significantly reshaped the work landscape and challenged traditional perceptions of what it means to work. Looking at the future, it becomes clear that these changes are not merely temporary adaptations but rather a fundamental shift in how we approach work and define its boundaries.

### **Flexibility is the norm**

The future of work will likely witness flexibility becoming the norm rather than the exception. A recent study published in June 2024 by Stanford Professor Nicholas Bloom, highlighted in *Nature*, indicates that hybrid working models can improve job satisfaction and reduce employee turnover without hampering productivity. These findings suggest that hybrid working can benefit employees and employers. Employees will increasingly expect the ability to choose when, where and how they work, focusing on outcomes rather than adherence to strict schedules or locations. Organizations embracing this flexibility will be in an advantageous position to attract and retain top talent.

### **Redefining the purpose of physical workplaces**

With the rise of remote and hybrid work, the purpose of physical office spaces will transform. Offices will no longer be the default location for work but will serve as hubs for employees to foster collaboration, innovation and social contact. The design of these spaces will prioritize flexibility, creativity and employee well-being, demonstrating a commitment to the health and happiness of the workforce.

Moreover, the term work will likely undergo a perceptual shift, migrating from the traditional notion of a 9-to-5 job performed in a specific location. Instead, the idea of work transforms into a versatile and ever-changing notion that covers a wide spectrum of tasks and endeavors, which aid in achieving individual and company objectives, regardless of when and where they are performed.

### **Blurring boundaries between work and life**

As work becomes more flexible and untethered from traditional office spaces, the boundaries between work and personal life continue to blur. This approach will require individuals to

develop strong self-management skills and organizations to support employee well-being and work-life balance proactively.

The shift toward flexible working will place even more emphasis on the outcome and less on the time consumed on tasks. While requiring adaptation, this change also presents an opportunity for a more effective and efficient work environment. It necessitates an evolution in how performance is measured and evaluated, with a distinct focus on establishing clear goals, defining metrics for success, and providing regular and meaningful feedback.

Over the past years, employees have gained experience in the flexibility needed to deliver their best outcomes. In today's rapidly evolving work environment, it is becoming quite apparent that in a world where work is ubiquitous, the future of work will not be confined to an office desk. Furthermore, the traditional office setup is becoming a relic of the past.

Although this changing world of work presents challenges for corporate real estate and facility managers, it would be inadmissible to declare the office obsolete. Gensler's Global Workplace

Survey highlights how modern workplaces should transform for peak performance. Comprehensive studies on workplace design, EX and performance metrics have identified key factors contributing to top team performance in office environments.

Pillars of high-performing workplaces

- 1. Diverse space types:** High-performing teams thrive in environments that offer a variety of spaces tailored to different work activities. These include focused work areas, collaborative spaces and social zones. Employees in high-performing workplaces can access up to three times more space for relaxation, concentration and confidential conversations than those in low-performing environments.
- 2. Effective work modes support:** Gensler identifies five key work modes that need support: working alone, working with others in-person, working with others virtually, learning and socializing. High-performing teams benefit from spaces that effectively support these diverse activities. The most effective office setups are capable of



providing the right environment for individual and collective tasks, thereby increasing overall employee productivity and satisfaction.

**3. Technology integration:** Seamless technology integration is critical to support hybrid and virtual collaboration. Top-performing offices integrate cutting-edge technologies into their building designs, such as IoT sensors and actuators, AI-enhanced occupancy management and building automation systems.

**4. Sustainability and energy efficiency:** Companies have identified the potential of how smart workplaces can contribute to reaching their sustainability goals. Therefore, they are investing in systems to monitor and optimize energy consumption, reduce waste and enhance the overall environmental performance of their office buildings. They also focus on creating environments that are responsive to employees' needs, making spaces comfortable, healthy and conducive to productivity and well-being.

**5. Data-driven design:** Top-performing smart workplaces can adapt to changing conditions and user preferences through data analysis. By collecting and analyzing real-time data, companies gain a better understanding of use patterns to optimize workplace performance.

Companies that are highly advanced in their flexible work journey have a high percentage of hybrid meetings and employ advanced technologies to facilitate collaboration across different places and time zones. They design for experience parity as the emotional response to workplace design significantly impacts team performance and contributes to engagement, satisfaction and productivity. High-performing teams also report improved workplace experiences, contributing to strong team relationships and an increased sense of belonging.

The future of work will increasingly rely on advanced collaborative technologies that enable seamless communication, knowledge sharing and project management across distributed teams. These tools will continue to

evolve, becoming more intuitive, AI-powered and integrated into daily workflows. Microsoft released the long-awaited public preview of Microsoft Places — its AI-powered connected workplace solution. This solution helps address challenges of work flexibility, such as booking the right spaces, planning where work happens or scheduling in-person events.

### **AI integration and workplace transformation**

AI is at the forefront of workplace transformation. ChatGPT has been published nearly two years ago, and its impact has just started to unfold. In Germany, as in other countries, AI tools such as copilots are revolutionizing how work is conducted. These tools automate routine tasks, reducing employees' time on administrative chores.

This shift allows workers to concentrate on high-value tasks that demand creativity, strategic thinking and collaboration. AI integration is crucial for boosting productivity and enhancing employee satisfaction, particularly in hybrid work environments where flexibility and efficiency are paramount. However, businesses struggle with the best

approach to introduce these smart copilots and often rely on external expertise to build the right approach and identify the best use cases to start with.

Accelerated AI adoption, smart automation and advanced data analytics enhance productivity and create new business opportunities. However, this technological shift necessitates significant investments in digital infrastructure and cybersecurity to safeguard sensitive information and maintain operational integrity. One key finding emerges: Similar to flexible work models and return-to-office approaches, there is no one-size-fits-all solution. AI will drive businesses forward, yet each business will adopt it at its own pace and uniquely.

### **Continuous learning and upskilling**

The integration of AI and automation is currently driving the transformation and development of professional responsibilities while introducing new career paths in various industries. Employees will need to adapt to the new AI-powered technologies, processes and working methodologies. Organizations must invest in learning and development programs



to ensure that their workforce remains competitive.

Despite the widespread use of AI, concerns regarding job replacement persist. According to Microsoft's Work Trend Index, approximately 45 percent of professionals are concerned that AI might replace their jobs. This anxiety is not unfounded, as 66 percent of leaders state that they would not hire someone without AI skills. According to Gallup's research, only 12 percent of employees are prepared to work with AI. This gap underscores the need for more robust training and development programs to help employees adapt to AI-driven changes in their roles. Despite concerns regarding job security, skill gaps and increased work pressure, many employees recognize the potential for AI to improve their work experience. Microsoft's findings indicate that employees are eager for AI integration and are willing to undertake initiatives rather than waiting for their employers to lead.

### **Increased use and concealment of AI tools**

A significant portion of the workforce is actively using AI tools. Approximately 75 percent

of global knowledge workers report using generative AI (GenAI) at work, often without formal organizational approval. This trend challenges businesses to cope, embrace, compete with or navigate the implications of bring-your-own-AI scenarios.

### **Psychological and emotional impact**

Many employees are reluctant to disclose their use of AI for critical tasks. Approximately 52 percent of AI users are hesitant to admit using AI for their most important work tasks, concerned that it may make them appear replaceable. This concealment suggests an underlying anxiety regarding job security and the perception of AI's role in the workplace.

The rapid pace of work, accelerated by AI adoption, contributes to employee burnout. A substantial number of employees report struggling with the pace and volume of work, with 46 percent feeling burned out. AI's role in intensifying work demands highlights the need for balanced integration that considers employee well-being.

Despite anxieties, many employees recognize the potential benefits of AI. Users report that

AI helps them save time (90 percent), focus on important work (85 percent), be more creative (84 percent) and enjoy their work more (83 percent). These positive perceptions advise businesses to carefully design AI implementation. With proper implementation and support, AI can enhance job satisfaction and productivity while successfully mitigating anxiety associated with AI use. Providing AI tools has become a clear career advantage, acting as an accelerator that helps attract and retain top talent.

### **Digital employee experience (DEX) has become the new standard**

With the shift from deploying technology to positioning people at the center and building the digital experience they need to deliver peak performance, DEX has evolved into the new standard for proactively managing the consumption of IT devices and enhancing employees' experience. Ahead of this, DEX encompasses all digital touchpoints employees encounter during their workday. These touchpoints are pivotal in the modern workplace. A seamless DEX ensures that employees remain productive and satisfied.

More and more organizations recognize the importance of DEX and are increasing their budgets to enhance these digital experiences. They are investing in technologies that support remote and hybrid work setups, recognizing that a positive digital experience is critical for employee retention and performance. These investments include deploying user-friendly platforms, providing robust and smart IT support, and implementing continuous feedback mechanisms. In 2024, DEX focuses on enabling work and enhancing the overall employee journey in the digital workspace. This trend includes investing in advanced monitoring tools and AI-driven solutions to anticipate and resolve issues proactively.

### **Superior and employee-focused DEX design**

Leading DEX strategies are increasingly focused on end-user experience, enabling that technologies are user-friendly, accessible and supportive of employees' needs regardless of their technical expertise or work location. The evolving paradigm of DEX management views it as a comprehensive ethos supporting employees' digital journeys instead of a mere technical requirement. This approach includes



improving organizational security and using technology to solve problems preemptively. IT's ambitions in terms of EX, engagement and productivity are to enable, ensure or restore productivity.

### **Proactive smart issue resolution with AI**

DEX tools and management strategies are the backbone of digital experiences, encompassing everything from digital platforms and tools enabling remote work to behind-the-scenes automation that resolves issues seamlessly in real-time. Effective DEX management leverages technologies such as digital experience monitoring (DEM), unified endpoint management (UEM) and IT asset management (ITAM) to provide a comprehensive, real-time overview and proactively maintain digital work environments with advanced smart automation capabilities.

An essential aspect of DEX management is resolving technical problems prior to impacting users. This proactive approach uses AI and ML for predictive maintenance and self-healing systems that address issues automatically. Organizations that prioritize DEX report high productivity and efficiency. Tools that monitor and optimize device performance, application

responsiveness and network access are crucial for maintaining a seamless digital experience.

### **Employee well-being benefits from frictionless IT experiences**

High-quality digital experiences reduce frustration and improve overall job satisfaction. When employees encounter minimal technical issues and have reliable, efficient tools at their disposal, their morale and engagement levels increase.

Adobe's 2023 State of Work report indicates that employees' expectations have recently increased. They are expecting more from their technology experience to better collaborate. They demand more and smarter automation, better information and more digital dexterity to contribute to organizations' value creation efficiently. This expectation and perception do not stop at the employee level; even members of senior leadership teams admit that they would leave their organizations for a better technology stack.

### **DEX helps provide a secure and compliant digital work experience**

As organizations strive to meet these rising

expectations, it becomes clear that the quality of digital experiences directly influences employee satisfaction, operational security and compliance. A robust DEX strategy transcends beyond mere functionality; it integrates security and compliance into daily workflow, enabling employees to possess the tools they need to work efficiently while maintaining the integrity and security of organizational data.

Poor digital experiences can lead to employees circumventing security protocols, thereby increasing risk. A well-managed DEX ensures compliance and enhances security by providing seamless and secure digital interactions. By understanding and implementing these components and trends, organizations can create a more efficient, satisfying and secure digital workplace, thereby enhancing overall EX and organizational performance.

### **Sustainability remains a top priority, and digital workplaces are helping to go green**

Sustainability remains pivotal in Germany's future of work. Businesses increasingly incorporate sustainable practices into their operations, driven by regulatory requirements and consumer expectations. Corporate

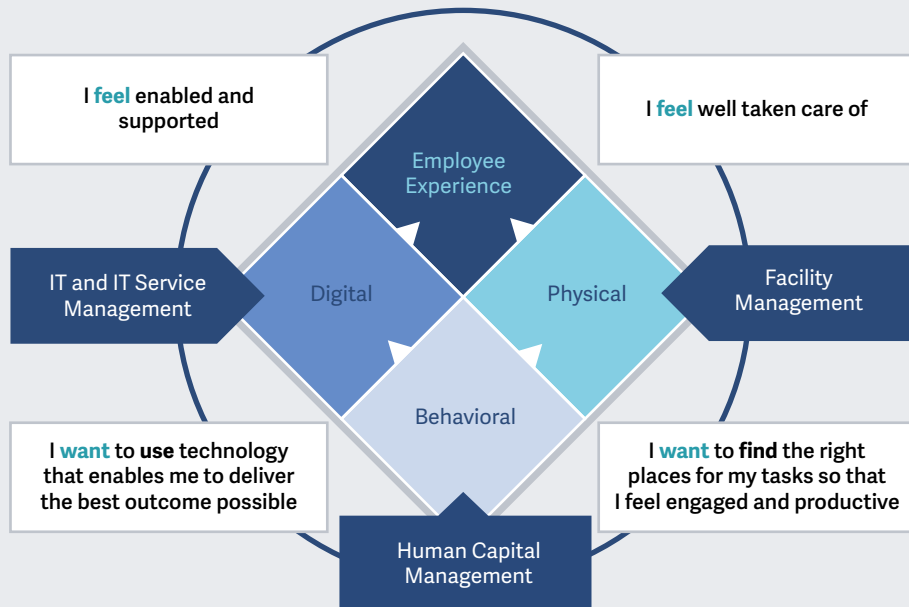
responsibility initiatives focus on reducing carbon footprints, promoting circular economy principles and enhancing supply chain transparency. This shift toward sustainability is an ethical imperative and a strategic advantage in attracting environmentally conscious consumers and employees.

Sustainability is increasingly intertwined with digital transformation. Companies are adopting eco-friendly practices and integrating sustainable technologies into their operations to meet the growing environmental demands. Global systems integrators and managed service companies are increasingly differentiating themselves based on the extent to which their workplace-related services help clients achieve their sustainability goals.

Digital tools are being used to monitor and reduce carbon footprints, optimize resource usage and enhance energy efficiency. This convergence of digital and sustainable practices is reshaping work environments. A convergence and dynamic interplay of economic resilience, technological innovation, social change and regulatory adaptation characterize the state of the workplace in



**Figure 1: Designing an employee experience that resonates implies bringing all relevant stakeholders to the table (Source: ISG 2024)**



Germany in 2024. As businesses and workers navigate this evolving landscape, the focus remains on creating a flexible, inclusive and sustainable work environment that can thrive in the face of global challenges and provide an attractive, smart EX regardless of the place and time.

The 2024 ISG Provider Lens™ Report on Future of Work Services focuses on what currently matters and how leaders can find the right partner to navigate these challenging times.

Amid all uncertainties, one certainty remains: the future of work is a joint effort that transcends the desk.

**Key Takeaways**

**Quadrant 1: Workplace Strategy and Enablement Services**

- The implementation of hybrid and adaptable work models indicates a substantial and enduring shift in the workplace landscape, resulting in enhanced job satisfaction and reduced turnover rates.

- The redefinition of physical workspaces aims to transform traditional office environments into centers for collaboration, innovation and social interaction rather than mere places for work.
- The blurring of work-life boundaries due to the rise of flexible work arrangements highlights the need for strong self-regulation skills and organizational support to maintain a healthy work-life balance.

**Quadrant 2: Collaboration and Next-gen Experience Services**

- Advanced collaborative technologies, including AI-powered solutions, are essential for facilitating seamless communication, knowledge sharing and project management among dispersed teams.
- The integration of AI tools in the workplace streamlines operations by automating mundane tasks. This strategy allows employees to focus on more strategic and creative responsibilities, ultimately enhancing productivity.





- Continuous learning and upskilling initiatives are crucial for helping employees stay competitive in a rapidly evolving technological landscape driven by AI and automation.

### **Quadrant 3: Managed End-user Technology Services**

- DEX has emerged as the standard approach for managing devices and enhancing IT service experiences and adoption. It emphasizes delivering a seamless digital experience to boost productivity and employee satisfaction.
- Prioritizing high-quality digital experiences in workplaces is key to reducing frustration, enhancing job satisfaction and increasing employee morale and engagement.
- Well-managed DEX practices ensure compliance and bolster security by facilitating secure digital interactions, minimizing the likelihood of employees bypassing security measures.

### **Quadrant 4: Continuous Productivity Services (including Next-gen Service Desk)**

- DEX tools utilize AI for predictive maintenance and self-healing systems, addressing technical issues before they disrupt users, thus promoting continuous productivity.
- Monitoring and optimizing device performance, application responsiveness and network connectivity are crucial for maintaining a seamless digital experience and maximizing productivity.
- Superior DEX design prioritizes employee well-being and focuses on implementing user-friendly technologies to support work-life balance and enhance satisfaction and productivity.

### **Quadrant 5: Smart and Sustainable Workplace Services**

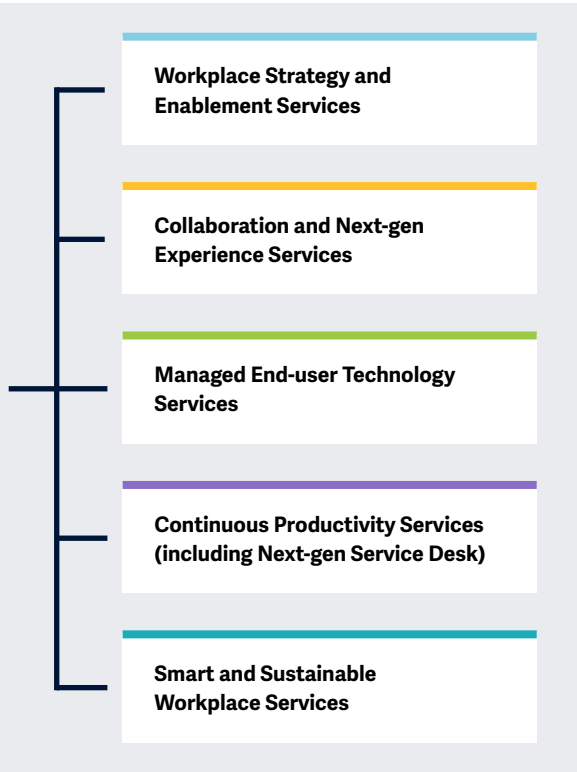
- High-performing workplaces provide a range of spaces tailored to different work tasks, including areas for focused work, collaboration and relaxation, to cater to the diverse needs of teams.
- The seamless integration of cutting-edge technologies, such as IoT sensors and AI-driven systems in workplaces, supports hybrid and virtual collaboration, ultimately improving overall workplace performance.
- Smart workplaces prioritize sustainability by implementing systems to monitor and optimize energy consumption, reduce waste and enhance environmental performance. This strategy creates healthy and productive work environments that are aligned with sustainability objectives.

The digital, human and physical aspects of work converge. In the rapidly evolving workplace, flexibility is not just an option but the new norm that reshapes how we define and interact with work. Emphasizing flexibility, these modern workspaces balance professional and personal life, fostering a culture of productivity and satisfaction while setting the stage for growth.



This study evaluates providers' capabilities in delivering key **Future of Work services** across different regions.

Simplified Illustration Source: ISG 2024



**Definition**

The future of work is constantly evolving, with enterprises either mandating employees' return to offices or adopting hybrid working models. The advancements in generative AI (GenAI) and the need to assimilate new business models to meet dynamic customer demands also contribute to the evolving future of work.

Enterprises no longer partner with service providers to provide laptops, mobiles, Wi-Fi and service desks and allow employees to work as they want. Instead, they embrace a flexible workplace open to new technological possibilities.

A continuum extends from traditional, low-tech approaches to sustainability-focused agendas, incorporating AI, XR and immersive experiences into EX. Experience parity is becoming a significant differentiator in the market. Thus, workplaces must deliver seamless EX regardless of location or customer interaction.

Employees seek the freedom to select both their workspace and the required technology. They need ubiquitous access to devices, applications, data, workflow, documents and

processes, irrespective of location. These requirements demand security, entailing established platforms, protocols and access rights.

Collaboration and communication are equally critical, involving internal and external tools such as AR, VR and XR. However, enterprises face challenges when integrating pre-pandemic infrastructure with post-pandemic capabilities.

GenAI opens new avenues for increased employee productivity and efficiency. It allows enterprise IT to better manage back-end workplace technologies. Still, enterprises need expert help strategizing, implementing and adopting this technology.

This report focuses on the approaches where next-generation thinking changes the future workplace landscape.



## ISG's Future of Work Framework

- Encapsulates what enterprises are doing to design new ways of working plus the Future of Work / Workplace models and helps connect them to digital solutions
- Represents convergence of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities with unique market-leading providers and solutions





Sweet Spot

# Lenovo

## Overview

Lenovo is headquartered in Quarry Bay, Hong Kong. It has more than 69,500 employees across 25 offices in seven countries. In FY24 the company generated \$56.9 billion in revenue, with Intelligent Devices Group as its largest segment.

Lenovo is a global technology leader and is rapidly expanding its Digital Workplace Services (DWS) footprint in Germany, focusing on enhancing EX and productivity.

### Key Provider Capabilities

As a market leader in devices, Lenovo has a deep understanding of clients' end-user computing environments across various industries. It has designed its DWS desktop-as-a-service business in a way that significantly reduces multi-party handoffs.

Lenovo has identified DWS as a strategic driver for future growth, aiming to become a leading provider in this space within the next five years. This ambition is backed by significant investments in R&D.

Lenovo utilizes its robust device and cloud infrastructure to add value through a tailored approach. With innovative, AI-powered DWS designed to meet a plethora of needs, it aims to manage over 8 million devices by 2029. A broad global delivery network and

a significant presence in over 180 markets, enables Lenovo to position itself as a leading partner for Germany-based enterprises.

The company is at the forefront of innovation and has designed its DWS platform to create a unified experience in modern unified endpoint management.

Through a cloud-enabled offering, Lenovo manages devices in hybrid environments with high levels of automation and by integrating robust security to ensure that devices and data are managed and protected throughout their life cycle.

Lenovo provides enhanced device analytics and insights through leading-edge software solutions, including Microsoft Intune enhanced by Lenovo IP, offering complete

device life cycle management through its services.

Lenovo designs its solutions with a strong focus on EX, utilizing persona-based configurations to customize services to specific user needs, thereby improving productivity and customer satisfaction.

Its strategic partnerships, including that with Microsoft, ServiceNow and Aisera, enable it to offer innovative solutions such as Care of One™ and next-gen TruScale DaaS, designed to meet the evolving needs of a hybrid workforce.

### Benefits Delivered

Lenovo's solutions drive measurable business outcomes, offering significant cost reductions and improvements in EX through AI-driven insights and proactive management. Its zero-touch services reduce friction, while contractual commitments ensure clients gain in productivity, engagement and operational efficiency.



# Lenovo

## Sweet Spot

Lenovo's focus on outcome-based pricing and innovation through partnerships has allowed it to stay competitive in an increasingly fragmented market. It aligns its portfolio with emerging trends such as a shift toward AIOps, proactive mass healing, persona-based configurations and the integration of GenAI in daily operations.

Lenovo's DWS are well-suited for enterprises in Germany seeking to modernize their digital workplace infrastructure, with a focus on EX and productivity. Its offerings will benefit organizations with a diverse and distributed workforce that require advanced endpoint management across hybrid environments.

Clients already using Lenovo devices can seamlessly avail Lenovo's DWS offerings,

benefiting from reduced multi-party handoffs and an increasingly integrated service experience.

Lenovo's strategy is centered on four key pillars:

### 1. AI- and Automation-first Approach:

Lenovo leverages AI to deliver proactive solutions, offering an AI-powered service desk and a personalized EX platform through Care of One™.

### 2. Technology and Platform Leverage:

Lenovo's strong partnerships with leading technology providers allow it to offer best-in-class solutions, such as Microsoft Copilot integration, for enhanced cybersecurity and productivity.

### 3. Tailored Business Outcomes:

Lenovo focuses on industry-specific solutions that align with clients' business objectives such as rapid time-to-market, IT cost savings and improved EX/UX metrics.

### 4. Sustainability and Cybersecurity Focus:

Through offerings such as cyber-resiliency-as-a-service and sustainable device-as-a-service models, Lenovo helps clients meet regulatory and environment protection goals, a critical differentiator in markets such as Germany. Organizations with strict security requirements will benefit from its integrated security services that protect devices and data throughout their life cycle.

## Future roadmap

Lenovo excels in delivering AI-driven workplace solutions tailored to a hybrid workforce's evolving needs. With a focus on business outcomes, sustainability and proactive strategies, it is set to become a leading DWS provider in the next five years.

Lenovo's future focus is on significantly expanding the DWS market share, with services driving substantial revenue growth. Its key initiatives would include enhancing the Care of One™ platform, increasing adoption of GenAI and AI-PC technologies and pursuing growth through targeted acquisitions.

It also aims to strengthen its partnerships by integrating more cybersecurity and AI capabilities into its solution to enhance client security and productivity.





# Appendix

The ISG Provider Lens 2024 – Future of Work Services study analyzes the relevant software vendors/service providers in the Germany market, based on a multiphased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Future of Work Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation





## Author & Editor Biographies



*Lead Author*

**Roman Pelzel**  
**Assistant Director & Principal Analyst**

Roman Pelzel is a thought leader and trusted advisor with 30 years of experience in leading and facilitating outcome-centric digital workplace strategy and technology transformations across different industries, including ITIL-based service management.

Roman has made it his mission to sustainably connect talent and technology by helping organizations transform their digital workplaces into a people-centric digital work state experience.

He advises clients in the employee experience-centric transformation of digital work and flexible working and contributes

to their success with his comprehensive expertise gained in various roles, combining leadership, coaching, and technical skills.

As a Principal Analyst, he is dedicated to the Future of Work in the DACH region and is a frequent voice on the topic of employee experience and digital experience management.



*Research Analyst*

**Ayushi Gupta**  
**Senior Research Analyst**

Ayushi is a Senior Research Analyst at ISG. She is responsible for supporting Provider Lens™ studies on the Future of Work. Ayushi has 3 years of experience conducting in-depth competitive research in IT services, Health, Higher Education, Infrastructure, and Finance. Along with a rich understanding of various business verticals, she has also been responsible for collating and analysing secondary data to provide insights on ongoing trends, defining the business landscape, and evolving needs of the potential target audience.

She is good at collaborating seamlessly with stakeholders and external clients, ensuring smooth project management and successful strategy development. Ayushi is skilled in market research, visualization, storyboarding and analysis.





*Study Sponsor*

**Iain Fisher**  
**Director**

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximise benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.



*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



### 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™

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For more information, visit [isg-one.com](http://isg-one.com).





**OCTOBER, 2024**

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