ISG Provider Lens™

Future of Work Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of: Lenovo

QUADRANT REPORT | OCTOBER 2024 | U.S.

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Report Author: Mrinal Rai

With the economic slowdown and GenAI possibilities, 2024 is an year of cautious optimism for workplace

When we analyzed the Future of Work Services market last year, we defined 2023 as the year of stabilization. While the 2 – 3 years of the COVID-19 pandemic are increasingly becoming a distant memory, the changes it brought in the way people work persist and are redefining how organizations frame their new future of work strategy. Enterprises started adopting return-to-office (RTO) policies last year, a move that, according to multiple studies, employees did not receive well. Organizations are implementing hybrid ways of work policies, allowing their workforce the flexibility to work from a location of their choice but mandating in some instances where in-office presence is essential. These policies profoundly guide how enterprise workplace leaders define the technology and operational approach with their workforce.

Another major trend in the industry is the evolution of AI technology. After the advent of generative AI (GenAI) and OpenAI's ChatGPT, enterprise workplace leaders are increasingly exploring opportunities to leverage the promising tech within the workplace technology ecosystem to improve efficiency and individual productivity. With a continued economic slowdown because of many geopolitical factors, leaders responsible for designing future work strategies are also experimenting with AI to explore possible cost optimization opportunities. With controlled budgets and the possibilities with AI, enterprise leaders are proceeding in 2024 with cautious optimism.

U.S. employers dealing with a growing workforce, RTO policies and flexible working

According to the U.S. Bureau of Labor Statistics, 168 million of the 330 million adults in the working population were employed, and the U.S. economy created 272 million jobs in May 2024. Currently, the unemployment rate is 4 percent, less than the long-term average of 5.69 percent. Many studies suggest that enterprises are confident with the growth

U.S. enterprises deal with **unsuccessful return-to-office policies** and **flexible working needs.**

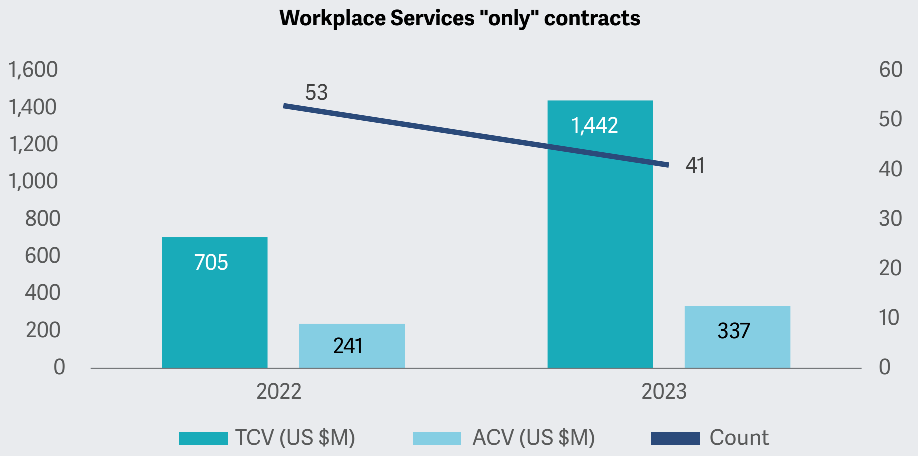
of the U.S. economy and expect their head count to grow further in the coming years. The healthcare, government, leisure and hospitality industries lead the U.S. employment growth opportunities. Millennials comprise over one-third of the U.S. workforce, Gen X represents one-third, baby boomers represent one-fourth, and Gen Z and Gen Alpha represent about 5 percent. With five generations currently in the workforce, enterprises expect intergenerational dynamics impacting decisions related to career development, learning and development, and technology adoption.

Large U.S. technology enterprises strictly adopted RTO policies in late 2023 and forced their employees back to the office. This measure was followed by enterprise clients from other industries as well. The Financial Industry Regulatory Authority (FINRA) rules that forbade banks from disclosing and inspecting traders and brokers' home offices expired in May 2024, and central U.S. banks are calling their staff back to the office. According to multiple studies, this move has backfired for many industries, resulting in dissatisfied employees and talent loss, and employees are ready to leave the job for flexibility. In April 2024, the Federal Trade Commission banned noncompete clauses in employment agreements for U.S. workers, allowing them to switch careers to competitors easily. These trends have significantly changed the approach of U.S. employers. According to multiple studies, less than half of large U.S. enterprises expect to call their employees five days a week, while nearly half accept the hybrid working norms. However, considering the nature of specific jobs that require in-office presence, enterprises need to make an informed decision about their hybrid and remote working policies to ensure that the criticality of job profiles and employee experience with flexible working styles are met.

Impact of increasing client expectations on workplace outsourcing

The aforementioned trends have impacted how the role of workplace technology-buying decision-makers has expanded. As enterprises make strategic decisions to transform their businesses and operations, workplace technology and service partner selection have become critical elements to consider. This is reflected in how workplace services are outsourced to managed service providers. There is a decline in the number of standalone workplace services contracts, where enterprises partner with service providers that only manage the digital workplace technology that consists of end-user computing (EUC) environment (virtual desktop infrastructure [VDI], device management, field support and desktop engineering) and service desk workplace support services. These are the core services offered by a digital workplace service (DWS) provider or systems integrator, and workplace services-*only* contracts are not too focused on major business-level transformation.

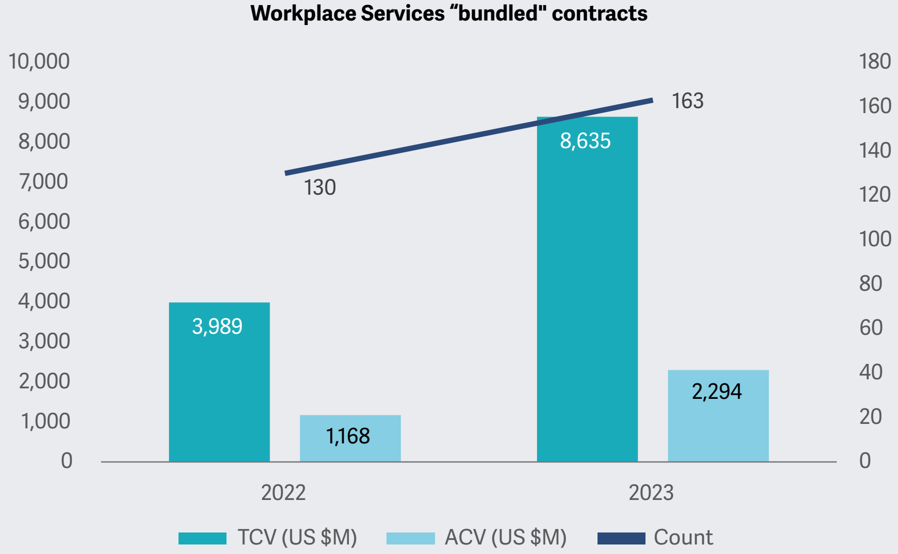
Figure 1: Workplace service contracts insight, U.S.



Source: ISG Contracts Knowledgebase, 2024

On the other hand, workplace services-*bundled* contracts, where the enterprise partners with a service provider to manage a large-scale digital or business transformation along with managing the workplace technology ecosystem, are increasing in both number and value.

Figure 2: Workplace service contracts insight, U.S.



Source: ISG Contracts Knowledgebase, 2024

These trends indicate that workplace services can no longer be seen as horizontal IT infrastructure services. They will become increasingly focused on industry verticals, and providers that offer more verticalized offerings will stand out.

Workplace service providers struggle to showcase innovation

Although many large service providers are signing contracts with clients for bundled contracts, clients do not appreciate their capabilities concerning innovation. According to the ISG's Voice of Customer survey 2024, clients have experienced high satisfaction when providers are open to constructive criticism and feedback, maintain high-quality work and ensure industry-specific regulations and policy compliance. However, clients were unhappy with the providers' ability to help them adapt to emerging technologies, demonstrate novel working methods or identify business processes to improve.

Figure 3: Areas where clients are least and most happy with their digital workplace service providers

Top three areas clients have rated digital workplace service providers the highest	Top three areas clients have rated digital workplace service providers the lowest
Being open to constructive criticism or suggestions for improvement	Identifying processes or operations to apply innovative services
Maintaining consistently high-quality work	Demonstrating new methods of work, techniques or tools
Ensuring there was limited downtime in any systems or services provided	Adapting emerging technilogies and help in widespread use
Source: ISG Star of Excellence™, Voice of Customer survey, n=804 (where n is the number of clients surveyed)	

New possibilities and opportunities, thanks to GenAI

GenAI has opened up many possibilities for transforming the technologies that assist and support employees and help enterprise IT organizations in managing the entire workplace tech infrastructure. Employee experience remains a key priority for enterprise IT; workplace technology leaders seek opportunities to improve operations by leveraging this technology. AI has invaded all aspects of digital workplace technology that can impact the end-user experience.

Every unified communications and collaboration (UCC) technology provider has included GenAI as a critical product or service portfolio functionality. With the introduction of Microsoft Copilot and similar solutions, AI has become a key component of everyday individual productivity and applications that connect employees with their co-workers and assist in their content creation.

AI-enabled devices will soon become integral to the consumer market, starting with AI PCs and smartphones. Digital workplace technologies witnessed significant upheaval when smartphones, mainly iPhones, entered the workplace. Technology that disrupts and enhances end-user experience in the consumer world eventually finds a place in the enterprise work environment. Enterprises will seek assistance in adopting AI-enabled hardware and technologies for their employees.

GenAI provides significant opportunities to enhance the efficiency of service desk agents and reduce the cost of workplace support functions. It can assist in creating a support incidence knowledge base, categorizing incident tickets, improving user self-help, promoting proactive incident resolution and monitoring, and translating chat. Every service provider is integrating and leveraging GenAI technology in its digital workplace service portfolio.

Sustainability increasingly becoming an important ask

Sustainability has also become an important aspect that many U.S. enterprise clients are looking into. Although it was treated as a mandatory checkbox, U.S. clients are beginning to include carbon footprint reduction and sustainability elements in their digital workplace technologies. This initiative includes ensuring low energy consumption with devices, measuring the impact of technology usage on sustainability and reporting it on an ongoing basis to help workplace and enterprise leaders measure their progress against their environment, social and governance (ESG) goals.

This report delves into the areas mentioned previously and evaluates service providers that support U.S. enterprise workplace technology leaders in strategizing and managing their workplace technology environment.

> U.S. clients seek support for strategizing workplace transformation, using AI for productivity improvement, workplace support, service desk, end-user enablement, collaboration and EX enhancement, and sustainability initiatives.

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Accenture	Leader	Leader	Product Challenger	Not In	Product Challenger	Product Challenger
Allied Digital	Not In	Not In	Not In	Not In	Contender	Not In
Atos	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Avaso Technology	Not In	Not In	Not In	Contender	Not In	Not In
BCG	Market Challenger	Not In	Not In	Not In	Not In	Not In
Bell Techlogix	Contender	Not In	Contender	Leader	Product Challenger	Not In
Birlasoft	Not In	Contender	Contender	Not In	Contender	Not In
Blackbox	Not In	Not In	Not In	Not In	Contender	Not In
Brillio	Not In	Not In	Not In	Contender	Not In	Not In

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Capgemini	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
CDW	Not In	Not In	Not In	Contender	Not In	Not In
Coforge	Not In	Contender	Contender	Product Challenger	Contender	Not In
Cognizant	Rising Star ★	Leader	Leader	Not In	Leader	Market Challenger
CompuCom	Not In	Market Challenger	Leader	Leader	Market Challenger	Not In
Computacenter	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Deloitte	Leader	Not In	Not In	Not In	Not In	Not In
Dexian	Not In	Not In	Not In	Contender	Not In	Not In
DWG	Market Challenger	Not In	Not In	Not In	Not In	Not In

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
DXC Technology	Product Challenger	Leader	Leader	Not In	Leader	Leader
EY	Market Challenger	Not In	Not In	Not In	Not In	Not In
GAVS	Not In	Not In	Contender	Contender	Not In	Not In
HCLTech	Leader	Leader	Leader	Not In	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Rising Star ★	Leader	Not In	Not In
Infosys	Leader	Leader	Leader	Not In	Leader	Leader
Insight	Not In	Not In	Contender	Contender	Contender	Not In
ITC Infotech	Not In	Contender	Contender	Product Challenger	Contender	Contender
KPMG	Market Challenger	Not In	Not In	Not In	Not In	Not In

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Kyndryl	Leader	Leader	Leader	Not In	Leader	Rising Star ★
Lenovo	Contender	Product Challenger	Product Challenger	Rising Star ★	Contender	Product Challenger
Long View Systems	Not In	Not In	Not In	Contender	Not In	Not In
LTIMindtree	Contender	Contender	Product Challenger	Leader	Product Challenger	Contender
Microland	Not In	Contender	Product Challenger	Not In	Contender	Not In
Milestone Technologiess	Not In	Not In	Not In	Contender	Not In	Not In
Movate™	Not In	Not In	Contender	Product Challenger	Contender	Not In
Mphasis	Contender	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
NTT DATA	Leader	Leader	Leader	Not In	Leader	Product Challenger

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Pomeroy	Contender	Market Challenger	Product Challenger	Leader	Product Challenger	Market Challenger
PwC	Market Challenger	Not In	Not In	Not In	Not In	Not In
Red River	Contender	Contender	Contender	Product Challenger	Contender	Not In
Ricoh	Not In	Not In	Not In	Contender	Not In	Not In
SHI	Not In	Not In	Not In	Contender	Not In	Not In
SoftwareOne	Not In	Not In	Not In	Product Challenger	Not In	Not In
Stefanini	Product Challenger	Product Challenger	Product Challenger	Leader	Leader	Contender
TCS	Leader	Leader	Leader	Not In	Leader	Leader
Tech Mahindra	Product Challenger	Rising Star ★	Leader	Leader	Rising Star ★	Product Challenger

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services – Large Accounts	Managed End-user Technology Services – Local Specialists	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
TEKsystems	Not In	Not In	Contender	Contender	Not In	Not In
Unisys	Product Challenger	Leader	Leader	Leader	Leader	Leader
UST	Not In	Not In	Not In	Product Challenger	Contender	Not In
Wipro	Leader	Leader	Leader	Not In	Leader	Leader
WWT	Not In	Not In	Not In	Contender	Not In	Not In
Zensar Technologies	Contender	Market Challenger	Product Challenger	Leader	Market Challenger	Contender
Zones	Contender	Contender	Product Challenger	Product Challenger	Market Challenger	Not In

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

Simplified Illustration Source: ISG 2024

- **Workplace Strategy and Enablement Services**
- **Collaboration and Next-gen Experience Services**
- **Managed End-user Technology Services – Large Accounts**
- **Managed End-user Technology Services – Local Specialists**
- **Continuous Productivity Services (including Next-gen Service Desk)**
- **Smart and Sustainable Workplace Services**

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

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following six quadrants for services:

- Workplace Strategy and Enablement services
- Collaboration and Next-gen Experience Services
- Managed End-user Technology Services – Large Accounts
- Managed End-user Technology Services – Local Specialists
- Continuous Productivity Services (Including Next-gen Service Desk) and Smart
- Sustainable Workplace Services

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

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 existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between$20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptionsare possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Workplace Strategy and Enablement Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating workplace strategy and enablement service providers. In this quadrant, ISG highlights the current market positioning of workplace strategy and enablement service providers in the U.S. and how they address the key regional enterprise challenges.

In the hybrid work era, US enterprises prioritize seamless workflows by embracing AI-driven solutions. They seek providers with vendor-neutral approaches to workplace transformation and guidance on digital capabilities impacting human and physical workplaces. Providers also emphasize upskilling and reskilling initiatives to help the workforce adapt to evolving business needs. At the same time, some providers develop strategies to optimize procurement, project management, CX and workplace strategy delivery. Enterprises invest in modern office layouts that leverage cutting-edge technologies, persona-based services and next-generation support solutions to enhance collaboration and employee well-being.

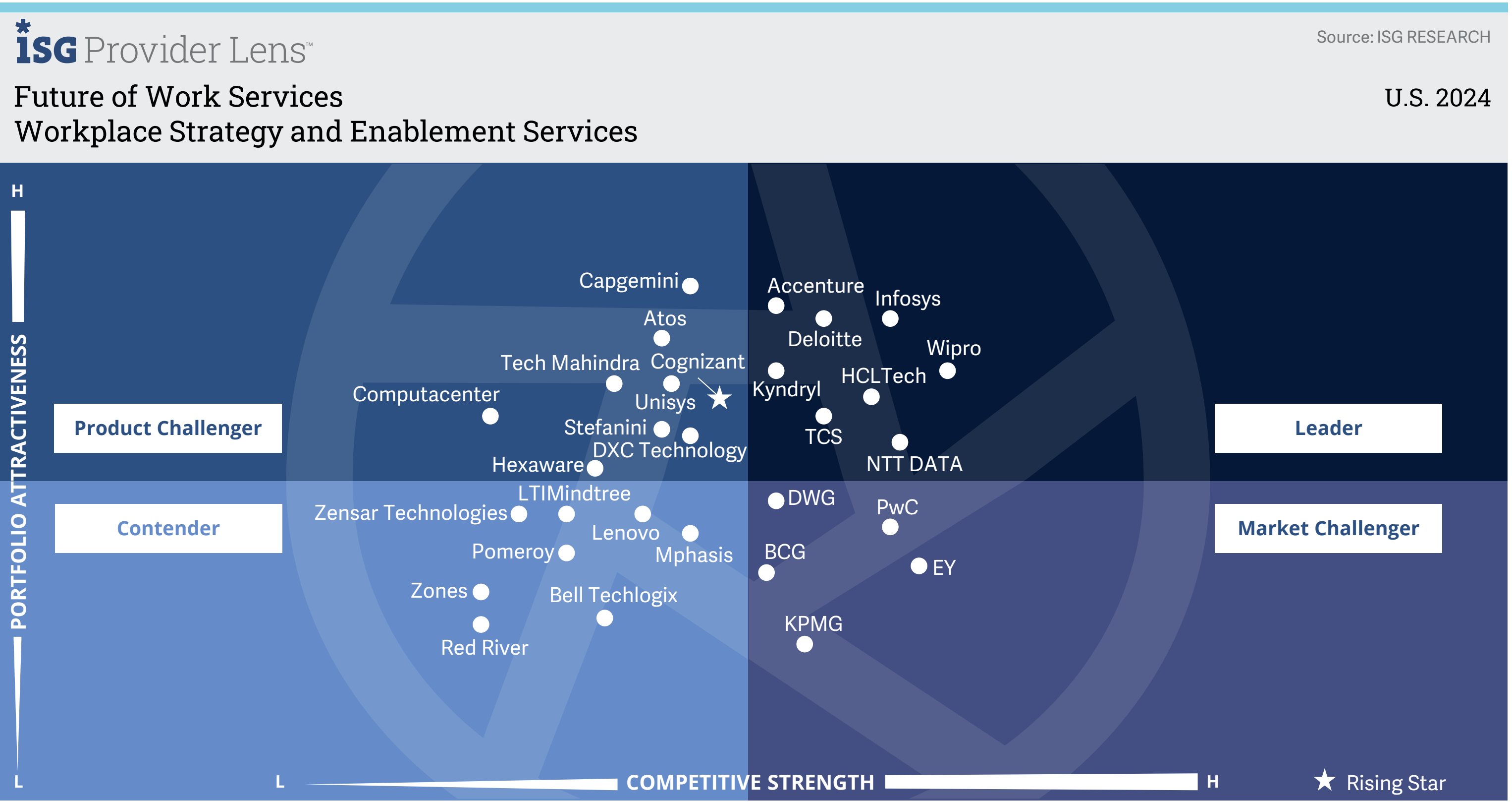
Providers aim to help U.S. enterprises navigate complex strategies and regulations and offer tailored advice and strategies based on region, market direction and organizational responsibility. They demonstrate expertise in asset strategy, assessments and workplace-driven sustainability strategies, which are highly valued by U.S. enterprises navigating the changing work landscape.

Chief experience officers (CXOs) should read this report to know about leading providers that can help them better prepare workforces for changing business models and dynamics in the post-pandemic world.

Consultant professionals should read this report to advise companies on workplace strategies and performance to enable them to stay up-to-date on the latest trends and developments in the industry.

Strategy professionals should read this report to identify the best workplace strategy and enablement service providers for their companies to help develop and implement a winning workplace strategy.

Technology professionals, including workplace technology leaders, should read this report to understand the positioning and capabilities of providers to enhance employee services.



This quadrant assesses providers that offer **business outcome–focused advisory and enablement** services to assist clients in designing their future workplace strategies.

Mrinal Rai

Definition

This quadrant evaluates providers offering workplace strategy and enablement services, including implementations, across industries. Organizations aiming to help clients navigate the complex strategies and regulations of the workplace landscape must be able to tailor advice and strategy by region, market direction and organizational responsibility. They must also provide strategic capabilities and services spanning several integrated areas related to enterprisewide workplaces.

Workplace service providers must focus on considerations such as advanced business models and new talent models. These considerations require guidance, compliance and strategy suited to human, digital and physical workplaces and must be considered collectively instead of in silos. Newer aspects that should be included as part of workplace services are listed as follows:

- Market change and new business model design, including the creation of a circular
- business delivery model
- Guidance on digital capabilities that can impact human or physical workplaces
- New talent models
- Integration of local and remote physical workplaces
- Physical asset strategy and assessments
- Workplace-driven sustainability strategy

While some providers can develop strategies, the key to minimizing potential issues is to work on procurement, project management, change, CX and workplace strategy delivery. Delivering these capabilities across several industries is crucial as the regulations vary by industry.

Eligibility Criteria

1. Provide **advisory services** and new business model designs
2. Have a vendor-neutral approach for **workplace transformation-led business delivery** models
3. Offer advisory services for human, digital or physical workplace strategy
4. Adopt new **talent models** impacting workforces. The models should integrate diversity, equity and inclusion and **eliminate modern slavery risks**
5. Integrate local and remote physical workplaces to ensure **experience parity**
6. **Deliver asset strategy and assessments**, including property and infrastructure usage and bottom-line performance
7. Have experience and references in delivering **workplace-driven sustainability strategy**
8. Have **industry-wide case studies** for workplace strategy leading to human, digital and physical workplace benefits

Observations

ISG has introduced the Workplace Strategy and Enablement Services quadrant in 2024 to evaluate providers that offer services to support workplace strategy formulation. The providers positioned in this quadrant are from diverse groups: some are pure-play consulting, some offer both consulting and implementation, and some offer business process and IT outsourcing services in addition to business process consulting. Providers that are strong in providing technology enablement for workplace transformation and offer technology advisory are also positioned in this quadrant. All providers in this quadrant have a strong market presence in the U.S.

Every managed service provider offers technology consulting and advisory services that precede implementation and managed services. These services include analyzing the *as-is* environment and preparing a blueprint for the *to-be* environment. As workplace services become integral to overall business transformation, enterprises will benefit from additional strategy consulting around talent transformation, envisioning experience enhancement measures that leverage experience-level agreements, collaborative approach for solution development, return to office and sustainability initiatives.

The Contenders in this quadrant are strong in implementing transactional end-user and service desk services, but their strategic advisory often does not go beyond technology implementation. The Product Challengers offer a strong portfolio of additional services, as highlighted previously. The Market Challengers are strong in traditional and business consulting but lack consulting related to implementation. Leaders offer a combination of transformative and strategic consulting services.

From the 52 companies assessed for this study, 35 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture is a Leader in this quadrant because of its strong presence in the region and credentials in business and technology consulting. Its broad coverage for talent transformation, organizational change management (OCM) and diversity are key differentiators.

Deloitte.

Deloitte supports enterprise clients with strategic decisions to transform work, workforce and workplace, emphasizing technology, automation, AI and employee well-being. Success stories include enhancing employee experience and productivity.

HCLTech

HCLTech's workplace consulting services provide strategic guidance to transform workplaces. It leads in thought leadership and has numerous success stories in the U.S., including meeting room transformations and sustainable IT policies.

Infosys

Infosys engages in extensive transformation services, offering workplace strategy and transformation initiatives. It provides broad consulting services, focusing on the digital workplace, employee well-being, AI and sustainable workplace design.

kyndryl

Kyndryl offers deep expertise in workplace consulting, focusing on customer experiences and performance. It assists with Microsoft Copilot adoption and has numerous U.S. client success stories.

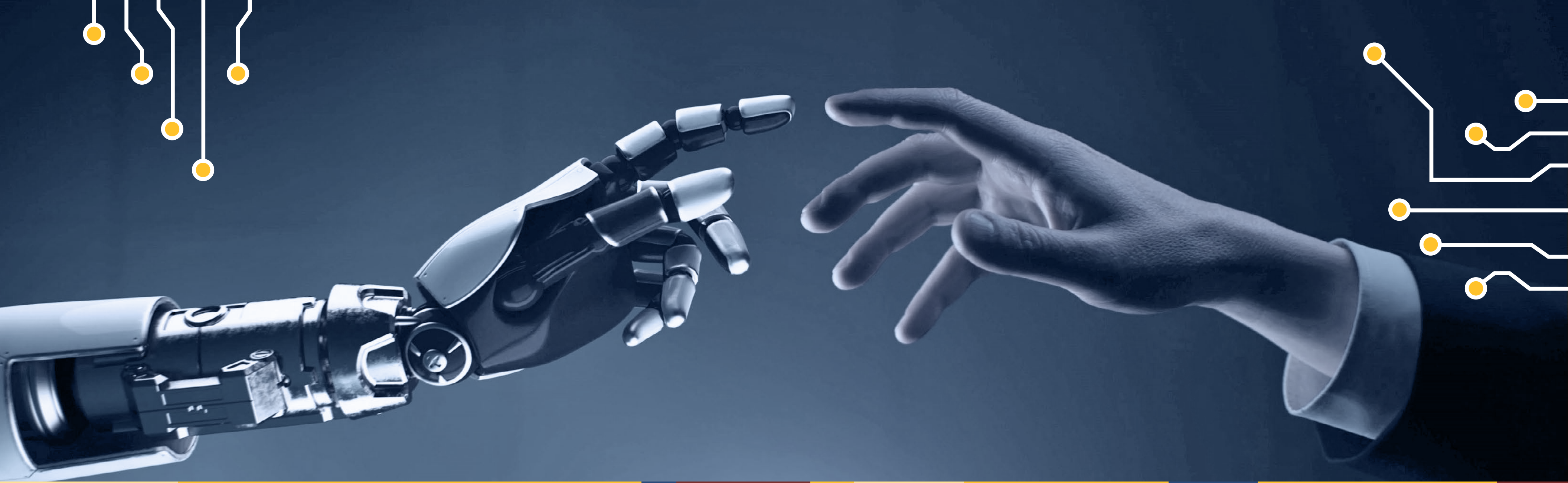
NTT DATA

NTT DATA offers digital strategy, design and program management. It provides consulting for cloud strategy, sustainable devices, CX and Microsoft Copilot adoption.

TCS takes a Consult2Operate approach with its TCS Cognix suite, focusing on cloud-first strategy and innovation. Its consulting services and GenAI adoption services are available on Azure Marketplace.

Wipro's consulting demand is rising as it offers specialized consulting on ServiceNow, ESG, accessibility and EX transformation. It advises on Microsoft Copilot adoption with comprehensive service offerings.

Cognizant (Rising Star) has experienced strong growth in the U.S. Using design thinking and an innovation-led approach, it helps clients enable workplace strategy and invests in developing industry-specific solutions to assist clients with workplace transformation consulting.



Collaboration and Next-gen Experience Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating collaboration and next-gen experience service providers. In this quadrant, ISG highlights the current market positioning of collaboration and next-gen experience service providers in the U.S. and how they address the key regional enterprise challenges.

Emerging technologies are shaping the future of enterprise collaboration and workforce development in the U.S. Enterprises increasingly recognize the transformative potential of leveraging AI, ML and AR to enable more effective and seamless collaboration among their employees, whether working in smart spaces, virtual meetings or immersive experiences.

As a result, enterprises in the U.S. are looking for providers with collaboration and next-gen experience capabilities, including modern device management/modern endpoint management, Teams Rooms and Microsoft 365 collaboration suite, and strong collaboration and integration on Teams using Power Platform.

Service providers prefer clients that adopt an outcome-focused model using an XLA-based approach.

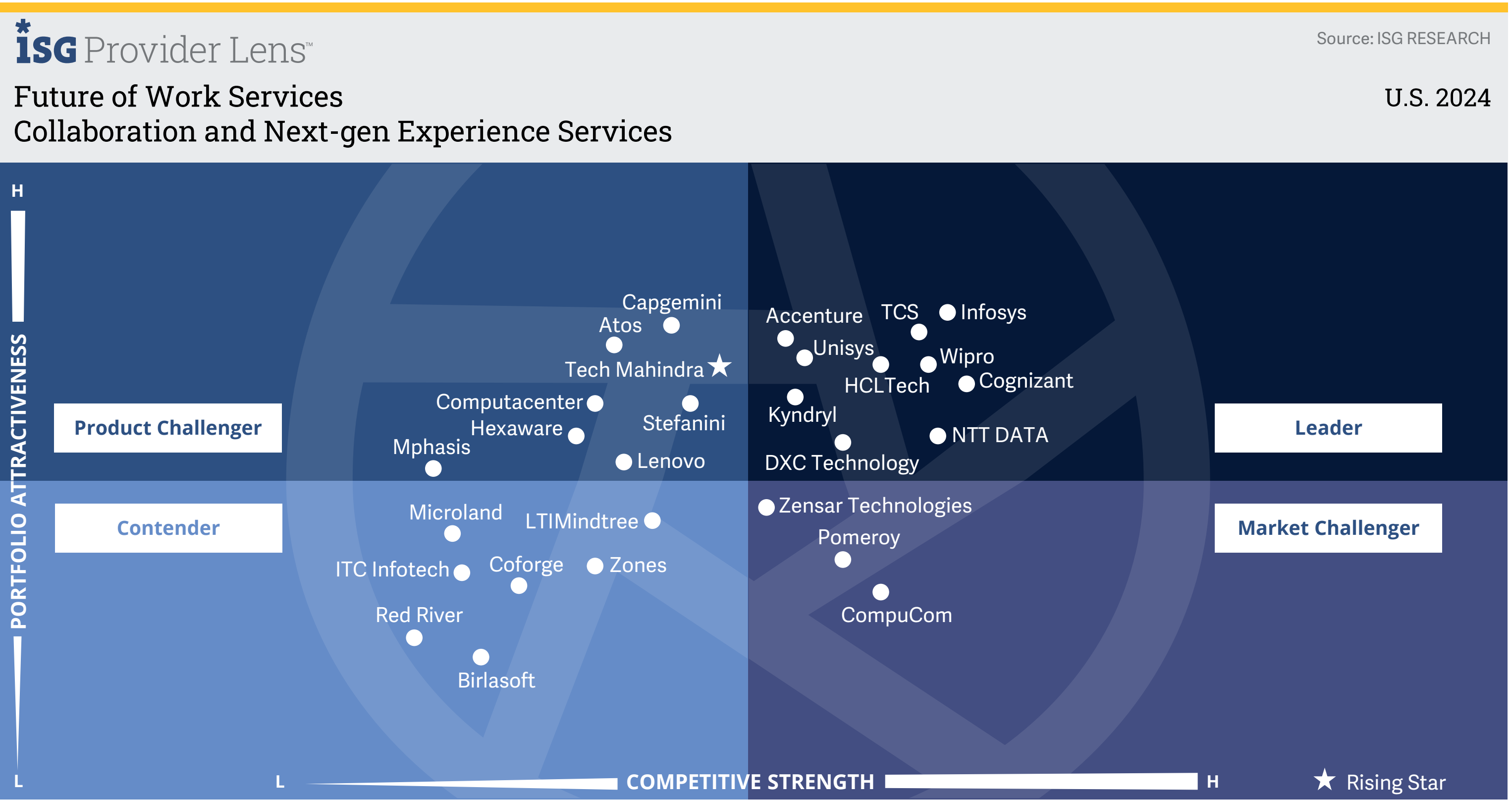
Service providers are expanding their Power Platform services to provide regional enterprises with development support in the ongoing maintenance and functionality updates of low-code applications at offshore and nearshore locations, giving customers more flexibility. To enable digital learning, providers integrate generative AI capabilities and facilitate continuous learning, reskilling and upskilling for employees using gamification, analytics, telemetry and virtual training programs.

Technology experts should read this report to learn the relative positioning and abilities of providers that can help them effectively plan and select a unified communication and collaboration as a service.

Digital professionals should read this report to understand how unified communication and collaboration solution providers fit their digital transformation initiatives.

Cybersecurity professionals should read this report to see how solution providers address the challenges related to compliance and security while maintaining a seamless EX.

Procurement professionals should read this report to better understand the current landscape of unified communication and collaboration solution providers.



This quadrant assesses providers that provide **managed UCC services** and **EX-enhancement services** leveraging the latest technologies and assist clients in developing their **experience management office (XMO)** and realizing their **XLA** vision.

Mrinal Rai

Definition

This quadrant assesses service providers' capabilities in enhancing end-to-end CX and EX and offering value-added managed services to enable workplace technology ecosystem and enhance end-user experience. Typically, providers offer services that enable business leaders, line-of-business (LOB) representatives and CXOs to provide enhanced collaboration capabilities, resulting in improved experience. Their services associate experience with measurable business results and help align the digital workplace transformation with human needs.

Next-generation experience extends beyond technology implementation, including professional services promoting technology adoption. Service providers engage with clients in an outcome-focused model using an XLA approach. The experience management office (XMO) gathers actionable insights through data and analytics, sentiment analysis, ML and change management activities.

These providers enhance collaboration and support comprehensive communication, collaboration and productivity stacks using AI and GenAI technologies. They also extend their offerings to consulting and advisory services, addressing the requirements of various business functions such as HR and operations. They provide expert guidance on effective change management and technology adoption, using cutting-edge technologies to ensure seamless transitions. Additionally, these providers offer services promoting digital dexterity, thus fostering an environment conducive to learning and skill development essential for navigating the evolving workplace landscape.

Eligibility Criteria

1. Provide an **XLA-focused delivery approach** to enhance collaborative experience
2. Leverage AI and GenAI technologies to provide **value-added experience transformation services**
3. Deploy **collaboration solutions** such as Teams, Cisco and Zoom and manage by monitoring analytics from deployed hardware
4. Support **unified communication, collaboration and productivity stack**
5. Provide services to **support the needs of other business functions**, such as human resources outsourcing (HRO) and operations
6. Provide services that enable proper change management and technology adoption, **leveraging the latest technologies** such as Copilot
7. Support XMO and associated services
8. Provide services to support **digital dexterity**, learning and skills evolution and deploy **integrated AR and VR capabilities**

Observations

ISG has introduced the Collaboration and Next-gen Experience Services quadrant in 2024 to evaluate providers that offer managed and implementation services to manage employee experience. Enterprise clients that bundle workplace services with a large-scale digital transformation often seek to partner with providers that offer experience-level agreements (XLAs) tied with larger business objectives. With the introduction of Microsoft Copilot and similar solutions by other UCC providers, the impact these solutions can have on overall operations and business has become extensive. Providers positioned in this quadrant offer core and bundled workplace services.

The Contenders in this quadrant provide proactive incidence management and predictive analytics to assist the workplace support functions and positively impact workplace support function efficiency. The Market Challengers have a significant presence in the U.S. market and provide experience measurement services based on technology performance. The Product Challengers have significantly advanced their XLA approach and offer dedicated services for Microsoft Copilot and similar solutions. The Leaders in this quadrant have a strong market presence and follow a comprehensive XLA approach that covers technology performance and the impact on business objectives.

From the 52 companies assessed for this study, 30 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

Accenture is a Leader in this quadrant. It provides a dedicated and collaborative approach to XMO development. It leverages a platform-driven analytical approach for XLAs and partnerships with productivity collaboration vendors to strengthen its capabilities further.

Cognizant leads the market with its experience-focused services, robust partnerships, next-gen technology investments and innovative approach. It has grown significantly in the U.S. market and provides focused services for productivity, UCaaS and predictive intelligence.

DXC Technology uses dashboards and KPIs to enhance client experiences, leveraging analytics for workforce profiling. It employs AI within its UPtime™ platform for chat translation, ticket analysis and device management. Its Microsoft partnership enhances UX with tools like Copilot and Microsoft 365.

HCLTech supports a diverse, unified communications and collaboration ecosystem, uses a phased XLA approach, and offers proprietary IPs and accelerators for productivity and collaboration.

Infosys designs and manages XLAs with its DWX Command Center, and aggregates experience insights, leveraging AI and Microsoft Copilot to automate workflows and enhance user engagement.

Kyndryl focuses on XLAs, automating incidents to enhance employee engagement and well-being. Its Kyndryl Conductor integrates diverse tech insights, feeding into an AI-driven orchestration system for comprehensive workplace support.

NTT DATA offers advisory, implementation and operational services leveraging its Cloud Voice and Microsoft Copilot. Its experience as a service combines CX and EX insights for total experience (TX) management.

TCS leverages AI to provide experience-centric workplace services and supports AI-led productivity improvements. It enhances productivity through interoperability between diverse collaboration solutions and offers industry-specific copilots.

Unisys provides managed services for Microsoft 365, meeting rooms, voice, frontline enablement, smart places and copilot. It uses GenAI for actionable insights to improve IT and non-IT business functions.

Wipro is expanding its footprint in existing large accounts by engaging additional stakeholders from various business functions. This approach enables the company to deliver experience-focused services and enhance value for its clients across different operational areas.

Tech Mahindra (Rising Star) measures ESG-, cost- and sentiment-based XLAs. It leverages GenAI for issue recommendations, anomaly detection and smart APIs, and it supports seamless collaboration tools.

Managed End-user Technology Services – Large Accounts

Who Should Read This Section

This report is relevant to large enterprises across industries in the U.S. for evaluating providers of managed workplace services end-user technology. In this quadrant, ISG highlights the current market positioning of providers that offer managed workplace services to large enterprises in the U.S. and how they address the key regional enterprise challenges.

Large enterprises in the U.S. are undergoing a fundamental shift in their approach to the modern digital workplace. They are moving from a traditional, device-centric desktop environment toward a more responsive, experience-centric model. As enterprises in this region scale their operations, they increasingly seek a provider to assess their current workplace maturity and offer innovative end-to-end solutions that can manage the entire lifecycle of end-user devices.

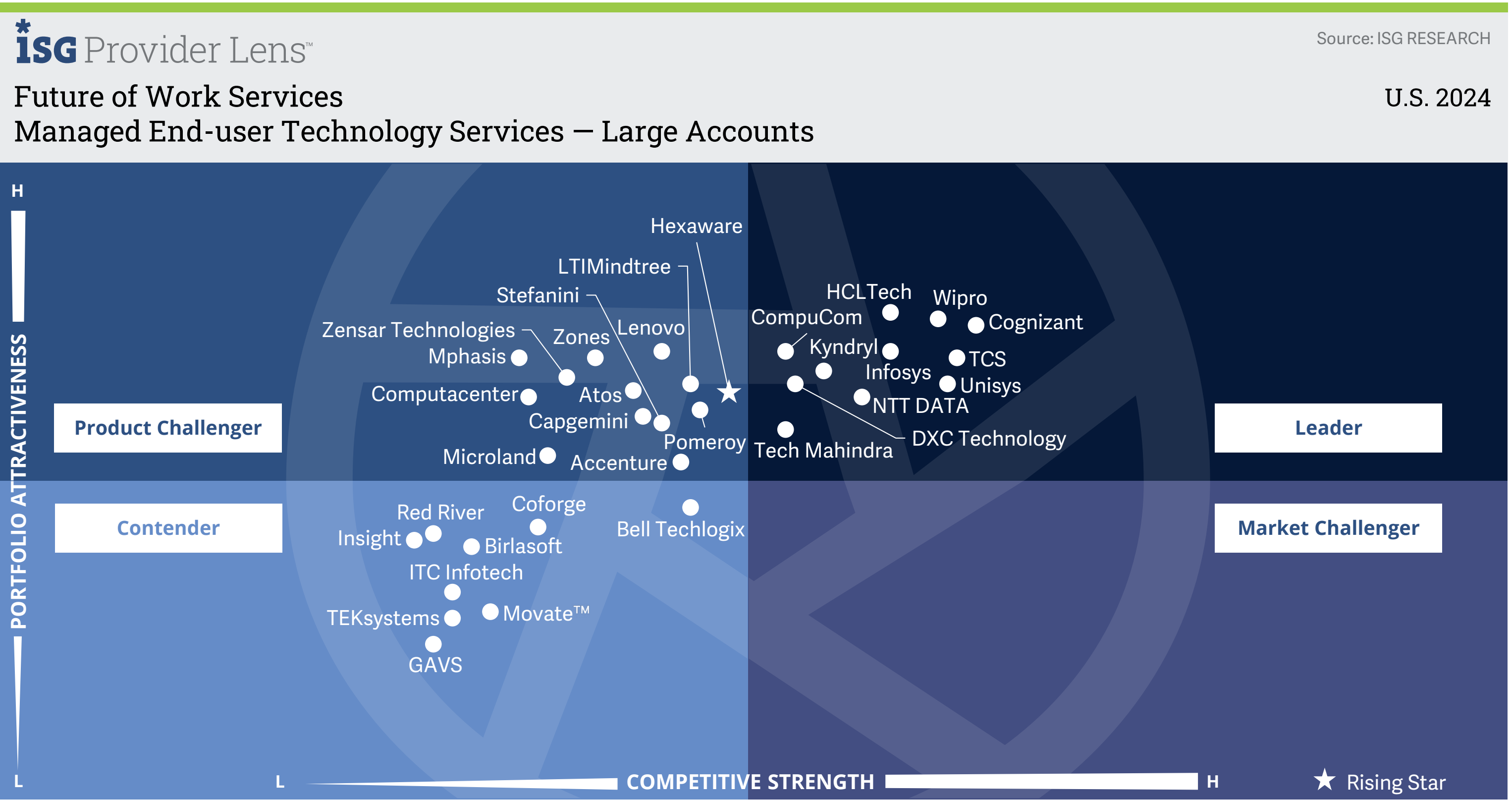
U.S. enterprises also seek providers that address their security concerns while ensuring frictionless experience and consistent security measures across devices of their choice. Therefore, service providers leverage digital platform conductors to deliver key capabilities like asset discovery and intelligent PC refresh planning. They partner with endpoint security providers to improve asset reclamation and boost overall workplace security. Crucially, providers also adopt zero trust principles to validate identity and access at all points.

Chief information officers (CIOs) should read this report to understand how current processes and protocols influence an enterprise's use of workplace technologies and the potential limitations while adopting new capabilities.

Cybersecurity professionals should read this report to understand how providers address the significant challenges of compliance and security while maintaining a seamless EX.

Technology professionals should read this report to understand how providers' relative positioning and abilities can help them effectively plan and select managed digital workplace services.

Digital professionals, including facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives.



This quadrant assesses **managed service providers** that serve large accounts and offer **device management, mobility support and other end-user technology services** to enable and support **experience-centric** hybrid and remote working for large enterprises.

Mrinal Rai

Definition

This quadrant assesses service providers offering managed services associated with technologies that enterprise IT departments deploy, provision and secure for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and endpoint security. Providers assessed in this quadrant offer complete end-user computing (EUC) services that form the core of the digital workplace. These services include device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. Their service portfolio extends to support bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX) support. Provisioning, managing, and securing the devices remain the first primary step to enabling a digital workplace and providing devices with integrated collaboration and productivity capabilities to employees. The increasing focus on experience through endpoints has transformed services and helped providers cater to clients' respective industries. While these services are typically associated with traditional computing devices and tablets, their scope can be expanded to include industry-specific scenarios, such as point-of-sale or handheld devices for retail and hospitality or medical equipment devices for healthcare and more traditional workplace setups.

Eligibility Criteria

1. Provide **connected, always-on and updated end-user devices** for secure collaboration and productivity
2. Support **unified endpoint management (UEM), enterprise mobility management, application provisioning and patch management**
3. Offer **complete device lifecycle management services**, such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
4. Provide **DEX solutions for automated issue resolution**
5. Demonstrate **experience in providing virtual desktop services on-premise and on the cloud** (desktop as a service)
6. **Offer related field services**, IMAC and break/fix services. Provide remote and onsite field support and in-person technical assistance
7. **At least 75 percent of regional contracts must include end-user technology services management**

Observations

There have been slight changes in the providers' positioning in this quadrant compared with last year. Although many Leaders and Challengers retain their positions, there is considerable movement in their positioning on both axes. The provider positioning in this quadrant is influenced by their ability to provide two differentiating services: one, verticalized solutions and second, leveraging observability and analytics capabilities extending beyond end-user devices.

Service providers differentiate themselves by providing verticalized solutions for different industries and managing the endpoints and devices specific to those industries. Since many of the leading providers in this space partner with clients for a broader transformation deal, they offer additional IT infrastructure management services other than the digital workplace. These providers can aggregate insights from observability and telemetry solutions of the adjacent infrastructure elements, such as cloud, data center and networking, and combine those with the data from endpoint or device performance. Providers with a broader partner ecosystem are at an advantage in this market.

The Contenders in this quadrant have a smaller scale of operations and less usage of observability solutions. The Product Challengers offer more verticalized solutions or consolidate inputs from diverse IT infrastructure components. Some providers positioned firmly on the Portfolio Attractiveness axis use GenAI to leverage these combined insights. This is a mature market where no provider has a significant market presence without a considerable service portfolio. Hence, there is no Market Challenger in this quadrant.

From the 52 companies assessed for this study, 33 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

cognizant

Cognizant has a strong track record and partnerships with Microsoft, ServiceNow and Nexthink to offer predictive issue resolution and personalized services. Its industry-focused solutions and DEXOps platform enhance efficiency and reduce costs.

compucom

CompuCom offers device lifecycle management, endpoint protection and asset management. Its AIOps and FLO platform provide advanced analytics and insights. With a strong U.S. presence and global support, the company enhances efficiency and reduces costs.

DXC TECHNOLOGY

DXC Technology offers a comprehensive services portfolio for end-user technology. It uses AI for device management and optimization, reducing device refresh by over 50 percent. It partners with major tech providers, including Microsoft, to provide enhanced services and solutions.

HCLTech

HCLTech offers dedicated end-user tech services with end-user technology. It leverages its partnerships, uses GenAI, AR and VR for advanced tech support, and has industry-specific solutions as differentiators.

Infosys supports device lifecycle and endpoint management, as well as managed services with analytics and AR tech. Its AI-powered tools enhance end-user tech service experience and automate virtual desktop management.

Kyndryl manages over eight million devices globally with strong OEM partnerships. It offers industry-specific solutions and expertise in VDI, supporting secure, modern and cloud-based virtual desktop solutions.

NTT DATA's SDaaS manages device lifecycles by focusing on sustainability, reducing carbon footprint and TCO. The Nucleus platform integrates with third-party tools for comprehensive device management.

TCS Cognix™ observability center analyzes telemetry and experience-centric insights from devices and applications. It provides device consumption analysis, auto-predicting issues, green IT, AR support and secure remote management.

Tech Mahindra offers endpoint security, device management, BYOD, asset management, VDI and automation. It manages two million devices, specializes in vertical solutions and uses GenAI for performance and support.

Unisys offers device management, UEM solutions, virtual desktops and consulting services for key technology provider solutions. Its key partners include Microsoft, Dell, AWS and ServiceNow.

Wipro strategically partners with leading technology providers like DEX, ServiceNow, Microsoft, Intel and conversational AI solutions, integrating AI-enabled services into its LiVE Workspace™ portfolio.

Hexaware (Rising Star) offers a broad end-user service portfolio and partners with VDI, automation and hybrid cloud tech providers. Its experience management caters to the broad requirements of large accounts.

Managed End-user Technology Services – Local Specialists

Who Should Read This Section

This report is relevant to local specialists across industries in the U.S. for evaluating providers of managed workplace services end-user technology. In this quadrant, ISG highlights the current market positioning of providers that offer managed workplace services to local specialists in the U.S. and how they address the key regional enterprise challenges.

With the growing traction of end-user technology, local specialists in the U.S. seek to transform their workplace by adopting a modern management approach. Some growing local specialist trends have been observed in this space, including device-level security management, a shift from UX to cost savings, AI assistance to support workers, proactive performance monitoring, upskilling, modern device management and newer broadband technology.

Local specialists in the U.S. are looking for providers that can assist them in migrating from legacy on-premises tools to more modern device management tools in the cloud. They seek providers that offer highly customized and dedicated offerings for local specialists, including virtual assistance and personalized support, device lifecycle management services and other end-user computing technology services.

Chief information officers(CIOs) should read this report to understand how current processes and protocols influence an enterprise's use of workplace technologies and the potential limitations while adopting new capabilities.

Technology professionals should read this report to understand providers' relative positioning and abilities to help them effectively plan and select managed digital workplace services.

Cybersecurity professionals should read this report to know how providers address significant compliance and security challenges while maintaining a seamless employee experience.

Digital professionals, including facility management leaders, should read this report to understand how managed workplace service providers fit their digital transformation initiatives.

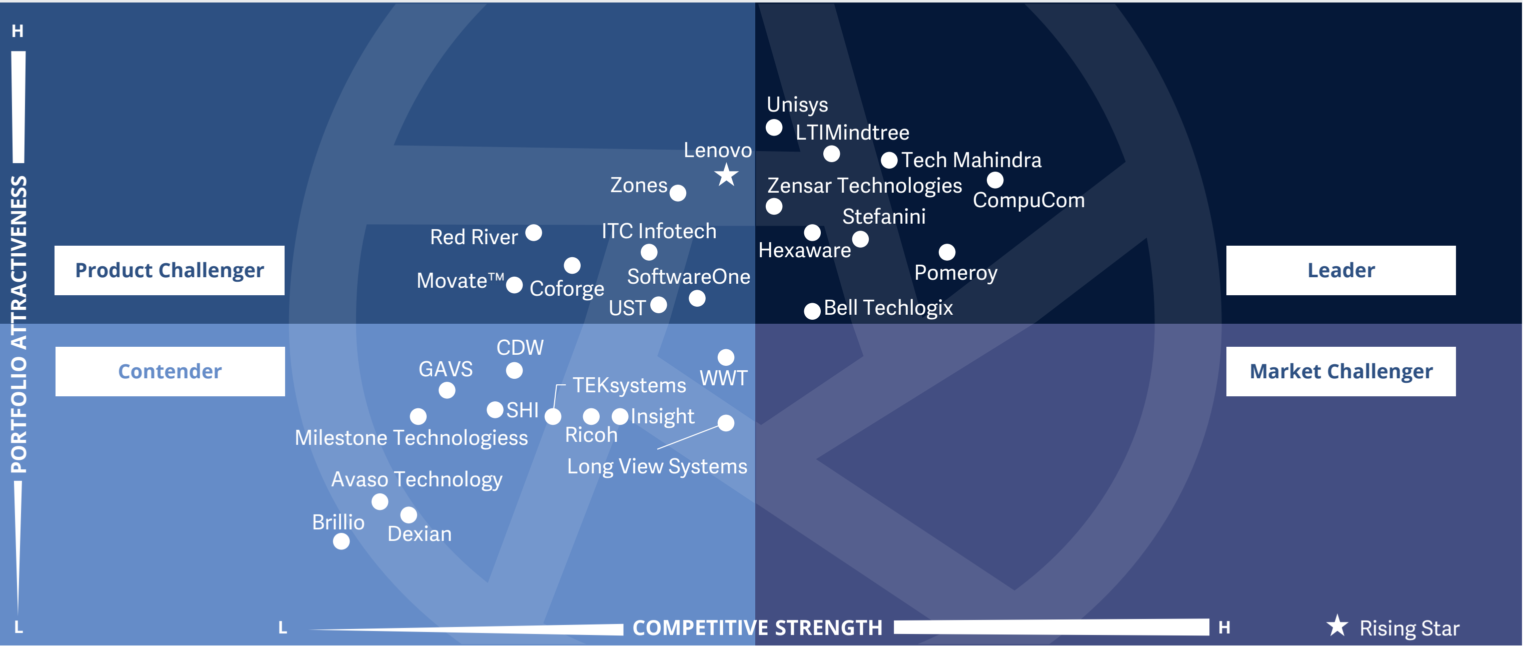
ISG Provider Lens™

Source: ISG RESEARCH

Future of Work Services

Managed End-user Technology Services — Local Specialists

U.S. 2024



This quadrant assesses providers **specializing in managing the end-user technology** environment and servicing **more local clients** with a regional presence.

Mrinal Rai

Definition

This quadrant assesses service providers specializing in managed services associated with technologies that enterprise IT departments deploy, provision and secure for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and endpoint security. Providers assessed in this quadrant specialize in complete end-user computing (EUC) services that form the core of the digital workplace. These services include device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. Their service portfolio extends to support BYOD initiatives and mobility and telecom expense management. While transformative services such as XLAs and consulting are desirable, they are not mandatory to consider inclusion in this quadrant.

While these services are typically associated with traditional computing devices and tablets, their scope can include industry-specific scenarios, such as point-of-sale or handheld devices for retail and hospitality or medical equipment devices for healthcare and more traditional workplace setups.

Local and midmarket clients often use these providers to manage their end-user computing estate. Local enterprise clients that want to keep the management of their EUC environment in-house or closely monitored engage with these specialized providers as they are not very keen on larger XLA or transformation engagements.

Eligibility Criteria

1. Provide support for the complete **EUC environment**
2. Support unified endpoint management (UEM), **enterprise mobility management, application provisioning and patch management**
3. Offer complete **device lifecycle management services** such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
4. Demonstrate experience in providing **virtual desktop services** on premises and on the cloud (desktop as a service)
5. **Offer related field services, IMAC and break/fix services**. Provide remote and onsite field support and in-person technical assistance
6. Generate either 30 percent or more revenue from the midmarket or SMB market and/or have 30 percent or **more digital workplace clients** in the U.S. from the midmarket segment (end users 5,000 or less)

Observations

ISG introduced the Managed End-user Technology Services — Local Specialists quadrant in 2024 for evaluating providers with a significant local presence specializing in end-user technology services. The providers in this quadrant are laser-focused on end-user technology services and provide dedicated offerings to manage end-user device and endpoint management, device lifecycle management and virtual desktop services. These providers have a robust presence in the U.S. and serve midmarket and SMB clients seeking nationwide coverage.

Contenders in this quadrant provide end-user computing and device management services with a presence in the market. The Product Challengers offer device management focused on experience enhancement and OpEx-based device lifecycle management or device- or desktop-as-a-service offering. The Leaders in this quadrant have significant experience with midmarket and SMB clients in the U.S. and provide focused end-user technology services targeted at cost optimization and end-user experience enhancement.

From the 52 companies assessed for this study, 29 qualified for this quadrant, with nine being Leaders and one a Rising Star.

Bell Techlogix leads the market because of its strong local presence, targeted approach for the midmarket segment and dedicated offerings catering to IT asset management, device-level support and UEM.

CompuCom reduces desktop procurement and support expenses and improves employee productivity for midmarket clients. Its FLO platform enhances digital experiences and IT visibility. Significant client growth across various industries solidifies its market presence in the U.S.

Hexaware offers device lifecycle management, smart IT desk solutions with AI and AR support, and midmarket-focused services with flexible, consumption-based pricing models.

LTIMindtree shows strong growth in digital workplace services and offers unified experience management with proactive management, hyperpersonalization and self-service options.

Pomeroy

Pomeroy leverages industry-specific solutions such as those in retail. It uses analytics and DEX to monitor and minimize downtime and enhance user experience.

Stefanini offers comprehensive digital workplace services, prioritizing user experience and industry-specific support. Its D3 framework provides actionable insights for resource utilization and green IT solutions.

Tech Mahindra provides specialized device as a service (DaaS) and automation services with persona-based XLA and GenAI-enabled device management and VDI monitoring. It manages two million devices in the U.S. for midmarket clients.

Unisys offers complete device lifecycle management, endpoint as a service and consulting for persona-driven, evergreen device services. It manages various kinds of devices with analytics- and insights-led experience enhancement.

Zensar Technologies offers a broad portfolio that includes UEM, device management, VDI and mobility management, catering to midmarket and SMB clients with proactive issue resolution.

Lenovo (Rising Star) leads digital workplace services growth, leveraging AI for personalized support with *Care of One* and TruScale DaaS for sustainable device lifecycle management.

Rising Star

"With its focused services, targeted market approach, strong growth and AI-enabled support services, Lenovo is rapidly emerging as a Rising Star in this market."

Mrinal Rai

Lenovo

Overview

Lenovo is headquartered in Beijing, China and North Carolina, U.S. It has more than 77,000 employees across 25 offices in seven countries. In FY23 the company generated $61.9 billion in revenue, with Intelligent Devices Group (IDG) as its largest segment. It offers end-user technology services as part of its Digital Workplace Solutions. This represents 82 percent of its overall future of work services revenue, while the U.S. accounts for nearly 20 percent. It serves approximately 500 clients globally, and 57 percent of clients in the U.S. are from the SMB and midmarket.

Strengths

Excellent growth: Lenovo has registered the highest growth in its digital workplace services revenue compared with all other service providers considered for this study. The company strategically invests in standalone digital workplace service deals focusing on specialized end-user technology. It aggressively pursues the market and has ambitious goals to disrupt and lead the pack.

Device lifecycle management using TruScale DaaS: Lenovo offers TruScale DaaS as a separate service unit that provides device lifecycle management integrated with Care of One and managed services. It extends to AR and VR devices, focusing on sustainability and refurbished devices.

Care of One and LLMOps: Lenovo provides robust end-user computing managed services through its AI-enabled persona segmentation and support platform, *Care of One*. It leverages GenAI and persona segmentation to provide personalized support services. The company offers highly automated, preventive and proactive support leveraging an LLMOps approach that uses the enterprise's internal LLM, Lenovo's LLM, Lenovo partner's LLM and finally, the foundational LLMs to serve incident tickets based on issue complexity.

Caution

While Lenovo aims to displace established service providers in this space, it also partners with many large global systems integrators and managed service providers to support their digital workplace services portfolio and DaaS offering.

Continuous Productivity Services (including Next-gen Service Desk)

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating continuous productivity service (including next-gen service desk) providers. In this quadrant, ISG highlights the current market positioning of continuous productivity service (including next-gen service desk) providers in the U.S. and how they address the key enterprise challenges in the region.

The U.S. enterprise market is witnessing the growing adoption of zero-service desk solutions, which enable organizations to seek capabilities like AI-powered automation, user experience and analytics, self-service with chat and proactive troubleshooting. These features facilitate robust self-service support options, allowing enterprises to streamline their IT support and enhance user experience. However, the transition to next-generation service desk solutions presents a critical decision point for U.S. enterprises. Factors such as regulatory restrictions, low adoption because of unfamiliarity, higher costs and the availability of skilled labor pose challenges that organizations seek to address.

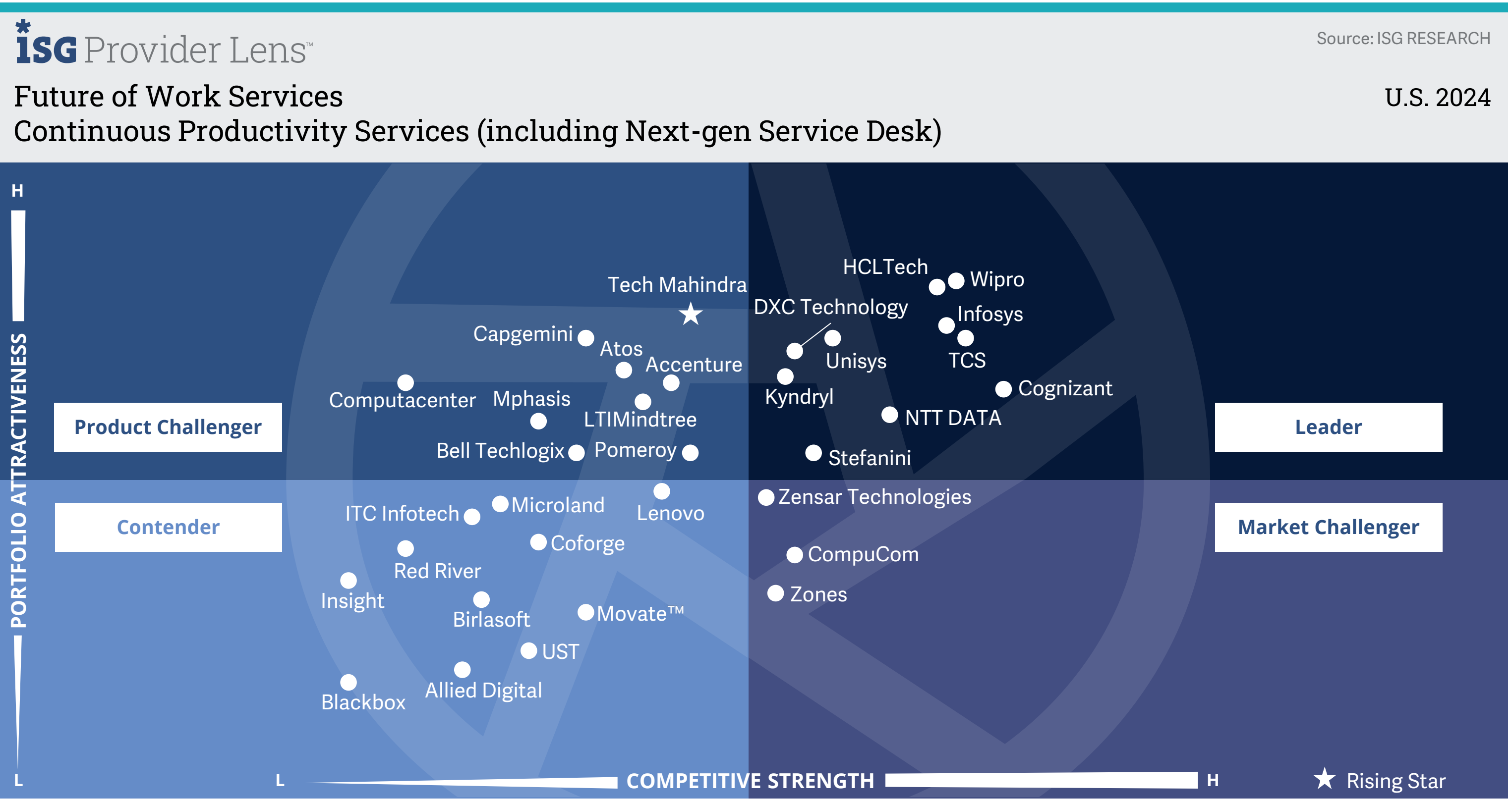
Providers collaborate with innovators to bring advanced conversational AI to the next-gen service desk to cater to enterprise needs, offering users robust analytics and human-like assistance. Some providers partner with Microsoft on Copilot to ensure data confidentiality and privacy. Others are investing in AI skilled workforce to bridge the talent gap. Providers leverage AR and VR, human-holographic presence and AI-based copilots and chatbots to facilitate innovative workplace support.

Technology professionals, including workplace technology leaders, should read this report to learn about providers that can help them modernize service desk and workplace support services.

Digital professionals, including facility managers, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives.

Field service professionals should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations.

Procurement professionals should read this report to better understand the current landscape of digital service desk and workplace support service providers in the U.S.



This quadrant assesses managed service providers that offer **next-generation AI-enabled and empowered service desk** and workplace support services that leverage **automation and analytics**.

Mrinal Rai

Definition

This quadrant assesses service providers' capabilities in supporting the continuous productivity needs of next-generation workplaces, human workplaces and fully integrated hybrid working patterns.

For today's workforce, being productive means having the ability to work from anywhere, anytime. Users require a different IT operating model, driven by the changes in business models and market channels, which they must operate and support. The current workforce needs autonomy and constant connectivity to ensure productivity regardless of location, work pattern or device. Meeting these needs requires providers to offer enhanced support capabilities, rendering typical service desk offerings less appealing yet available. Next-generation services include sentiment analysis and automated DEX triage to ensure always-on IT is managed, AI-powered health monitoring for managed services, and emerging devices such as AR and VR. These services encompass automated and proactive technical support and cloud platforms to offer always-on systems. Providers leverage AI and cognitive technologies for user-facing tasks, achieving significant cost savings.

Success is measured through XLAs linked to business outcomes rather than SLAs. Providers can enhance business outcomes by offering advanced productivity support. Previously, these services included field and onsite support requiring expert technicians to visit user locations. Currently, providers leverage automation and use more remote and self-service options such as AR self-fix, workplace support, service desk, tech bars and cafés, DigiLockers, omnichannel chat and voice support.

Eligibility Criteria

1. Provide **deliver-anywhere autonomous workplace support**
2. Offer fully integrated analytics and **automation for issue resolution**
3. Deliver **contextualized AI** support for workplace
4. Provide service **desk augmentation**
5. Offer XLA-driven support instead of **SLA-driven decisions**
6. Set up and **deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers
7. Provide automated and **contextualized support** for end users based on their roles and work
8. **Quantify workplace support** function performance beyond traditional service metrics
9. Have a **robust local presence** with most workplace engagements around service desk services

Observations

This quadrant is an evolved version of the Digital Service Desk and Workplace Support Services quadrant from last year's report. Many providers retain their position as Leaders. However, their positioning on the two axes has changed slightly based on the depth of their portfolio and their growth in the U.S. market. Generative AI and Microsoft Copilot and their impact on service providers' automation and contextual support capabilities significantly influence their ability to provide next-generation service desk and support services to their clients. LLMs and GenAI can be used to build a support knowledge base, categorize tickets, provide live translations, and consolidate information from automated systems to assist human desk agents in making informed decisions and helping end users with self-help services.

The Contenders in this quadrant offer automated service desk services and support services. The Product Challengers extensively use GenAI to support service desk agents. The Market Challengers in this quadrant focus on end-user technology services and automated support and have extensive market presence. The Leaders in this quadrant leverage GenAI-enabled insights from multiple sources and provide consolidated information to support agents.

From the 52 companies assessed for this study, 33 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

Cognizant's robust workplace suite enables clients to transform support function performance from traditional to total experience services.

DXC Technology provides dedicated and value-based offerings to its users. With a strong focus on analytics capabilities, it has been positioned as a Leader in this quadrant.

HCLTech's strong commitment to growing its next-generation service desk and modernizing frontline workers make it a strong Leader in this space.

Infosys' robust partner ecosystem allows users to build analytics and dashboarding solutions to deliver enhanced end-user monitoring experience.

Kyndryl's people-first approach and measurable business impact with advanced and 24/7 personalized omnichannel experiences make it a Leader in this space.

NTT DATA's innovative services and strong partner ecosystem drive user experiences by combining sustainability, personalization solutions, engagement and automation capabilities.

Stefanini entered the Leader category with its wide range of experience-centered workplace portfolios, allowing users to minimize the need for a traditional service desk.

TCS leads with its vast, comprehensive solution and analytics suite, enabling its clients to achieve an enhanced contactless experience.

Unisys' InteliServe offers advanced omnichannel support with detailed AI and analytics capabilities, providing users with secure, personalized service and flexible support channels.

Wipro's LiVE Workspace™ allows users to seamlessly integrate AI into diverse business processes, enhancing efficiency and decision-making and fostering innovation.

Tech Mahindra is recognized as a Rising Star for its innovative expansion and application of its FLEX portfolio, improving user performance and increasing business efficiency.

Smart and Sustainable Workplace Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating smart and sustainable workplace service providers. In this quadrant, ISG highlights the current market positioning of smart and sustainable workplace service providers in the U.S. and how they address the key regional enterprise challenges.

U.S. enterprises are recognizing the evolving needs of the modern workplace. They seek capabilities beyond technology and are looking to implement retraining initiatives to address the skills gap, emphasizing social responsibility and creating smart, inclusive workplaces that address critical concerns like carbon reduction, climate change and social inequality. The increasing focus on environmental stewardship also drives the need for investments in robust security measures that align with these sustainability goals.

To address the evolving enterprise needs, providers are developing a balanced customer scorecard to deliver near-real-time operational waste metrics. Some providers are also collaborating closely with OEM partners to support a sustainable economy through the remarketing and remanufacturing devices. They also conduct comprehensive sustainability assessments and reports, assist in developing net zero emissions road maps, implement green IT strategies and provide energy consumption analytics through tailored sustainability dashboards.

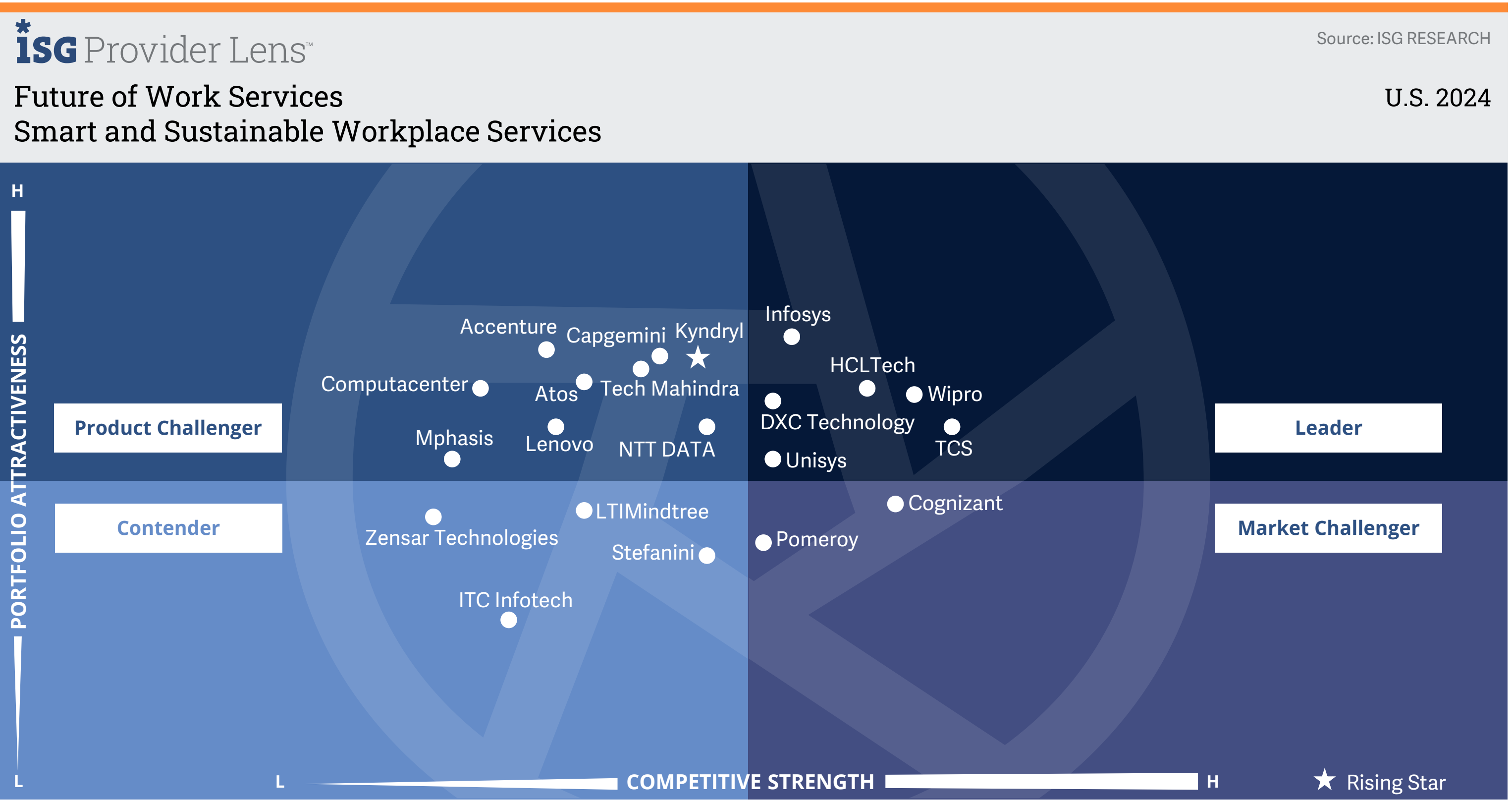
This shift signals a maturing understanding that the path forward lies in developing workplaces that are not only efficient but also environmentally sustainable and socially equitable.

C-suite executives should read this report to understand the latest smart and sustainable workplace services trends to assist in resource allocation and strategy development.

Strategy professionals should read this report to identify the best smart and sustainable workplace service providers for companies to help develop and implement an effective ESG strategy.

Chief sustainability officers and ESG professionals should read this report for updated insights on developing and implementing effective, sustainable strategies.

Consultant professionals should read this report to advise companies on sustainable strategies and performance to stay up-to-date on the latest trends and developments in the industry.



This quadrant assesses managed service providers that provide **analytics- and automation-powered smart and sustainable workplace** services that support clients in achieving their **ESG** and **RTO** initiatives.

Mrinal Rai

Definition

This quadrant assesses service providers that support smart, IoT-enabled physical workplaces and assist clients in achieving sustainability goals. The modern workplace combines human, digital and physical workplaces to enable remote, hybrid or in-person collaboration and productivity. Buildings and spaces must be integrated, inclusive and sustainable, offering users a purpose to attend.

With commercial retail facing major occupancy issues, workplace service providers must collaborate with enterprise leaders and create a holistic office strategy. Providers must draw on technology and sustainability to design, implement and manage workplace environments that enhance operational efficiency, employee well-being and environmental responsibilities. As organizations focus on a return-to-office strategy, service providers can help build an environment with smart meeting and facility management solutions. Besides traditional office management, these services include an adaptive, efficient, inclusive and responsible environment. These help create spaces that meet the current needs of employees and businesses and anticipate future challenges and opportunities in the evolving work landscape.

Providers must also integrate experience parity capabilities into their offerings, with tangible outcomes irrespective of remote, virtual or hybrid models. They must incorporate unified communications and collaboration capabilities and offer smart collaborative workspaces. Their services include IoT-enabled functionality to control the environment, resulting in a smart campus with an intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. Support smart office spaces by **leveraging IoT and the latest technologies** to provide workplace analytics, hot desking, smart building and facility management
2. Offer support for asset efficiency and address **energy management requirements**
3. Provide inclusive, adaptable and integrated **hybrid working solutions and spaces**
4. Provide services to **reduce carbon emissions** from workplaces
5. Assist in aligning client strategies and metrics for **reporting the ESG aspects**, particularly **focusing on workspace utilization within the social and governance dimensions**

Observations

ISG introduced the Smart and Sustainable Workplace Services quadrant in 2024. U.S. enterprises are increasingly focusing on sustainability initiatives. Their approach to managing digital workplace technology plays a significant role in their ESG strategy. Almost every device management approach includes carbon footprint reduction and sustainability goal measurement. By embracing an OpEx-based device-as-a-service model, providers offer device refurbishment and recycling services with a positive environmental effect. Modern device management and DEX solutions can measure carbon emissions and offer insights to workplace technology management teams.

As clients implement their RTO policies, they seek technology service support to measure the impact of carbon emissions by buildings and facilities. By implementing flexible working, these clients avoid their employees' commuting, thereby reducing carbon emissions. Besides reducing their carbon footprint, clients also seek support to make their physical workplaces smarter and foster more collaboration.

The Contenders in this quadrant offer experience-focused services and leverage device lifecycle management services for carbon footprint reduction. The Product Challengers in this quadrant focus on ESG and sustainability. They also offer support for diversity, equity and inclusivity. The Market Challengers in this space are strong in their digital workplace service portfolio but not too focused on sustainability. The Leaders in this space have successful client implementation examples of sustainable workplaces and implementing solutions to enable a smart RTO strategy.

From the 52 companies assessed for this study, 21 qualified for this quadrant, with six being Leaders and one a Rising Star.

DXC TECHNOLOGY

DXC Technology holds major sustainability certifications, contributes to thought leadership, and has won accolades for its internal sustainability performance. It offers services to help clients achieve sustainability goals and provides ESG data management and reporting.

HCLTech

HCLTech integrates sustainability in device lifecycle management and partners with Circular Computing for device remanufacturing. It also offers smart physical workplace services, including AI-enabled meeting rooms for physical office environments.

Infosys

Infosys emphasizes sustainability in digital workplace services, using AI for persona-based device usage and procurement. It supports smart, green offices with IoT-powered solutions and offers space analytics for optimized RTO planning.

TCS TATA CONSULTANCY SERVICES

TCS Cognix™ Wellbeing promotes user breaks for physical, mental and emotional health. The company ensures sustainable services and is certified for environmental and social impact reporting.

unisys

Unisys enhances efficiency and sustainability with smart space management, IoT connectivity, and sustainability performance tracking, complemented by consulting, change management, and unified experience management.

wipro

Wipro supports diversity, equity and inclusion (DEI) goals with AI solutions like sign language translation and ensures inclusivity and accessibility for all employees.

kyndryl

Kyndryl (Rising Star) supports sustainability, DEI and accessibility goals using digital workplace ESG metrics. It leverages Kyndryl Bridge for continuous monitoring and offers Kyndryl Mindful for employee wellness and mindfulness coaching.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till June 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Future of Work Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Procurement / Vendor Management

Region

▲ **Most satisfied**
Western Europe

▼ **Least satisfied**
Eastern Europe

Industry

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Insurance

Industry Average CX Score

75.3

▲ Highest CX: 95
▼ Lowest CX: 50

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 980

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	18.7%
Offshore	22.1%

Appendix

The ISG Provider Lens 2024 – Future of Work Services study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased 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

Lead Analyst

Mrinal Rai
Assistant Director and Principal Analyst

Mrinal Rai is Assistant Director and Principal Analyst at ISG and leads research for the future of work and enterprise customer experience. His expertise is in the digital workplace, emerging technologies and the global IT outsourcing industry. He covers key areas around the Workplace and End User computing domain, viz., modernizing workplace, Enterprise mobility, BYOD, DEX, VDI, managed workplace services, service desk and modernizing IT architecture. He also focuses on unified communications collaboration as a service, enterprise social software, content collaboration, team collaboration, employee experience and productivity services and solutions.

He has been with ISG for 11+ years and has 17+ years of industry experience. Mrinal works with ISG advisors and clients in engagements related to the digital workplace, unified communications and service desk. He also leads the ISG Star of Excellence™ program that tracks and analyzes enterprise customer experience in the technology industry and authors quarterly ISG CX Index reports. He is also the ISG's official media spokesperson in India. Mrinal was awarded as one of the top analysts in APAC by Institute of Influencers and Advisory Relations (IIAR) and as an Indian Achiever by the Indian Achievers Forum 2023.

Co- Author and Research Analyst

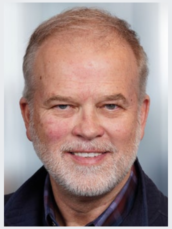
Khyati Tomar
Research Analyst

Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work – Services and Solutions, and OCM. She supports lead analysts in the research process and authors the Enterprise Context and Global Summary reports. Prior to this, she had over 2.5 years of experience in the technology research industry and had carried out various consulting and custom projects and co-authored CIS reports, mostly focusing on the public sector vertical.

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.

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 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 isg-one.com.

ISG Provider Lens™

OCTOBER, 2024

REPORT: FUTURE OF WORK SERVICES