Digital Workplace of the Future
Brazil 2019-20
Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

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About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September, 2019, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

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EXECUTIVE SUMMARY

General Trends

The major trends observed this year are related to data and experience.

The digital workplace market continues its journey to full automation that will eventually eliminate user support. Shift-left strategies, which empower the end user to self-support, are increasingly demanding a data-driven digital workplace. Data is required to understand user needs and behaviors, to enable automation and to deploy predictive maintenance.

User experience is rising in importance. Although automation improves user experience, a hassle-free environment is a must, not a differentiator. Clients are concerned with improving user productivity by enabling collaboration and discovering new ways of working. There is increasing use of design thinking methodologies for involving and understanding users’ needs to propose changes that include office layouts, organization hierarchies, job descriptions and the surrounding technologies. Workplace decisions are no longer restricted to IT, with participation from the human resource organization rising.

Digital Transformation Trends

As mentioned, there is a clear trend around data and user experience, which is pushing automation and artificial intelligence adoption. Organizations have not eliminated “Fordism,” but the days of sequential work performed by humans are numbered. Sequential, repetitive tasks can be automated for the most part. The key for transforming the work environment includes redesigning workflows, automating tasks and freeing users’ time to spend on collaboration. Work is changing from repetitive task executions to intelligent decision making, creative thinking, problem-solving and improving the customer experience. Clients that do not embrace this trend will see eroding margins as competitors reduce costs while providing better services.
Managed Workplace Services Trends

The managed workplace service market is converging around user experience and productivity. The omnichannel experience is no longer a destination, as it has become business-as-usual, offered by all participants. Users expect to have seamless experiences while using desktop and smartphones apps and services; however, few service providers have an end-to-end service platform to deliver on this expectation.

Because “experience” has increased in importance, it needs to be measured. Sensors, events and applications provide data that are tagged by machine learning solutions while feeding online management dashboards. E-mails, user speech converted to text and chat conversations feed artificial intelligence (AI) sentiment analysis. All these data sources provide user experience measurements. Initial experiments around experience level agreements (XLA) based on the user experience exist, but most service providers are not ready for broad adoption.

Managed Mobility Services

Of the 228 million active mobile phones in Brazil, 140 million had 4G access in May 2019, according to the regulation agency Anatel. Brazil had approximately 105 million formal employed workers in the same month. In this study, participating companies collectively provide services to less than 5 million users. Without going through the specifics to estimate the percentage of workers that use 4G to access enterprise applications, the numbers are large enough to give an idea of the mobility market growth opportunity.

ISG expects that the increasing security threats, data breaches and regulatory measures around privacy will push this market growth. Managed mobility services market participants have reported growth around 10 to 25 percent year over year.
Introduction

Definition

Digital workplace of the future refers to the technology ecosystem that enables employees in an enterprise to securely access their work profiles, data and applications anytime, anywhere and on any device or platform. It aims to improve digital dexterity and worker productivity while enabling workers to efficiently connect and collaborate with fellow employees.

Key trends in digital workplace are driven by users’ preference to use technology of their own choice, the increasing relevance of emerging technologies and the diverse possibilities they bring. Enterprises are focusing on end user experience enablement and its measurement, and service providers are moving from SLA to XLAs (experience level agreements) in workplace services contracts.
Augmented and virtual reality (AR/VR) reduces and eliminates the need for in-person tech support, and its relevance and use are growing for onsite and remote support. Through use of interactive virtual agents and analytics that run on systems and track resource usage, enterprises can perform predictive analytics and measure end-user satisfaction. There is also increasing interest in transforming workplace management to a more operating expense (opex) model through device leasing or device-as-a-service approaches where OEMs and service providers handle the complete device lifecycle management and the client pays per month per device used. Enterprise interest is rising for desktop virtualization through cloud or DaaS (desktop-as-a-service) and also for unified endpoint management (UEM). Various collaboration solutions and platforms are becoming the face and focal point for digital workplace enablement, and provide visible gains in end user productivity and other business benefits, so awareness and demand are growing.

However, while enterprises are trying hard to catch up with changing user expectations, they are still unable to match the pace at which technology is changing and attracting the new-generation workforce.

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

- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Focus on different markets, including global, U.S., Brazil, Latin America, Germany, U.K., and the Nordic countries.

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

Digital Workplace Consulting Services
This quadrant assessment centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture, creating the roadmap and validating the business case for transformation specific to workplace digital transformation.

Managed Services – Workplace Support
Managed services for IT service desk with level one (L1) and two (L2) support, along with in-person technical support and user self-help services, form the core of the managed services offering. The quadrant includes next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help, chatbots, managed end-user collaboration (EUC) and unified communications (UC) services and managed virtual desktop services.

Managed Services – Mobility Support
Mobility services include secured device management, mobile application and content management, application deployment and accessibility related to roles and access policy, mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle management, mobile application management (MAM), mobile security and cloud-based services.

Managed Services – Workplace and Mobility for the Midmarket
Midmarket clients make intense use of communication and collaboration but require less sophisticated services and usually have fewer locations and less geographic dispersion when compared to large account clients. This quadrant considers all of the abovementioned mobility support services, except for in-person technical support, field support, IT kiosks, unified communications (UC) services, secured device management, mobile application and content management, application deployment, which are usually not required by midmarket clients.

This quadrant focuses on providers that typically serve clients that have less than 5,000 users or generate less than $1 billion in revenue.
The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

**Leader**
The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

**Product Challenger**
The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

**Market Challenger**
“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

**Contender**
“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.
Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.
# Digital Workplace of the Future - Quadrant Provider Listing 1 of 2

<table>
<thead>
<tr>
<th>Provider</th>
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Digital Workplace of the Future Quadrants
Digital workplace consulting centers on workplace optimization strategies. Modules include support for defining a workplace strategy, designing the architecture and creating the roadmap, and for validating the business case for transformation. These advisory services are specific to workplace digital transformation. The service typically includes assessing the current workplace environment, designing end user-focused workplace transformation, defining the business case and return on investment (ROI), segmenting end user personas, providing a roadmap for implementation, enabling technology adoption and supporting change management.
Eligibility Criteria

- Consulting and workplace assessment is an essential part of the digital workplace offering and is offered independently of the associated managed services;
- Vendor-neutral approach in assessing the best technology partner;
- Established methodology for end user persona segmentation;
- Ability to define and visualize a modern workplace environment for enhancing end user experience, and ability to measure it;
- Inclusion of technology adoption and change management services in the consulting portfolio.

Observations

The digital workplace transformation market has centered on the user experience. While some consulting firms continue to provide technical upgrades, such as by moving productivity and collaboration tools into the cloud, leading companies take the opportunity to innovate, transforming the way the work is done by implementing new tools that go much farther than e-mail and productivity software.

Organizations have not eliminated Fordism but the days of sequential work performed by humans tend to disappear. Sequential, repetitive tasks can easily be automated today. The key for transforming the work environment includes redesigning workflows, automating tasks and freeing users’ time to spend on collaboration. Work is changing from repetitive task executions to intelligent decision making, creative thinking, problem solving and improving the customer experience. Clients that do not embrace this trend will see eroding margins as competitors reduce costs while providing better services.

The leaders in this market are those consulting firms that can redesign work and introduce innovation to transform clients’ productivity.
Accenture has maintained its consulting leadership position. It provides an end-to-end suite of business and technology services to address employee experience, productivity, culture, change, and adoption. From a business transformation perspective, Accenture works with human resources professionals on the organizational design, culture, teams and behaviors to transform the physical, digital and technology landscape for a completely new user experience.

Atos launched its SyntBots automation platform in 2019, making a significant change in its portfolio offerings with improved partnerships and its use of artificial intelligence. Atos provides services and solutions for business reinvention, operations management and strategic consulting. In Brazil since 1998, its operation center is located in Londrina.

DXC Technology envisions the workplace around each person. DXC’s MyWorkStyle continues to be its market differentiator, a design approach that starts with the individual at the center. DXC leverages global best practices and its robust ecosystem to provide a highly secure digital workplace. Its long experience in delivering digital workplace services allows robust transformations for the most demanding clients.

IBM has restructured its digital workplace offering around artificial intelligence, while adopting standard software for service desk management, end-user productivity and collaboration. IBM digital workplace consulting services can integrate all workplace software and tools around the IBM Watson platform, without any vendor bias. It provides advanced digital workplace transformations, using leading-edge artificial intelligent technologies.

Stefanini’s portfolio improvement has allowed it to move from a Rising Star position into the Leaders’ quadrant. Its services include cognitive computing, workplace collaboration, automated insight and analytics, IT service management, unified communications, process automation, workplace automation, customer experience and IoT. Supporting services are service desk, field support, asset management and device-as-a-service. It has improved its consulting and technology capabilities to provide digital workplace transformations that are custom designed for each client.
**Overview**

Accenture provides consulting, IT outsourcing and business process outsourcing services in more than 200 cities in 53 countries. Accenture has an advanced consulting practice focused on digital transformation. Its offer includes collaboration, cloud and agility. The company is an active Microsoft partner and Google's top enterprise partner for G-Suite migrations. For collaboration and workplace consulting, Accenture proposes a user-centric design to create rich experiences ranging from end users to support services.

**Strengths**

**More choices for clients:** Accenture provides an end-to-end suite of business and technology services to address employee experience, productivity, culture, change, and adoption. With a broad range of partners, Accenture can deliver a solution using a multitude of options. The roadmap can include virtual desktops, software and device as-a-service, cognitive chatbots, analytics, learning, collaboration, crowdsourcing, communication and productivity. From a business transformation perspective, Accenture works with human resources on the organizational design, culture, teams and behaviors to transform the physical, digital and technology landscape for a completely new user experience.

**A differentiated project management capacity:** Accenture has long experience in delivering complex transformations. It leverages robust tools and highly qualified professionals to handle large transformations. Accenture provided several client case studies comprising many users that were impacted in multiple countries.

**Advanced intelligent operations:** Accenture focuses on enabling anytime, anywhere work execution by providing digital communication, collaboration and service models. It implements robust automation and artificial intelligence to support operations. Accenture's leading technologies measure each employee's experience and productivity, using analytics to support decision-making and allowing IT to act in real-time.

**Caution**

Accenture consulting is structured to handle large transformation projects. Clients should not expect the company to offer the lowest price, as its cost structure supports a complex delivery organization.
Atos offers a robust consulting practice around people and data-driven decision making to transform a client’s business performance.

**Overview**

Atos provides services and solutions for business reinvention, operations management and strategic consulting and has a full range of implementation services and platform solutions. In 2018, it acquired Syntel and launched its SyntBots automation platform in 2019. The company has had a significant change in its portfolio offerings, with improved partnerships and use of artificial intelligence. In Brazil since 1998, its operation center is located in Londrina. Atos transformation engagements can include Microsoft Office or Google G-Suite technologies.

**Strengths**

**Human workplace empowered by AI:** Atos starts a transformation with people, places and platforms in mind. It considers people at the center of the digital workplace, and guides its consultants to think about who will use the solutions. While solutions are important, so are the places that influence the way that people interact and collaborate to perform their jobs. The discussion around people and places defines the platform requirements, including artificial intelligence to empower workplace users.

**Implement automation to scale operations:** Atos focuses on large-scale operation enablement. Atos’ SyntBots is an integrated IT automation platform that uses a holistic approach to automation, taking clients to a new digital reality. SyntBots for IT Operations has predefined business rules and guided machine learning to take precise and intelligent steps to keep the business running at peak performance. Atos has achieved 70 percent improvement in self-help utilization and 35 percent reduction in TCO.

**Robust transformation by design:** Atos consulting starts with understanding the work and users. It focuses on design-thinking and adds a robust organizational change management plan, including impact assessments, communication plan, training plan, training roll-out plus the use of analytics, gamification and other adoption activities to accelerate the transformation.

**Caution**

Atos focuses on large Brazilian accounts, which are not typical G-Suite users. It could increase its G-Suite footprint by entering the midmarket and would benefit from Google's market expansion ambition.
**Overview**

DXC Technology is a global IT services company serving 6,000 private and public-sector clients in 70 countries. In Brazil, the company has several thousand employees and strong partnerships to deliver services to all industry verticals and regions. DXC relies on robust processes to share global resources, and provides digital workplace services from central delivery centers. DXC manages 7.5 million desktops and 1.5 million mobile devices for more than 1,100 clients in 150 countries. Its service desk responds to more than 42 million contacts in 56 languages annually.

**Strengths**

**Comprehensive portfolio:** DXC services include user experience, mobility, augmented reality and virtual reality (AR/VR), workplace IoT applications, unified communications, cloud and hybrid IT software licensing compliance. Through its broad partnerships, DXC provides value-added services, leveraging multivendor agreements that reduce clients' costs.

**DXC MyWorkStyle:** DXC envisions the workplace around each person. MyWorkStyle continues to be its market differentiator. This consulting approach starts with the individual at the center with apps, devices, information and locations around it, while support, digital services, device management, productivity and unified communications are viewed as orbit solutions. MyWorkStyle guides the design of a consumer-like experience that has enterprise security and collaboration to provide the needed applications and data on whatever device the individual chooses to work with at a particular moment.

**Enhanced security:** DXC leverages global best practices and its robust ecosystem to provide a highly secure digital workplace. Its industry-leading security services help clients predict attacks, proactively respond to threats, ensure compliance and protect data, applications, infrastructure and endpoints. Security is built into the DXC consulting offer.

**2019 ISG Provider Lens™ Leader**

DXC’s full scope consulting offer was designed to address large enterprise complexities. Midmarket clients can benefit from DXC's experience by requesting standard offerings to accelerate their digital transformation. In some cases, DXC industry solutions with preset configurations can provide faster results.
IBM

Overview
IBM restructured its digital workplace offering around artificial intelligence, while adopting standard software for service desk management, end-user productivity and collaboration. In 2018, IBM sold its proprietary software to HCL, which is now a software provider for IBM clients. With this strategic move, IBM digital workplace consulting services can integrate all workplace software and tools around the IBM Watson platform, without any bias.

Strengths

Workplace powered by applications: IBM implements hybrid solutions and services to empower a client's workforce to be productive and successful. It delivers secure, predictive and proactive enterprise application management services that support critical business processes and quickly scale and adapt to support constant change and continuous innovation. IBM has cross-functional consulting teams of business, strategy and technology experts that help clients envision their future as cognitive enterprises.

Comprehensive portfolio: IBM implements all IT processes that support device lifecycle management, workplace virtualization, user collaboration and support. IBM's differentiators are its advanced use of integrating analytics, cognitive technologies and automation, and creating an intelligent infrastructure that is continuously learning through each interaction.

Interactive solution design: IBM's consulting methodology emphasizes interaction with client teams to drive optimal success in data gathering, analysis and implementation. It applies digital strategy skills, industry insights and design-thinking approaches. IBM assists clients in evaluating employee types and developing employee-based personas, while application assessment tools extract usage patterns from analytics tools. The combination of consulting and usage data enables a robust solution design around user personas.

IBM focuses on the advanced use of AI, machine learning and cognitive computing, and is designed for clients that value innovation. Clients that are risk averse should ask to use industry vertical solutions that were previously tested on other companies.

2019 ISG Provider Lens™ Leader
IBM's consulting services and its innovation capacity provide advanced digital workplace transformations, using leading-edge artificial intelligent technologies.
Stefanini has improved its consulting and technology capabilities to provide digital workplace transformations that are custom designed for each client. Stefanini is very flexible in adapting to client needs and, as a consequence, it has accumulated many different processes and standards from many years of working with diverse clients in various industries. Stefanini does not have a "one-size-fits-all" solution. Clients should always spend the necessary time to negotiate the digital workplace scope to find the best fit for their need.

**Strengths**

**Flexibility to adapt and adopt:** For a long time, Stefanini’s differentiation has been the ability to adapt its proposals to specific clients’ requests, while adopting clients’ best practices quickly. The company states that transformation journeys are co-created with customers to adopt at their speed. With impressive flexibility, Stefanini eases its clients’ decisions around technologies, innovation and risk.

**Proven cognitive solution:** Stefanini’s Sophie cognitive platform and AI agent has been tested in complex environments. One client uses a Sophie virtual agent to support more than 150,000 users. Stefanini states that Sophie has passed 650,000 users. It leverages the platform for shift-left, moving incidents and requests to self-service, eliminating the need to contact the support staff. Clients benefit from improved service levels, better user experience and cost savings.

**Persona-based design model:** Stefanini’s persona-based design puts the user experience first. It starts with the assumption that users can be anywhere, access work anytime from any device. The company involves clients in co-creation, providing a unique solution. Stefanini trusts this method so much that it accepts gainsharing contractual terms.

**2019 ISG Provider Lens™ Leader**

Stefanini has improved its consulting and technology capabilities to provide digital workplace transformations that are custom designed for each client.

Stefanini is a global service provider headquartered in São Paulo. It has more than 25,000 employees in 41 countries. Digital workplace services represent a large portion of its revenue and include a cognitive automation platform called Sophie. In Brazil, Stefanini provides services in all states for midmarket and large enterprise clients.

Stefanini's workplace solution includes cognitive computing, workplace collaboration, automated insight and analytics, IT service management, unified communications, process automation, workplace automation, customer experience and IoT. Supporting services are service desk, field support, asset management and device-as-a-service.

Stefanini is a leader in digital workplace consulting services, as recognized by ISG Provider Lens™ in its November 2019 report.
Managed services for IT service desk with level one (L1) and two (L2) support, along with in-person technical support and user self-help services, form the core of the managed services offering. The quadrant includes next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help, chatbots, managed end-user collaboration (EUC) and unified communications (UC) services and managed virtual desktop services.
Eligibility Criteria

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support, automated virtual agent;
- Ability to offer onsite field support and in-person technical assistance;
- Ability to set up self-help kiosks, tech bars, IT vending machines, digital lockers;
- Ability to offer managed services for collaboration and communication over diverse platforms;
- Ability to offer device support, predictive analytics and proactive monitoring services;
- Ability to offer and experience in providing remote virtual desktop services, both on-premise and on cloud.

Observations

The managed workplace service market is converging around user experience and productivity. The omnichannel experience is no longer a destination, as it has become business-as-usual, offered by all participants. Users expect to have seamless experiences while using desktop and smartphone apps and services; however, few service providers have an end-to-end service platform to deliver on this expectation.

Support calls regarding service unavailability are dramatically reduced for those that move applications to the web. Office productivity tools are very stable and bug free in the cloud. Cloud-based services reduce incident calls to close to zero, reducing demand for human attendees for a help desk. Video tutorials and virtual assistants, or chatbots, guide users through "how-to-use" types of calls, provide self-help knowledge access and self-heal through automation.

The use of robotic process automation (RPA) is rapidly increasing in service desk operations to automate repetitive tasks such as password reset, provisioning, access, user onboarding and other service requests. Virtual assistants are getting better in speech recognition and sentiment analysis for handling service requests.
Field support requests are changing in nature. In the past, technology experts required access to devices to fix and configure them. With services moving to the cloud, and the advancements in remote control software tools, it is often no longer necessary for experts to touch devices. Most commonly, the nature of service has changed to device replacement and providing user guidance on how to use and configure applications, aiming to increase user proficiency that leads to higher productivity. Kiosks provide a friendly space where field support staff interacts with users; however, kiosks are in the process of being replaced by app-controlled lockers that provide replacement devices, while video tutorials and virtual reality apps are replacing human support interaction.

As "experience" becomes more important, it needs to be measured. Sensors, events and applications provide data that are tagged by machine learning solutions, while feeding online management dashboards. E-mails, user speech converted to text and chat conversations feed AI sentiment analysis. All these data sources provide user experience measurements. Initial experiments around experience level agreements (XLA) based on user experience levels exist, but most service providers are not ready for broad adoption.

- **Accenture** is an active Microsoft partner and Google's top enterprise partner for G-Suite. For collaboration and managed workplace services, Accenture leverages its cloud automation platform, service desk tools and delivery centers around the world. Accenture has a robust ecosystem, providing clients choices on most technologies covering collaboration, unified communications, desktop as a service, asset management, mobility, security, self-service, self-healing, chatbots, application store, kiosks and field services.

- **Atos** acquired Syntel in 2018 and developed an AI automation platform called SyntBots. The company has had a significant change in its portfolio offerings, with improved partnerships and use of artificial intelligence. Atos has 3,000 employees in South America and a Brazilian service delivery center in Londrina that supports more than 66,000 users. SyntBots intelligent self-help has provided up to 70 percent SLA improvement with 35 percent cost reductions.

- **IBM** delivers secure, predictive and proactive enterprise application management services including device lifecycle management, workplace virtualization, workplace collaboration and workplace support. IBM's service center in Hortolância supports a wide array of technologies, from corporate applications to mobile apps. The company has many clients running chatbots in text and voice, speaking Portuguese and other languages. It has evolved from cognitive capabilities to service operation automation with analytics around the user experience.
Observations (cont.)

- **Sonda** has 8,000 employees and 600 clients in Brazil. Its digital workplace services include service desk, field support, device-as-a-service, device procurement, asset management, mobility management, application management, email and collaboration, geo-localization, data security, configuration, distribution and hardware maintenance for notebooks, tablets and smartphones. Sonda is a traditional workplace services provider with a robust delivery capability to support large enterprises dispersed across many locations.

- **Stefanini** is a global service provider with 25,000 employees in 41 countries. Digital workplace services represent a large portion of its revenue and include a cognitive automation platform called Sophie. It is an agile organization, able to change and adapt rapidly to accommodate clients requests. Stefanini empowers local managers to respond and resolve issues quickly. It is a lean organization that prizes simplicity and promotes client centricity. In Brazil, Stefanini provides services in all states for midmarket and large enterprise clients.

- **TIVIT** is a longtime digital workplace services provider, with countrywide coverage. TIVIT supports more than 500,000 users that generate 30 million tickets per year over multiple channels, such as mobile devices, phone and web portal. Its service desk is HDI certified. TIVIT has an efficient service offering that scales for large enterprises. It can support multiple technologies, offering choices for digital workplace clients.

- **Unisys** is a global information technology company that builds high-performance, security-centric solutions for the most digitally demanding businesses and governments. Its workplace services rely on Unisys InteliServe, an integrated suite of best-in-class technologies for omnichannel support, advanced analytics, automation, artificial intelligence, machine learning and identity authentication. Its service portfolio is the most complete, providing a superior user experience.
ACCENTURE

Overview

Accenture provides consulting, IT outsourcing and business process outsourcing services in more than 200 cities in 53 countries. The company is an active Microsoft partner and Google's top enterprise partner for G-Suite. For collaboration and managed workplace services, Accenture leverages its cloud automation platform, service desk tools and delivery centers around the world. Its Brazilian delivery centers for digital workplace are in Campinas and Jaguariúna.

Strengths

**Strong portfolio and ecosystem**: Accenture is the largest global service provider by number of employees. The company's robust processes support seamless operations in all countries, sharing resources, platforms and best practices. Accenture has a robust ecosystem, providing clients choices on most technologies covering collaboration, unified communications, desktop as a service, asset management, mobility, security, self-service, self-healing, chatbots, application store, kiosks and field services.

**Geographic coverage**: Accenture provides a personalized, proactive support experience leveraging its multi-language, around-the-clock support. It covers all Brazilian states with employees or partners for remote locations. Its artificial intelligence framework enables clients to benefit from intelligent operations and real-time response.

**The power of three**: Avanade was created in 2000 by Accenture and Microsoft and now has 25,000 employees. Accenture's access to Avanade's resources and Microsoft technology is a unique advantage to stay ahead of the competition in workplace services. Jointly the three companies can deliver and support large organizations. The alliance provides access to robust tools to assess and execute upgrades and migrations.

Caution

Accenture has the technology and expertise to scale operations in Brazil. However, it has not been growing into the midmarket.
ATOS

Overview

Atos provides services and solutions for business reinvention, operations management and strategic consulting. It acquired Syntel in 2018 and developed an AI automation platform called SyntBots. The company has had a significant change on its portfolio offerings, with improved partnerships and use of artificial intelligence. Atos has 3,000 employees in South America. Its Brazilian service delivery center in Londrina supports more than 66,000 users.

Strengths

Digital workplace analytics: Atos’ analytics platform enables delivery of data-driven services. It collects data from devices, applications, networks, incidents, IT service management tools, physical environment sensors, IoT and user feedback to feed machine learning and identify patterns and trends to provide insights about people, places and platforms. The result is a better understanding to improve services, security and user support.

Robust automation: Atos SyntBots is an integrated IT automation platform that enables a holistic approach. The platform covers all IT outsourcing services. SyntBots for IT Operations uses predefined business rules and guided machine learning to take precise and intelligent steps to keep the business running at peak performance. The intelligent self-help in SyntBots has provided up to 70 percent SLA improvement with 35 percent cost reductions.

User experience management: Atos service levels agreements (SLAs) integrate experience measurements to provide experience level agreements (XLAS). A combination of different measurements from the workplace environment create a “device experience score” to guide service improvements. User experience follows the Atos 6E framework: empower with the right tools; engage to provide insight and feedback; enable without outages and issues; be efficient by not performing mundane and repetitive tasks; educate with relevant information and knowledge; and enhance by continuously providing better experiences.

Caution

Atos’ advanced technologies allow for scale and efficiency; however, the company has not increased its midmarket presence in Brazil.
IBM has been maturing Watson services for IT operations and user support. It can provide cutting-edge digital workplace services to companies of any size. IBM services incorporate Watson cognitive capabilities and include automation with innovation in mind. Clients averse to cognitive computing, or those that prefer to wait until the market matures before adopting advanced AI, may find IBM’s full end-to-end transformation services intimidating and may choose to scale back on the pace or scope of the available services for their digital workplace transformation.

**Overview**

IBM’s vision is to help clients implement a hybrid cloud strategy that delivers the right tools, solutions and services to empower a global workforce to be productive, efficient and successful. It delivers secure, predictive and proactive enterprise application management services, including device lifecycle management, workplace virtualization, workplace collaboration and workplace support. IBM focuses on transforming the user experience from “access” to “enablement” by adding learning and analysis to understand and empower each user.

**Strengths**

- **Performance-driven deals**: IBM services are wrapped around digital workplace transformation. IBM’s consulting engagement, personas and user scenarios define the client journey and assist clients on transforming into a cognitive enterprise. IBM maps these definitions to provide managed services’ key performance indicators (KPIs) and service performance targets that can be used to support outcome-based contracts.

- **Broad support capabilities**: Proxxi is an IBM company specialized in technical support services, with more than 1,500 practitioners and 161 logistic points in Brazil that manages more than 2.5 million devices in 11,000 client locations. IBM supports Microsoft Office 365 and collaboration tools. For a Brazilian digital bank, it has deployed and now supports Apple devices and apps. Watson integration with the ServiceNow cloud platform provides even broader service alternatives. IBM’s service center in Hortolândia supports a wide array of technologies, from corporate applications to mobile apps.

- **Value-added intelligent services**: IBM has many examples of clients running chatbots in text and voice, speaking Portuguese and other languages. It has evolved from cognitive capabilities to service operation automation with analytics around the user experience. IBM’s public cases include BRF’s service desk virtual assistant called EVA (Exceptional Value Assistant) that supports 28,000 users.

**Caution**

IBM services incorporate Watson cognitive capabilities and include automation with innovation in mind. Clients averse to cognitive computing, or those that prefer to wait until the market matures before adopting advanced AI, may find IBM’s full end-to-end transformation services intimidating and may choose to scale back on the pace or scope of the available services for their digital workplace transformation.

**2019 ISG Provider Lens™ Leader**

IBM has been maturing Watson services for IT operations and user support. It can provide cutting-edge digital workplace services to companies of any size.
SONDA

Overview
Sonda is a major service provider in Latin America that operates in more than 3,000 cities in 10 countries. It has 8,000 employees and 600 clients in Brazil, which produced 29 percent of the parent company's 2018 revenues. Sonda's digital workplace services include service desk, field support, device-as-a-service, device procurement, asset management, mobility management, application management, email and collaboration, geo-localization, data security, configuration, distribution and hardware maintenance for notebooks, tablets and smartphones.

Strengths

Large scale for countrywide operations: Sonda has delivery centers in the cities of Santana de Parnaiba, São José dos Campos, Rio de Janeiro and Brasília. It supports more than 2 million incidents and service requests per year. Its field support services cover all Brazilian states. Sonda's clients include fast-food restaurants, telecommunications operators and banks with many branches spread all over the country. Sonda is present in 3,000 cities in Latin America.

Flexible contracting terms: Sonda's services are available individually or combined in a single solution. Sonda can charge by usage, by as-a-service, or for staff augmentation to operate the clients' systems and tools. Sonda focuses on full outsourcing engagements and can integrate workplace management to infrastructure management and application development and maintenance. With integration, it offers vertical solutions for ERP, CRM and other systems.

Robust operations: Sonda is a profitable company with ongoing investment objectives. It announced a $360 million investment budget for 2019-21. With consistent financial results and its acquisition appetite, Sonda will continue to gain scale and grow its market share. It has a long list of client references and manages many users and devices, indicating the company's capacity to deliver workplace management services.

Caution
Sonda has recently announced SonIA, its automation platform. The company is late in providing artificial intelligence and machine learning automation, although it uses third party or partner automation solutions. Clients should be aware that Sonda may change its portfolio offering in the near term to reflect the introduction of more advanced AI, machine learning and analytic tools and dashboards.

2019 ISG Provider Lens™ Leader
Sonda is a traditional workplace services provider with a robust delivery capability to support large enterprises dispersed in many locations.
Stefani is a global service provider headquartered in São Paulo. It has more than 25,000 employees in 41 countries. Digital workplace services represent a large portion of its revenue and include a cognitive automation platform called Sophie. In Brazil, Stefanini provides services in all states for midmarket and large enterprise clients.

**Smart workplace:** Stefanini has developed Sophie, a robust artificial intelligence platform that includes virtual agents and advanced analytics. Sophie improves end user experience while lowering support costs. Stefanini d³ is an analytics platform that collects and analyzes performance metrics from endpoint systems, allowing the support team to react to workplace needs and provide customer support quickly. Stefanini d³ grants practitioners extraordinary insights into clients' business, resulting in faster issue resolution and proactive support.

**Omnichannel workplace enablement:** Stefanini supports users in multiple platforms, including desktop, thin clients, notebooks, tablets, smartphones and purpose-specific devices. Its services are designed to adapt to users on the move, with seamless access, including chat, WhatsApp, Facebook Messenger and other instant messaging solutions. Stefanini offers all related services such as extended on-site hours, hardware maintenance and replacement, printer services, asset management, conference room and communication tools, mobility support, spare parts and plant support.

**Designed for efficiency:** Stefanini is an agile organization, able to change and adapt rapidly to accommodate clients' requests. Its horizontal organization empowers local managers to respond to issues and resolve them in short time. The company has achieved a large scale to invest in acquisitions and innovation to maintain its competitiveness. It is a lean organization that prizes simplicity and promotes client centricity. These ingredients have created a very competitive service provider that has consistently grown for more than 30 years.

Stefanini is rapidly improving its service automation. To improve its portfolio attractiveness, the next step is to expand the use of smart vending machines for IT supplies, complementary to field support services.
TIVIT has an efficient service offering that scales for large enterprises. It can support multiple technologies, providing choices for digital workplace clients.

**Overview**

TIVIT is a Brazilian multinational digital solutions provider with operations in 10 Latin American countries. The company supports its clients in evolving their businesses through digital solutions divided into four lines of business: Digital Business, Cloud Solutions, Digital Payments and Technology Platforms. TIVIT is a longtime provider of digital workplace services, covering all Brazilian states and several countries in Latin America.

**Strengths**

- **Global scale:** TIVIT's workplace management services are present in seven Latin American countries. It handles incident and service requests in English, Portuguese and Spanish. TIVIT's IVI virtual assistant and chatbot provides automation. The company supports more than 500,000 users that generate 30 million tickets per year over multiple channels, such as mobile devices, phone and web portal. Its service desk is HDI certified.

- **Wide field services coverage:** TIVIT has employees and partners working on field support in all Brazilian states. Its clients include banks and retailers with branches spread over large distances. It uses advanced localization and service tracking mobile apps for its field staff, providing user visibility into service schedules and execution. Field services can include non-IT devices such as POS systems, extended support hours, on-site and VIP support, asset management and other services that require human intervention or face-to-face interaction. TIVIT manages more than 300,000 field devices.

- **Collaboration management:** TIVIT partners with multiple vendors. Its services can include support for Microsoft suites, Google's G-Suite, SAP, Apple and Android Mobile platforms, IP telephony, videoconferencing solutions and other communications and networking equipment. Its software asset management practice help clients control and optimize licensing costs and service subscriptions.

**Caution**

TIVIT has been updating its digital workplace services, including automation. However, it should improve its market communications and publish case studies to improve its market relevance.

TIVIT has an efficient service offering that scales for large enterprises. It can support multiple technologies, providing choices for digital workplace clients.
Unisys is a global information technology company that builds high-performance, security-centric solutions for the most digitally demanding businesses and governments. Its offerings include digital transformation and software operating environments for high-intensity enterprise computing. Unisys has extensive experience in the Brazilian market and has many resilient clients. Its services cover all Brazilian states, with logistic centers in São Paulo and Campo Grande. Workplace services include endpoint management, field services, service desk and collaboration.

**Overview**

Unisys focuses on large enterprises; not all services apply to midmarket clients due to the scale of operations.

**Far-reaching digital workplace platform:** Unisys IntelliServe is an integrated suite of best-in-class technologies for omnichannel support, advanced analytics, automation, artificial intelligence, machine learning and identity authentication. Its virtual assistant relies on IPsoft's Amelia services. Nice RPA services deliver back office automation. NexThink, which is used for improving the user experience, collects and identifies problems to trigger automation. AirWatch monitors wearables and smartphones. ActiveInsights can be added for the healthcare market.

**Secure omnichannel experience:** Unisys provides users with a secure, simplified, personalized and flexible means to access support services from any device at any time across phone, email, web, video, chat, service portal and social media. Usage and experience are continuously measured to trigger immediate action if needed. Advanced security includes behavior monitoring and mobile data wipe on stolen or missing devices.

**Technology savvy field support:** Unisys uses the Help Lightning AR/VR solution to reduce travel. A mobile Uber-like app allows users to request field services. Unisys' Digital Tech Cafe™ includes IT vending machines and IT lockers that are activated by end user apps to provide immediate device or peripheral replacement. To support self-help, short video sessions provide education on new technologies and processes. Video tutorials can be used when deploying new technologies. Unisys' field services coordinate more than 100 Brazilian locations.

**Strengths**

Unisys' managed workplace services are the most complete to enchant large enterprise clients and take IT services to a higher level of user experience.
MANAGED SERVICES – MOBILITY SUPPORT

Definition

With increasing acceptance of mobility and bring-your-own-device (BYOD) culture, these services include secured device management, mobile application and content management, application deployment and accessibility related to roles and access policy. Managed mobile enterprise services include support for mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. It also includes larger aspects of enterprise mobility management (EMM) like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.
Eligibility Criteria

- Ability to offer device sourcing and logistics, unified endpoint management (UEM), financial management, device security and mobility program management;
- Ability to offer implementation and support for enterprise mobility, support for BYOD, mobility expense and asset management;
- Ability to provide complete device lifecycle management, device-as-a-service (hardware-as-a-service, PCaaS);
- Ability to develop industry-specific plug-and-play mobility solutions;
- Ability to offer support for single sign-on, secured app access, support for smart devices.

Observations

Mobility services is a highly dispersed market in Brazil, with many small providers that count on consulting services to deploy and support mobility without advanced tools or automation. As more clients move their workplace solutions to the cloud, and depend on mobile apps to access collaboration and office productivity tools, mobile device usage is growing rapidly, without much enterprise security for the average client.

Of the 228 million active mobile phones in Brazil, 140 million had 4G access in May 2019, according to the regulatory agency Anatel. Brazil had approximately 105 million formal employed workers in the same month. Companies participating in this study collectively provide services to less than 5 million users. Without going through the specifics to estimate the percentage of workers that use 4G to access enterprise applications, the numbers are large enough to give an idea of the mobility market growth opportunity. These figures do not take into consideration the imminent IoT market. ISG expects that increasing security threats, data breaches and regulatory measures around privacy will push mobility market growth.

Due to market dispersion and an initial use of managed mobility services, ISG has qualified only 12 providers that meet criteria to serve large enterprises. The five Leaders are profiled below.
HCL provides end-to-end mobility services to both large local and global clients, using its Employees First culture. Enterprise mobility management includes procurement and provisioning for software and devices, with network activation and expense management. Real-time tracking secures data and file sharing according to client company rules. LibreSpace applies identity-centric policies to adapt to the context, delivering personalized experiences. In the event of compliance deviations, automated corrections follow predefined policies.

IBM is long established in the Brazilian market. Its mobility device lifecycle management uses analytics, cognitive technology and automation to power services around device procurement, zero-touch enrollment, dynamic configuration, secure cloud backup, containerization, application distribution, enterprise app store, self-service portal, self-help portal, device health monitoring and end-user support.

Stefanini’s as-a-service offerings can include desktops, mobile devices, collaboration tools and support services, eliminating the need for capital expenditures. It molds innovative solutions to fit specific requirements. Stefanini accelerates mobile device management automation, providing a predefined service catalog that supports automation, self-service, security and policy management. Its Sophie automation and cognitive platform can be accessed from anywhere, on any device, to provide mobility services.

Unisys merged its mobile managed services with unified endpoint management to provide a better digital worker experience on any device. It handles a high number of devices in Brazil, placing the company among the top three providers. Unisys services are available in more than 100 Brazilian locations. Unisys provides the most advanced security for mobile devices and has a unique geographic coverage to support large enterprises.

The Wipro Enterprise Mobility Management Suite uses Wipro’s LiVE platform and covers service desk, field support, workplace management and mobility. The company manages 3.6 million devices and 7.7 million users for 380 clients worldwide. Wipro’s robust automation and comprehensive portfolio provide a fruitful opportunity for clients willing to adopt advanced mobile solutions.
HCL Technologies is an Indian multinational company. In Brazil, HCL has offices in São Paulo, Rio de Janeiro, Paraná, Pernambuco, Amazonas and a global delivery center in São Leopoldo. HCL services both large local and global clients, using its Employees First culture. It has acquired 11 companies in the last four years, and paid $1.8 billion for IBM’s intellectual property (workplace software and patents). Central to its services is HCL’s LibreSpace automation platform that integrates other HCL tools such as MyWorkplace, DRYiCE LUCY virtual assistant, Profile Kaleidoscope, Mobility Enablement Suite, WorkBlaze, OptiBot and others.

Strengths

Enterprise mobility lifecycle services: HCL provides end-to-end mobility services. Enterprise mobility management includes procurement and provisioning for software and devices, with network activation and expense management. Real-time tracking secures data and file sharing according to client company rules. LibreSpace applies identity-centric policies to adapt to the context, delivering personalized experiences. When compliance deviations occur, automated corrections follow predefined policies.

Lucy, OptiBot and ScoutBot: DRYiCE is a division of HCL Technologies focused on building AI-powered products and platforms. LUCY is a cognitive virtual service assistant that uses IBM Watson speech services. OptiBot has more than 350 pre-set ServiceNow automations. ScoutBot uses Google AI for information gathering and multilingual translations. IBM Watson and Google AI power HCL solutions to work well with the Portuguese language.

Robust management platform: With HCL’s software-defined workplace platform, corporate apps can be deployed to any device. HCL tools also incorporate mobile device management (MDM), mobile email management (MEM), mobile application management (MAM) and mobile content management (MCM). HCL’s LibreSpace orchestrates all mobility management under a single platform.

Caution

HCL has operated in Brazil since 2009 and has a robust mobility services portfolio. It has had slow growth in 10 years and has not demonstrated a clear strategy to increase its market share. HCL may require a larger market footprint to stay relevant.

Overview

HCL Technologies is an Indian multinational company. In Brazil, HCL has offices in São Paulo, Rio de Janeiro, Paraná, Pernambuco, Amazonas and a global delivery center in São Leopoldo. HCL services both large local and global clients, using its Employees First culture. It has acquired 11 companies in the last four years, and paid $1.8 billion for IBM’s intellectual property (workplace software and patents). Central to its services is HCL’s LibreSpace automation platform that integrates other HCL tools such as MyWorkplace, DRYiCE LUCY virtual assistant, Profile Kaleidoscope, Mobility Enablement Suite, WorkBlaze, OptiBot and others.
IBM is long established in the Brazilian market. Its mobility device lifecycle management uses analytics, cognitive technology and automation to power services around device procurement, zero-touch enrollment, dynamic configuration, secure cloud backup, containerization, application distribution, enterprise app store, self-service portal, self-help portal, device health monitoring and end-user support.

**Zero-touch enrollment:** IBM automation provides device-dynamic configuration, applying security and compliance policies with application management tools. Users can self-service from an enterprise application store. This automated portal works with the user's device of choice, including their own (BYOD), without compromising compliance and security. With IBM’s zero-touch approach and its integrated procurement solutions, enterprise clients can fully automate user onboarding. IBM’s service solution is a fully end-to-end service and includes device shipping and handling though its field support services.

**Device health with Watson:** IBM has a patented cognitive analytics platform that uses data from within the client's organization to provide a health score of each device. IBM tracks all devices' health from a single dashboard to move from time-based refreshes to health-based refreshes. The benefits include extended device lifespan, optimized spending, reduced support costs and proactive support.

**The power of innovation:** IBM Research invests billions of dollars into enhancing IBM products and services. Clients benefit from continuous innovation. IBM uses its own managed mobility services for more than 700,000 company devices. Overall, IBM manages more than 8 million devices globally. IBM MaaS360 is an enterprise mobility management platform supports all mobile operating systems and integrates with IBM Cloud Identity to enable single sign-on (SSO). All of its solutions include leading edge technologies with artificial intelligence and analytics.

**Caution**
IBM automation and cognitive services scale for large organizations, and require little human intervention. Clients requesting more human interaction may find IBM expensive when consultants are added to perform mobility support services.

**2019 ISG Provider Lens™ Leader**
IBM mobility services make intense use of leading-edge technologies that reduce human intervention while delivering a superior user experience.
Stefanini is a global service provider headquartered in São Paulo. It has more than 25,000 employees in 41 countries. Digital workplace services represent a large portion of its revenue and include a cognitive automation platform called Sophie. In Brazil, Stefanini provides services in all states for midmarket and large enterprise clients. Mobility management is included in Stefanini’s digital workplace services.

**Strengths**

**Everything as-a-service:** Stefanini’s as-a-service offerings can include desktops, mobile devices and cloud infrastructure for applications, collaboration tools and support services, eliminating the need for capital expenditures. Clients can pay for mobility as-a-service, including devices and software. Stefanini molds innovative solutions to fit specific requirements, focusing on increasing ROI, end-user productivity and business growth, with continuous service and customer experience improvement.

**Structured service catalog:** Stefanini accelerates mobile device management automation, providing a predefined service catalog that supports automation, self-service, security and policy management. Its Sophie automation and cognitive platform can be accessed from anywhere, on any device, to provide support and mobility services.

**Predictive analytics:** Stefanini continues to drive innovations and automation to reduce human interventions. It focuses on a zero-touch setup and remote device imaging. Stefanini SmartCare™ for mobile devices captures usage information to enhance mobile device self-healing and self-diagnostics. With a predictive and proactive mobile device care, Stefanini can reduce service desk and field services demand. The benefits of rapid diagnostics and problem resolution reduce the costly handling of faulty devices.

Stefanini can improve its portfolio attractiveness. Although it can provide mobility management, it should invest in expanding its portfolio around device activation, network expense management and device handling logistics.
Unisys is a global information technology company that builds high-performance, security-centric solutions for the most digitally demanding businesses and governments. With longtime experience in doing business in Brazil, Unisys offers managed digital workplace and field services powered by analytics, geo-localization and countrywide logistics to cover client branches spread over great distances. In 2018, Unisys merged mobile managed services with unified endpoint management to provide a better digital worker experience on any device.

### Strengths

**Integrated security and device handling:** Unisys' device handling logistics include dispatching, maintenance, replacement and safe device disposal. Users can use mobile apps to schedule device returns or pickups at Unisys Tech Café, or open IT lockers in their office, providing highly convenient services. All software installation, device configuration, data wipe and upgrades happen over the air, without user interference. Endpoint security is embedded in services and is transparent for the user. Security solutions can protect sensitive data, including performing remote wipe for stolen, lost or missing devices.

**High scalability with automation:** Unisys handles high device volume in Brazil, placing the company among the top three providers. However, its Brazilian managed device count is small compared to Unisys' volumes in other countries. Due to automation, Unisys could scale multiple times in Brazil. Unisys services are available in more than 100 Brazilian locations, which is one of the best service coverage footprints in this study.

**Comprehensive service and platform:** Unisys' end-to-end mobility services rely on its robust automation platform. Unisys' InteliServe is an integrated suite of best-in-class technologies for omnichannel support, advanced analytics, automation, artificial intelligence, machine learning and identity authentication. Usage and experience are continuously measured to trigger immediate action if needed. Advanced security includes behavior monitoring.

Not all the items in Unisys' portfolio are available in Brazil due to a lack of market demand. Clients should check availability and plan a longer installation process for those services that need activation.
Wipro is a global service provider with offices in São Paulo. Globally, Wipro is going through a self-imposed business disruption that it calls "non-linearity." It is investing in intellectual property development and has more than 2,000 patents. Wipro bets on its HOLMES artificial intelligence platform and is moving from offshore to onshore services. The Wipro Enterprise Mobility Management Suite uses Wipro’s LiVE platform and covers service desk, field support, workplace management and mobility. The company manages 3.6 million devices and 7.7 million users for 380 clients worldwide.

Strengths

Experience and capacity: Wipro is capable of sharing global resources to allow clients to reach the most skilled professionals. Wipro has built a global team of mobility consultants with an average industry experience of 15 to 18 years. This team has capabilities in mobility-enabled business strategy, user experience, mobility-ready enterprise systems and data architecture, process reengineering and solution development. By sharing resources and experiences, Wipro can bring global best practices to local clients.

Wipro HOLMES automation platform: Wipro says HOLMES has been deployed in 85 percent of the company’s client base, with the benefit of reusing chatbots and automation for increasing user satisfaction. Wipro focuses on reusing its chatbots’ library, which provides an automation fabric to reduce costs. For mobile clients, it measures device usage and collects information that goes through machine learning to provide advanced analytics that support service improvements.

Full scope mobility services: Wipro is well known among global clients for its robust workplace engineering capabilities. It provides all mobility services in Brazil and has achieved a reasonable market presence. Mobility services include security and application management on top of device handling.

Caution

Wipro is consistently growing but has not achieved large scale in Brazil. Clients should check geographic coverage and service availability to negotiate a reasonable ramp-up time for deals that require support outside the major cities.
MANAGED SERVICES - WORKPLACE AND MOBILITY FOR THE MIDMARKET

Definition

Midmarket clients make intense use of communication and collaboration but require less sophisticated services and usually have fewer locations and less geography dispersion than large account clients. This quadrant considers service providers that focus on the midmarket client, offering digital workplace services around communication, collaboration and productivity tools. These service providers are typically to support users of Microsoft Office suite and Google G-Suite, and complementary collaboration tools such as Skype, Hangout and similar tools.

Managed services comprises IT service desk with level one and two (L1, L2) support, self-help, chatbots, e-mail management, service availability, collaboration support and consulting around security and cost management of cloud-based services. For mobility, services include mobile device management (MDM), policy configuration, mobile security and digital user experience management. Mobile application management (MAM) is optional.

This quadrant focuses on providers that typically serve clients that have less than 5,000 users or generates less than $1 billion in revenue.
The participant focuses on the midmarket and typically serves clients that have less than 5,000 users or $1 billion in revenue. However, it may serve larger clients as well;

- It provides service desk with human agents, complementary to optional virtual agents;
- At minimum, the participant support users of Microsoft Office, Office 365, or Google G-Suite;
- Ability to offer implementation and support for enterprise mobility, support for BYOD and mobility expense;
- Ability to offer support for single sign-on, secured app access, support for smart devices.

The typical midmarket client expects a pragmatic approach to digital workplace services. It has a stronger focus than large enterprises on cost and productivity, with lower priority around innovation and user experience. This is in part because smaller organizations are more informal and collaborative by nature. Most of the service providers that compete in this market offer simple collaboration in the cloud, changing the work environment to improve productivity and availability, but limit their offerings to one or two collaboration platform vendors.

Most of the participants in this quadrant are partners of the traditional collaboration platform providers Microsoft and Google. Microsoft's stronger market presence takes most of the transformation projects. Many providers do not offer field support services or device management, leaving the client with the responsibility to provide local support. Apparently this practice is not perceived as a problem, as client testimonials are positive. Most likely, local support is not required because the collaboration platform is stable, intuitive and easy to use.

Leading providers in this market provide a broader portfolio and value-added services identified in their respective strengths.
**MANAGED SERVICES - WORKPLACE AND MOBILITY FOR THE MIDMARKET**

Observation (cont.)

- **DXC Technology** relies on robust processes to share global resources and provides digital workplace services from central delivery centers. DXC’s Bionix automation platform enables the company to deliver price-competitive services to the midmarket, including licensing, cloud subscription, transformation, managed services, field support and mobility services. It implements a user-centric, secure, digital workplace that increases collaboration for better user experiences.

- **IBM's** digital workplace services focus on the midmarket and large enterprises. IBM delivers secure, predictive and proactive enterprise application management services that can support critical business processes in a digital workforce, and quickly scale and adapt to support constant change and continuous innovation. Its services include device lifecycle management, workplace virtualization, workplace collaboration and workplace support.

- **SantoDigital** is a Brazilian company founded 2010. It is the first Google Partner Premier in Brazil to receive the global Google Enterprise Collaboration Specialization, which qualifies a partner to deliver professional services focused on digital workplace transformation. SantoDigital is a natural choice for clients evaluating the G-Suite collaboration platform at the center of a dynamic digital workplace.

- **Stefanini** has long experience in providing digital workplace services to the midmarket. Its persona-based support model is designed to put customer experience first. The company's robust services, advanced innovation and device as a service offering combined can provide an accelerated digital transformation to midmarket clients.

- **Wipro's** Brazilian office is in São Paulo. Brazilian clients have been using its workplace services for more than four years, and the company has demonstrated capacity to leverage its global workplace services technology and expertise. Local practitioners serve local clients; Wipro's global shared services are transparent to clients. Its robust services can benefit midmarket clients with world-class services.
DXC TECHNOLOGY

Overview

DXC Technology is a global IT services company serving 6,000 private and public-sector clients in 70 countries. In Brazil, the company has several thousand employees and strong partnerships to deliver services to all industry verticals and regions. DXC relies on robust processes to share global resources, providing digital workplace services from central delivery centers. The Bionix automation platform enables DXC to deliver price-competitive services to the midmarket, including licensing, cloud subscription, transformation, managed services, field support and mobility services.

Strengths

Most complete portfolio: DXC manages the workplace lifecycle. It has a platform with APIs to connect to clients’ and vendors’ solutions. Managed services include user management, virtual assistants, satisfaction rating, client dashboards, service catalog, automated procurement and provisioning, device-as-a-service, IoT, location-aware management, delivery logistics, device break-fix, licensing compliance, device image and application management. Service desk, field support and security are transparent to clients.

DXC device-as-a-service full lifecycle: DXC’s platform and services automate tasks throughout the device lifecycle, starting with licensing and procurement. A user request starts an automated approval process that is integrated to procurement systems and addresses device receipt, storage, application licensing and delivery to the user. It also covers deployment by user persona, as well as secure and compliant access by location, and ends with device replacement by managing data wipe, device disposal and recycling.

DXC client experience program: DXC offers a continuous feedback program that engages clients in a consultative manner and monitors satisfaction and experience level. DXC has an automated platform to capture client feedback and track initiatives globally. It has a formal structure for follow-up with global executive visibility.

Caution

DXC is gradually moving to everything-as-a-service, which is good for midsize companies. However, it also means that service customization or dedicated staff may not be available in some cases.
IBM has a clear focus on the midmarket, offering digital workplace, mobility, security and cognitive computing to elevate user experience and productivity. IBM can be price competitive in certain circumstances. However, clients should not expect it to match the lowest price point when leading-edge technologies are included in the deal.

Overview
IBM's digital workplace services focus on the midmarket and large enterprises. IBM delivers secure, predictive and proactive enterprise application management services that can support critical business processes in a digital workforce, and quickly scale and adapt to support constant change and continuous innovation. Its services include device lifecycle management, workplace virtualization, workplace collaboration and workplace support.

Strengths

A continuous learning organization: IBM offers analytics, cognitive technologies and automation around an infrastructure that is continuously learning from each interaction. Capabilities like "self-heal" and robotic process automation (RPA) transform the user experience. It delivers on next-generation support services with digital strategy skills, industry insights, design-thinking and cognitive computing to meet every client need.

User virtual assistant: IBM has many of Watson's cognitive use cases in production, in multiple languages, including Brazilian Portuguese. AI services range from a plain chatbot to a virtual assistant that interacts in an instant messaging group (Skype or Slack). Virtual assistants can automate tasks, execute processes, respond to "how-to" questions, search documents and make the IT service catalog transparent to the user.

Knowledge at scale: IBM's knowledge is a clear differentiator in terms of state-of-the-art global innovation and disruptive technologies. This gives it a leading edge over peers. The firm still attracts the best talent in Brazil and can train, develop and retain a team with high delivery capabilities. IBM's expertise reduces clients' risks. Midmarket clients benefit from its extensive experience and can apply best practices rather than experimenting with innovation.

Caution
IBM can be price competitive in certain circumstances. However, clients should not expect it to match the lowest price point when leading-edge technologies are included in the deal.
SantoDigital is a Brazilian company founded 2010. It is the first Google Partner Premier in Brazil to receive the global Google Enterprise Collaboration Specialization, which qualifies a partner to deliver professional services focused on digital workplace transformation. SantoDigital is fully committed to the cloud. Its digital workplace services include transformation, design thinking around new ways of working, user support, managed cloud services, mobility support and analytics. The company is a prominent Google partner for G-Suite and Google Cloud Platform (GCP) and also migrates and supports Microsoft clients.

Proven cloud migration and G-Suite services: SantoDigital has migrated more than 1,000 clients to G-Suite. Its major transformation project migrated close to 20,000 users. The company makes proficient use of vendors' tools and professional certification programs. SantoDigital focuses on change management around collaboration and analytics. Clients benefit from unlimited storage, collaboration, productivity and more security and compliance.

Advanced use of artificial intelligence and analytics: SantoDigital has an optimized consulting staff, highly specialized in automation, artificial intelligence and machine learning to deliver custom analytic algorithms. Its professional team includes data scientists and data engineers. SantoDigital uses advanced AI based on Google's technology to automate operations and provide dynamic dashboards. It uses Softwatch to understand user behaviors that elevate their experience.

Fastest growing service provider: SantoDigital's differentiated market focus, expertise and quality services have allowed the company to grow exponentially. It was ranked in the Contender's quadrant in 2018 and more than doubled its footprint and portfolio breath in one year. The company showcases interesting client testimonials, including existing clients that are migrating more services to SantoDigital.

Clients and prospects should keep in mind that like any service provider that grows fast, SantoDigital will be challenged to keep up with service quality and retain its key personnel. ISG has asked about its business practices to check consistency. SantoDigital is a lean organization with clear leadership that is applying business management best practices. At this point the company demonstrates capacity to continue its growth journey.

SantoDigital offers digital workplace services around cloud collaboration platforms. It does not provide field services and device management.

SantoDigital is a natural choice for clients evaluating the G-Suite collaboration platform at the center of a dynamic digital workplace.
STEFANINI

Overview

Stefanini has long experience in providing digital workplace services to the midmarket. Its persona-based support model is designed to put customer experience first. Stefanini has developed a cognitive automation platform called Sophie. In Brazil, it provides services in all states, including device as a service, software licensing, service desk, field support, security, mobility management, virtual assistant and automation.

Strengths

Workplace anywhere: Stefanini supports users in any scenario, whether they require a more stable, secure platform with a fully managed desktop, thin clients, virtual desktops or mobile devices. Flexibility is key for Stefanini. Its custom solutions are designed to adapt to users as they change their work style. Its Sophie automation and cognitive platform provides easy access from any device, including chatbot and virtual assistant over mobile apps.

Proactive automation: Stefanini's d3 Workplace Analytics monitors and measures user experience at the endpoint, identifying problem areas with contextual information for the service desk and desk side engineers. Stefanini d3 enables proactive problem identification and resolution.

Everything as-a-service: Stefanini's as-a-service offerings can include desktops, mobile devices and cloud infrastructure for applications, collaboration tools and support services, eliminating the need for capital expenditures. Clients can pay for mobility as-a-service, including devices and software. Stefanini molds innovative solutions to fit specific requirements, focusing on increasing ROI, end-user productivity and business growth, with continuous service and customer experience improvement.

Caution

Stefanini has a broad IT outsourcing portfolio. Midmarket clients should be very specific and concise in defining service scope to avoid large transformations. Clients should prefer to start small and evolve according to service maturity.

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Stefanini's robust services, advanced innovation and device as a service offering combined can provide an accelerated digital transformation to midmarket clients.
Wipro offers a full stack workplace service in Brazil. However, it may face logistics limitations to install and maintain onsite equipment to support self-service kiosks in certain locations, due to Brazil’s special conditions. Clients that opt for Wipro’s full services should consider it a destination, rather than counting on immediate availability. As Wipro acquires more clients, these limitations tend to disappear.

Wipro is well established in Brazil to provide lasting client relationships. Its robust services can benefit midmarket clients with world-class services.
The research study "ISG Provider Lens™ 2019-20 – Digital Workplace of the Future" analyzes the relevant software vendors/service providers in the Brazil market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Digital Workplace of the Future 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements
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