Digital Workplace of the Future
U.S. 2019-20

A research report comparing provider strengths, challenges and competitive differentiators

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November 2019
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 July 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.

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EXECUTIVE SUMMARY

XLA: A Topic of Interest for U.S. Enterprises:

As part of ISG’s recent study, “Creating the Workplace of the Future,” we spoke to leading U.S. enterprises about their workplace transformation initiatives. While the preferences and challenges did vary a bit, we found enterprises agreed upon few key underlying themes most prevalent in workplace modernization initiatives:

- Most organizations now understand the importance of providing employees with technologies that enhance their experience, rather than the ones which integrate easily within existing environment.
- In addition to roles and technical requirements, IT organizations are increasingly focusing on segmenting end-user personas based on demographics, which also include employees’ likes and dislikes, experience enhancers and more.
- Many IT organizations are either already investing or are considering to invest in enhancing employee self-help and self-service tools like vending machines, chatbots, kiosks, vending machines, etc.
- Better user engagement is the best indicator for successful digital workplace strategy implementation.
- End user acceptance of new technology and change management is the biggest challenge for advancing digital workplace projects.

Enterprise IT leaders will be dissatisfied with their managed services partner if they only consider the provider as a service implementor and operator, and not as a change or transformation enabler.

Progressive IT organizations understand that emerging technologies like artificial intelligence (AI) and augmented and virtual reality (AR/VR) have much broader applications for enhancing and improving end user productivity.

These trends support the growing enterprise interest in end-user experience level agreements (XLAS), where service providers are able to sign outsourcing contracts based on quantifiable measure of end users’ experience enhancements rather than traditional SLAs. A modern outlook toward digital workplace services requires service contracts that grade provider performance by measurable end user experience, as specified in an experience level agreement. There is a growing interest in XLA-based contracts, although we have not observed wide acceptability yet, as both clients and service providers are still figuring out best way to structure the agreements. In essence, continuously monitoring system, network, device and application performance can generate analytics that can provide an indication of the prevalent overall end-user experience level with enterprise IT. Leveraging machine learning, data analytics, sentiment analysis and cognitive intelligence can provide significant improvements in the way IT services are consumed by enterprise end users. Many service providers are developing offerings that personalized analytics...
to end users to provide the most appropriate actionable insight for enterprise business functions. ISG's recent work with enterprise clients suggest a balanced and optimal combination of traditional SLAs and modern XLAs can best capture end user workplace experience measurement.

Key trends observed in managed services for workplace support and mobility are:

- With the advent of XLAs, almost all service providers are building capabilities for measuring user experience. How they define user experience and what they measure as part of it is increasingly becoming a differentiating factor for service providers.

- The scope of intelligent automation and cognitive intelligence are opening new doors and unexplored areas to improve end user experience by having a bot or virtual agent act as personal digital secretary, or in some cases a digital twin, of the end user.

- There is huge interest in smart workspaces, meeting rooms and intelligent physical campuses. Service providers are investing in these capabilities by partnering with IoT solution vendors.

- Service providers and clients continue to explore augmented and virtual reality technologies for onsite field support.

- In mobility, there is a growing interest in moving to a leading enterprise mobility management (EMM) solution like Microsoft Intune. Service providers are developing offerings to enable the migration.

- On the device analytics front, zero-touch Windows 10 migration and application readiness services are significant areas of interest for service providers.

- Clients see value in the device-as-a-service model. They do not want to own the hardware and asking managed service providers to take care of device lifecycle management along with associated device app provisioning and security.
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 productivity for workers while enabling them 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 and by the increased relevance of emerging technologies and diverse possibilities they bring. Enterprises are focusing on end-user experience enablement and its measurement. Consequently, service providers are moving from SLAs to XLAs in workplace services contracts.
Augmented and virtual reality (AR/VR) reduces and eliminates needs for in-person tech support. Its relevance and use are growing in onsite and remote support. Through use of interactive virtual agents and analytics running on systems and tracking resource usage, enterprises can perform predictive analytics and measure end-user satisfaction. There is also an 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 usage. There is growing interest among enterprises in desktop virtualization in cloud or DaaS (desktop-as-a-service) and also in unified endpoint management. There also has been a huge interest in various collaboration solutions and platforms because they are becoming the face and focal point for digital workplace enablement and provide visible benefits in end user productivity and other business benefits. 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.

Definition (cont.)

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, Germany, U.S., U.K., Brazil, the Nordic countries and Latin America.

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.

Scope of the Report

Introduction

Scope of the Report

ISG Provider Lens™ Quadrant Report | November 2019
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 for validating the business case for transformation specific to workplace digital transformation.

Managed service providers leverage their global consulting capabilities for their clients in the U.S.

Managed Services – Workplace Support

Support for IT service desk with level one and two 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 (Midmarket)

This quadrant assesses providers that deliver managed workplace and mobility services to midmarket clients with a user base of less than 5,000.
Provider Classifications

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.
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.
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Digital Workplace of the Future
Digital Workplace Consulting Services

Definition

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.

Service providers positioned in this quadrant leverage their global capabilities and approach to serve clients across U.S.
Eligibility Criteria

- Consulting and workplace assessment are an essential part of the provider’s digital workplace offering and are offered independently of the associated managed services;
- A vendor-neutral approach to assessing 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

Providers positioned in this quadrant leverage their global consulting capabilities to serve clients in the U.S. ISG has observed no difference in the consulting capabilities and consulting service delivery at a global level versus in the U.S. and therefore the two quadrants will be identical between the Global and U.S. reports.

- End-user computing is increasingly becoming experience centric that requires traditionally strong infrastructure service providers to develop consulting capabilities. Service providers who are traditionally strong in digital application transformation space are leveraging their consulting and design thinking approach to provide workplace advisory services. Often, it’s a precursor to implement their own managed infrastructure services for the latter.
- **Atos** leads the quadrant with its employee experience services with focus on end user satisfaction and wellbeing.
- **TCS**, with its technology adoption approach and XLA methodology, is offering strong consulting capabilities.
- **Accenture** provides leading consulting and advisory services based on industry use cases.
- **Capgemini** supports digital adoption by leveraging the D-GEM framework based on its consulting offering.
HCL takes a gamification approach towards technology adoption along with its Kaleidoscope persona segmentation methodology.

IBM differentiates by using cognitive automation for user persona segmentation and its wide coverage in digital workplace-related transformation.

Wipro’s service delivery incorporates a strong consulting focus.

DXC Technology’s consulting services leverage its client experience program and partnership with PwC.

NTT DATA’s pragmatic approach and broad consulting capabilities identify it as a leader.

Cognizant is taking a consultative approach for workplace transformation initiatives and is identified as a Rising Star.
ACCENTURE

Overview

Accenture leverages its industry-leading consulting capabilities to complement its digital workplace services that cater to both IT and other business function requirements. The company has approximately 16,000 consultants spread globally providing advisory and strategy services for digital workplace. Accenture, together with Avanade, provides consulting services for key transformation initiatives like implementing or migrating to Office 365, Windows 10 and implementing Teams. It also partners with other key vendors including Google, Apple, HP, Dell, Lenovo, ServiceNow, Cisco and VMware and can provide vendor-agnostic consulting and advisory services.

Strengths

Human+ workforce focus: Accenture understands the employee reskilling and supporting automation enabled “human+” workforce requirements. It provides consulting services to design a workplace inculcating and supporting continuous technology-led employee enablement. Accenture leverages its leading consulting capabilities in the clients’ digital workplace journey starting from migration and also covers key aspects like culture and change management.

Coverage of key workplace areas: Its consulting services cover three key areas in digital workplace services producing higher business impact. The first one is physical experiences that deal with physical workplace environment and Accenture provides consulting around smart workspaces and its PLACES solution. The second area is human experience where Accenture provides consulting around its cloud managed workplace and device management services. Third area is digital experience where Accenture provides consulting around enhancing users' digital experience through interaction with IT and diverse collaboration components.

Workplace assessment workshop: Accenture’s workplace assessment model comprises of deep engagement to define the vision, workplace personas, identifying needs/ wants and developing plan. The core at this engagement is physical and digital workplace requirements with key focus on technology adoption and change management.

Caution

Microsoft has the lion’s share of the large enterprise workplace environment and Accenture or Avanade can be a good fit for these clients consulting needs. However, Accenture also is considering clients in the SMB and mid-market segments that may not always have Microsoft-heavy dependency. Accenture would need to position its consulting abilities in areas other than technology enablement to succeed in those segments.

Accenture is well-known for its consulting approach and is often preferred for service technology implementation and adoption services. However, other service providers, better known for technology implementation are also rapidly building up and enhancing their consulting portfolio.

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Accenture is well known for its consulting and industry business case analysis approach. Its consulting services tied to its managed services offering covers diverse aspects in technology enablement and adoption.
ATOS

Overview

Atos has a dedicated digital workplace consulting practice as part of its wider digital transformation unit. It leverages 400 Europe-based consultants to provide clients advisory services for workplace transformation initiatives. Atos offers both standalone consulting services and those tied with its own implementation and managed services. Its services focus around solution co-creation with customer, technology adoption, change management and implementing an associated commercial gainshare model.

Strengths

People, Platform and Places approach: Atos consulting services focus on three areas: People, which is focused on culture and employee satisfaction; Places, which addresses mobility and smart workspaces and; Platforms, for dealing with technology aspects. These areas consider human, technological and environmental factors in a digital workplace to help clients realize benefits related to talent attraction, user productivity, workplace campus and travel.

Focus on employee wellbeing and happiness: Atos' consulting services are particularly useful for the business HR function as they help provide indicators of employee satisfaction not only from the technical but also a wellbeing perspective. Atos uses analytics to measure factors related to end users’ motivation or demotivation. Its Chief Happiness Officer application includes an analytics-driven “Mood Monitor” to measure employee satisfaction.

Knowledge and change management: Atos considers technology adoption and change management as an important step to realizing digital workplace benefits. It focuses on getting change management right at every stage of the transformation journey. Atos consulting services ensure proper knowledge management is provided to help enable experience-enhancing technologies like chatbots.

Caution

Atos consultants are concentrated only in Europe.

To fully realize Atos workplace consulting services, clients' equal participation and contribution is paramount. It could be difficult to help client realize the benefits of change adoption and employee wellbeing without active HRO involvement.

2019 ISG Provider Lens™ Leader

Atos’ digital workplace consulting services cover aspects of employee satisfaction in their jobs in addition to technology availability, which acts as a differentiator.
Consulting is a key element in Capgemini’s Connected Employee Experience service portfolio and cover three key areas: connected workspace, connected office and connected employee. Its services focus around digital technology adoption and organization change management. The company leverages 600 consultants worldwide and, significantly, has grown that number 55 percent in the last three years.

**Strengths**

**Digital adoption services:** Capgemini’s consulting services focus strongly on end user adoption and experience in new ways of working, from technical and productivity standpoints. Capgemini uses analytics to determine the effects of technology deployment by measuring the end user experience.

**Strong results with business HR function:** Capgemini reports that it is implementing end-user happiness measurement for approximately 75 percent of its clients. Its Happiness Score analyzes and determine end users’ satisfaction with the workplace and is benchmarked against factors like their locations, the service channels they use and their personas.

**D-GEM framework:** Capgemini’s consulting methodology is based on its Digital Global Enterprise Model (D-GEM) framework, which looks at various aspects of digital technologies adoption, automation and financial insights. The robust model was developed based on Capgemini’s decades-long experience with largescale digital transformation with global customers.

**Caution**

Capgemini’s robust consulting services can provide favorable results when there is enough interest and participation from the client side. With nascent interest in digital workplace consulting, clients need to understand the wide array of Capgemini’s capabilities that cover both business and technology adoption side.
DXC TECHNOLOGY

Overview

DXC Technology offers digital workplace consulting services to provide advisory around prominent transformation initiatives both from the business and technology perspectives. Its consulting services are often an initial advisory for its implementation and managed services. The company has more than 70 consultants worldwide and more than 30 industry experts to work with large global clients to help them design their workplace strategy.

Strengths

- **Partnership with PwC:** DXC partners with PwC and provide consultative approaches for transforming business models, end-user digital experience and business processes. The partnership also covers advisory for mobile technologies to increase employee productivity and workplace efficiency.

- **Other partnerships:** DXC has a strong partner ecosystem. Because of its partnership with Microsoft, DXC has a dedicated practice for advising client migrations to Windows 10 and Office 365, which includes validations for the reasons and processes that require migration. DXC’s partnerships with other technology vendors like VMware and Citrix help its consulting capabilities with technology-specific nuances.

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

Caution

DXC is not able to share enough examples of its true consultative engagements that include technology adoption and client cultural change management.

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DXC retains its good position in the digital workplace consulting space because of its strong global presence and experience with diverse industry clients.
HCL has showcased substantial improvements in both its portfolio and results pertaining to its digital workplace consulting services. Its robust methodology and experience play to its advantage.

Though consulting is an integral part of digital workplace services, HCL has traditionally been known as a strong IT infrastructure services player from the time when consulting was not an integral part of delivery. It may be challenging for HCL to convince clients to leverage its capabilities like BOOST for technology adoption, especially when clients don’t consider it relevant for such offerings.

Kaleidoscope: HCL provides a persona-led consulting service offering called Kaleidoscope™. It touches every aspect of the modern workplace like Windows 10 migration, managed mobility, smart support, cloud-based workspace, collaboration and virtual agents. More than 90 HCL clients are leveraging Kaleidoscope to cover approximately 2 million users. HCL also incorporates advisory on GDPR compliance, augmented reality and IoT.

BOOST: HCL offers a gamification approach called BOOST for enabling technology adoption at clients to accelerate favorable behavior change. It leverages positive reinforcement techniques and user incentivization based on personas and demographics to help market products and services internally. Its DECODE methodology for service implementation aims at developing a more digitally dexterous workforce for its clients.

Technology-led experience enhancement: HCL leverages automation and cognitive technologies in its service delivery, and consulting services is no exception. The company offers a data-driven approach to user persona segmentation and user behavior monitoring. It also leverages recommendations from cognitive virtual assistants about the best hardware fit, which is aligned based on application and device usage.
IBM’s consulting practice include offerings around persona segmentation, change management, business process reengineering and an outcome-based approach. IBM’s consulting and advisory services pricing could be a discouraging factor. However, with its new workplace-as-a-service offering, IBM aims to simplify its own service portfolio and reduce midmarket clients’ consulting needs significantly.

IBM deploys both cognitive automated approaches, such as desktop agents and traditional methods like surveys to capture information to segment end users into different personas. Cognitive intelligence is applied to collected data, and user behavior is determined and monitored by leveraging the intelligence. IBM consulting services aim at transforming client organizations to become a cognitive enterprise. IBM digital workplace consulting services interact with diverse business functions other than business IT. The business relevance and viewpoint of each persona provides function-specific persona segmentation. IBM’s consulting services cover workplace assessment and help clients explore different technology initiatives. The company has consulting experience and capabilities for digital workplace initiatives involving enterprise mobility, service desk, enterprise collaboration and desktop virtualization.
Although the recent consolidation of NTT companies was aimed to consolidate the parallel service offerings provided by sister companies, NTT DATA must communicate clear differentiation of responsibilities and synergies to clear out any possible confusion.
TCS provides consulting as an overarching capability for its comprehensive digital workplace services that cover various aspects of IT infrastructure, applications, mobility and end user collaboration. The company has 1,000 consultants globally to provide advisory and strategy formulation services for key workplace transformation initiatives. TCS also leverages its global consulting and system integration units that help clients develop innovative business models that take advantage of technological opportunities.

**Comprehensive offering:** TCS provides consulting services around its Microsoft 365 offering that include strategy and rollout. It also provides consulting services for modern intranet and content services that cover strategy and adoption. The company conducts consulting for mergers and acquisition from the workplace perspective, and consulting around business application transformation. The TCS technology adoption and change management practice within digital workplace services provides advisory around change strategy and technology impact assessment.

**XLA influencers:** TCS emphasizes measuring end-user experience levels through XLA (experience level assurance) on top of traditional service level agreements. In the consulting phase, TCS identifies XLA influencers and decides upon measurable KPIs for them. These KPIs define the experience level agreement terms that TCS will aim to deliver its services on.

**Design thinking approach:** TCS's Digital Reimagination Studio uses design thinking methodologies where client teams work with TCS teams collaboratively to assess new business models to take advantage of digital technologies. The iterative design process includes workshops around areas like mobile devices, social collaboration technologies, conversations and augmented and virtual reality implementation for support operations.

**Caution**

Though TCS has run workplace support implementation services for some time, the modern digital workplace services with significant consulting elements is fairly new. Its focus on technology adoption and change management is a differentiator and market will require some time to realize this.
Wipro provides consulting services as a precursor to its managed and implementation services, making its clients ready for its diverse workplace modernization approaches.

Wipro is well-known in the market as a strong workplace engineering services provider. It should strongly communicate its differentiation in technology adoption and change enablement which is not yet widely known in the market.

**Workspace Maturity Model:**
Wipro leverages its Workspace Maturity Model (WMM) to assess client's current workplace setup from a service desk, field operations, endpoint protection and network perspective. WMM provides insights into technology maturity and business criticality of operations and processes and identify consulting opportunities from both business and technology side. Wipro also has recently integrated its network consulting offering Insightx with WMM that covers the consulting to create business case for network transformation.

**Design thinking via Designit:**
Wipro provides consulting services through a design thinking approach aimed at creating a digital experience for end users. Its DesignIT subsidiary specializes in designing end user experience across devices and platforms. Advisory services cover the virtualization, mobility and communication collaboration aspects of the workplace.

**wAssess methodology:**
Wipro's assessment methodology called wAssess analyzes the client's current workplace environment and suggests application modernization or cloud migration based on legacy or cloud-ready states. Both approaches culminate in the target environment being an available, connected and assisted workplace as defined by Wipro's LiVE Workspace platform.

**Caution**
Wipro is well-known in the market as a strong workplace engineering services provider. It should strongly communicate its differentiation in technology adoption and change enablement which is not yet widely known in the market.
RISING STAR: COGNIZANT

Overview

Cognizant has recently branded its digital workplace services portfolio as WorkNEXT™. It is focusing on consulting as an important aspect of this portfolio. Although Cognizant has been offering consulting and assessment as part of its managed services, recently it has started focusing on consulting as a standalone offering. The company has large number of consultants worldwide supporting consulting-led initiatives for all Cognizant solutions and services. The company is focusing on workplace enablement areas like change and technology adoption and is already developing dedicated offerings around them. It has been identified as the Rising Star in this quadrant.

Strengths

Consulting with WorkNEXT™: Cognizant offers consulting as key lever for its WorkNEXT™ solution. It focuses on an end user centric approach while conducting as-is assessment and user persona segmentation.

Technology migration consulting: Cognizant offers dedicated offerings for Windows 10 migration and Office 365 adoption. These major technological projects require significant consulting elements and Cognizant is focusing on these aspects.

Thought leadership: Cognizant has recently won some key customer accounts for digital workplace services where consulting was a major part of the implementation. It also recently started positioning itself as a thought leader in digital workplace services by promoting its services on various channels.

Caution

Cognizant's consulting approach is fairly new and relatively less tested than others. It will take some time for the market to start considering Cognizant as a consulting partner in addition to being a managed service provider.
Managed digital workplace services are comprised of all managed services related to the digital workplace. An IT service desk with level one and two 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. It also includes smart meeting rooms and field services enabled by augmented reality (AR) and/or virtual reality (VR).
Observations

- **IBM** leads the market by providing workplace support services that are powered by high cognitive intelligence.
- **Cognizant** has a strong local presence, and its newly improved WorkNEXT™ offering leverages cognitive intelligence to cover smart service desk services.
- **HCL** provides strong productized solutions for predictive analytics, automated service support and an innovative approach to field and onsite support.
- **Wipro’s** comprehensive offerings cover different aspects of managed workplace support services through automation with the LiVE workspace platform.
- **DXC Technology’s** MyWorkStyle leverages the Bionix platform and massive operational scale to provide managed workplace support services.
- **TCS** provides cognitive automation-enabled managed services through its ONE delivery platform.
- **Atos** provides workplace support services powered by strong automation and the company’s 6E framework.

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 setup 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.
Unisys leverages its InteliServe platform and automation-focused service desk services.

NTT DATA’s Dynamic Workplace services take advantage of the global delivery and onsite support capabilities within its portfolio.

Zensar uses predictive analytics, automation, bots and other technology to achieve high service levels that are oriented around business KPIs.

Accenture, together with Avanade, manages a large number of end users and focuses on technology adoption, and has been identified as a Rising Star.
Overview

Digital workplace remains a key strategic focus area for Atos and an important pillar of its digital transformation services. The company manages approximately 4 million end users globally and employs 11,000 FTEs for digital workplace services. Atos’ position in this quadrant improved both in terms of portfolio attractiveness and competitive strength this year because of its acquisition of Syntel and continued focus on employee experience.

Strengths

- Managed services in the U.S.: Atos delivers service desk services from Mason, Ohio and Cheshire, Connecticut with 1,040 FTEs. Atos partners with NSC Global to offer on-site support that can include tech bars, IT kiosks and smart vending machines.

- Automation focus and 6E framework: Atos’ managed workplace services strongly leverage its automation and analytics capabilities. With automation usage, end-user analytics and the Atos Virtual Assistant (AVA), the company has been able to reduce tickets by 13 percent and achieve a 9.3 end-user satisfaction rating on a 10-point scale. It reports approximately 70 percent first call resolution (FCR). With automation and analytics, Atos measures service effectiveness around six parameters focused on employee experience. These “6E” parameters ascertain whether employees are empowered, engaged, enabled, enhanced, educated and efficient.

- Syntel acquisition: Atos’ recent acquisition of Syntel has significantly increased its portfolio and presence in the U.S. and North America region.

Caution

Both Syntel and Atos offer IT infrastructure automation services. Atos could cross-leverage or let go of some homegrown solutions in this space for U.S. clients.
Overview

Cognizant recently branded its workplace services under WorkNEXT™, which focuses on delivering personalized digital workplaces with enhanced support and provides an agile and scalable experience. Cognizant manages an estimated 4 million-plus users in the U.S.

Strengths

Digital service desk and U.S. coverage: Cognizant’s total revenue from managed digital workplace services in the Americas forms a significant percentage of its global total. Cognizant provides AI-enabled multichannel service desk services. It has two service desk delivery locations in the U.S., in Denver and Phoenix. It supports more than 20 languages globally with high first-level resolution (FLR) and average speed of answer (ASA) rates. Cognizant has partnered with Essential Enterprise Solutions and DecisionOne to provide on-site support in the U.S. with augmented reality/virtual reality labs.

WorkNEXT™ and workplace-specific IP: Cognizant’s managed digital workplace services are branded as WorkNEXT™. The company provides automation- and AI-enabled workplace services, along with an AI-enabled virtual agent (IVA), smart IVR password reset, self-healing intelligent machines and RPA-enabled workflow automation. Cognizant uses its HiveCenter™ platform for developing bots and automated agents with on-screen and optical character recognition. Cognizant also provides user-triggered Windows migration services.

Strong references in the U.S: Cognizant has strong examples of providing managed workplace services to U.S. clients. It has helped clients in the manufacturing, financial and technology industries with automation-focused managed support services.

Caution

Cognizant has a strong presence and hold in the U.S. market. Its newly branded workplace services with focus on automation and analytics further strengthen its position.
DXC TECHNOLOGY

Overview

DXC Technology’s managed workplace support services are part of its MyWorkStyle offering powered by its intelligent Bionix platform and serves large customers in the U.S. ISG estimates DXC supports and manages more than 3 million end users in U.S. for more than 400 clients.

Strengths

Leveraging global scale: DXC has a global presence with five service desk delivery centers supporting 56 languages, and 200 client walk-in locations for on-site support. It also provides video kiosk services both on its own and through local partners in the U.S. To offer device-as-a-service, DXC Technology partners with leading OEMs in the U.S. and provides cost-effective solutions for the entire device lifecycle, along with its managed services.

Bionix™ platform and automated resolution: DXC’s Bionix™ automation platform uses analytics, AI, efficient lean processes and workflow automation at its back end. DXC has been able to automatically resolve 71 percent of incidents through its self-help and predictive analytics services.

U.S. customer examples: DXC has some strong managed services and on-site support case studies in the U.S. in the consumer packaged goods and healthcare industries. The company has recently signed contracts with manufacturing and financial services clients for managed digital workplace services.

Caution

DXC has many large legacy services contracts in the U.S. for workplace support and service desk services. It should focus on transforming these contracts to be based on XLAs.

2019 ISG Provider Lens™ Leader

DXC is one of the largest service providers in the U.S. and provides massive scaled services around workplace support.
HCL Technologies offer a comprehensive managed services portfolio with a productized IP-based approach and its SMART digital workplace MODEL™. HCL provides managed services through many productized offerings that use analytics, automation and artificial intelligence. It manages 1.4 million end users, servicing 125 U.S. clients, and 41 percent of its managed workplace support services business comes from the U.S.

### Strengths

**Strong U.S. presence:** HCL offers service desk services from six U.S. locations that support the English and Spanish languages. HCL partners with DecisionOne, A&O, Unisys, Hemmersbach, CompuCom, Insight and Jardine OneSolution for on-site support where its own resources are not available, field support and IT kiosk services. It partners with Librestream, SightCall, RealWear and Microsoft Hololens for augmented and virtual reality field support. It also works with multiple technology vendors for smart building and office solutions.

**Automation and innovative solutions:** HCL has significantly improved the self-help automation capabilities in its OptiBot solution and scaled it to handle 15 million incidents annually. Its WorkBlaze predictive analytics solution provides real-time experience monitoring, and IntelliZone provides lounge-based IT access with IT vending machines. HCL reports average 84 percent FCR, 36 percent incident reduction through automation, and 21 percent reduction through self-help. HCL has improved its virtual cognitive assistant LUCY to handle 2 million contacts and the capacity has been increasing by 200 percent every year. Many HCL clients have accepted LUCY as a digital colleague or personal digital secretary. HCL recently introduced smart meeting capability with LUCY, and it now also integrates with Pepper, HCL’s humanized bot. In addition, HCL is also offering some innovative solutions like portable modular meeting spaces called ZenPods that are enabled with technologies to help execute successful meetings. It is also introducing a facial expression analyzer and smart wearables for AR/VR-based onsite support.

**Multi-industry experience:** HCL has experience providing OptiBot- and WorkBlaze-based managed services solution to many clients in the U.S. in the healthcare and financial services industries. It also signed managed digital workplace services deals in the manufacturing and energy verticals in the U.S.

### Caution

Though consulting is an integral part of digital workplace services, HCL has been known as a traditionally strong IT infrastructure services player since the time when consulting was not an integral part of delivery. It may be challenging for HCL to convince clients to leverage its capabilities or technology adoption, especially when clients don't consider it relevant.
Overview

IBM has extensive experience and massive operational scale to provide managed digital workplace services across the globe. IBM’s Workplace Support Services (WSS) covers the entire service spectrum from end-user computing to unified endpoint management. They leverage IBM’s analytics, cognitive and automation capabilities. ISG estimates that IBM manages more than 4 million end users and serves more than 200 clients in the U.S.

Strengths

Leveraging global capabilities in the U.S.: IBM has 16 strategic delivery and 14 complementary centers globally for service desk operations. It supports 50 languages and 8,000 clients in more than 50 countries. IBM manages more than 8.3 million mobile devices globally. It uses its global capabilities and scale to serve its clients in the U.S. The company has recently signed clients in the manufacturing, finance and healthcare industries for managed workplace and infrastructure services.

Workplace support services with Watson: IBM offers cognitive workplace support services. They include cognitive self-service that provides a chat-based solution, “with Watson,” that continuously learns and can transfer a call to an agent to preserve the continuum of services. It also provides automated password reset, standard service desk operations and SLA reporting.

End-user experience enablement through analytics: IBM uses ticket analysis, an AI-enabled end-user portal and Watson integrated with Lakeside Software's workplace analytics technology to enhance the end-user experience. Analytics-driven services determine top call drivers and provide objective ticket data information about the causes of the most common service desk issues. Calculating a health score plus metrics like Net Promoter Score (NPS) can help determine appropriate end-user experience metrics for each client.

Caution

IBM still seems to be delivering services based on traditional SLAs for managed workplace services. It should showcase more examples of U.S. clients benefiting from its services through an XLA approach.
NTT DATA has a Dynamic Workplace Services offering for end-user IT lifecycle management. It provides device provisioning and end-to-end managed services based on end-user personas. ISG estimates NTT DATA manages 4 million users and serves approximately 200 clients across the U.S.

**Strengths**

**U.S. end-user support capabilities:** NTT DATA has service desk delivery capabilities in all major geographies and offers support for more than 20 languages. In the U.S., it offers service desk services from Panama City, Florida; Oklahoma City, Lincoln, Nebraska; Nashville, Tennessee; and Bowling Green, Kentucky. The company also uses its global scale and capabilities to serve U.S. clients. Because of its wide local presence in the U.S., NTT DATA provides field services and on-site walk-in or tech bars without any partners.

**Automation and AI capabilities:** NTT DATA provides artificial intelligence- and automation-enabled managed services that include AI-based virtual agents, user and endpoint monitoring plus enhanced analytics and reporting capabilities. Its predictive analytics and insights are transforming the service desk function from a low-skilled operation to a data-rich component of workplace strategy. NTT DATA has an AI automation expert team with 200 data analysts, data scientists and consultants, and has 1,500 developers of embedded technologies. NTT DATA offers up to 20 percent incident reduction through automation and self-help utilization.

**Recent customer wins:** The company recently signed significant managed workplace services deals in the U.S. manufacturing, healthcare, energy, banking, financial services, insurance and travel industries.

**Caution**

There is limited information about NTT DATA's capabilities and experience with user experience level agreements, which is an area of interest for clients in the U.S.
TCS

Overview

TCS has strong capabilities in the overall workplace services spectrum. It has been providing service desk and end-user computing support for clients for a long time and also has credentials in helping clients with its modern collaboration and intranet consulting capabilities. Since digital workplace services combine these two areas, TCS has emerged as a strong player providing services on both sides of the spectrum. ISG estimates TCS has approximately 130 managed workplace services clients and manages more than 4 million users.

Strengths

Strong U.S. services delivery: TCS has three U.S. service desk delivery locations, in Chicago, Cincinnati and Dallas. The company partners with WWTS, CompuCom and Blackbox for field support services.

XLAs: TCS defines the client experience by improving the end-user experience level, and it approaches clients with experience level agreements. These XLAs are influenced by measurable parameters for IT experience, such as ease of access to get IT support, ownership of incident resolution and measurements of implemented changes and technology adoption.

Recent wins: TCS has recently signed managed workplace services contracts with U.S. clients in the manufacturing, retail and financial services industries.

Caution

TCS undertakes a customer qualification process and offers its services to potential clients at three levels: gold, silver and bronze. U.S. clients have to choose carefully to get the best results from TCS’s managed services and XLA approach.
Unisys is a well-known name in workplace support services in the U.S. because of its wide coverage, intelligent support and onsite and field support. Unisys considers experience level agreements from a gainshare perspective and has not seen much traction among its clients. However, ISG has observed significant interest in technology adoption and XLAs among U.S. clients.

Unisys offers end-to-end digital workplace solutions that help in enhancing productivity and collaboration using cloud-based and mobile-centric solutions. The company generates more than 42 percent of its managed workplace support services revenue in the U.S. It serves over 675 clients and manages 2.3 million users in the U.S. with more than 3,000 employees.

Unisys offers service desk services from Augusta, Georgia, and Salt Lake City. It also provides on-site support, walk-in tech café support and remote dispatch support through its own resources and its partnerships with Pinnacle and Tech Systems. Unisys offers smart meetings capabilities plus physical building solutions in partnership with AVI-SPL, and AR/VR based onsite support through a partnership with Help Lightning.

Unisys leverages its InteliServe™ service desk service platform powered by automation and analytics. It supports more than 1 million contacts across four languages in the U.S. Unisys uses IPsoft’s Amelia for its virtual agent technology, using proprietary automation technology to train Amelia based on client requirements. Unisys reports a first call resolution rate of 65 percent, 47 percent incident reduction through automation and 12 percent incident reduction through self-help. It enjoys an average end user satisfaction rating of 92 out of 100. Unisys deploys a risk vs. business outcome approach to determine automation scope.

Unisys has a strong client base in the U.S., which accounts for 40 percent of its global managed digital workplace services clients. It has recently signed workplace modernization and managed support services contracts with state and local government, healthcare, commercial and retail clients.
WIPRO

Overview

Wipro's LiVE workspace platform covers service desk, field support and workplace management under managed services and is powered by Wipro's HOLMES™ automation platform. Fifty percent of Wipro's digital workplace services revenue comes from the U.S. and it manages around 3.3 million end users in the country.

Strengths

Strong U.S. support services portfolio: Wipro has service desk locations in Atlanta and Houston. Its U.S. operations support four languages. Wipro is partnered with WWTS, Excis, Hemmersbach and IronSystems to provide on-site support in the U.S. For smart meeting solutions, Wipro partners with WSiC, CloudBooking, Samsung, Cisco, Pointgrab and Teem.

LiVE Workspace™ and analytics: Wipro's LiVE Workspace is a consumerized platform for managed services delivery of a connected, always-on and smartly assisted workplace. It covers service desk, field support and workplace management under managed services and is powered by Wipro's HOLMES™ automation platform. Wipro has integrated its HOLMES™ and natural language processing (NLP) capabilities with its managed digital workplace services to minimize or eliminate manual processes. It provides cognitive, multilingual, AI-based virtual agents. Wipro reports automation resolves up to 40 percent of incident tickets and that 20 percent are resolved by self-help.

Strong client-base: The U.S. forms 50 percent of Wipro's global revenue for digital workplace services. It has recently signed key contracts with manufacturing, energy and healthcare clients for managed workplace and support services.

Caution

Wipro's initiatives to enhance its workplace offering by including adjacent elements of IT infrastructure like networks act as a differentiator. However, it may need to further market its technology adoption and change enablement services.

2019 ISG Provider Lens™ Leader

Wipro is a major service provider in the U.S. for managed workplace support services. It is well regarded among clients for its automation- and analytics-focused services.
Zensar offers a managed digital workplace services portfolio oriented toward business KPIs. Zensar’s services scope enables a customer journey from being IT focused to being business focused. Zensar has a complete managed digital workplace services offering covering consulting, smart service desk, digital user experience management, client site support, unified communications, cloud workspace, unified endpoint management and enterprise mobility to modern workplace services.

**Strengths**

**U.S. operations scale:** Zensar provides digital workplace services from four U.S. locations in Massachusetts, North Carolina and Texas, and supports English and Spanish directly through Zensar Enterprise Smart Desk. It manages more than 462,000 end users through its digital workplace support services in the U.S., serving 51 clients with 293 workers in the country.

**The Vinci™:** Zensar’s Vinci™ automation platform provides automation-based predictive analytics, shift-left and “shift-zero,” self-heal resolution, user experience and sentiment analysis, Win10 and O365 automated migration and intelligent collaboration over different devices and platforms. It provides digital user experience bots for both known and unknown issues, virtual assistance with NLP, cognitive and artificial intelligence, and bots to monitor end-user issues, RCA and impact. Through automation, Zensar reports 95 percent FCR, 30 percent incident resolution and 17 percent incident resolution through self-help. The company reports an average end user satisfaction rating of 4.8 out of 5.

**Success stories in U.S.:** Zensar has successful engagements with clients in the U.S. from diverse industries like healthcare, banking, telecom and manufacturing that have resulted in significant user experience improvements and ROI results.

**Caution**

Zensar has seen rapid growth in recent times; it needs to pursue the market more aggressively to compete against other major global service providers leading this quadrant.
RISING STAR: ACCENTURE

Overview

Accenture offers global managed workplace support services both independently and through its Avanade joint venture with Microsoft. Accenture manages approximately 489,000 end users in the U.S. It also provides services to measure digital tool adoption in the workplace, end-user behaviors and the corresponding business value realized.

Strengths

**U.S. services scale:** Accenture delivers service desk services from Knoxville, Tennessee, and San Antonio, Texas, plus virtual service desk services through its Ottawa, Canada, center. The company supports English, French and Spanish. It provides onsite field support in all major U.S. cities. It also offers smart building, meeting solutions and AR/VR field support and has partnerships with HP, Dell, Lenovo, LogMeIn.

**Focus on automation:** Accenture offers automation-focused service desk and workplace support services and reports 75 percent first level resolution through automation. Its automation-enabled services can resolve 22 percent incidents automatically. It enables end users’ self-help to resolve up to 46 percent of incidents before being raised. The company reports an impressive average end user satisfaction rating of 90 out of 100.

**End user technology adoption:** Accenture offers services to encourage end user technology adoption through its partnership with Microsoft, and can provide analytics on end user productivity tool utilization. It leverages user and behavior analytics to help drive ROI in digital workplace technologies.

Caution

Accenture is not traditionally known as a strong end-user computing services provider. Clients may be hesitant to approach Accenture for managed services unless a strong transformation element is involved, or if their environment is very Microsoft oriented.

2019 ISG Provider Lens™ Rising Star

Accenture is increasingly being seen as a key service provider in managed workplace support because of its focus on automation, analytics and technology adoption services.
With increasing acceptance of mobility and the bring-your-own-device culture, managed mobility support 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 management and telecom expense management. It also includes larger aspects of enterprise mobility management like mobile application management (MAM), mobile security, digital user experience management and cloud-based services.
Eligibility Criteria

- Support and manage a large number of mobile and smart devices in the U.S.;
- Ability to offer device sourcing and logistics, managed unified endpoint management (UEM), financial management, device security and mobility program management;
- Ability to offer implementation and support for enterprise mobility, BYOD support, mobility expense management and asset management;
- Ability to provide complete device lifecycle management, including device-as-a-service (DaaS) and 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 and support for smart devices.

Observations

- **IBM's** massive scale of devices managed places it as leader in this quadrant.
- **Wipro**, through its M2TA framework, provides strong managed mobility services.
- **HCL's** FlexSpace and focus on three-level managed mobility services position the company as a leader.
- **DXC Technology's** comprehensive device-as-a-service offering is a key differentiator.
- **Accenture** leverages its strong partnerships and device lifecycle management services to provide managed mobility.
- **TCS** provides its productized Mobitio offering in addition to its device management capabilities.
- **Unisys's** strong focus on cybersecurity establishes the company as a leader in the quadrant.
- **Cognizant's** WorkNEXT™ offering has dedicated focus on unified endpoint management and mobility support.
Overview

Accenture's Enterprise Managed Mobility (EMM) offering covers mobility strategy consulting, implementation, deployment and managed services. Accenture also provides add-on services, like application packaging and endpoint management. It has partnerships with a network of third-party service providers for enterprise mobility management. Accenture manages approximately 700,000 smartphones and 15,600 IoT devices in the U.S., a 5 to 10 percent increase compared to last year.

Strengths

- **Avanade relationship and Microsoft expertise**: With its strong partnership with Microsoft that includes the Avanade joint venture, Accenture has solid consulting and Microsoft environment capabilities. Accenture provides mobility assessment through its Mobility Capability Framework (MCF) model. It also provides managed services around Azure migration, Intune and SCCM management. It provides complete end-to-end managed workspaces for the Office 365 environment.

- **Global partner ecosystem**: Accenture uses its global partnerships to provide managed mobility services in the U.S. It partners with leading identity and access management (IDAM) and EMM vendors and provides managed services for diverse environments. It also partners with Dell, HPI, Lenovo, VMware, XenMobile, AirWatch, Intune, Citrix and AWS for device-as-a-service offerings.

- **Strong reference cases**: Accenture has case study examples from different industries in the U.S. for managed mobility services. It has helped clients in the travel, telecom, retail and packaging industries with its managed mobility services. The company has not only provided BYOD mobile strategy consulting, but also mobile device management through Intune and VMware resources.

Caution

The majority of Accenture's client examples are in the Microsoft Intune environment. Accenture also must showcase examples of its device-as-a-service capability, because DaaS is gaining more traction among clients. Though Accenture has invested in its DaaS offering and has plans to expand it in coming years.
Cognizant has a dedicated managed services unit for enterprise mobility. It provides device, application, identity and content management services. Cognizant has strategic partnerships with VMware, Citrix and Microsoft to drive mobility adoption. ISG estimates Cognizant manages approximately more than 900,000 smartphones and laptop devices in the U.S.

**Unified device management**: Unified device management is a key component of Cognizant's WorkNEXT™ offering. It includes WorkNEXT™ Device as a Service and WorkNEXT™ Unified Endpoint Management services.

**Managed mobility services portfolio**: Cognizant's managed mobility services consist of BYOD consulting, application and device compliance, device lifecycle management and virtualization. It offers WorkNEXT™ Digihub, an enterprise web portal with virtual assistants and other digital workplace elements. Cognizant conducts mobility effectiveness measurement using analytics, and proactive mobile threat detection and defense.

**U.S. practice prominence**: Cognizant has a significant number of clients in the Americas region, and the resulting revenue forms a very high percentage of its total global revenue from managed mobile services. Cognizant works with clients in the insurance industry to deliver mobile-based business solutions. It also showcases examples from U.S. healthcare and technology industry clients, where it helped enable a secure BYOD culture.

Cognizant's revenue from managed mobility support services is lower than others. Clients need to see and understand Cognizant's differentiation and consider the company for device management in addition to support services.
DXC TECHNOLOGY

Overview

DXC Technology’s managed mobile enterprise services provide business solutions and enterprise mobility management services. Mobile business solutions include mobile consulting, app building services and EMM services, including endpoint device and application management, risk mitigation and secured access to data and applications. ISG estimates DXC manages around 1 million devices in the U.S.

Strengths

DXC device-as-a-service: DXC offers device lifecycle services that allow clients to own, lease, use and refresh devices. DXC has partnerships with leading OEMs and can help clients in device procurement, managed services and device disposal. It provides both thick clients migrated to new operating systems and virtual desktops on thin clients. DXC charges clients on a per-device, per-month basis for this service.

Comprehensive services portfolio: DXC’s managed mobility services portfolio consists of consulting around mobilizing business processes, mobile app development for all devices, including IoT devices, application containerization and enterprise app stores. DXC also provides mobile threat protection for application and device compliance and partners with EMM and other vendors for IDAM and file level protection. It offers the Mobile Business Insights package for measuring mobility program effectiveness.

Strong case examples in the U.S.: DXC has strong experience and multiple case examples for providing effective mobile user experience and device management services for diverse industry clients in the U.S.

Caution

DXC’s mobility services package is too focused on Microsoft offerings. The company needs to strongly highlight similar functionality and partnerships with other device and application suite vendors.

2019 ISG Provider Lens™ Leader

DXC’s DaaS offering is a differentiator in managed mobility space. Its scale of operations in U.S. is massive and clients regard the company well.
HCL’s managed mobile enterprise services include mobility-based consulting, unified endpoint management (UEM), and secured cloud-based, persona-driven workplace data and application delivery. It manages approximately 1.4 million smartphones and laptops and 3,750 IoT devices in the U.S., a 30 percent increase from last year.

Strengths

Comprehensive portfolio: HCL’s Kaleidoscope consulting services let enterprise clients determine their workforces’ mobility requirements based on user personas. Its alliance with PowWow Mobile helps HCL to provide mobile application modernization, while HCL FlexSpace offers device as a service capability. Its Enterprise Mobile Enablement services provide a mobile-first service, including device, application and content management for 570,000 smart devices. HCL also offers integration between different endpoint management tools and MDM solutions. It has a single console that integrates both on-premise and in-the-cloud device management and provides associated security services.

Asset management: HCL has been able to implement intelligent real-time asset tracking for devices through its intelligent use of RFID technology. It provides geofencing and remedial security actions like remote data wiping.

Industry-specific solutions and experience: HCL has developed specific mobility solutions to support mobile workforces in diverse industries like banking, financial services, insurance, healthcare, pharmaceutical, manufacturing, energy, retail and media. It has strong case study examples for managed mobility services from U.S. clients in the telecom, healthcare and manufacturing industries.

Caution

HCL offers three levels of managed mobility services. Clients should opt for higher levels if they want to get real value out of HCL’s intelligent automation and analytics-enabled offerings. The tiering could be a discouraging factor for price-sensitive clients.
IBM offers a comprehensive managed mobility services portfolio covering device lifecycle management that provides proactive monitoring using cognitive intelligence.

Overview

IBM has a strong and very experienced mobility practice that manages more than 8,000 clients in 50 countries. It has more than 750 patents for mobility-related innovations. IBM provides managed mobility services in on-premise, hybrid and public cloud environments and reports ROI as high as 108 percent. IBM's mobility services manage more than 8 million devices globally.

Strengths

Managed mobility services: IBM offers zero-touch or light-touch device enrollment, dynamic device and application configuration, cognitive telecommunications and mobility expense management, plus application management, enterprise self-service portals and app store services. IBM also offers the Watson Device Health module, which performs proactive monitoring and identifies devices predicted to fail soon. The company can help manage IoT ecosystems through unified monitoring and data integration. Its device lifecycle management services span procurement to disposal. IBM offers portal-based device choice for end users, global coverage for device deployment and strong partnerships with Brightstar and AT&T for IT asset deployment.

Vendor-agnostic approach: IBM offers vendor-agnostic mobility management services. Although IBM offers its own MaaS360 EMM solution, it can also support the VMware AirWatch, Citrix XenMobile, Microsoft Intune, Jamf Pro and MobileIron mobility environments.

Device Health with Watson: IBM recently introduced a patented cognitive analytics platform that uses new and existing data from within the organization to provide a health score for each device. This score is used to predict device refresh requirements, thus eliminating need for time-based replacement (and potential failures) and move to health-based refreshes. IT managers can track the health of all devices in the organization from a single dashboard to understand when and why devices underperform. The capability can allow organizations to extend device lifespans, optimize spending, reduce support costs and provide proactive support.

Caution

IBM targets the midmarket with its device-as-a-service offering but hasn't been able to report significant client engagements within this market segment for these offerings.

2019 ISG Provider Lens™ Leader

IBM offers a comprehensive managed mobility services portfolio covering device lifecycle management that provides proactive monitoring using cognitive intelligence.

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TCS's managed mobile enterprise services comprise its device and application management, mobility consulting and industry-specific mobile solutions. ISG estimates TCS to manage approximately 700,000 mobile devices in the U.S. TCS has invested in mobility innovation centers to develop cutting edge offerings. It also provides analytics-based device strategy services.

**Strengths**

**U.S. focus and momentum:** TCS's revenue from managed mobility services in the U.S. is higher than the industry average and represents 52 percent of its total managed mobility services revenue. The U.S. service revenue has grown 64 percent in the last three years. The company now provides managed mobility services to 138 clients in the U.S.

**Mobitio™ and ELF:** TCS' Mobitio productized mobile app platform covers service desk, end-user computing, data center and application support services. The platform is embedded with TCS's ignio™ automation framework and provides collaboration solutions to enhance productivity. The Mobitio framework is customizable for every client. TCS also provides its Endpoint Lifecycle Factory (ELF) for proactive device health monitoring and unified endpoint compliance.

**Industry scope and references:** TCS provides telecom expense management and specific solutions for the retail, manufacturing and life sciences industries. TCS has client examples in financial services and other industries in the U.S., where it provides collaboration-focused mobility management services.

**Caution**

TCS provides industry-specific mobility management services but should showcase more examples from complex and unique mobile workplace environments, like highly secured Sensitive Compartmented Information Facilities (SCIFs), or media industry clients with low latency requirements.
Unisys offers a very robust managed mobility services portfolio because of its focus on cybersecurity and its unified endpoint management services. Unisys offers a strong device management and mobility management suite encompassing mobile-based consulting, partnerships with leading vendors, and unified endpoint management. With its managed mobility services, Unisys manages around 1.4 million smartphones and laptops in the U.S.

**Strengths**

**U.S. managed mobility services:** For managed mobility services, Unisys largely caters to large enterprises and multinationals and has a major focus on the IT, telecommunications, and media industries.

**Services portfolio:** Unisys provides unified endpoint management services plus advisory and delivery services for PC and mobile management. It has a mobile center of excellence (CoE) that develops solutions to manage PCs as mobile devices. It has partnerships with leading EMM and IDAM vendors. Unisys' mobile enterprise management (MEM) services cover enterprise application integration, asset and expense management, and application containerization.

**Industry-specific mobility solutions:** Unisys has business-oriented mobility management offerings for many industries, including banking, healthcare, media, and the public sector. It provides mobile device management services to many clients in the U.S., including organizations in the healthcare and media industries.

**Caution**

Unisys' mobility services cover mobile device and secured access management. To stay competitive, Unisys should also include elements of digital experience design and mobility-effectiveness monitoring in its solution stack.

Unisys has a strong security and endpoint management services portfolio. It offers comprehensive managed services for enterprise clients irrespective of where they are in their mobility adoption journey.
Wipro has a strong portfolio for enabling mobility in enterprises and its significant partnerships within EMM space can help clients efficiently manage their enterprise mobility application and device landscape.

Wipro has strong capabilities in its managed mobility services portfolio; however, the scale of smart devices it manages is less than its closest competitor.

**Overview**

Wipro's managed mobile enterprise services include assisting enterprises with mobile environment strategy development, application and device security, increasing adoption and securing content. These services are underpinned by Wipro's mobile strategy consulting, partnerships and vertical solutions. Wipro manages approximately 1.6 million smartphones and laptops in the U.S.

**Strengths**

**M2TA:** Wipro recently introduced its M2TA framework that stands for Manage, Monitor, Transform, Absorb. It involves managing the client's existing mobility landscape and applications and monitoring application usage. It then suggests mobile-first, cognitive-enabled applications to be created and then absorbs commonly used apps within collaboration solutions like Teams and Slack.

**Design thinking in the services portfolio:** Wipro's managed services portfolio for mobile devices consists of consulting with a design thinking-led approach for mobile strategy development and device lifecycle management. Wipro partners with important IDAM, UEM and EMM technology vendors.

**Lifecycle and UX success stories:** Wipro has strong case studies from clients in the U.S. manufacturing, technology, retail, banking and utility industries. It has helped these clients in enabling their mobile workforces with device lifecycle and end-user experience management services.

**Caution**

Wipro has strong capabilities in its managed mobility services portfolio; however, the scale of smart devices it manages is less than its closest competitor.
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 accounts. This quadrant considers service providers that focus on the midmarket client, by offering digital workplace services around communication, collaboration and productivity tools. These service providers are typically support users of Microsoft Office suite and Google G Suite, and complementary collaboration tools such as Skype, Hangout and similar tools.

Managed services comprise IT service desk with level one (L1) and level two (L2) support, self-help, chatbots, e-mail management, service availability, collaboration support and consulting around security and cost management for cloud-based services. 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.
Eligibility Criteria

- Ability to offer highly automated service desk and workplace support services with minimal human agent requirements;
- Ability to offer services on a pay-as-you-go model to manage the entire workplace infrastructure;
- Ability to offer easily scalable and flexible service models;
- Must have considerable business coming from midmarket clients.

Observation

- HCL is successfully targeting the midmarket segment with its specialized FlexSpace offering.
- Unisys has a strong presence in the U.S. market and is targeting the midmarket for managed mobility services.
- Stefanini has strong experience in providing digital workplace services to the midmarket through its persona approach and device as a service offering.
- CSS Corp. offers an outcome-based approach specifically targeted for midmarket companies.
CSS CORP.

Overview

CSS Corp. is a U.S.-based managed service provider specializing in digital workplace services. It manages approximately 500,000 end users and 650,000 devices, including 30,000 mobile devices globally. Its digital workplace services solution is empowered by cognitive intelligence and contextual AI.

Strengths

EUCS platform: The CSS Corp. End User Computing Solution (EUCS) platform offers new-age service desk services through assisted channels (voice, chat, mail and digital) powered by self-help and self-serve. It can sit on clients’ ITSM tools and provide help on endpoint issues and service management.

Cognitive automation: At the back-end is the cognitive automation engine that works with customer (end user) data and generates outcomes based on cognitive customer experience. It includes micro-segmentation through natural language understanding (NLU) and context-driven information. It also supports deep learning based on user behavior and offers cognitive search based on sentiment analysis. CSS Corp. offers cognitive bots to provide information through conversations, and the Cotelligent machine learning platform that leverages RPA and context-aware information. These capabilities lead to automation as high as 50 percent.

Midmarket fit: Approximately 45 percent of CSS Corp.’s digital workplace services revenue comes from midmarket clients. It has achieved 83 percent growth in its number of U.S. midmarket clients. The company offers its platform-led approach plus outcome-based and performance-based pricing for cognitive support and automation projects. CSS Corp. lets midmarket clients pay per device mode. Clients can choose their platform elements and CSS Corp. will grow with them.

Caution

CSS Corp. can leverage cognitive automation to measure end users’ digital dexterity improvement and package it as an additional offering. This capability would be valuable for midmarket clients.
HCL understands the growing importance of midmarket clients and has developed dedicated offerings for the segment. Globally, 18 percent of HCL’s digital workplace services revenue comes from midmarket clients. Its midmarket client base grew by 20 percent in the U.S. and the company now manages approximately 96,000 end users in the segment.

**Strengths**

**Dedicated midmarket approach:** HCL offers a dedicated midmarket approach where it offers miniaturized versions of its productized offerings, like hosted OptiBot, Kaleidoscope Lite and WorkBlaze. HCL also offers tailored consulting on workplace productivity tool environments, for example, by letting clients stay on Google’s G Suite instead of migrating to the Microsoft environment.

**FlexSpace:** HCL offers the FlexSpace device-as-a-service solution, which includes experience-as-a-service (EaaS) functionality that provides clients a predictable price per seat, per month. FlexSpace takes care of complete device lifecycle management and HCL’s associated cognitive automation support and device management services. This opex-based model is well suited for a midmarket client.

**Additional offerings:** HCL also offering digital whiteboarding solutions for meetings and hot desking solutions to support midmarket clients.

**Caution**

HCL has impressive coverage in its midmarket client base, it could leverage its learnings in this segment and try implement them with its larger clients.
With its well-known automation capabilities and experience in managing workplace services, Stefanini is a preferred choice in the midmarket segment.

Stefanini delivers transformative digital workplace services in collaboration with its clients. Its client base consists of large midmarket companies and around 34 percent of its total digital workplace revenue comes from midmarket clients. Stefanini manages around 133,000 end users in the midmarket segment in the U.S.

**Strengths**

*Workplace anywhere:* Stefanini provides flexible workplace services to midmarket clients across diverse platforms. It also offers Sophie, a cognitive SaaS-based intelligent automation platform. Sophie is based on cognitive computing and provides self-adapting, interactive and contextual automation. These capabilities help to provide self-learning, human-like interaction plus self-healing automation capabilities. Stefanini also offers walk-up service kiosks with a custom storefront look to improve the user experience for service desk interactions.

*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.

*Innovative gainshare pricing model:* Stefanini has a gainshare pricing model where it offers an innovation-based transformation roadmap with measurable cost savings every quarter. It provides a cost savings calculator to clients and follows a 60-40 gainshare mode where 60 percent of cost savings are passed on to the client. This approach is favorable for midmarket clients looking for outcome-based outsourcing.

Midmarket clients should be cautious when adopting Stefanini’s gainshare model because successful implementation requires optimum adoption of transformation initiatives brought by Stefanini.
UNISYS

Overview
Unisys attributes 23 percent of its global digital workplace revenue to the midmarket and small business segment. It has 27 clients from this segment in the U.S. and manages more than 44,000 end users from these clients.

Strengths

Consumerized approach and ease of support: Unisys field support provides a consumerized approach toward IT support services. For example, its field support services provide an Uber-like experience for a technician visit. Unisys uses sentiment analysis and other technologies to better capture end user feedback and improve support.

Analytics to determine what to automate: Unisys conducts analysis to understand the best areas where analytics can be applied to enable automation. It segments end user IT processes based on their complexity and associated business outcomes, and determines which processes are the best candidates for automation. Unisys can leverage this approach to help midmarket companies determine IT process improvement areas.

Micro-personas for the gig economy: Unisys offers a micro-persona approach aimed at short-term and gig workers. It uses technology to make end user onboarding quicker through faster application and device deployment.

Caution
Unisys is often considered most suited for large-scale enterprises. Unisys offers technology adoption assistance such as organizational change management for enterprise clients, but it does not have enough examples of these services for mid-market segment.

2019 ISG Provider Lens™ Leader
Though Unisys is known for serving large clients, it does have considerable percentage of clients in the midmarket and smaller segments.
METHODOLOGY

The research study "ISG Provider Lens™ 2019-20 – Digital Workplace of the Future" analyzes the relevant software vendors/service providers in the U.S. 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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