# ISG Provider Lens™

## 2021

## Future of Work — Services and Solutions 2021

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Connecticut, ISG employs more than 1,300 professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.
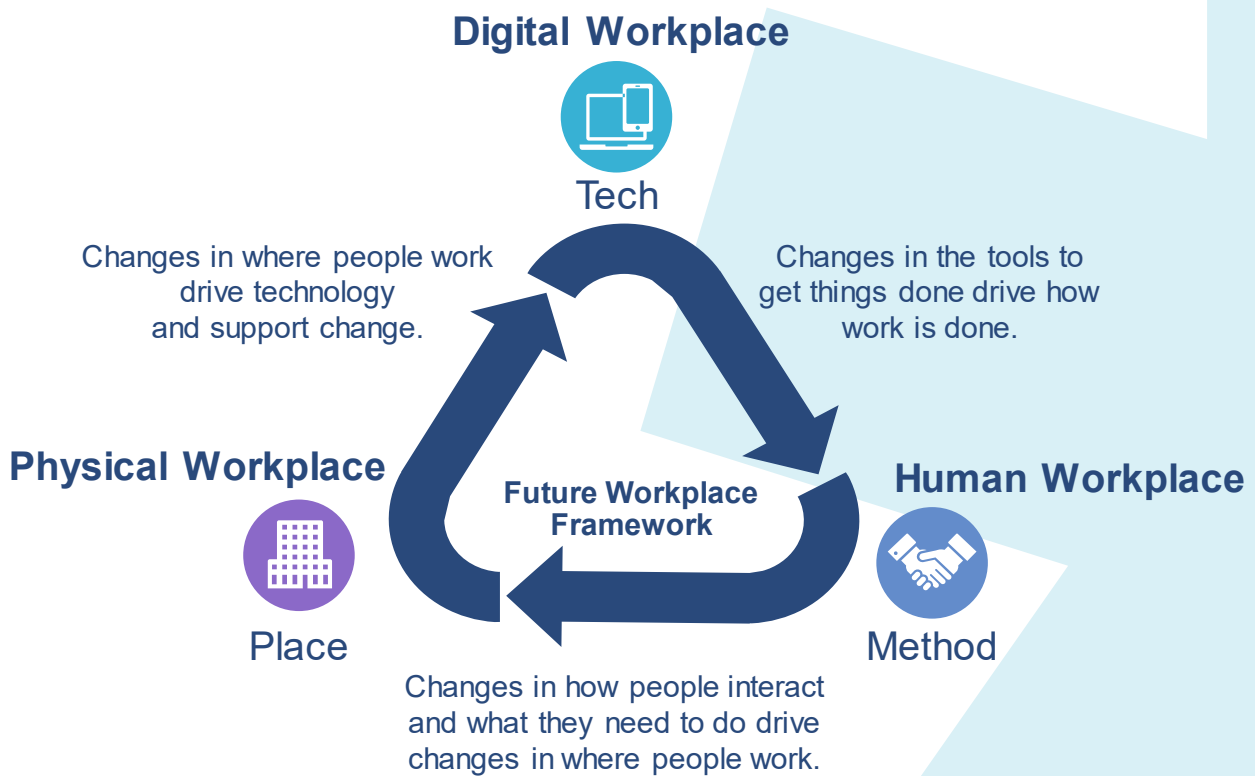
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# Definition

The COVID-19 pandemic has drastically changed the way people work. The shift to a remote-working model was expected in the coming years, but the crisis has accelerated its adoption at a significant pace. Enterprises that have changed their business culture and technological adoption due to the ongoing situation have learned to iterate, adapt and overcome. This has led to new ways of increasing both productivity and engagement for employees. While ISG had equated the term "future of work" with "digital workplace," the pandemic has led to an understanding that the future of work is more than just technology and support functions performed by enterprise IT functions. ISG's new Future Workplace framework comprises three workplace ecosystems, namely Digital Workplace, Physical Workplace and Human Workplace, as described in the following illustration:

Figure 1: ISG Future Workplace Framework



**Digital Workplace**

Tech

Changes in where people work drive technology and support change.

Changes in the tools to get things done drive how work is done.

**Physical Workplace**

Place

**Future Workplace Framework**

**Human Workplace**

Method

Changes in how people interact and what they need to do drive changes in where people work.

# Definition cont.

ISG believes that the future ways of working will involve not only enabling digital technologies for employees irrespective of their location but will also cover aspects of human empathy and will drive culture. Smart physical workplaces that ensure employee safety and well-being via mechanisms of tracking and checking the pandemic spread across workforces will also be an important aspect. This desired state of future workplace will differ and have specific nuances for different geographic regions, but the requirements will generally revolve around a few key themes. In each region, client expectations will involve establishing relationships with service providers that offer future workplace strategy transformation services such as cultural enablement and office-vs.-remote workforce planning. Clients will also partner with service providers that can manage and support the entire workplace technology ecosystem for remote employees, while also managing and measuring the experience of both in-office and remote workers. At a global level, the pandemic has led enterprises to invest in workplace technologies that can secure user identity, data and devices, provide unified collaboration and communication irrespective of location, and enhance digital dexterity and productivity. ISG expects this to continue in the coming years.

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 U.S., Germany, Switzerland, U.K., Nordics, Australia and Brazil.

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

# Quadrants Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following seven quadrants on Future of Work Services and Solutions:

Simplified illustration

## Future of Work — Services and Solutions

**Services**

Workplace Strategy Transformation Services*

Managed Digital Workplace Services*

Managed Employee Experience Services*

Managed Future of Work Services — Public Sector**

**Solutions**

Unified Endpoint Management

Unified Communications and Collaboration as a Service (UCCaaS)

Employee Engagement and Productivity

\* - to be segmented into SMB and large account quadrants for each country/region as applicable
\*\* - not for all countries and regions

Source: ISG 2021

# Workplace Strategy Transformation Services

This quadrant evaluates service providers that offer professional and transformation-oriented consulting for the future of work. These providers offer workplace strategy formulation, design the post-pandemic workplace architecture and help create roadmaps for the required transformation. These services are an essential part of digital workplace offerings and are offered independently of the associated technology and managed services. These providers also assist clients in transforming their business and operating model and enable the desired organizational changes.

**Eligibility criteria:**

- Ability to provide consulting and workplace assessment services that are independent of the associated managed services and offer a vendor-neutral approach for assessing the best technology partner;

- Define and visualize the post-pandemic workplace environment, covering areas such as workforce segmentation into remote and in-office workers, uberization of the workforce, innovative talent models and cultural adoption, while also enhancing end-user experience;

- Provide technology adoption and change management services in the consulting portfolio;

- Provide solutions to address employee empathy and well-being is a plus.

For inclusion in the mid-market/SMB quadrants in this space, providers should be able to offer all the above for that market and have at least 50 percent clients from this market. (The size of mid-market/SMB business is different for each of the regions in scope and will be explicitly mentioned in the questionnaire.)

# Managed Digital Workplace Services

This quadrant assesses service providers that offer end-to-end managed services, including workplace support, desktop engineering, managed mobility services and virtualized workspaces. Providers assessed in this space offer complete end-user computing (EUC) services that form the core of the digital workplace. Their services provide the ability to work from anywhere/anytime, device support, including automated proactive technical support and cloud platforms to provision always-on systems. They leverage artificial intelligence (AI)/cognitive technologies for end-user facing tasks and help achieve significant cost savings.

**Eligibility criteria:**

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents;

- Offer on-site field support and in-person technical assistance;

- Set up and support self-help kiosks, tech-bars, IT vending machines and digital lockers;

- Offer managed services for collaboration and communication over diverse platforms;

- Provide device support, predictive analytics and proactive monitoring services;

- Demonstrate experience in providing remote virtual desktop services, both on-premises and on cloud;

- Offer managed mobility services in the respective countries with at least 25 percent of the devices managed outside the home region;

- Offering complete device lifecycle managed services is a plus, covering device sourcing and logistics, device-as-a-service (DaaS) for device security, support for unified endpoint management (UEM) and mobility program management;

- Provide implementation and support for enterprise mobility, support for bring-your-own-device (BYOD), mobility expense and asset management.

For the mid-market/SMB quadrant in this space, providers should offer all the above for this market and have at least 50 percent clients from this market. (The size of mid-market/SMB business is different for each of the regions in scope and will be explicitly mentioned in the questionnaire.)

# Managed Employee Experience Services

This quadrant assesses providers that offer value-added managed services not only for enabling the workplace technology ecosystem but also for enhancing the end-user experience. These providers typically deal with business leaders and line-of-business representatives in addition to the CIO office. They offer services that associate employee experience with measurable business results. Their services help align the digital and physical facets of the future workplace with the human aspect.

**Eligibility criteria:**

- Ability to provide services that directly correspond to user experience associated with device and app access, as well as team collaboration, human augmentation with digital workforce, line of business (LoB) employee experience, user productivity and digital dexterity;

- Offer a seamless experience for remote-working employees and part-time workers as well as provide work-from-home support and innovative engagement services/solutions for the respective country/region;

- Should have a sizeable client base in the respective country/region with experience-level agreement (XLA) engagements that span beyond IT enablement;

- Provide managed unified communications and collaboration (UCC), analysis of user behavior and measurement of user experience beyond workplace technology, extending smart workplace services to other business functions such as HRO and operations;

- Offer workplace services that permeate businesses, including smart user and context-specific access through virtualized workspaces;

- Offer smart facilities services, physical workspaces with services to ensure COVID-appropriate behavior and tracking.

For inclusion in the mid-market/ SMB quadrant in this space, providers should offer all the above for this market and should have at least 50 percent clients from the same. (The size of mid-market/SMB business is different for each of the regions in scope and will be explicitly mentioned in the questionnaire.)

# Managed Future of Work Services − Public Sector

This quadrant assesses providers that have experience in managed workplace services for public sector clients. The requirements of clients in this segment are different from those of commercial enterprises. These clients tend to be more conservative while complying with regulations and security requirements. The service provider should offer security over devices, applications and user identity, which are paramount for public sector clients. The pandemic has pushed public sector clients to accelerate their adoption of public cloud and digital workplace services. Some of these clients across regions could not implement mass remote working due to regulation restrictions or lack or resources. For a public sector client, transforming and managing workplace services while maintaining credibility and ensuring employee experience are critical.

**Eligibility criteria:**

- Demonstrate experience with public sector clients in the respective region/country; should have active clients from this sector or historic client engagements not spanning over two years;

- Provide device lifecycle management and device support services for public sector client employees along with managed mobility services;

- Provide secure digital workplace services, services desk, modern support and field support services while complying with regulation and security requirements;

- Demonstrate experience in supporting public sector clients with modern workplace technologies such as cloud-based virtual desktop infrastructure (VDI), enterprise mobility, BYOD enablement, identity access and content management;

- Provide transparency in demonstrating compliance with country regulations, with credentials for participating in public sector bidding processes;

- Have experience in complex procurement processes for public sector clients, providing assistance for change management, improving employee experience, developing technology frameworks and providing training for IT staff.

*- This quadrant will be covered for the U.S. region

## Unified Endpoint Management

This quadrant assesses software solution vendors that provide standalone unified endpoint management (UEM) software solutions. These solutions help enterprises to manage smartphones, tablets laptops, PCs and smart devices. A UEM solution should primarily provide full enterprise mobility management (EMM), covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM), along with a unified approach for managing devices through a single console. It should support both on-premise and cloud deployments, remotely manage and configure devices, and provide application and device analytics. It should also offer mobile security, endpoint security, user identity and access security and PC/ desktop management integration.

**Eligibility criteria:**

- Ability to offer an independent software solution for UEM that can be purchased separately;

- Software solution to provide MDM, EMM, MCM, MAM, secure user access and profile management;

- Solution to integrate with systems managers such as Microsoft endpoint configuration manager and manage devices from different platforms;

- Manage devices with diverse OS environment such as Windows 10, Android, macOS, Chrome OS and Samsung Knox;

- Measure end-user experience through the usage of analytics on device, app usage and user behavior;

- Provide integration with enterprise security and user policies through identity access features and endpoint security.

*This quadrant will be covered at a global level. However, data will be collected for the purpose of evaluating major regions for the ISG CPQ process.

## Unified Communications and Collaboration as a Service

This quadrant assesses providers of unified communication as a service (UCCaaS) solutions. UCCaaS is a cloud-based delivery model that provides business communication and collaboration systems across multiple channels and devices. It combines voice and telephony, enterprise messaging, online meetings (web, video and audio), and team collaboration and presence on a single integrated cloud platform. It can be accessed from any device such as desktops, laptops, tablets or mobile phones. The model enables businesses and IT departments to cut costs and achieve greater scalability, security and reliability.

UCCaaS solutions enable online communication and interaction by combining messaging, content sharing, and audio and video meetings. These solutions often follow protocols to protect information online through encryption and compliance to internationally accepted security and privacy standards.

**Eligibility criteria:**

- Ability to provide cloud-based solutions for audio/video meeting and conferencing; solutions may also have an on-premises deployment option;

- Provide softphone capabilities or private branch exchange (PBX) telephony integration, built-in voice over Internet protocol (VoIP) and toll-based audio calling options;

- Allow video conference hosts to access moderator controls, invite guests to meetings and integrate with conference room systems;

- Offer features such as chat, remote access and desktop and application sharing;

- Enable integration with enterprise applications such as customer relationship management (CRM) and marketing;

- Provide meeting recording, replaying and sharing capabilities for future references and integrate drawing tools with virtual whiteboard capabilities;

- Support different endpoints, from room systems to personal computers, laptops, smartphones and tablets;

- Offer in-built collaboration features and enable integration with supporting collaboration solutions such as enterprise file sync share.

* This quadrant will be covered at a global level. However, data will be collected for the purpose of evaluating major regions for the ISG CPQ process.

## Employee Engagement and Productivity Solutions

This quadrant assesses software solutions that enhance user productivity and employee engagements. The solutions include, but are not limited to, enterprise social networks, next-generation intranet solutions, business communications, and team and content-centric collaborations. They can also extend to providing groupware, knowledge management, email, conferencing, activity streams, microblogging, and talent and skills management. These software solutions offer productivity enhancements for end users, offering them new and improved ways of communicating with peers along with continuous enhancements to the enterprise knowledge base. They ensure that employees in a team or a project are connected irrespective of the device or location. The solutions can also offer communication/meeting conferencing features included or through their own company offerings and/or can integrate with leading UCCaaS solutions. The objective is to enhance employee engagement and business communication, which also contributes towards improving user productivity and digital dexterity. These cloud-based software solutions can be leveraged by both mid-sized and large enterprises.

**Eligibility criteria:**

- Ability to reduce email usage and/or complement intranet usage;

- Demonstrate a focus on enterprise-wide information sharing and team/content-based collaboration;

- Provide technology differentiation with a focus on measurable productivity enhancement;

- Cover elements in a converged service stack of enterprise social collaboration offering such as file sharing collaboration, instant messaging, news feed, enterprise application integrations, reporting and analytics;

- Offer standard features such as blog support, calendars, discussion forums, document management, employee directory, employee engagement, wiki support and workflow customization and approval;

- Solution to offer enhanced employee engagement and effective business communication;

- Solution to be often the first entry point for the entire digital workspace.

* This quadrant will be covered at a global level. However, data will be collected for the purpose of evaluating major regions for the ISG CPQ process.

# Quadrants by Region

| Quadrant | Global | U.S. | Germany | Switzerland | Nordics | U.K. | Australia | Brazil |
|---|---|---|---|---|---|---|---|---|
| Workplace Strategy Transformation Services | | √ | √ | √ | √ | √ | √ | √ |
| Managed Digital Workplace Services | | √ | √ | √ | √ | √ | √ | √ |
| Managed Employee Experience Services | | √ | √ | √ | √ | √ | √ | √ |
| Managed Future Work Services – Public Sector | | √ | | | | | | |
| Unified Endpoint Management | √ | | | | | | | |
| Unified Communications and Collaboration as a Service | √ | | | | | | | |
| Employee Engagement and Productivity | √ | | | | | | | |

# Archetype Report

In this report, ISG identifies and classifies the typical buyers of digital workplace of future services, which now also include transformational capabilities. Enterprises that are aspiring to transform their workplace environments exhibit different characteristics according to their digital maturity. Based on the workplace environment complexity and level of enterprise IT integration with businesses, ISG will classify enterprise behavior into different archetypes around workplace transformation.

- An example of this classification is illustrated below:

- **Cost and operations optimizers (the friends of CIOs):** These clients seek benefits such as cost savings and operational efficiencies while applying cutting-edge technologies within workplace transformation.

- **Employee experience explorers (the XLA experimenters):** Clients in this archetype are focused on enhancing the experience of end users through technology usage.

- **Collaboration productivity solution focused (the ones that focus on employee skills):** Clients in this archetype define their digital workplace through the usage of modern productivity collaboration and communication solutions.

- **Next-gen workplace archetype (the office and factory goers):** These clients would continue to have an office presence for their employees instead of adopting a remote-working model.

# Schedule

The research phase falls in the period between **May and June 2021**, during which the survey, evaluation, analysis and validation will take place. The results will be presented to the media in **October 2021.**

| Milestones | Beginning | End |
|---|---|---|
| Launch | May 18, 2021 | |
| Survey Phase | May 18, 2021 | June 25, 2021 |
| Sneak Preview | August 2021 | |
| Press Release | October 2021 | |

Please refer to the link to view/download the ISG Provider Lens™ 2021 research agenda:

**Access to Online Portal**

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation.

**Research production disclaimer:**

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

# Partial list of companies being invited for the survey

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

| | | |
|---|---|---|
| 247meeting | Avaya | Compasso UOL |
| 2nd Watch | Axians IT Solutions GmbH | CompuCom |
| 3CX | Baramundi | Computacenter |
| 3Step IT | Basefarm | COYO |
| 42Gears | Bechtle | Crayon |
| 8x8 | Bell Technologix | CSS Corp |
| Abraxas Informatik | BigMarker | d.velop |
| Accelerite | BitHawk | Damovo Deutschland GmbH & Co. KG |
| Accenture | Bitrix 24 | Decision One |
| Acquia | BlackBerry | Deloitte |
| AdEPT | Blackboard | Deutsche Telekom / T-Systems |
| Adobe CONNECT | BlueJeans | Devoteam Alegri |
| Advania | Brainloop | Digital Workplace Group |
| Alcatel-Lucent | BTC AG | DMI |
| Alest Consultoria | CA Technologies | Dropbox |
| Algar Tech | Campana & Schott | DXC |
| AppSphere AG | Cancom | Econis |
| AppTec 360 | Capgemini | Elisa Oyj |
| Arkadin | CDW | EmpowerPoints |
| Arvato Systems | CGI | Enfo |
| AT&T | Cisco | Enghouse Interactive |
| Atea | Citrix | Enghouse Systems |
| Atlassian | Clearbox | Ericsson |
| ATOS | Coforge | Euvic |
| Avanade | Cognizant | |

| | | |
|---|---|---|
| Evolve IP | ITPoint | NetApp |
| ezTalks | Ivanti | Nextiva |
| Flock | Jalios | NNIT |
| fme AG | Jamf | NTT DATA |
| FreeConference.com by Iotum | Jitsi | Okta |
| Fujitsu | Jive | OneNeck IT Services |
| Fuze | Jostle | Oracle Communications |
| G&P | Just Software AG | Orange Business Services |
| GAVS | Liferay | Pegasystems |
| Getronics | Lifesize | Penso Tecnologia |
| GISA GmbH | Livetiles | Pexip |
| Google | Logicalis | PGi |
| HCL | LogMeIn | Poly |
| Hexaware | Long View Systems | Pomeroy |
| Highfive | LoopUp | Proact |
| Huddle | LTI | PROFI AG |
| IBM | Lumen Technologies | Proficonf |
| Igloo | ManageEngine | Quality |
| Ilegra | MangoApps | Redcentric Solutions Limited |
| Infosys | Matrix42 | Requestia |
| Innofactor | Microland | Ricoh |
| Insight | Microsoft | RingCentral |
| Interact Software | Mitel | Rocket.Chat |
| Intermedia | Mobileiron | RTCLab |
| Iomart Group PLC | Mphasis | Ryver |
| IPsense | MTF Schweiz | SAIC |
| Itadel | MULTIEDRO | Salesforce |
| ITC Infotech | Natilik Limited | SantoDigital |

SAP

Servent Ltd

ServiceNow

Slack

Smarp

Snow Software

Sococo

Softtek

SoftwareOne

SONDA

Sopra Steria

SOTI

Star2Star Communications

StarLeaf

Stefanini

Syntax

TCS

TDC Group

TeamViewer

Tech Mahindra

Techstep

TECJUMP

Tecnocomp

TEKsystems

Telefonica Brasil

Telenor

Telia

Telstra

TietoEVRY

TIVIT

T-Systems Multimedia Solutions (MMS)

UberConference

Unily

Unisys

United Planet

UST

Venha pra Nuvem

Vexia

Visolit

VMware

Vodafone

VoipSwitch

Vonage

VoxMobile

Whereby

Windstream Communications

Wipro

WITTEL

Workday

Workplace from Facebook

Yash technologies

ZALTS

Zensar

Zimbra Collaboration

Zoho

Zoom

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**Do you need any further information?**

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.
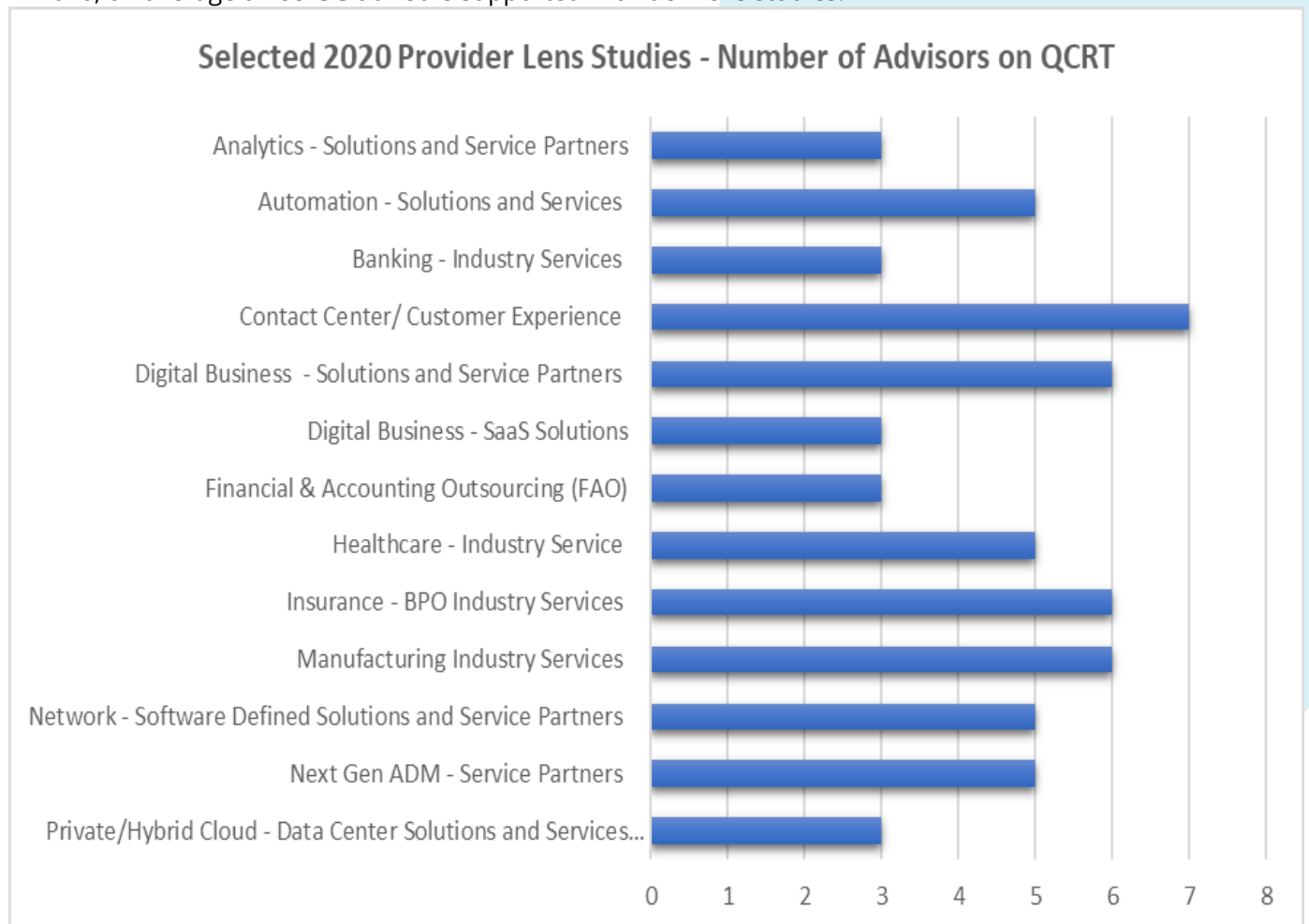
# ISG Provider Lens QCRT Program Description

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.
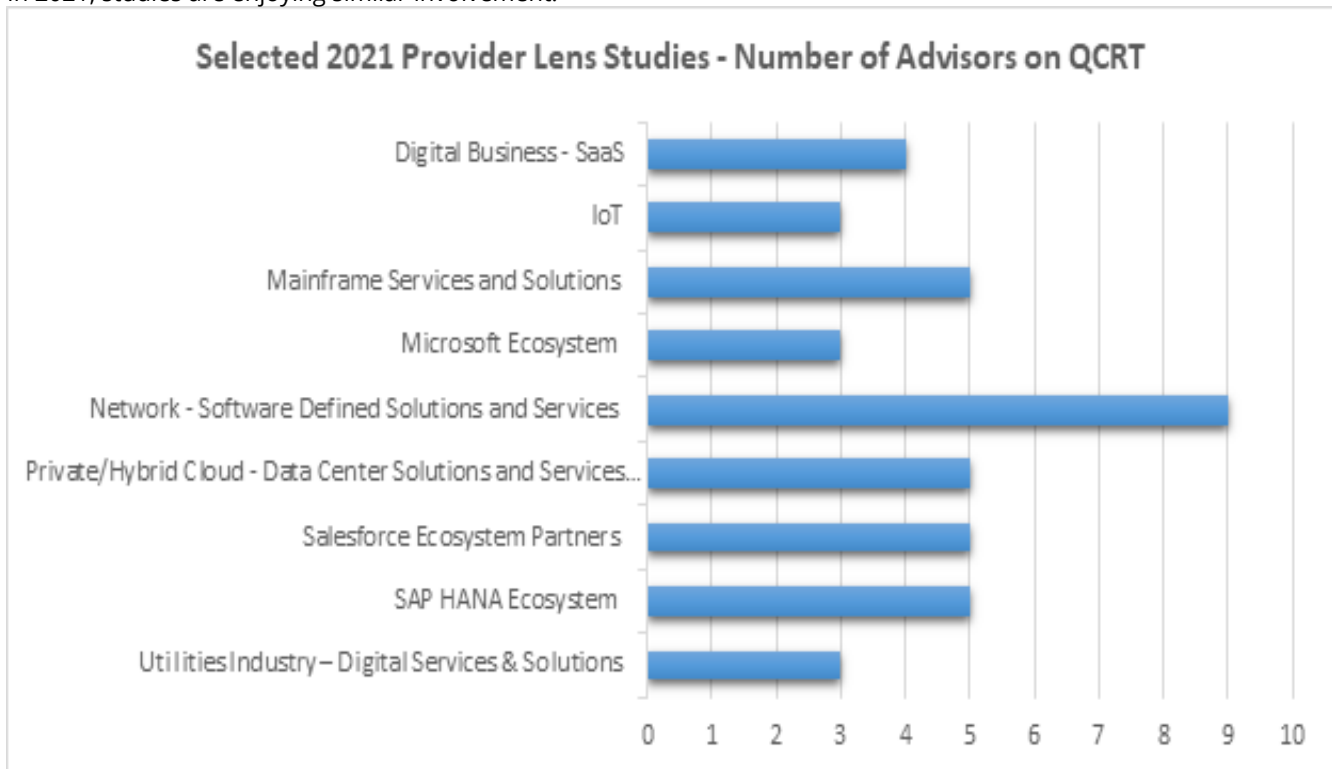
The QCRT advisors:

- help define and validate quadrants and questionnaires,

- advise on service providers inclusion, participate in briefing calls,

- give their perspectives on service provider ratings and review report drafts.

In 2020, on average three ISG advisors supported Provider Lens studies.



### Selected 2020 Provider Lens Studies - Number of Advisors on QCRT

| Study | Number of Advisors |
|---|---|
| Analytics - Solutions and Service Partners | 3 |
| Automation - Solutions and Services | 5 |
| Banking - Industry Services | 3 |
| Contact Center/ Customer Experience | 7 |
| Digital Business - Solutions and Service Partners | 6 |
| Digital Business - SaaS Solutions | 3 |
| Financial & Accounting Outsourcing (FAO) | 3 |
| Healthcare - Industry Service | 5 |
| Insurance - BPO Industry Services | 6 |
| Manufacturing Industry Services | 6 |
| Network - Software Defined Solutions and Service Partners | 5 |
| Next Gen ADM - Service Partners | 5 |
| Private/Hybrid Cloud - Data Center Solutions and Services... | 3 |

Source: ISG Research

In 2021, studies are enjoying similar involvement.



Source: ISG Research

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

# Quality & Consistency Review Team for this study



Jim Kane
Director, Americas