



***ISG** Provider Lens™

2021

ServiceNow Ecosystem
Partners 2021

imagine your future®

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Definition

The ServiceNow Ecosystem Partners 2021 study examines the extensive, global but complex partner network of one of the leading workflow-enabled service management software solutions. The broad acceptance of ServiceNow's product offerings from the user community has led to an exponential growth. Professional services are required for end-users to fully utilize the broad functionality all the way from process (re-)design through software implementation and integration to application management services and training. Various offerings and certification levels indicate the focus of different partner companies ranging from full-scale lifecycle support to laser-focused services for extremely specific tasks.

ISG Provider Lens ServiceNow Ecosystem Partners 2021 study analyzes the services and offers of ServiceNow partners in the U.S., Brazil and Germany, in selected segments. The findings from the analysis help assess the service providers operating in the defined segments with regard to the strength of their portfolio and their competitiveness in the market.

The ISG Provider Lens™ study offers the following to the information technology (IT) decision-makers:

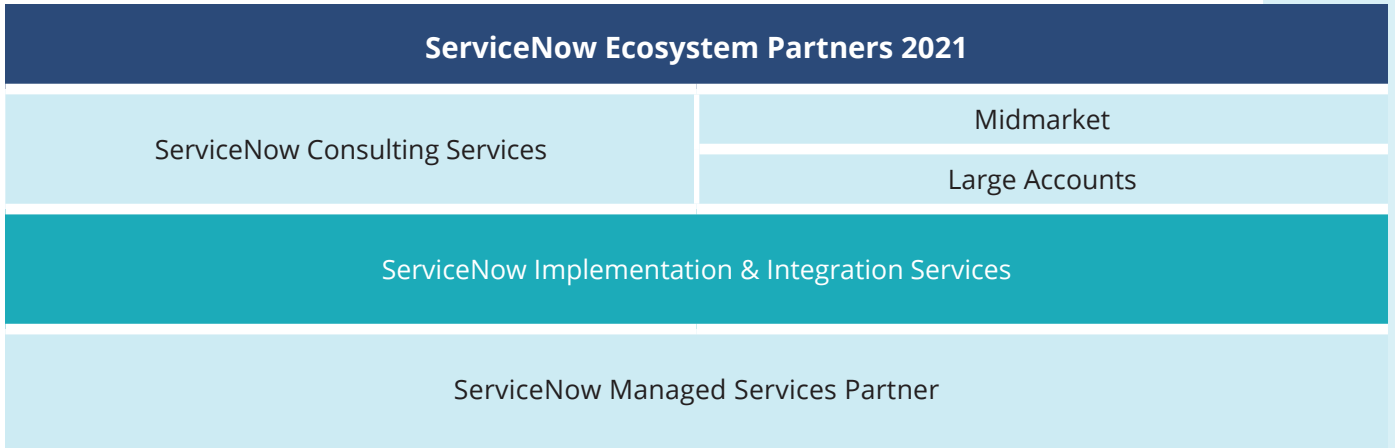
- Transparency of the strengths and weaknesses of relevant providers
- Differentiated positioning of providers by segments
- A perspective on different markets, including the U.S., Brazil and Germany

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

Quadrants Research

As part of the ISG Provider Lens™ quadrant study, we are introducing the following four segments on the ServiceNow Ecosystem Partners 2021 market:

Simplified illustration



Source: ISG 2020

Definition of segments

ServiceNow Consulting Services

This segment addresses the providers of consulting services that help customers prepare for the use of workflow-driven service management. While reference models and assessments are key to understand the client's maturity and prevailing challenges, a broad understanding of the technical capabilities at present and in the future help differentiate the partners. Helping clients understand what transformational efforts have to be made to use the investment made into ServiceNow and delivering a robust migration path distinguish consultants from one another.

This quadrant is split into partners that address midmarket clients and the partners that work with enterprise clients. We will parallelly analyze the maturity, requirements and budgets that vary heavily between these two market segments.

Main evaluation criteria for this segment are as follows:

- Use of reference models and templates
- Experience in broader workflow and service management design
- Capabilities to predict long-term technology developments
- Knowledge about ServiceNow capabilities and other available tools for broader enterprise service management
- Knowledge about workflows and processes within enterprise services supported by ServiceNow
- Certifications with standard bodies
- Experience with organizational change principles

ServiceNow Implementation and Integration Services

This segment addresses the providers that are highly specialized in implementing ServiceNow. As ServiceNow's solutions do not run in isolation in most companies, knowledge of integration with different software tools is an essential differentiating factor. Although the experience of the service providers is supposed to make installation and integration as problem-free as possible, they should also further focus on ensuring the maintainability of the installed solution.

Main evaluation criteria for this segment are as follows:

- Broad technical experience of tools in scope
- Use of predefined solutions, accelerators and templates
- Experience with emerging technologies such as machine learning (ML), natural language processing (NLP) and artificial intelligence (AI) paired with cognitive computing
- Experience in system, data and process integration
- Knowledge about specifics in enterprise-shared services
- Approach to ensure maintainability of installations

ServiceNow Managed Services Providers

The assessment in this quadrant covers the capability of providers to offer managed services for maintenance and support functions, which include monitoring, remote support and centralized management of the Now Platform, the workflows as well as the applications that run on this platform. Maintenance, data quality management, data security and compliance-related aspects are considered when analyzing the different providers in this segment. Due to the complexity of workflows that need to be supported, providers have to deliver services in the context of global reach and cross-organizational usage. The service providers not only have to support a highly sophisticated and integrated application landscape, but also have to prove how they operate or integrate in a multivendor environment.

Main evaluation criteria for this segment are as follows:

- Experience with support for ServiceNow's Now Platform, the workflows and third party applications
- Delivery capabilities with proximity to customers
- Existing technology partnerships with key software providers
- Breadth of application management services (AMS)-related service portfolio
- Service integration and management (SIAM) approach and delivery models
- Maturity of delivery and contract models
- Broad customer base
- Local use cases and references

In addition to the criteria mentioned above, the following evaluation criteria apply to all the segments:

- Unique differentiators
- Economic stability
- Market position

Quadrants by Region

Quadrants	U.S.	Brazil	Germany
ServiceNow Consulting Services	√	√	√
ServiceNow Implementation and Integration Services	√	√	√
ServiceNow Managed Services Providers	√	√	√

Schedule

The research phase is between **November 2020 and December 2020**, during which survey, evaluation, analysis and validation will take place. A presentation of the results to the media is planned for February / March 2021.

We will roll out the survey on an online platform. The invites will be sent with links for you to fill in the responses and submit.

Milestones	Beginning	End
Launch	Nov 9, 2020	
Survey Phase	Nov 9, 2020	Dec 2, 2020
Sneak Preview	Dec 2020	
Press Release	Feb 2021	

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!

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2021 research agenda:

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 the work identified by 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 produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the 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 a relevant provider that is missing in the list?

Then feel free to contact us to ensure your active participation in the research phase.

Accenture	Concurrency, Inc.
Acorio	ConfigureTek
Advance Solutions Corporation	Contender Solutions
Aeritae	Coreio
agineo GmbH (subsidiary of Materna)	Covestic, Inc.
AHEAD, Inc.	Crayon
Alcor Solutions Inc.	Creative Systems and Consulting, LLC
Alparservice Tecnologia Ltda	Crossfuze
Aoop Cloud Solutions	Deloitte
Atos International	DEVOTEAM
BitKnights	direkt gruppe GmbH
Booz Allen Hamilton Inc.	DO IT WISE
Bravium Consulting Inc.	DXC Technology
BusinessNow P/S	Ernst and Young LLP
CAI (Computer Aid, Inc.)	Evergreen Systems
Capgemini	Exccon AG
Cask, LLC	Fishbone Analytics Inc.
CDW Logistics, Inc.	Fujitsu Services
Cerna Solutions	FX INNOVATION
Clientfocus GmbH	GlideFast Consulting LLC
CloudPires LLC	Globalweb data services
Cognizant Technology Solutions	Globant
CompuCom Systems	HCL Technologies Ltd.
Computacenter	Hexaware Technologies Inc
Computer Design & Integration, LLC (CDI)	HGC Technologies

Highmetric
Hitachi Solutions, Ltd.
IBM
Incentive Technology Group (ITG)
InfoBeans
Infosys
INMORPHIS SERVICES PRIVATE LIMITED
INRY (IntegRhythm Inc.)
InSource Inc
Intellibliss
ITSM Group
ISM
ITS Partners
Kloves Inc.
KPMG
Larsen & Toubro Infotech Limited (LTI)
Logicalis, Inc
Maryville Consulting Group
Media Solutions GmbH
Mercer
MobiChord, LLC
Ness Digital Engineering (FKA Linium)
NTT DATA
nuvolax
Nuvolo

Pathways Consulting Group
Pharicode LLC
Planhorizon GmbH
Plat4mation BV
ProV International, Inc
Quint Technology
Serviceberry Technologies Pvt Ltd
Silpion ITSM
SilverStorm Solutions SL
SoftwareONE
SOLVvision GmbH
Spencer Thomas Group (STG)
Stefanini
SuMO IT Solutions Inc.
SVA
syscovery Solve & Serve GmbH
TCS
Tech Mahindra
Trianz
T-Systems International GmbH
Unisys Corporation
Volteo
Wipro Limited
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