ISG Provider Lens™

Digital Workplace of the Future – Services & Solutions

Managed Workplace and Mobility Services – Midmarket

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

October 2020

Customized report courtesy of:

HEXAWARE

About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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 October 2020, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The lead author for this report is Mrinal Rai and the co-author is Rahul Basu. The editor is Ambrosia Sabrina and Stephen Lawson. The research analyst is Rahul Basu and the data analyst Bhanwar Chauhan. The enterprise context and global overview analyst is Rahul Basu. The Quality and Consistency Advisor is Dr. Linda Delbridge.

ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under ISG Provider Lens™.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.

1 Executive Summary
6 Introduction
19 Managed Workplace and Mobility Services – Midmarket
22 Methodology

EXECUTIVE SUMMARY

Pandemic-Driven Accelerated Workplace Technology Adoption by U.S. Clients

The COVID-19 pandemic has affected and challenged U.S. clients in multiple ways. The most apparent, immediate and explicit impact may be that it has suddenly forced many of them to accept and facilitate remote working. Enterprises across the country were making progress in the journey toward enabling a digital workplace, and they were all at different stages of maturity in terms of enabling automation and focusing on managing the employee experience. The pandemic has accelerated these moves, and clients are undertaking many digital workplace transformation initiatives that otherwise would have taken many years. From the workplace technologies side, this is an exciting and challenging time. Changing working models and modern remote work require technology to further improve and innovate like never before, and at a high pace. For service providers implementing and managing such technologies, the times couldn't be more challenging, as they need to accelerate their workplace transformation initiatives, customize the technologies to unique business needs and maintain focus on employee engagement.

While there has been a lot of focus on managing the current remote working challenges, U.S. clients are also looking up to their technology and service partners to ensure that solutions and services take into account the future "new normal" way of working. It is now generally accepted that we may never go back to the old ways of working: A high number of clients are considering allowing more than 45 percent of their workforce to permanently work from home. This would require different technology outlooks for workers on campus, in offices and at home.

This year's ISG Provider Lens report for Digital Workplace of the Future compares service providers and vendors for their solutions and services during these difficult times and positions them based on their current portfolios and their outlooks on the future. This report compares vendors and service providers across different quadrants that represent key workplace areas where COVID-19 has led to significant changes and development.

Digital Workplace Consulting:

- ISG has been comparing service providers that offer workplace advisory and consulting around digital transformation for many years now, even though workplace consulting was usually seen as a part of managed and implementation services and not a separate offering. The pandemic has ensured that consulting is always an integral part of workplace transformation and that clients always need proper guidance before attempting any technology adoption or business process change that could affect employee experience. Clients are looking for service partners that can provide consulting catered to their business processes, industry and changing customer and employee expectations in the remote working world.

- Technology adoption has become a key element in the time of COVID-19. Previously, clients would adopt new technologies at their own pace. The pandemic and the resulting remote work culture have elevated the importance of such initiatives, and clients need to make sure they implement the proper work culture and associated change management to make the best use of technologies for business outcomes
- Perhaps for the first time, workplace technology transformation initiatives are being seen as closely tied to visible business benefits. Many workplace service providers and global system integrators were developing their offerings to be able to measure employee experience with workplace technologies and quantify their abilities to influence the experience. The resulting key performance indicators (KPIs) would translate into managed services contracts commonly known as experience level agreements (XLAs). The XLA approach requires significant focus on prior consulting to determine key parameters that need to be part of the XLAs.

Managed Workplace Services

- Service providers have been working with clients to help them adopt automated solutions to reduce incident tickets through technologies such as artificial intelligence (AI) and machine learning (ML). However, the level of adoption and implementation was not uniform throughout their client base. Because of the pandemic, end users cannot go to a tech café or support center and get in-person support. Neither can there be too much reliance on phone-based support, given high call volume from large users as everyone is working from home. The use of the latest technologies ensures employees perform self-help and tickets get automatically resolved so there is no interruption for the end user
- There are many KPIs that may be used in XLA-based contracts, ranging from enabling self-help to measuring users' digital dexterity. In the current pandemic times, providers can extract the most important and most relevant KPIs for their clients based on their business and industry requirements. Client IT organizations are also beginning to understand the XLAs and are ready to implement some.
- Many service providers have developed miniaturized versions of their comprehensive service offerings to help clients quickly adopt them to enable remote work. Service providers have been able to offer quick customization of their capabilities to rapidly enable and manage remote working.
- There has been a strong focus on Microsoft 365 solutions that include Microsoft's widely used office productivity suite, Windows 10 operating system and unified endpoint management solution. As it is easier to quickly integrate and upgrade within an existing Microsoft environment, multiple service providers have developed similar offerings for managed services around these technologies.

Managed Mobility Services

- With the pandemic, clients in the U.S. had to equip their large workforces to perform with minimal or no disruption. This included both devices and apps required by the end users. In addition to traditional computing devices such as PCs and laptops, clients also require managing multiple smartphones they issue to employees. In many cases where clients had logistical issues in sending devices to employees' homes, they had to let employees work on their own personal devices and needed to ensure that access to apps and data was secured and managed without compromising the user experience.
- There has been a strong demand for and focus on the device-as-a-service model, where the service provider manages the entire device lifecycle. This involves providing users with devices at their own location and letting them enroll the devices in the enterprise device management system, which could be an enterprise mobility or a unified endpoint management solution. This model manages the entire device lifecycle from procurement to retirement and provides an opex- based operating model that is quite flexible for clients.
- After many years of anticipation, 2020 finally proved to be "the year of virtual desktop infrastructure (VDI)" where clients are adopting virtualized desktops at scale to enable their mobile and remote workforces. There has been less focus on on-premise VDI and more on the cloud-hosted virtual desktop solution also known as desktop-as-a-service (DaaS) (Not to be confused with device-as-a-service.). Microsoft's Windows Virtual Desktop (WVD), released late last year, proved to be the most sought-after solution by clients for enabling this technology.
- Predictive analytics and device/app health monitoring solutions are in high demand, as they can ensure end users don't face challenges in remote working and there is no dip in employee experience. Device management usually forms a key aspect of XLA KPIs.

Unified Endpoint Management

- While UEM solutions are designed for managing all kinds of devices that employees of an enterprise use through a single pane of glass, we have seen U.S. clients mostly interested in co-management functionality, where they can manage both legacy client management tools (CMTs) such as Microsoft Endpoint Configuration Manager (earlier known as Microsoft System Configuration Manager or MSCCM) and modern mobility management tools . However, with COVID-19, there has been an accelerated shift towards modern management.
- UEM solutions are highly focused on secure access and increasing mobile security capabilities by implementing related technologies such as zero-trust mobile threat defense (MTD). As employees work from home, the threat of security breaches is paramount at both the data and the device level.
- UEM solutions are also extending their security capabilities at the application development level by providing protection for software development kits (SDKs). The solutions also provide app-wrapping and containerization to ensure workplace apps and data are protected regardless what device or network employees use.

- There has been some increased focus on the use of AI and ML technologies to enhance threat detection and incident prevention. AI can be used to assess user behavior to preempt a breach and ensure safety.

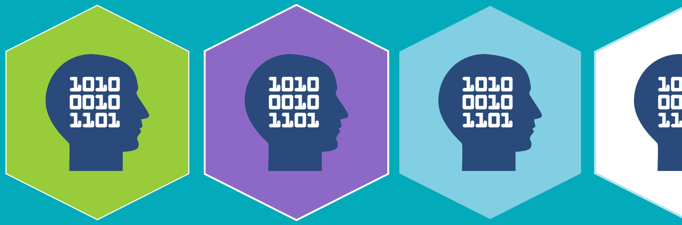
Enterprise Collaboration Solutions

- Clients in the U.S. distinguish enterprise collaboration from the traditional unified communication and collaboration (UCC) space that also includes solutions that provide meeting and conferencing capabilities. These solutions focus on enabling collaboration around teams and content collaboration can also provide task and project management capabilities.
- In the pandemic times, clients initially preferred to get the most out of their existing productivity suite solutions, which usually include email, productivity, meeting, file storage, intranet and chat apps to provide collaboration. While this worked for some, others had to invest in another solution for the collaboration they needed. Among those who didn't invest in a third-party solution, Microsoft Teams emerged as the single most widely used solution.
- Clients are looking for collaboration solutions that can be adopted quickly, require less training, ensure a high level of engagement and provide visible business benefits. Many popular and widely used solutions may fail to excel in all these areas. Though clients understand that it is not just the tool but the underlying company culture that enables collaboration, unfortunately, the pandemic has reduced the scope to the tool.
- Collaboration solutions have come to the forefront of the workplace technology ecosystem and can determine the effectiveness of remote working technology. Successful clients ensure optimal utilization of these solutions and innovative approaches to enhance user productivity and digital dexterity.

Meeting And Conferencing Solutions

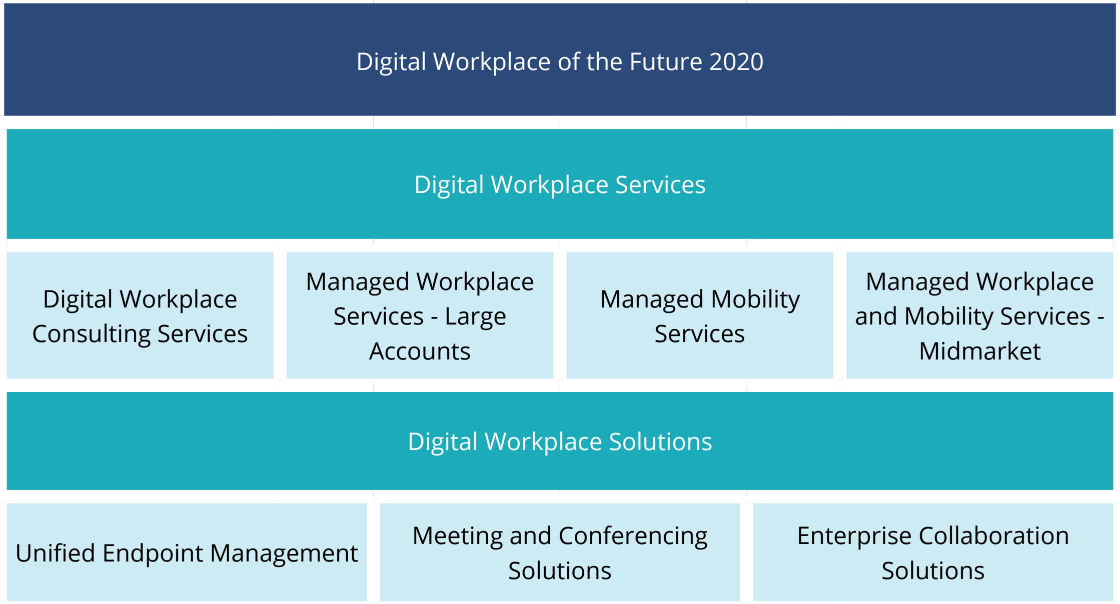
- During the COVID-19 pandemic, enterprises have not been able to host physical meetings and travel for conferences. Instead, they have relied on videoconferencing software solutions that saved them crucial time and money while enhancing convenience for end users. For employees working remotely from the comfort of their homes, the adoption of video as a mode of communication increased significantly, and major videoconferencing software vendors reported spikes in their daily and monthly active users.
- Collaboration solution vendors have realized their interdependency and have started to focus on interoperability to enhance ease of use. This trend has been prevalent across both hardware and software solution vendors. Users have also started to prefer integrated collaboration tools to enhance productivity and reduce going back and forth from one software to another in an environment of multiple devices and software. Productivity can be boosted by combining a consistent user interface with interoperability of various platforms.

- Deep integrations of videoconferencing solutions with productivity suites and CRM systems like Office 365, G Suite, Slack, Salesforce, Zendesk and ServiceNow have become a must to enable a seamless user experience. These vendors have started to support multiple integrations in addition to open APIs that allow enterprises and developers to customize their environment.
- As remote working has soared due to the pandemic, the use of meeting and conferencing solutions has also skyrocketed, and this, in turn, has attracted cybercriminals to these platforms. Consequently, the focus on security has become stronger in the videoconferencing market space. Users were trained in locking down meetings to enhance security, and vendors now need to balance security with ease of use.
- Innovation among videoconferencing vendors has accelerated and the focus on implementation of automation, smarter user experience with AI to eliminate mundane tasks and ease meeting fatigue has increased. Many software vendors have started to develop and implement speech-to-text, automated speech recognition, natural language processing, real-time transcription, sentiment analysis and facial recognition capabilities. The inclusion of 4K video meetings with enhanced audio capabilities has also become one of the focal points for many vendors.



Introduction

Simplified illustration



Source: ISG 2020

Definition

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

The digital workplace technology ecosystem encompasses software vendors offering solutions that provide secure device management, continuous access to apps and data over any device, next-generation collaboration and productivity. It also includes system integrators and service providers that act as partners for enterprises in their workplace transformation journey — helping to assess their workplace environment, suggesting best approaches, managing the entire technical environment and providing support to end users by leveraging the latest and emerging technologies.

Definition (cont.)

As global enterprises grapple with the COVID-19 pandemic, they need to enable remote working at scale for a majority of their workforce. This requires employees to have seamless access to their workplace apps through the device they carry (personal or company-owned). It also requires an overarching technical environment that ensures connectivity and collaboration among globally dispersed employees anytime and anywhere. Also, enterprises must ensure that corporate data and applications remain secure and protected from cyberattacks. This requires significant investments in secure tools for remote working, along with meeting and collaboration solutions to ensure employee productivity.

Scope of the Study

As part of this quadrant study, ISG is introducing the following seven quadrants on digital workplace services and solutions.

Digital Workplace Consulting Services: Digital workplace consulting centers on workplace optimization strategies. The modules include support for defining a workplace strategy, designing the architecture and creating the roadmap for validating the business case around transformation. Consulting and workplace assessment are essential parts of the digital workplace offering and are offered independently of the associated managed services. These advisory services are specific to workplace digital transformation. They typically include assessing the current workplace environment, designing the 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 change management.

Managed Workplace Services - Large Accounts: Managed digital workplace services encompass all managed services related to the digital workplace. An IT service desk with level 1 / 2 support, in-person technical support and user self-help services are the core components of the managed services offering. The quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing (EUC) and unified communication (UC) services and managed virtual desktop services.

Definition (cont.)

Managed Mobility Services: With the growing acceptance of mobility and the bring-your-own-device (BYOD) culture, these services have extended to cover secure device management, mobile application and content management, application deployment and accessibility related to roles and access policy. Managed mobility services include support for mobile device management (MDM), policy configuration, device configuration, device kitting, device lifecycle and telecom expense management. They also include larger aspects of enterprise mobility management, such as mobile application management (MAM), mobile security, digital user experience management and cloud-based services.

Unified Endpoint Management Solutions: Unified endpoint management (UEM) solutions are converging to encompass smartphones, tablets, laptops and PCs. A UEM solution should primarily provide full enterprise mobility management, covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM). It provides a unified approach to managing desktops, PCs and mobile and smart devices through a single console. A UEM solution should support both on-premise and cloud deployments, remotely manage and configure devices and provide application and device analytics. It should also provide mobile security, endpoint security and PC/desktop management integration.

Meeting and Conferencing Solutions:

Meeting and conferencing solutions provide calling, conferencing, messaging and audio and video meetings. Organizations use meeting solutions to collaborate for both informal and formal meetings such as external presentations, training sessions, webinars and town hall meetings. Some videoconferencing systems provide integration of marketing automation and customer relationship management (CRM) software to synchronize essential business data into specific conferences, allowing for seamless follow-up communications and updates for contact accounts. The meeting solutions should follow protocols to protect information online through encryption and compliance to internationally accepted security and privacy standards

Enterprise Collaboration Solutions:

These are the new-age collaboration solutions that provide team-based collaboration that can extend to task management, project management, modern intranet, enterprise social networking and meeting solutions. They may or may not offer their own meeting and conferencing capabilities but can integrate with other solutions. The key focus area of these solutions are around enhancing user digital dexterity, digital adroitness, communication and collaboration, task and project management and productivity solutions.

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 therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

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

Rising Star

"Rising Stars" are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have 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 to 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. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 1 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
42Gears	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in
8x8	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Accenture	Leader	Leader	Leader	Not in	Not in	Not in	Not in
Adobe	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Alcatel-Lucent	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Atos	Leader	Leader	Product Challenger	Not in	Product Challenger	Not in	Product Challenger
Avaya	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Baramundi	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in
Bell Techlogix	Not in	Market Challenger	Not in	Not in	Not in	Not in	Not in
Birlasoft	Not in	Contender	Not in	Contender	Not in	Not in	Not in
BlackBerry	Not in	Not in	Not in	Not in	Not in	Leader	Not in
BlueJeans	Not in	Not in	Not in	Not in	Not in	Not in	Leader
CA	Not in	Not in	Not in	Not in	Contender	Not in	Not in
Capgemini	Leader	Product Challenger	Product Challenger	Not in	Not in	Not in	Not in
Cisco	Not in	Not in	Not in	Not in	Product Challenger	Not in	Leader

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 2 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
Citrix	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Coforge	Not in	Contender	Contender	Product Challenger	Not in	Not in	Not in
Cognizant	Rising Star	Leader	Leader	Not in	Not in	Not in	Not in
Compucom	Contender	Market Challenger	Not in	Market Challenger	Not in	Not in	Not in
CSS Corp	Contender	Product Challenger	Not in	Leader	Not in	Not in	Not in
Digital Workplace Group	Product Challenger	Not in	Not in	Not in	Not in	Not in	Not in
DMI	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in
DXC	Market Challenger	Leader	Leader	Not in	Not in	Not in	Not in
ezTalks	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Flock	Not in	Not in	Not in	Not in	Contender	Not in	Not in
Fujitsu	Product Challenger	Product Challenger	Product Challenger	Not in	Not in	Not in	Not in
Google	Not in	Not in	Not in	Not in	Leader	Not in	Leader
HCL	Leader	Leader	Leader	Not in	Not in	Not in	Not in
Hexaware	Product Challenger	Product Challenger	Product Challenger	Rising Star	Not in	Not in	Not in
Honeywell	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 3 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
IBM	Leader	Leader	Leader	Not in	Not in	Leader	Not in
Igloo	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Infinite	Contender	Not in	Contender	Contender	Not in	Not in	Not in
Infosys	Leader	Rising Star	Product Challenger	Not in	Not in	Not in	Not in
ITC Infotech	Contender	Not in	Not in	Not in	Not in	Not in	Not in
Ivanti	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Jamf	Not in	Not in	Not in	Not in	Not in	Market Challenger	Not in
Jive	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Kaspersky	Not in	Not in	Not in	Not in	Not in	Market Challenger	Not in
Lifesize	Not in	Not in	Not in	Not in	Not in	Not in	Market Challenger
LogMeIn	Not in	Not in	Not in	Not in	Not in	Not in	Leader
Long View	Not in	Contender	Not in	Not in	Not in	Not in	Not in
LoopUp	Not in	Not in	Not in	Not in	Not in	Not in	Contender
LTI	Product Challenger	Product Challenger	Not in	Rising Star	Not in	Not in	Not in
Matrix42	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 4 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
Mattermost	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Microland	Contender	Contender	Contender	Product Challenger	Not in	Not in	Not in
Microsoft	Not in	Not in	Not in	Not in	Leader	Leader	Leader
Miro	Not in	Not in	Not in	Not in	Not in	Not in	Contender
MobileIron	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Mphasis	Contender	Product Challenger	Not in	Not in	Not in	Not in	Not in
NTT DATA	Leader	Leader	Product Challenger	Not in	Not in	Not in	Not in
Pexip	Not in	Not in	Not in	Not in	Not in	Not in	Market Challenger
PGi	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Pivot	Contender	Contender	Product Challenger	Product Challenger	Not in	Not in	Not in
Poll Everywhere	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Pomeroy	Market Challenger	Market Challenger	Not in	Leader	Not in	Not in	Not in
Quest KACE	Not in	Not in	Not in	Not in	Not in	Contender	Not in
RingCentral	Not in	Not in	Not in	Not in	Product Challenger	Not in	Product Challenger
Rocket.Chat	Not in	Not in	Not in	Not in	Product Challenger	Not in	Product Challenger

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 5 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
Salesforce	Not in	Not in	Not in	Not in	Market Challenger	Not in	Not in
SAP	Not in	Not in	Not in	Not in	Market Challenger	Not in	Not in
Slack	Not in	Not in	Not in	Not in	Leader	Not in	Not in
Smarp	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in
Snow Software	Not in	Not in	Not in	Not in	Not in	Contender	Not in
Softtek	Not in	Contender	Not in	Not in	Not in	Not in	Not in
Sophos	Not in	Not in	Not in	Not in	Not in	Contender	Not in
SOTI	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in
StarLeaf	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Stefanini	Contender	Product Challenger	Not in	Leader	Not in	Not in	Not in
Tangoe	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in
TCS	Leader	Leader	Leader	Not in	Not in	Not in	Not in
TeamViewer	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
Tech Mahindra	Product Challenger	Product Challenger	Not in	Not in	Not in	Not in	Not in
TEK Systems	Not in	Market Challenger	Not in	Not in	Not in	Not in	Not in

Digital Workplace of the Future — Services & Solutions - Quadrant Provider Listing 6 of 6

	Digital Workplace Consulting Services	Managed Workplace Services - Large Accounts	Managed Mobility Services	Managed Workplace and Mobility Services - Midmarket	Enterprise Collaboration Solutions	Unified Endpoint Management	Meeting and Conferencing Solutions
TIBCO	Not in	Not in	Not in	Not in	Market Challenger	Not in	Not in
UberConference	Not in	Not in	Not in	Not in	Not in	Not in	Market Challenger
Unisys	Leader	Leader	Leader	Not in	Not in	Not in	Not in
UST Global	Product Challenger	Product Challenger	Product Challenger	Leader	Not in	Not in	Not in
Visionet	Not in	Not in	Not in	Not in	Contender	Not in	Not in
VMware	Not in	Not in	Not in	Not in	Not in	Leader	Not in
Vox Mobile	Not in	Not in	Market Challenger	Not in	Not in	Not in	Not in
Wipro	Leader	Leader	Leader	Not in	Not in	Not in	Not in
Wire	Not in	Not in	Not in	Not in	Contender	Not in	Not in
Workplace from Facebook	Not in	Not in	Not in	Not in	Leader	Not in	Not in
Yash Technologies	Contender	Contender	Not in	Contender	Not in	Not in	Not in
Zensar	Product Challenger	Leader	Rising Star	Not in	Not in	Not in	Not in
Zoho	Not in	Not in	Not in	Not in	Rising Star	Rising Star	Rising Star
Zoom	Not in	Not in	Not in	Not in	Not in	Not in	Leader

Digital Workplace of the Future – Services & Solutions Quadrants

ENTERPRISE CONTEXT

Managed Workplace and Mobility Services - Midmarket, U.S.

This report is relevant to midmarket enterprise clients across industries in the U.S. for evaluating providers of managed workplace and mobility services.

In this quadrant report, ISG highlights the current market positioning of managed workplace and mobility service providers to midmarket enterprises in the U.S. and how each provider addresses the key challenges faced in the region.

Due to the COVID-19 pandemic, enterprises are focused on creating a secure and effective remote/hybrid working environment for employees. Some of the major challenges faced by enterprises involved accelerating workplace modernization and cost reduction simultaneously, equipping end users with the right devices embedded with the right technology while tackling logistical issues, optimizing the employee experience and enhancing end user adoption. Enterprises are also looking forward to implementing self-heal and self-service technologies to automatically resolve ticket queries while the users cannot access in-person support.

Most midmarket enterprises in the U.S. work with a single system integrator for both managed workplace and mobility services. Midmarket clients are open to a heterogenous productivity collaboration environment, but there has been a strong demand for comprehensive Microsoft 365 solutions. Device life cycle management, digital lockers, IT kiosks, meeting room booking solutions, cognitive virtual assistants and formulation of a unified communications and collaboration (UCC) strategy are some of the major demands of midmarket enterprise clients.

Service providers have created a miniaturized offering to attract enterprise clients from the midmarket segment. They are seeking to combine the power of artificial intelligence, analytics and automation to tackle these challenges.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed workplace and mobility services. The report also shows how the technical and integration capabilities of a service provider compare with the rest in the market.

Digital transformation professionals should read this report to understand how providers of managed workplace and mobility services fit their digital transformation initiatives and how they compare with one another.

Sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of managed workplace and mobility service providers in the U.S.

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security while keeping the employee experience seamless for remote employees.

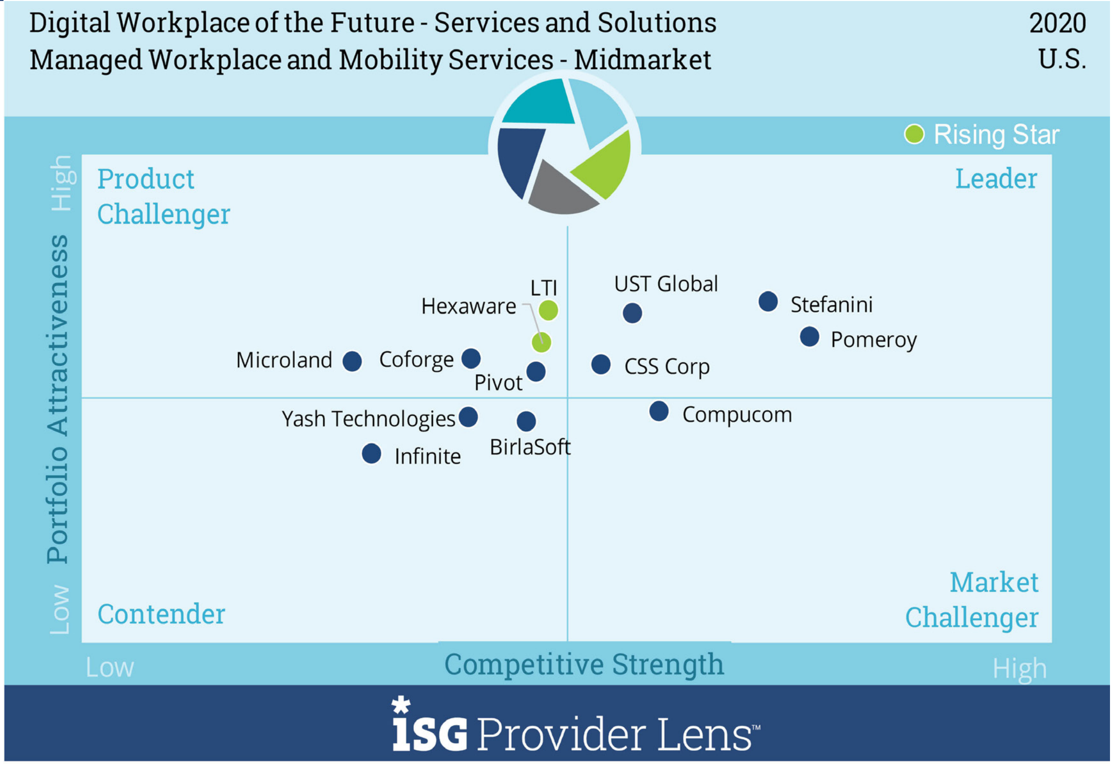
Admin and field services managers should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations.

MANAGED WORKPLACE AND MOBILITY SERVICES – MIDMARKET

Definition

Managed digital workplace services include all managed services related to the digital workplace. An IT service desk with level 1 and 2 support, in-person technical support and user self-help services are the core components of the managed services offering. The quadrant covers next-generation service desk services, field support, automation-enabled predictive analytics, IT kiosks, self-help capabilities, chatbots, managed end-user computing and unified communication services and managed virtual desktop services.

Managed Workplace Services for the Midmarket includes service providers that focus on midsized enterprise clients. Typical clients' revenues are less than $1 billion annually, or their user base is under 5,000 users. Service providers in this category usually support thousands of users, from multiple clients through shared service centers that offer IT service desk and user self-help services. Midmarket clients would normally work with a single system integrator for both managed mobility and workplace services.



Source: ISG Research 2020

MANAGED WORKPLACE AND MOBILITY SERVICES – MIDMARKET

Eligibility Criteria

- Significant client-base in the U.S. mid-market (less than 5,000 end users managed) along with a strong growth rate in this market for the last three years
- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents
- On-site field support and in-person technical assistance.
- Ability to set up self-help kiosks, tech bars, IT vending machines and digital lockers.
- Managed services for collaboration and communication over diverse platforms.
- Managed mobility, device support, predictive analytics and proactive monitoring services.
- Demonstrated experience in providing remote virtual desktop services, both on-premises and in the cloud

Observations

- While many large-scale managed workplace services providers are offering services to this segment and have created miniaturized offerings that could be lucrative, they do not have significant client bases. As remote work requirements continue to be extended, many of these providers may acquire many new logos in this space by next year.
- Stefanini retains its position as a leader in this quadrant with its cognitive virtual agent and predictive analytics offering.
- Pomeroy has been spun off from Getronics and rebranded and has reclaimed its position as a leader in this space. The provider has a huge client base in the mid-market segment, and it manages a large number of users and devices in the U.S.
- UST Global has moved significantly from being a Contender last year to a Leader this year, with strong growth in the midmarket client segment. It has significantly enhanced its portfolio with automation and analytics-driven managed services.
- CSS Corp has retained its leadership position in this quadrant with a continued focus on AI-enabled workplace support and ability to connect with enterprise application solutions
- In a first in the digital workplace ISG Provider Lens report, there are two providers identified as Rising Stars in a quadrant. LTI provides strong consulting-led managed services, its own platform-enabled managed services portfolio with very strong growth in the midmarket segment. Hexaware offers a flexible engagement model with clients and strong automation capabilities.

RISING STAR: HEXAWARE

Overview

Hexaware provides comprehensive digital workplace services that cover service desk, deskside support, workplace mobility, messaging collaboration, workplace security and employee experience management services. The company manages 22,500 users in the mid-market segment, with a 22 percent client growth rate over the last three years.

Strengths

U.S. scale: Hexaware generates around 59 percent of its digital workplace services revenue from the U.S., supporting 56 percent of its total clients from the region. It provides service desk services from Atlanta; Herndon, Virginia; New Jersey; and Chicago. It partners with Barrister, DecisionOne and WZC for onsite support.

Digital Resolver: Hexaware follows an automation first approach that handles the shift to AI/ML-led service automation in a very flexible manner. Through its Digital Resolver concept, it commits contractually to a percentage of incidents being resolved through automation. It also offers innovative commercial models that are outcome-driven with greater flexibility as per client requirements. Hexaware's differentiation lies in allowing clients to retain their existing technology investments in technologies while simultaneously claiming responsibility for identifying and delivering on automation opportunities. The company reports 34 percent ticket resolution through automation and 13 percent through enabling user self-help.

Mobiquity and XMF: Hexaware offers its own XLA approach with Experience Measurement Framework (XMF), which covers many Key Experience Indicators (KEIs) including inputs received directly from employees and through digital channels. It can measure employee experience across many channels and tools. Hexaware also leverages its acquisition of Mobiquity to provide experience-centric design consulting and strategy services.

Caution

Although Hexaware reports strong growth in the midmarket segment over the last three years, its revenue from the segment is lower than compared to other leaders in this category. Mid-market clients engaging with Hexaware must leverage its Digital Resolver capability that has strong client centricity.

Hexaware offers a strong XLA KPI approach which can be further enhanced to include elements of employee working style as remote working becomes commonplace in the post pandemic world.

2020 ISG Provider Lens™ Rising Star

Hexaware offers a flexible approach to engaging with clients using its strong automation and experience-centric capabilities.

Methodology

METHODOLOGY

The research study “ISG Provider Lens™ Digital Workplace of the Future - Services & Solutions 2020” analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of 2020 ISG Provider Lens™ Digital Workplace of the Future — Services & Solutions market.

2. Use of questionnaire-based surveys of service providers/vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities and use cases.

4. Leverage ISG’s internal databases and advisor knowledge and experience (wherever applicable).

5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and 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

Authors and Editors

Mrinal Rai, Author

Principal Analyst

Mrinal Rai is the Principal analyst for Digital Workplace and Conversational AI His area of expertise is digital workplace services and enterprise social collaboration both from a technology and business point of view. He covers key areas around the Workplace and End User computing domain viz., modernizing workplace, Enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture. He also focuses on enterprise social software, content collaboration, team collaboration, social media management and chatbot platforms. He has been with ISG for last 8+ years and has more than 13 years of experience. Mrinal works with ISG advisors and clients in engagements related to workplace modernization, social intranet, collaborative workplace, cloud-based VDI, end user computing and service desk.

Rahul Basu, Co-Author

Senior Analyst

Rahul Basu is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Digital Workplace and Social Business Collaboration. His area of expertise is unified communication and collaboration, contact center and social media management. During his tenure, he has developed content for ISG Provider Lens™ in the areas of digital workplace, social media marketing and contact center customer experience. He is responsible for supporting research authors and authoring blogs, enterprise content and the Global Summary report with market trends and insights.

Authors and Editors

Jan Erik Aase, Editor

Director, Principal Analyst and Global Head – ISG Provider Lens/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™ | Quadrant Report
October 2020

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 more than 75 of world's top 100 enterprises, 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; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.