

Life Sciences Digital Services

Patient Engagement Digital Transformation Services

Global. 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

HCL

December 2021

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 September 2021, 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 authors for this report are Frances Grote and Rainer Suletzki. The editors are John Burnell and Ipshita Sengupta. The research analyst is Sandya Kattimani and the data analyst is Sibasis Panigrahy. The Quality and Consistency Advisors are Jenn Stein and Barbara Florschuetz.



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 ISG Provider Lens™ studies, please email ISGLens@isg-one.com, call +1.203.454.3900, or visit [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 +1.203.454.3900, or visit [ISG Provider Lens™](#).

- 
- 
- 1** Executive Summary
 - 3** Introduction
 - 14** Patient Engagement Digital Transformation Services
 - 19** Methodology

© 2021 Information Services Group, Inc. All Rights Reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.



EXECUTIVE SUMMARY

Digital: The New Engine Behind The Life Sciences Business

As the world moved into year two of the COVID-19 pandemic, all segments of the life sciences industry showed dramatic strategy and process adaptations to the new normal. The adoption of digital technologies to facilitate the pace of change and deliver competitive advantage and increased efficiencies provided the foundation for much of this new way of working. Significant mergers and acquisitions focused on enabling rapid scale-up of digital expertise and innovation. Challenges such as the need to rapidly implement telemedicine and enable direct-to-patient data collection while maintaining cybersecurity have put new constraints on technology providers and have increased demands for digital solutions. Added to this are challenges that, while not always specific to the life sciences industry, have a significant impact on business continuity and profitability. These include the implementation of digital clinical trials, dramatically increased levels of patient engagement, supply chain dysfunction and increased dependence on AI, machine learning (ML) and automation to enhance operations in MedTech, pharmacovigilance and regulatory affairs.

The Leaders in each of these quadrants were able to rapidly implement digital solutions as a result of their existing investments and strategies focused on developing digital offerings prior to the pandemic. Some of these firms leveraged solutions they were already providing

in other sectors to support the sudden shift to digital in the life sciences industry. Some providers that are purely life sciences service-oriented, such as the leading global contract research organization (CROs), or those that have developed substantial life science-specific offerings, were already deeply invested in digital roadmaps based on their own understanding of where the market would need to go to achieve necessary efficiencies and economies of scale. The pandemic provided the impetus for the industry to meet these Leaders at a point of delivery that might otherwise have taken several more years to attain.

The increased reliance on digital technologies is associated with other trends across the life sciences quadrants evaluated. There is an increased demand for cloud services in the industry to support the needs of a growing remote workforce and for additional computing power. Changing business needs have also elevated the demand for Software as a Service (SaaS) solutions that can rapidly provide digital power in expert domains and facilitate turning large volumes of data into business intelligence. In addition to investments in technology, services, tools and skillsets, interest and sophistication in the use of advanced analytics, AI and automation is rapidly rising to expert levels across

the talent continuum, not just within IT. The new face of the customer is a digitally-savvy subject matter expert (SME), and providers that can exceed this customer's expectations are the Leaders in their respective quadrants. The quadrant trends are highlighted below.

Within the **Clinical Development** quadrant two major trends — digital clinical trials and the advantages of implementing advanced analytics — require both CROs and technology providers to offer standardized, but customizable, solutions that clients can rapidly implement. Leaders in this quadrant, such as Accenture, Capgemini, Cognizant, HCL, IQVIA, PPD, TCS and Wipro, also offer strong change management support and active measures of early and ongoing success. Hexaware is a Rising Star.

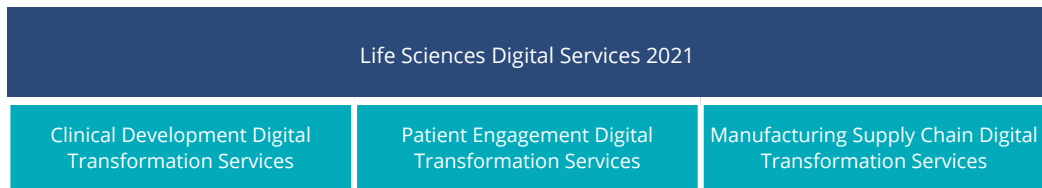
With the overarching goal of improving patient experience and outcomes, digital services providers in the **Patient Engagement** quadrant have been focusing on remote monitoring, using devices, wearables, sensors and smart pills as some of the direct-to-patient ways to help ensure compliance and patient retention. Leaders in this quadrant, which include Atos, Capgemini, Cognizant, HCL, Hexaware, IQVIA, PPD, TCS and Wipro demonstrate deep knowledge of digital enablement, regulatory requirements and the patient experience. Verizon is a Rising Star.

Well-documented supply chain and logistics challenges have raised the demand for business intelligence in the **Manufacturing Supply Chain quadrant**. The use of sensors to monitor real-time shipping data, combined with expertise in advanced analytics sets apart Leaders such as Accenture, Atos, Capgemini, Cognizant, HCL, TCS and Wipro. LTI is a Rising Star.

Collaborations between traditional IT providers and global CROs, often including representation from industry and academia, continue to grow as the leading providers in these areas leverage their combined expertise. The emphasis on improving patient outcomes by combining deep domain expertise with digital enablers is seen among all the Leaders in these quadrants. The accelerated pace of change demanded as a result of the COVID-19 pandemic has created so many new points of entry that Leaders are increasingly pursuing multiple models to expand their capacity for innovation.

Introduction

Simplified illustration



Source: ISG 2021

Definition

The life sciences industry is under increasing pressure to change. The COVID-19 pandemic and public demand for more effective outcomes are mandating the acceleration of actions needed to better meet care lifecycle requirements and build patient-centric business models. All segments of the industry are being compelled to comply with new regulations and to deal with emerging sources of competition, integrate waves of competitive mergers and acquisitions, and adapt to the needs of an aging population. The efforts required to deal successfully with each of these challenges are expensive. At the same time, consumers are increasingly expecting advanced and convenient digital service delivery. Life sciences companies are increasingly relying on innovation to stay apace with the rising demand for their services and mounting competitive pressures.

Definition (cont.)

As new business approaches take hold, regulatory hurdles and cost pressures will continue to be higher and more complex. The competitive landscape has never been more dynamic and global. In this context, innovation is imperative. Biopharma companies, CROs and other life sciences ancillary suppliers will face increasing pressures to expand and extend current investments. MedTech companies should continue to focus on the efficiency of the supply chain and recognize that innovation is the key to growth and survival.

Successful organizations in the life sciences industry have been meeting these challenges with the following:

- Driving targeted investments and constant cost control
- Using advanced technology and digital operating models as a platform for transformation
- Focusing on improved and innovative patient engagement
- Optimizing supply chain operations

Digital transformation helps address many of the current and anticipated industry challenges. In the life sciences industry, digital transformation services are already playing a key role across multiple areas to help accelerate clinical development. Digital transformation is also making fundamental changes to how pharmacovigilance and regulatory affairs activities are conducted. Furthermore, recent technology trends such as connectivity, including mobile enablement or advanced analytics, provide innovation opportunities for MedTech companies. As the impact of COVID-19 has shifted the concept of “customer” more directly onto the patient, life sciences enterprises are increasingly relying on digital transformation to conduct their operations, support regulatory obligations and help ensure business outcomes.

Definition (cont.)

Scope of the Report

While many organizations may initially pilot digital solutions with internal resources, the need for expertise, scale, innovation, flexibility and cost efficiency often point toward an outsourced solution. This study focuses on accelerated clinical development, patient engagement and manufacturing supply chain services.

Participating service providers are evaluated on how they are an extension of a client's technology organization and involved in creating blueprints, architecture frameworks and management processes. They are also measured on factors such as brand recognition in the markets under study, market reach and the number and quality of clients. They are evaluated on thresholds of annual revenue, assigned professionals (resources) and R&D investments.

The ISG Provider Lens™ study offers technology decision-makers the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Perspective on different markets, including global, the U.S. and EU

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 engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US\$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Life Sciences Digital Services - Quadrant Provider Listing 1 of 2

	Clinical Development Digital Transformation Services	Patient Engagement Digital Transformation Services	Manufacturing Supply Chain Digital Transformation Services
Accenture	● Leader	● Market Challenger	● Leader
Apexon	● Contender	● Product Challenger	● Not in
Atos	● Market Challenger	● Leader	● Leader
Birlasoft	● Contender	● Product Challenger	● Product Challenger
Capgemini	● Leader	● Leader	● Leader
CGI	● Not in	● Contender	● Contender
Cognizant	● Leader	● Leader	● Leader
Conduent	● Not in	● Product Challenger	● Not in
DXC	● Not in	● Market Challenger	● Product Challenger
Genpact	● Not in	● Product Challenger	● Market Challenger
Harman	● Market Challenger	● Market Challenger	● Contender
HCL	● Leader	● Leader	● Leader
Hexaware	● Rising Star	● Leader	● Not in
IBM	● Market Challenger	● Not in	● Not in

Life Sciences Digital Services - Quadrant Provider Listing 2 of 2

		Clinical Development Digital Transformation Services		Patient Engagement Digital Transformation Services		Manufacturing Supply Chain Digital Transformation Services	
	ICON	<div></div>	Market Challenger	<div></div>	Product Challenger	<div></div>	Not in
	IQVIA	<div></div>	Leader	<div></div>	Leader	<div></div>	Not in
	LTI	<div></div>	Not in	<div></div>	Product Challenger	<div></div>	Rising Star
	Mphasis	<div></div>	Contender	<div></div>	Contender	<div></div>	Product Challenger
	NTT DATA	<div></div>	Product Challenger	<div></div>	Product Challenger	<div></div>	Product Challenger
	Persistent	<div></div>	Contender	<div></div>	Product Challenger	<div></div>	Product Challenger
	PPD	<div></div>	Leader	<div></div>	Leader	<div></div>	Not in
	Stefanini	<div></div>	Not in	<div></div>	Product Challenger	<div></div>	Product Challenger
	TCS	<div></div>	Leader	<div></div>	Leader	<div></div>	Leader
	Tech Mahindra	<div></div>	Product Challenger	<div></div>	Product Challenger	<div></div>	Product Challenger
	Verizon	<div></div>	Not in	<div></div>	Rising Star	<div></div>	Not in
	Wipro	<div></div>	Leader	<div></div>	Leader	<div></div>	Leader
	Zensar	<div></div>	Not in	<div></div>	Product Challenger	<div></div>	Contender



Life Sciences Digital Services Quadrants

ENTERPRISE CONTEXT

Patient Engagement Digital Transformation Services — Global

This report is relevant to enterprises across industries, globally, for evaluating providers of digital transformation services around patient engagement.

In this quadrant report, ISG highlights the current market positioning of providers that offer digital transformation services in the global patient engagement space.

In response to COVID-19, healthcare practitioners are increasingly focusing on patient engagement and retention by leveraging digital solutions. The evolution of technology and its corresponding impact on the healthcare ecosystem is increasing patient participation in decision-making regarding their treatment and also overhauling their expectations from healthcare companies. At the same time, these companies require access to global content and the required regulatory approval. They also face the challenge of a coordinated patient care and experience across geographies.

The patient engagement technology market is expected to grow as the healthcare industry witnesses a rapid shift to a value-based reimbursement system, from the traditional volume-based fee system. The adoption of patient engagement technology enables the healthcare industry to reduce costs, while improving the quality of healthcare. The technology also provides positive ROI.

In the healthcare ecosystem, life sciences companies and healthcare providers have the opportunity to truly integrate patient engagement processes and other digital solutions and insights from data to improve patient outcomes.

Life science leaders should read this report to understand the relative positioning and capabilities of providers, enabling them to select the appropriate services and solutions related to patient engagement.

Start-up digital health innovators should read this report to understand the leading and emerging areas of investment, challenges faced by patient engagement innovators and the key to long-term success for innovators.

Pharma and MedTech companies should read this report to have a deeper understanding of end-user solutions and create business models that enhance patient outcomes and create value for key healthcare stakeholders, while ensuring patient safety, quality and compliance.

Security and R&D leaders should read this report to understand the way service providers address the significant challenges of compliance and security, while maintaining a seamless experience for end users.

IT and digital transformation professionals should read this report to understand how providers of patient engagement services fit in with their digital transformation initiatives and how they can be compared with one another.

Sourcing, procurement, and vendor management professionals should read this report to develop a better understanding of the current landscape of providers offering digital transformation services for patient engagement.



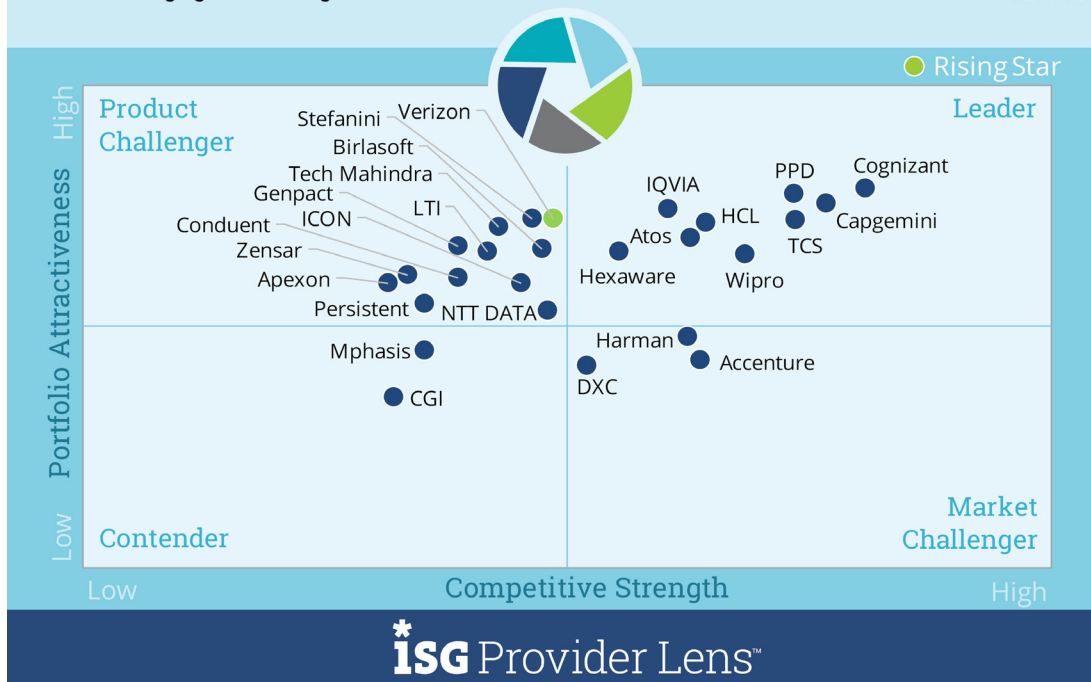
PATIENT ENGAGEMENT DIGITAL TRANSFORMATION SERVICES

Definition

This quadrant assesses service providers that focus on life science customer services using supporting processes and platforms. Life science companies are engaging directly with patients to improve their products and patient outcomes. The end goal is to improve patient experience during the development lifecycle all the way through outcomes, in collaboration with providers. With changes emerging from the pandemic, life science companies are leveraging remote monitoring for patient enrollment and engagement, while monitoring is done via connected sensors at home or in care facilities. In addition to enhancing enrollment and participation in clinical trials, improved patient engagement helps ensure compliance with therapies and reduces drop-out rates. Digital medicine is also an emerging area, with broader use of smart pills and wearables. Robotics and drones have the potential for enhancing the collection and value of data and therapeutic delivery. The connected technologies require secure, efficient and compliant data exchange to inform stakeholders in the patient care lifecycle, while adhering to regulations.

Life Sciences Digital Services Patient Engagement Digital Transformation Services

2021
Global



Source: ISG Research 2021

PATIENT ENGAGEMENT DIGITAL TRANSFORMATION SERVICES

Eligibility Criteria

- Ability to build a differentiated patient experience
- Capability to select, implement and manage patient engagement services and platforms
- Adept at providing consumer-friendly interactions with digital services
- Deep knowledge of device technologies and ability to develop suitable device strategies
- Competencies in device security and data privacy measures
- Ability to share data and analyses in an integrated ecosystem for communication, education and marketing.

Observations

Patient engagement is often viewed from the context of clinical development, where it covers functions such as patient enrollment, medication adherence and remote patient monitoring. These functionalities like the ones mentioned can also be used as a part of a solution during the ongoing marketing of a pharmaceutical product. For example, capturing vital signs by remote patient monitoring can be an integral part of the medication. Therefore, some CROs, with rich experience in this aspect, have evolved as significant players in this market. Crucial factors determining the success of the solutions provided are mobile enablement, in general, and integration of consumer devices (for example, smartphones and wearables) in particular. Hence, cooperation with device manufacturers is highly important for service providers.

PATIENT ENGAGEMENT DIGITAL TRANSFORMATION SERVICES

Observations (cont.)

The following providers achieved Leader positions in this quadrant:

- **Atos** provides a complete set of functionalities across the entire patient journey, combined on a virtual care platform. Based on its deep knowledge and broad experience on the infrastructure level and in IoT scenarios, Atos offers numerous solutions that enable comprehensive integration of wearables, sensors and other devices.
- **Capgemini** follows a strong patient-centric approach that integrates connected devices and the user interfaces for mobile and web around a patient. The company has shown significant growth in terms of capacity and the scope of functions covered, especially following the acquisition and fast integration of the engineering-focused company, Altran.
- **Cognizant** offers a device-agnostic Internet of Medical Things (IoMT) platform that is compliant with all relevant regulations and covers remote device management for medical-grade and consumer-grade devices (wearables and smartphones). In the context of patient services, Cognizant is co-creating a solution for digital health support, based upon the ServiceNow platform.
- **HCL** offers a complete spectrum of patient engagement solutions along the entire process chain, from consulting over design and implementation to operational support. With the Connected Care Suite, HCL provides a solution that drives the relationship between patients and physicians and ensures end-to-end patient engagement.
- **Hexaware** has been one of the early innovators in combining digital capabilities with pharmaceutical products (digital therapeutics). Its solutions entail a high level of automation that enable clients to reduce running costs significantly.
- **IQVIA** offers a comprehensive tool for use during clinical studies that includes functionalities such as telemedicine, patient eDiaries and questionnaires. The company's portfolio includes various solutions that take a data-oriented approach toward life-sciences-specific functionalities.

PATIENT ENGAGEMENT DIGITAL TRANSFORMATION SERVICES

Observations (cont.)

- **PPD's** portfolio includes a variety of solutions that primarily support interactions with patients that participate in clinical studies. PPD gives high consideration to an efficient supply chain operation in the context of patient engagement. Direct-to-patient (DTP) shipments are an integral part of this strategy.
- **TCS**, with its Health360 platform, provides patient-centric functionalities such as remote patient monitoring, telehealth and customized care programs. Effective integration is achieved by cloud-based data management, focusing on automated collection of patient-related data.
- **Wipro** uses its broad IoT capabilities to offer an integrated solution that helps to continuously monitor and capture high volumes of biometric data and health indicators from connected devices, wearables and health applications. In general, Wipro gives high priority to achieving efficiency in all relevant solutions by utilizing automation.

The following provider has positioned itself as a Rising Star in this quadrant and exhibits the potential to achieve a leader position in future.

- **Verizon** can rely upon its outstanding portfolio of connectivity and mobile device technologies. Its roadmap includes various functionalities that enhance the technological capabilities around connectivity by content- and data-management-driven solution components, including the technology backbone, for example, cloud databases.

HCL



Overview

HCL Technologies is a technology company that offers software, IT infrastructure and business process outsourcing (BPO) services worldwide. The company also offers hybrid clouds, digital workplace and cloud native services, together with service integration and management. It was founded in 1976 and has its headquarters in Noida, India. HCL has more than 187,600 employees across 50 countries and, in recent years, has expanded its footprint in the life sciences industry.



Strengths

A well-structured, comprehensive portfolio: HCL offers a complete spectrum of patient engagement solutions along the entire process chain — from consulting over design and implementation to operational support. Despite the inevitable complexity of this type of portfolio, HCL is successful in defining and providing a clear structure for the various components, which helps clients to understand the offerings.

Powerful solution for integrated patient care: With the Connected Care Suite, HCL provides a platform that drives the relationship between patients and physicians and ensures end-to-end patient engagement. It includes full connectivity with various devices and data management for chronic, acute and post-acute disease conditions. Essential functionalities included are telehealth, remote patient monitoring services such as vitals monitoring, home health services via device setup and IT help desk support, and integration with wearables by using IoT technology and device logistics.

Suitable methodology for patient-engagement solutions: In the design phase, solution development follows a persona-based approach, and is therefore suitable for patient-centric solutions. Furthermore, HCL has a strong focus on automation and infrastructure optimization that supports the development of cost-effective solutions.



Caution

HCL should increase the share of staff with consulting skills to optimize its position in strategy and business process consulting.

HCL should expand its client base outside of the U.S. to better accommodate the global character of the life sciences industry.



2021 ISG Provider Lens™ Leader

HCL is a highly competent provider in the digital services for patient engagement segment and can rely upon a comprehensive and well-structured portfolio.



Methodology

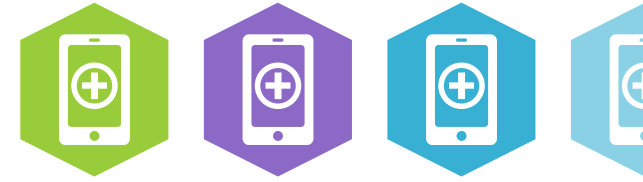


METHODOLOGY

The research study "ISG Provider Lens™ 2021 – Life Sciences Digital Services" analyzes the relevant software vendors/service providers in the Global 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 Life Sciences Digital Services 2021 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 & 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



Authors and Editors



Frances Grote, Author

Lead Analyst

Frances Grote joined the ISG IPL Life Sciences team in 2021. Prior to this, she led ISG's Life Sciences Digital Drug Development practice, which she helped to design and establish in 2016. Frances has over 25 years of experience in leading global biopharma R&D Strategic Sourcing organizations, prior to joining ISG. She is a recognized innovator in building supplier partnerships in drug development as well as in implementing digital technologies in biopharma R&D. She holds an MBA with a focus on Strategic Planning and has completed graduate training in negotiations.



Rainer Suletzki, Author

Lead Analyst

Rainer Suletzki brings more than 30 years of experience in various IT Management functions within a global German Life Science corporation. His main areas of expertise comprise IT application management, IT architecture, data modelling as well as IT sourcing strategy and execution. Currently he acts as independent consultant in various projects at ISG with focus upon application management for SAP, specifically for SAP HANA, and for Salesforce. This includes ISG Provider Lens Studies as well as various projects supporting companies in defining IT strategies and the corresponding sourcing decisions.

Authors and Editors



Sandya Kattimani, Enterprise Context and Global Overview Analyst

Senior Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, which includes market trends and insights.



Jan Erik Aase, Editor

Partner and Global Head - ISG Provider Lens™

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, Partner and Global Head - 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

December 2021

© 2021 Information Services Group, Inc. All Rights Reserved



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.