

# ServiceNow Ecosystem Partners

## ServiceNow Implementation and Integration Services

ServiceNow is rapidly transforming the workflows  
across the enterprise portfolio.

Customized report courtesy of:

**HCLTech**

Executive Summary	03	<b>ServiceNow Implementation and Integration Services</b>	13 – 19
Provider Positioning	06	Who Should Read This Section	14
Introduction		Quadrant	15
Definition	10	Definition & Eligibility Criteria	16
Scope of Report	11	Observations	17
Provider Classifications	12	Provider Profile	19
Appendix			
Methodology & Team	21		
Author & Editor Biographies	22		
About Our Company & Research	24		

Report Author: Dr. Tapati Bandopadhyay

### **ServiceNow is driving business transformation for its enterprise clients by focusing on Functions - specialized platform capabilities**

Enterprise service management (ESM) is the underlying capability that converges the nature of processes without distinguishing them. It has become the driving factor of every workflow management platform. As enterprises transition to a new work model, improved service support and efficient information flow of data are required to conduct systemic interactions. The latest advancement in the workflow system is the development of low-code/no-code platforms that help users create processes or applications, regardless of their technical knowledge. Orchestration, automation, distributed tracking and analytics are the most sought-after features embedded in these platforms. Enterprise workflow management vendors align their offerings to meet transforming business demands

and productivity requirements to amplify the platform engagement quotient. With an emphasis on AI and ML technologies, ServiceNow has been increasing its capabilities and product range. It continues to improve its AI-powered capabilities, such as predictive analytics, virtual agents and NLP, to help enterprises automate workflows and decision-making processes. Moreover, ServiceNow constantly enhances its platform's user experience, making it more intuitive and user-friendly. Overall, ServiceNow will play an essential part in enterprises' digital transformation, assisting them in streamlining operations, increasing productivity and improving CX.

With a range of enterprise portfolios and related processes, ServiceNow positions itself as an experience platform. Purpose-led applications, productivity-driven processes and modern workflows are critical to improving the overall business potential. The ServiceNow platform helps enterprise clients modernize workflows and drive their business. At the same time, service providers align with enterprise clients' business objectives, enabling them to capture

Enterprises seek  
platforms  
that deliver  
enhanced **CX and**  
**business success.**



## Executive Summary

business data across various enterprise systems and make critical decisions. This data fabric is building the information mesh through seamless processes and workflows. An analyst with business process knowledge can design, develop and deploy a process blueprint on the ServiceNow platform.

Technology adoption is elevating the competency and capability of platforms to achieve higher ability and improved accuracy. Similarly, ServiceNow aligns the features on its platform with emerging technologies and preeminent capabilities to deliver user experience and convenience at every point of interaction. ServiceNow formulates solutions considering employee productivity and hybrid workplace challenges by studying employee journeys and simplifying the interactions with the platform. The hybrid workplace model transforms application usage and criteria. Most users demand platform-independent and personalized experiences during every interaction. Enterprise clients strive to deliver these experiences to their internal stakeholders for better response rates and accurate service provisioning.

ServiceNow is one of the fastest-adopted platforms for ESM and infrastructure services in the U.S. market. The primary reason for ServiceNow being preferred over other platforms is its increasing relevance of solutions focused on business functions. The Now Platform is an excellent example of personalization and customization to design business- and industry-specific workflows. ServiceNow has strategic partnerships with service providers and enterprise clients to build customized, vertical-specific modules to meet unique business requirements. For instance, the telecommunications module, covering telecom service management and telecom order management. Healthcare and life sciences service management, financial services operations and public sector digital services are a few latest developments that orient with the respective business verticals.

Similarly, ServiceNow has already released human resource service delivery (HRSD) services and customer service management (CSM), tapping into the service functions of enterprises. The platform expands in every dimension by covering all portfolios and

business functions. Every new ServiceNow release includes features and advancements to address IT/OT gaps or enhance functionality. Security operations, GRC and enterprise asset management continuously lead to product maturity and bring rapid changes in business structures.

The future requirements are being discussed, and the effort to build future-ready offerings by studying the market trends and developments is driving ServiceNow to explore possibilities and gain capabilities through acquisitions. Hitch Works, Dotwalk, Mapwise, Era Software and Lightstep (microservices observability tool) are a few recent acquisitions adding exclusive capabilities to increase the intelligence quotient of the platform and expand its reach to large accounts.

ServiceNow continues to develop and innovate novel features that further streamline processes, with new features being developed regularly, which is accelerated due to technological advancements.

The latest feature being implemented by ServiceNow includes the new Tokyo release,

which was launched in September 2022, with the general release planned for the third quarter of this year.

The prominent features include the admin dashboard, which enables the user to keep track of various applications provided on the platform and provide alerts for available updates. Other dashboard features include a favorite folder and a widgets section. The widgets offer the flexibility of setting out the apps according to a client's requirements, making it more accessible to the client as a functional consultant. The other features include Formula Builder, which is mainly used in the development of fields and tables without any coding, reducing errors and accelerating the build time. The formula can be created for a particular field based on the App Engine Studio application builder. ServiceNow has further added basic mathematical formulas into the latest Tokyo release. The other features of this new Tokyo update include condition builder, user presence, multilingual notification support, S/MIME (Secure/Multipurpose internet Mail Extensions) support for inbound/outbound emails, guided setup, ATF test generation,



field service management, financial services operations, telecommunications service management, and order management.

The workflow platforms will evolve faster to become inclusive across processes. The game-changing milestones will be ambitions such as building business rules on the platform and developing an intuitive dashboard driven by analytics. ServiceNow has always complemented industry and customer base developments and acted promptly to stay ahead of the competition. Hence, ServiceNow is the market leader in the enterprise workflow management space and continues to retain this position consecutively for the second year. Enterprise services and the ServiceNow platform will keep evolving with time. It is still unclear how the competition will drive the shift in strategies and redefine the potential and ability of the platform.

Enterprises are witnessing an increase in the pace of business transformation with portfolio consolidation




## Provider Positioning

Page 1 of 4


	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Accenture	Leader	Leader	Leader
Advance Solutions	Product Challenger	Contender	Product Challenger
Aspire Systems	Product Challenger	Contender	Product Challenger
Atos	Product Challenger	Product Challenger	Not In
Capgemini	Leader	Leader	Leader
Cask	Leader	Leader	Leader
Coforge	Rising Star ★	Product Challenger	Rising Star ★
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader



 Provider Positioning

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
DXC Technology	Leader	Market Challenger	Leader
Evoke Technologies	Contender	Contender	Not In
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Market Challenger	Not In	Not In
Genpact	Product Challenger	Product Challenger	Product Challenger
Glidefast	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
HGC	Contender	Contender	Contender




 Provider Positioning

Page 3 of 4

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
IBM	Leader	Not In	Not In
Infosys	Leader	Leader	Leader
INRY	Rising Star ★	Rising Star ★	Product Challenger
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Leader	Leader	Leader
NewRocket	Not In	Not In	Contender
NTT DATA	Market Challenger	Not In	Market Challenger
RapDev	Not In	Rising Star ★	Not In





 Provider Positioning

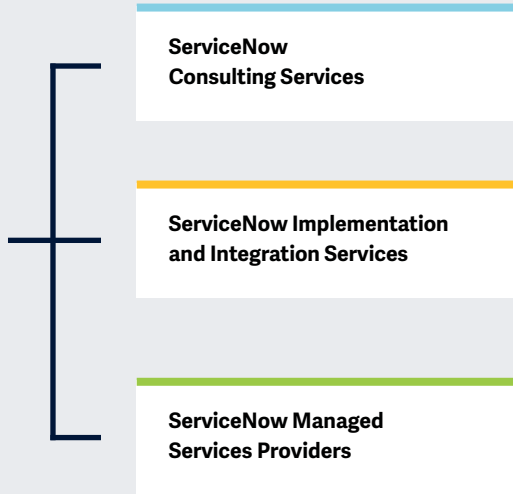
Page 4 of 4

	<b>ServiceNow Consulting Services</b>	<b>ServiceNow Implementation and Integration Services</b>	<b>ServiceNow Managed Services Providers</b>
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Market Challenger	Market Challenger
Thirdera	Product Challenger	Product Challenger	Product Challenger
Trianz	Product Challenger	Product Challenger	Product Challenger
UST	Contender	Not In	Contender
Wipro	Leader	Leader	Leader
YASH	Not In	Product Challenger	Product Challenger



# Key focus areas for ServiceNow Ecosystem 2023.

Simplified Illustration Source: ISG 2023



## Definition

ServiceNow just announced for its third quarter, 2022, subscription revenues of \$1,742 million, which translates to 22 percent year-over-year growth and is a clear demonstration that the ServiceNow platform fits well to the market demand for a transformation based on improved and engaging CX.

ServiceNow Partners are benefiting from the growth once every dollar spent on subscription licenses levers into substantial revenue for the ServiceNow Ecosystem.

The ServiceNow Ecosystem 2023 study examines the extensive, complex global partner network of one of the leading software solutions that allow companies to digitalize, connect and automate siloed processes to make workflows smoother. The broad acceptance of ServiceNow's offerings among the user community has led to the exponential growth of the company across the globe. Enterprises seek accredited and reliable professional services to fully utilize ServiceNow's broad functionalities – from process redesign and software implementation and integration to application

management and training. Various offerings and certification levels indicate the focus of partner companies, covering full-scale lifecycle support and laser-focused services for specific tasks.

Digital transformation is powering the future of organizations that are exploring new ideas, innovating at scale and realizing value faster by empowering people to do their best in a rapidly changing world, and the ServiceNow platform accelerates that journey.

The ISG Provider Lens™ ServiceNow Ecosystem 2023 study analyzes the services and offerings of ServiceNow partners in the U.S., Brazil, Germany and Australia, in selected segments. The findings from the analysis help assess the service providers operating in the defined segments for the strength of their respective portfolios and their competitiveness in the market.



### Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions: ServiceNow Consulting Services, ServiceNow Implementation and Integration Services and ServiceNow Managed Services Providers. This ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market

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

### Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

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. 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).





**Provider Classifications: Quadrant Key**

**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.

**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.

**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 products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**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.

★ **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** means 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.





# ServiceNow Implementation and Integration Services

### Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. for evaluating the providers of ServiceNow implementation and integration services. In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow implementation and integration services to enterprises in the U.S. and how each provider addresses the critical challenges faced in the region.

Enterprises leveraging the ServiceNow platform ecosystem and innovations for their digital business transformation seek outcome-assured implementations. Enterprises and service providers need to build and plan their implementation model in a way that best suits their business objectives. Service providers must have a future-proof technology and product roadmap to create enduring results and positive business outcomes.

Furthermore, given that most of the large mature enterprises in the U.S. are early technology adopters that own complex legacy tech stacks and business services landscapes, seamless integrations are essential for them to ensure smooth service delivery and consistent UX.



**Strategy professionals** should read this report to choose the right systems integration partner for ServiceNow implementation to develop a long-term technology roadmap.



**Engineering professionals** can use this report to understand the developments in software solutions to invest in and build IP and accelerators for cloud platforms and in various industries.

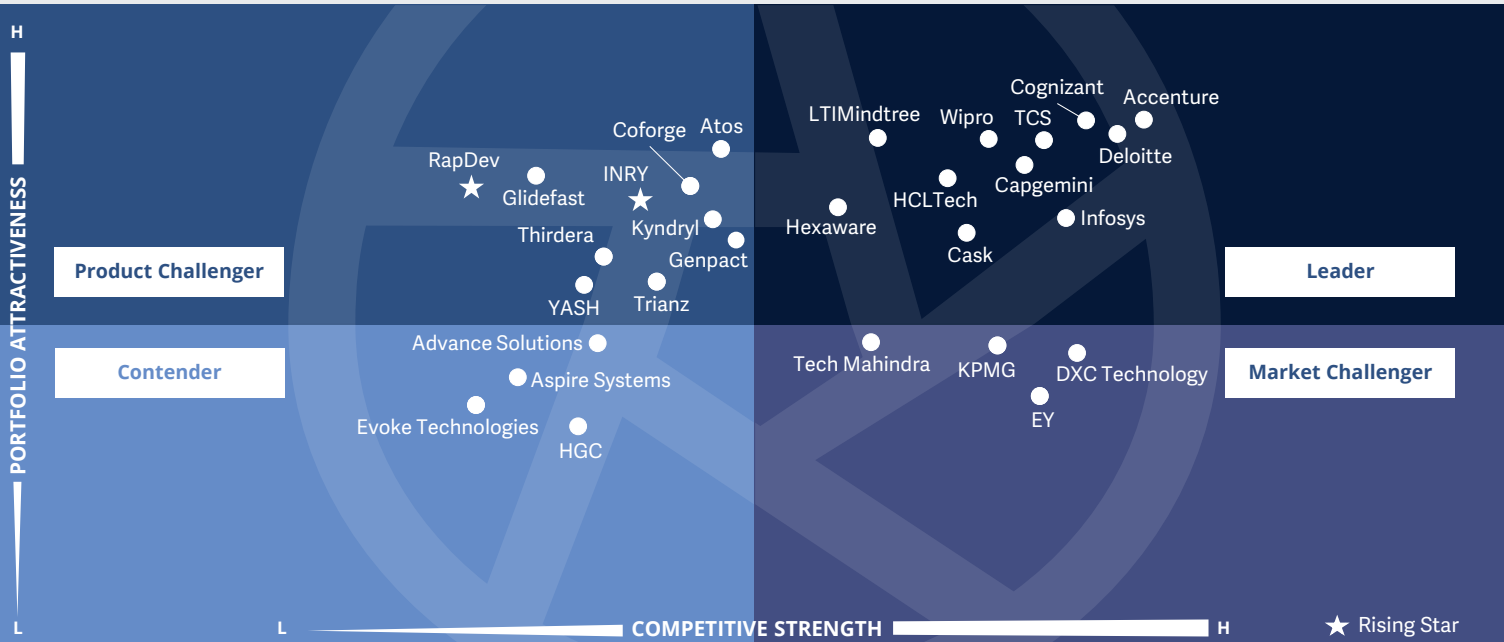


**Technology professionals** should read this report to gain insights into the latest technology trends and patterns aligned with their company goals.



**ServiceNow Ecosystem Partners**  
**ServiceNow Implementation and Integration Services**

U.S. 2023



This quadrant assesses providers' maturity and **ability to implement the ServiceNow platform** in diverse enterprise landscapes and **manage the growing complexity of integrating ServiceNow with disparate internal and external systems** for seamless information flow.

*Dr. Tapati Bandopadhyay*



### Definition

ServiceNow is often seen as the central system that brings together external and internal client requirements that need to be fulfilled, without adding to an organization's internal complexity. Implementing such an intelligent workflow platform in a complex enterprise requires expertise and experience, as well as special capabilities to integrate with other applications, software and tools. The integration should be as seamless as possible, with minimum data reformation.

To succeed, service providers need to have solid methodologies and an agile workforce, trained with modern methods, that can be easily scaled up and down. They also need outstanding capacities in system architecture, deep coding experience for low/no-code developments, and a deep understanding of AI and machine learning. The high complexity of multicloud, multi-tenant architectures and growing concerns about cybersecurity both force clients to look for service providers with high efficiency. Service providers also need to focus on certifications to prove their credibility to clients.

### Eligibility Criteria

- 1. Use of predefined solutions, accelerators and templates:** Experience in Agile project management (PMP certifications, SAFe and Scrum), continuous integration/continuous development and DevOps best practices and toolchains, containerization platforms, application performance monitoring and platform-specific ops management tools
- 2. Experience with emerging technologies:** Enterprise-shared services/BPO; cloud and multicloud integration; E2E management of machine learning techniques; and NLP and AI capabilities paired with cognitive computing to enable digital service management (DSM), virtual agents and self-service
- 3. Speed of adoption and value realization:** Deploy new features, modules and enhancements on the ServiceNow platform in a cost-effective and efficient manner
- 4. Ability to offer maintenance support:** Support with installations, upgrades and new feature/module release management, migration, patch management, the lifecycle management of ServiceNow instances and maintenance after ServiceNow release migration
- 5. Size and capabilities of local and global delivery teams:** Expertise in relevant ServiceNow technologies, such as API development, JSON and Python
- 6. Experience in system, data and process integration:** Integration with the hub and spoke model (starter, standard, professional and enterprise levels)
- 7. Customer satisfaction measurement:** Ability to gather voice of customer, service satisfaction index, ServiceNow score and net promoter score (NPS)





## ServiceNow Implementation and Integration Services

### Observations

ServiceNow is recognized as the preferred platform for providing integration and implementation services, which are widely adopted by most top providers. Providers collaborate with ServiceNow mainly due to its workflow management capabilities. Businesses integrate the implementation services to create a seamless flow of processes to reduce complexities and maximize ROI. Additionally, providers leverage ServiceNow's capabilities to configure workflow modules to translate end customers' process diagrams into the language that ServiceNow can interpret. Along with this, the workflow functionality is determined using workflow activities. The priority is currently shifted toward the modernization of legacy application architecture, along with digitalizing the current and new application landscape.

- Enterprises currently leverage AI solutions to benefit greatly from integrating ServiceNow data with their AI solutions. Integrating ServiceNow with an external data repository helps organizations use the platform's data better. With an external data repository, the data can be merged with enterprise sources for a more comprehensive view of enterprises or businesses.
- Businesses increasingly adopt ServiceNow's low-code and no-code development platforms, as ServiceNow is recognized as the leader. Numerous organizations use the platform to build applications using graphical user interfaces (GUIs) as opposed to command line interfaces (CLIs), without requiring specialist coding skills.
- ServiceNow supports organizations with the democratization of data via integrations using the ServiceNow interface. This allows employees to monitor and interact with the ServiceNow interface.

From the 70 companies assessed for this study, 29 have qualified for this quadrant with 11 being Leaders and two Rising Stars.

### accenture

**Accenture** offers ServiceNow implementation solutions that cater to the specific needs of enterprises. The combined implementation of services with ServiceNow allows clients to streamline their processes. Accenture chose ServiceNow for ITSM to capitalize on the solution's functionality.

### Capgemini

**Capgemini** leverages the ServiceNow platform, which brings together solutions such as digital service integration and management (SIAM) to provide a multi-provider business ecosystem and achieve end-to-end client satisfaction.

### Cask

**Cask** is an award-winning ServiceNow implementation partner that delivers cutting-edge technology. It offers a plethora of solutions, such as ITSM, HR, risk and security, finance, and asset management. Its collaborative implementation approach draws clients to opt for its services.

### cognizant

**Cognizant** has partnered with ServiceNow to co-create transformation offerings by envisioning, co-designing and implementing the right digital solution to drive successful business outcomes.

### Deloitte

**Deloitte** has strong domain- and industry-specific experience. It leverages the ServiceNow platform to create, innovate and develop solutions based on AI, ML and automation for clients seeking implementation services. It provides a plethora of industry-specific solutions.

### HCLTech

**HCLTech**, along with ServiceNow, has developed a single and centralized IT service management platform, leveraging its integration and implementation capabilities. Its proprietary offerings, such as Discovery, are backed by its strong service management implementation experience.



## ServiceNow Implementation and Integration Services



**Hexaware** and ServiceNow implement solutions such as ITSM, ITBM, ITOM, ITAM, HR, GRC/IRM, SecOps and CSM across enterprises to achieve rapid business outcomes. Hexaware uses the H2O framework to facilitate the ServiceNow implementation journey with relevant accelerators.



**Infosys** has developed ESM Café, an AI-powered, plug-and-play solution that provides all the process templates required to accelerate the deployment of ServiceNow implementation, while consolidating the existing tools to help predict service outages.



**LTI Mindtree**, along with ServiceNow, offers a combination of domain, functional and digital capabilities that resolve issues while delivering continuous innovations. Its unique approach to innovation and design thinking helps clients achieve quicker adoption of solutions on a large scale.



**TCS** and ServiceNow offer a comprehensive range of implementation solutions. With its Chrystallus™ modules and pre-curated services, clients can accelerate their digital transformation. ServiceNow implementations are accelerated using proprietary solutions in a predictable manner.



**Wipro** provides highly comprehensive implementation services by leveraging ServiceNow's expertise in the enterprise services domain. Wipro's FieldX solution is a cloud-based digital service lifecycle automation solution for the aftermarket service built on the ServiceNow platform.

### INRY

**INRY** (Rising Star) leverages ServiceNow's implementation expertise to build a unique and wide range of modules or processes. It provides a holistic approach to various capabilities and processes. The PASS methodology rapidly delivers predictable results.

### RapDev

**RapDev** (Rising Star) emerges as a ServiceNow implementation partner and provides unique and innovative solutions that equip clients with adequate knowledge and tools to streamline enterprise processes. The continuous development of new releases positions RapDev as a top Contender.





“HCLTech has strong capabilities and resources and co-innovates with ServiceNow to deliver industry-specific value propositions.”

*Dr. Tapati Bandopadhyay*

# HCLTech

## Overview

HCLTech is headquartered in Noida, India, and operates in 52 countries. It has over 219,300 employees across 215 global offices. In FY22, the company generated \$11.5 billion in revenue, with IT and Business Services as its largest segment. HCLTech’s implementation services comprise solutions that cater to various industries in the U.S. The company takes a holistic approach to providing solutions that benefit clients while streamlining processes within their organizations. It has 39 delivery centers and 10 innovation labs in the U.S.

## Strengths

**Co-selling with ServiceNow:** HCLTech has strengthened its partnership with ServiceNow to develop and execute value propositions jointly. This co-selling approach helps customers rapidly reap the benefits of the platform’s new and proven, pre-built features.

**Service capacity development:** Domain- and technology-specific talent shortage is a major challenge in the ServiceNow implementation space. HCLTech focuses on increasing its ServiceNow talent base by 40 percent. As talent scarcity is highly prevalent in the U.S. market, the increase in the talent base can enable HCLTech to provide customers with quality resources, strong support, and cost-effective and efficient services.

**Proven ServiceNow competencies:** With HCLTech’s focus on the ServiceNow partner points system and increase in certifications by 20 percent, the upskilling and cross-skilling programs generate rapid value for customers across the U.S. market. The HCLtech GBP leveraging the ServiceNow platform has proven to be competent in providing the best practices that are well-defined, designed, used and maintained for HCLTech infrastructure management and application management services.

## Caution

HCLTech must explore the opportunities to emerge as a thought leader, trendsetter in best practices and a strong service partner for ServiceNow clients across complex and traditional industries. To gain a competitive edge in the U.S. market, HCLTech must increase the frequency and strategic imperatives of its marketing communications.





# Appendix

The ISG Provider Lens™ 2023 – ServiceNow Ecosystem Partners report analyzes the relevant software vendors/service providers in the U.S., based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of February 2023, 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 study was divided into the following steps:

1. Definition of ServiceNow Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation



## Author & Editor Biographies

Author



**Dr. Tapati Bandopadhyay**  
**Lead Analyst**

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Research Analyst



**Arjun Das**  
**Research Specialist**

Arjun Das is a research specialist at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platform and Services and SAP HANA Ecosystem Services. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well.

Arjun has helmed his current role since 2020. Prior to this role, he has worked across several syndicated market research firms and has more than 8 years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain.





*IPL Product Owner*

**Jan Erik Aase**  
**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, 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™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

### ISG Research™

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 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 [isg-one.com](http://isg-one.com).







**MARCH, 2023**

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**REPORT: SERVICENOW ECOSYSTEM PARTNERS**