ISG Provider Lens™

ServiceNow Ecosystem Partners

ServiceNow Consulting Services

ServiceNow is rapidly transforming the workflows across the enterprise portfolio.

Customized report courtesy of:

HCLTech

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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**.

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,

Executive Summary

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

	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

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	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

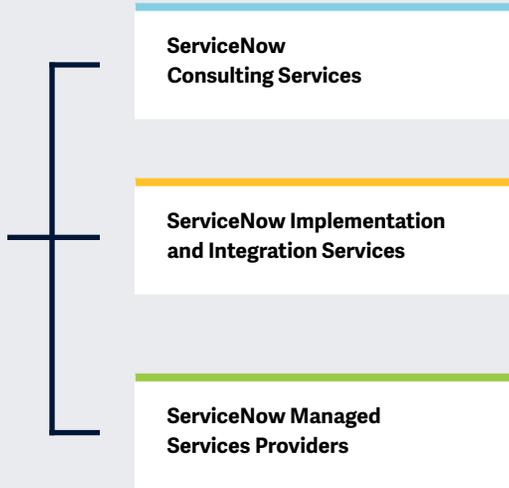|	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
IBM	Leader	Not In	Not In
Infosys	Leader	Leader	Leader
INRY	Rising Star ★	Rising Star ★	Product Challenger
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product 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

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
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

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Key focus areas for ServiceNow Ecosystem 2023.

Simplified Illustration Source: ISG 2023

ServiceNow Consulting Services

ServiceNow Implementation and Integration Services

ServiceNow Managed Services Providers

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 matrixcontaining 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.

★ **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.

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.

ServiceNow Consulting Services

Who Should Read This Section

In this quadrant, ISG highlights the current market positioning of providers of ServiceNow consulting services for enterprises in the U.S. and how each provider addresses the critical challenges faced in the country. ISG defines the current positioning of these providers, with a comprehensive overview of the competitive landscape of the market in the U.S.

In the U.S., many enterprises adopting digital transformation struggle to implement the same due to a lack of proper scope and failure to understand the level of change and repercussions digital transformation can bring. Hence, they look for consulting service providers that offer end-to-end capabilities, including a long-term roadmap that assesses the current situation of enterprises; develop strategies with a focus on the business impact; and aid in deploying solutions. Service providers must also offer process transformation blueprinting and proven execution capabilities in the ServiceNow ecosystem, in addition to ITSM, ITOM and ITAM.

Enterprises also seek digital transformation with a quicker development cycle. This has, in turn, increased the need for consulting service providers to be aligned with enterprises' business objectives.

Strategy professionals should read this report to understand the trends and changing patterns in the ServiceNow consulting area.

Technology professionals should read this report to learn about industry-specific solutions and providers' prowess in successfully conducting consulting assignments for a diverse set of industries.

IT and business professionals should read this report to understand the design framework, evaluation methodologies, maturity and complexity of processes associated with ServiceNow adoption in industries.

Digital transformation professionals should read this report to know how service providers design ServiceNow solutions and map respective technologies.

ISG Provider Lens™

Source: ISG RESEARCH

ServiceNow Ecosystem Partners
ServiceNow Consulting Services

U.S. 2023

PORTFOLIO ATTRACTIVENESS

H

COMPETITIVE STRENGTH

L — H

Product Challenger

Contender

Leader

Market Challenger

★ Rising Star

Tech Mahindra
Coforge
Kyndryl
Advance Solutions
Glidefast
Atos
Genpact
Thirdera
INRY
Aspire Systems
Trianz
HGC
UST
Evoke Technologies

LTIMindtree
Cognizant
Accenture
Wipro
Deloitte
TCS
Cask
HCLTech
IBM
Hexaware
Infosys
Capgemini
DXC Technology
Fujitsu
EY
KPMG
NTT DATA

This quadrant evaluates the breadth and depth of providers' **expertise in offering ServiceNow consulting services** to enterprise clients. The service providers consolidate the IT advisory and business consulting services to **deliver absolute value**.

Dr. Tapati Bandopadhyay

ServiceNow Consulting Services

Definition

This quadrant assesses the providers of consulting services that help clients prepare for the use of workflow management services. With ServiceNow's growth regions and new offerings, on the one hand, and the new economic realities, on the other hand, ServiceNow consulting services are gaining traction. Many clients will face budget restrictions, with the preservation of already-taken investments playing a bigger role. However, clients can expect to get the biggest benefit from the platform.

Designing client roadmaps to use ServiceNow as the main engagement platform to intelligently connect different systems will be an architectural challenge, especially when new functionalities come with each release. New potential use cases in the areas of customer services, facility management, field services and ESG compliance are envisioned, which requires the roadmaps to be designed in a way that the platform delivers the highest value to clients.

Clients may prefer consulting companies that have already invested in reference models and assessment methodologies, understand clients' maturity and prevailing challenges, and have a broad understanding of ServiceNow's technical capabilities and future releases, which can help design solutions and deploy roadmaps. Helping clients understand what efforts toward transformation have to be made and that they need to have a robust change management offering and benefits realization plan in place can be a differentiating factor for consulting providers.

Eligibility Criteria

1. **Use of reference models, templates and frameworks:** Best practices in opportunity identification and assessments for new ServiceNow competencies; availability of frameworks, tools for ROI and business case development, value realization metrics and benchmarks

2. **Experience in broad workflow and service management:** Designing client roadmaps to use ServiceNow as an integrated "platform of platforms" for all major corporate business operations and IT services, ESG, and the integration with GRC and security policies

3. **Capabilities to predict long-term technological developments:** Tools and methodologies to gather market intelligence; being a member of technology communities and knowledge forums

4. **Knowledge of ServiceNow capabilities and other tools:** Knowledge of different releases, the functional and business processes supported by ServiceNow, and ITSM and ITOM and expertise in areas such as CSM, HR, F/A, facility management, ESG and security

5. **Knowledge of ServiceNow application and value in specific client scenarios:** Knowledge and active development of industry-specific solutions, for example, healthcare and telecom

6. **Possess-relevant certifications:** ServiceNow certifications and workflow badges, ITIL 4 expertise, COBIT, DevOps and ESM-related accredited experience

7. **Experience with organizational change principles and practice:** Planning, delivering and supporting organizational changes with proven case studies and client storyboards from various industries

Observations

The business transformation is attributed to the increased adoption of consulting services in the market. Service providers elevate the consulting competency and focus on providing advisory services that lead to combined business and technology advancements. The collaboration between advisory firms and ServiceNow has been crucial in building enterprise portfolios that are aimed at transforming business processes. Mergers and acquisitions have been on the rise, with niche advisory firms collaborating with ServiceNow to form strategic partnerships while expanding teams and gaining extensive domain expertise. Currently, providers utilizing the ServiceNow platforms are infusing AI and automation into talent management processes with predictive, agile and automated employee workflows.

- Enterprises focus on using ServiceNow tools to promptly resolve challenges associated with creating different workflows and configure the service-level application while integrating ServiceNow with existing solutions. This is done to ensure smoother control and quality of services.

- Providers invest their resources into creating custom-based applications, along with ServiceNow, to focus on specific business needs such as integration applications, user satisfaction surveys, and data import for updating CMDB and foundation data.

- Organizations continuously tailor ServiceNow's platforms to meet business requirements. Service providers reengineer IT, business and organizational processes and calibrate an approach to refine processes using proprietary frameworks.

From the 70 companies assessed for this study, 31 have qualified for this quadrant with 13 being Leaders and two Rising Stars.

accenture

Accenture is continuously expanding its service portfolio with the integration of ServiceNow. It has strong expertise in consulting services that focus on execution and outcome-based delivery models. It has invested in building frameworks such as Telco, ACP4Gov and AIM.

Capgemini

Capgemini has strong knowledge of ServiceNow in terms of innovations and the development of novel processes that would benefit clients opting for consulting services. ServiceNow is proving to be a frontier in AIOps. It focuses on the unique technology-business hybrid approach.

Cask

Cask has established a strong partnership with ServiceNow, combining its skills and technology with the platform. The constant innovations and new releases in AIOps and data analytics have bolstered the partnership further. Cask has developed a Strategic Portfolio Management (SPM) framework.

cognizant

Cognizant takes a holistic approach toward ServiceNow consulting services. Its acquisition of Linium has furthered strengthened the partnership. Cognizant focuses on expanding its capabilities while providing expertise in unlocking business value using cloud technology.

Deloitte

Deloitte has been an award-winning ServiceNow partner and has consistently delivered efficient consultancy services. This bolsters clients' confidence and helps them achieve continuous innovation and value from disruptive technologies complementing the ServiceNow platform.

DXC TECHNOLOGY

DXC Technology witnesses strong growth in its ServiceNow practices, especially in the U.S. There has been a significant rise in the number of consulting professionals serving clients in the region. With the partnership with ServiceNow, the company focuses on innovation in automation.

HCLTech

HCLTech's ServiceNow consulting offerings combine standard IT, business and service functions. The company focuses on driving value from ServiceNow platforms and modules, along with newly released ones. HCLTech has implemented a centralized ServiceNow ITSM platform that leverages its capabilities to integrate with other applications.

HEXAWARE

Hexaware focuses on delivering curated client experiences while streamlining complex IT environments by leveraging the ServiceNow platform. Together with ServiceNow, the company has helped businesses across industries accelerate innovation and address clients' needs.

IBM

IBM combines its ServiceNow consulting services and offerings with its experienced talent pool equipped with an extensive knowledge and skills that would benefit clients opting for its consulting expertise in line with their business requirements.

Infosys

Infosys, along with ServiceNow, has curated a platform known as the ServiceNow System of Action, which can replace unstructured work patterns of the past with automation using AI. The requests can be made on a single platform that would streamline processes and workflows.

LTIMindtree

LTIMindtree leverages its partnership with ServiceNow to offer enterprises intelligent design capabilities and experience-driven solutions. It combines the full potential of the ServiceNow platform with deep industry expertise and offerings to help clients provide a holistic approach to managing enterprise workflows.

TATA CONSULTANCY SERVICES

Through the partnership with ServiceNow, **TCS** develops various new modules and technologies that help clients improve or streamline processes across business lines. In addition, TCS offers ServiceNow solutions for the manufacturing industry.

ServiceNow Consulting Services

Wipro has combined its long-standing ITSM practice with the Now Platform to provide best-in-class transformation experiences through improved workflows. It offers its clients a wide plethora of workflow solutions, ranging from IT to employee transformation.

Coforge

Coforge (Rising Star) has positioned itself as a leading ServiceNow consulting partner. This strategic partnership aims to deliver and manage IT services aligning with clients' business goals and objectives. Coforge has a dedicated ServiceNow practice and a growing team.

INRY

INRY (Rising Star) has a measurement-driven consulting approach and has strong frameworks and methodologies to enable clients to realize maximum benefits from its ServiceNow platform solutions.

HCLTech

Leader

"In-depth industry know-how and strong technology delivery models are the major differentiators of HCLTech in the U.S. market."

Dr. Tapati Bandopadhyay

Overview

HCLTech is headquartered in Noida, India, and operates in 52 countries. It has more than 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 has a comprehensive and unique consultative approach and practice, ranging from execution to strategy. It has a team of professionals with specific skillsets and deep technology expertise to provide robust, efficient and resilient services. It has 39 delivery centers and 10 innovation labs in the U.S.

Strengths

Diverse industry expertise and experience: HCLTech offers ServiceNow consulting services to clients across industries. In 2023, it won many clients, including metal production companies, software firms and IT companies, insurance firms and toy manufacturing companies. Such a wide and diverse client base enables the company to offer ServiceNow best practices across industries.

Industy-focused solutions: HCLTech's ServiceNow consulting offerings are built considering the unique challenges faced by various industries. The company aims at developing and delivering scoped applications, including Enterprise Studio, and solutions specific to industries such as healthcare and telecommunications on ServiceNow Store. The store also includes security operations and GRC applications in line with cybersecurity practices.

Established credentials and experience in handling complex client landscapes: HCLTech provides its FedRAM customers in the U.S., such as digital financial services companies and automotive companies, with unique models for development as a service in the enterprise service management (ESM) space beyond ITSM. Its go-to-market strategy is based on the Gold Blueprint (GBP), leveraging ServiceNow's ITSM product offering.

Caution

HCLTech must focus on showcasing its strengths and better market its capabilities in offering industry-specific solutions in the ServiceNow space. It must also improve its interaction with the practice research communities to enhance its business impact.

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.

Author & Editor Biographies

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.

About Our Company & Research

ĭsĠ 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.

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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.

ISG Provider Lens™

MARCH, 2023

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REPORT: SERVICENOW ECOSYSTEM PARTNERS