

ServiceNow Ecosystem Partners

Enterprise workflow management: Benchmarking
ServiceNow partners ecosystem on competitive
strengths and service portfolio

QUADRANT REPORT | APRIL 2025 | U.S.

Customized report courtesy of:

HCLTech

Executive Summary	03
Provider Positioning	06
Introduction	
Definition	10
Scope of Report	11
Provider Classifications	12
Appendix	
Methodology & Team	36
Author & Editor Biographies	37
About Our Company & Research	39

ServiceNow Consulting and Implementation Services	13 - 19
Who Should Read This Section	14
Quadrant	15
Definition & Eligibility Criteria	16
Observations	17
Provider Profiles	19

ServiceNow Managed Services	20 - 27
Who Should Read This Section	21
Quadrant	22
Definition & Eligibility Criteria	23
Observations	25
Provider Profiles	27

Innovation on ServiceNow	28 - 34
Who Should Read This Section	29
Quadrant	30
Definition & Eligibility Criteria	31
Observations	32
Provider Profiles	34

Report Author: Tapati Bandopadhyay

The U.S. market is driven by unique industry-specific solutions through codevelopment and coinnovation with ServiceNow.

Investments in agentic AI solutions

ServiceNow is pioneering the concept of agentic AI, representing the next evolution in intelligent automation. This approach involves autonomous agents capable of operating with minimal human intervention. ServiceNow has introduced the AI agent orchestrator to ensure specialized AI agent teams work together across tasks, systems and departments to achieve specific goals. The acquisition of Cuein, an AI-native conversation data analysis and insights firm, and Moveworks, another firm specializing in AI-powered self-service and enterprise search technologies, is set to significantly enhance the capabilities of ServiceNow's agentic AI solutions. Combining Moveworks' front-end AI assistant and enterprise search technology with ServiceNow's AI-driven workflow

automation can accelerate enterprise-wide AI adoption. This approach is expected to drive innovation and deliver game-changing outcomes for employees and customers. Such acquisitions will allow ServiceNow to extend its agentic AI solutions to key growth areas, including CRM, and redefine how AI is used to enhance employee engagement and customer service. Cuien has advanced its AI agent road map; its technology is integrated into ServiceNow's platform, benefiting nearly 1,000 signed AI agent customers. Cuein's technology will help bridge fragmented conversations by interpreting contexts and enabling AI agents to act intelligently across systems. This integration will streamline operations and enhance decision-making, thereby aligning with ServiceNow's vision of creating more integrated and intelligent systems that connect AI agents, data and workflows.

Developing customized industry-specific solutions

In the ServiceNow Creator Workflows space, several major service providers have been driving innovation and delivering transformative outcomes. Key trends include the release of

ServiceNow is
the new **business
engineering
platform** that
transforms
industries.



comprehensive workflow automation outlooks, development of low-code applications for faster integration and initiatives to optimize workforce through AI adoption. The launch of innovation centers focused on digital transformation and customer success target sectors such as manufacturing with solutions for engineering chain management (ECM) and supply chain management (SCM). Providers have been recognized for enhancing EX and productivity with self-service and guided journeys, creating valuable experiences for employees, customers and business operations. Industry-specific solutions have been introduced across the healthcare, financial services and manufacturing sectors, focusing on delivering exceptional CX. Advanced analytics and AI capabilities have been integrated into platforms, driving innovation and operational efficiency. Comprehensive services support customers' digital maturation journeys. The incorporation of GenAI into software development has enhanced productivity. Digital tools are used to reengineer business processes, creating intelligent workflows and improving customer engagement. Unique case

studies include transforming HR processes in the semiconductor industry, creating low-code apps for finance and procurement, optimizing IT asset management in financial services, merging companies in government services, introducing preconfigured workflows in the insurance sector and accelerating innovation cycles in software engineering through AI-powered platforms. These efforts highlight the innovative approaches and impactful results in the ServiceNow Creator Workflows space.

Seamless integration of third-party systems with ServiceNow

Integrating ServiceNow's platform with the existing IT systems and software can significantly reduce costs associated with managing multiple disparate tools. This seamless integration streamlines processes and data flows, minimizing maintenance and operational expenses. By leveraging ServiceNow's robust automation, integration and real-time analytical capabilities, organizations can enhance operational efficiency and gain strategic business advantages. For instance, the Now Assist platform helps create custom AI solutions

tailored to industry-specific needs. Its capabilities include building custom AI skills and integrating with other platforms such as Microsoft Copilot and Slack for seamless operations.

In the ServiceNow ecosystem, major trends include integrating AI and ML to enhance automation and decision-making, creating a unified AI ecosystem to streamline processes and developing industry-specific solutions for sectors such as manufacturing, financial services and healthcare. Enhanced security and compliance measures are also prioritized, ensuring secure integrations and adherence to industry standards. Tools such as Workflow Data Fabric and Integration HubWorkflow drive automation and optimization, enabling seamless data flow and integration across platforms. Successful ServiceNow partners leverage Workflow Data Fabric to unify business and technology data, Now Assist to deliver tailored AI solutions for specific use cases and Integration Hub to connect with modern API-enabled systems securely.

Building a robust talent pool for long-term success

The demand for ServiceNow experts, including administrators, developers and consultants, often exceeds the available supply. This shortage can lead to delays in project timelines and increased costs. Service providers are actively investing in upskilling and reskilling their existing workforce to bridge the talent gap. They are utilizing the ServiceNow University that offers comprehensive training and certification programs to upskill their certified resources. These programs cover a wide range of topics, from basic platform knowledge to advanced technical skills. ServiceNow certifications are recognized globally, confirming job-specific expertise and creating global work opportunities. Providers also invest in continuous learning and development, ensuring their teams stay updated with the latest advancements in the ServiceNow ecosystem. Customized training resources align team skills with business goals, fostering a highly skilled workforce that meets unique business demands.



Executive Summary

The talent strategy for delivering results and turnkey solutions in the ServiceNow space involves a holistic approach to talent management. This approach includes talent acquisition, succession planning and mobility, supported by strong people managers. Many providers have aligned their leadership to focus on key industry verticals and drive growth strategically. They are adopting a global talent strategy to tap into skilled professionals from different regions, including remote work arrangements and international recruitment efforts, to ensure a diverse and capable workforce.

Successful implementation of the ServiceNow platform relies on the seamless integration with third-party systems. Notably, there has been significant traction in Creator Workflows to develop customized and industry-specific solutions.




Provider Positioning

Page 1 of 4


	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
Accenture	Leader	Leader	Leader
Atos	Product Challenger	Rising Star ★	Product Challenger
Birlasoft	Product Challenger	Product Challenger	Contender
Capgemini	Leader	Leader	Leader
Cask	Leader	Leader	Leader
Coforge	Rising Star ★	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
EY	Market Challenger	Market Challenger	Market Challenger



 Provider Positioning


	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
Fujitsu	Product Challenger	Product Challenger	Product Challenger
Genpact	Leader	Product Challenger	Leader
GlideFast	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
IBM	Market Challenger	Market Challenger	Market Challenger
Infosys	Leader	Leader	Leader
Inmorphis	Product Challenger	Product Challenger	Rising Star ★
INRY	Product Challenger	Product Challenger	Product Challenger
Jade Global	Contender	Contender	Contender



 Provider Positioning

	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Product Challenger
LTIMindtree	Leader	Leader	Leader
NewRocket	Product Challenger	Not In	Product Challenger
NTT DATA	Not In	Market Challenger	Leader
Orange Business	Product Challenger	Not In	Not In
Pathways	Contender	Contender	Contender
ProV	Contender	Not In	Not In
Proven Optics	Not In	Not In	Contender
Randstad Digital	Contender	Product Challenger	Product Challenger



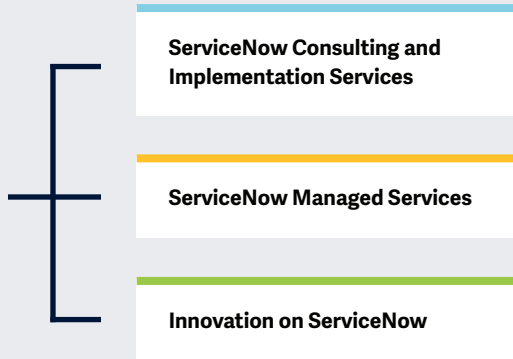
 Provider Positioning

	ServiceNow Consulting and Implementation Services	ServiceNow Managed Services	Innovation on ServiceNow
RapDev	Product Challenger	Product Challenger	Product Challenger
SoftwareOne AG	Not In	Not In	Product Challenger
Stefanini	Not In	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader
Unisys	Product Challenger	Product Challenger	Product Challenger
UST	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader
YASH Technologies	Not In	Contender	Contender



ServiceNow drives innovation, scalability and industry-specific solutions, offering a competitive edge in automation, AI and digital transformation.

Simplified Illustration Source: ISG 2025



Definition

ServiceNow is a cornerstone of digital transformation, facilitating streamlined workflows across industries with its cloudbased platform. As a leader in enterprise operations, it adapts to market demands, making it a strategic partner for businesses pursuing digital overhaul and operational efficiencies. Advanced AI capabilities, including document intelligence and GenAI controllers, enhance automated and intelligent workflows.

The ServiceNow Xanadu release confirms AI's mainstream status, introducing new IT, employee and customer workflow features. It offers enhanced AI integrations, automation and industry-specific solutions, focusing on user experience, low-code development and advanced analytics to drive digital transformation, predictive maintenance and operational efficiency. Key inclusions are GenAI, predictive analytics and workflow automation tools.

Digital business transformation is now the core theme for ServiceNow partners, with the release of Now Assist, which adds digital

engineering competency to the platform. Built with and Built on are the new transformative opportunities, and businesses can directly consume these without any dependency on other ServiceNow modules. Industries are adopting App Engine and Integration Hub to drive industry-aligned process modernization.

ServiceNow's ecosystem encompasses three key stakeholders: enterprise clients, service providers and the platform, each integral to driving transformation. The collaboration among these entities, coupled with strategic partnerships and initiatives like the RiseUp program, cultivates a rich talent pool and supports regional growth strategies, significantly



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: ServiceNow Consulting and Implementation Services, ServiceNow Managed Services and Innovation on ServiceNow.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 Consulting and Implementation Services

ServiceNow Consulting and Implementation Services

This report is valuable for service providers offering ServiceNow consulting and implementation services in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers and examines how each provider addresses key regional challenges.

Strategy professionals

Should read this report to understand the changing trends in ServiceNow consulting and select the right integration partner for a long-term technology roadmap for ServiceNow implementation.

Technology professionals

Should read this report to learn about industry-specific solutions and providers' prowess in conducting consulting assignments for diverse industries.

IT and business professionals

Should read this report to understand the design framework, evaluation methodologies and process maturity and complexity linked to ServiceNow adoption across industries.

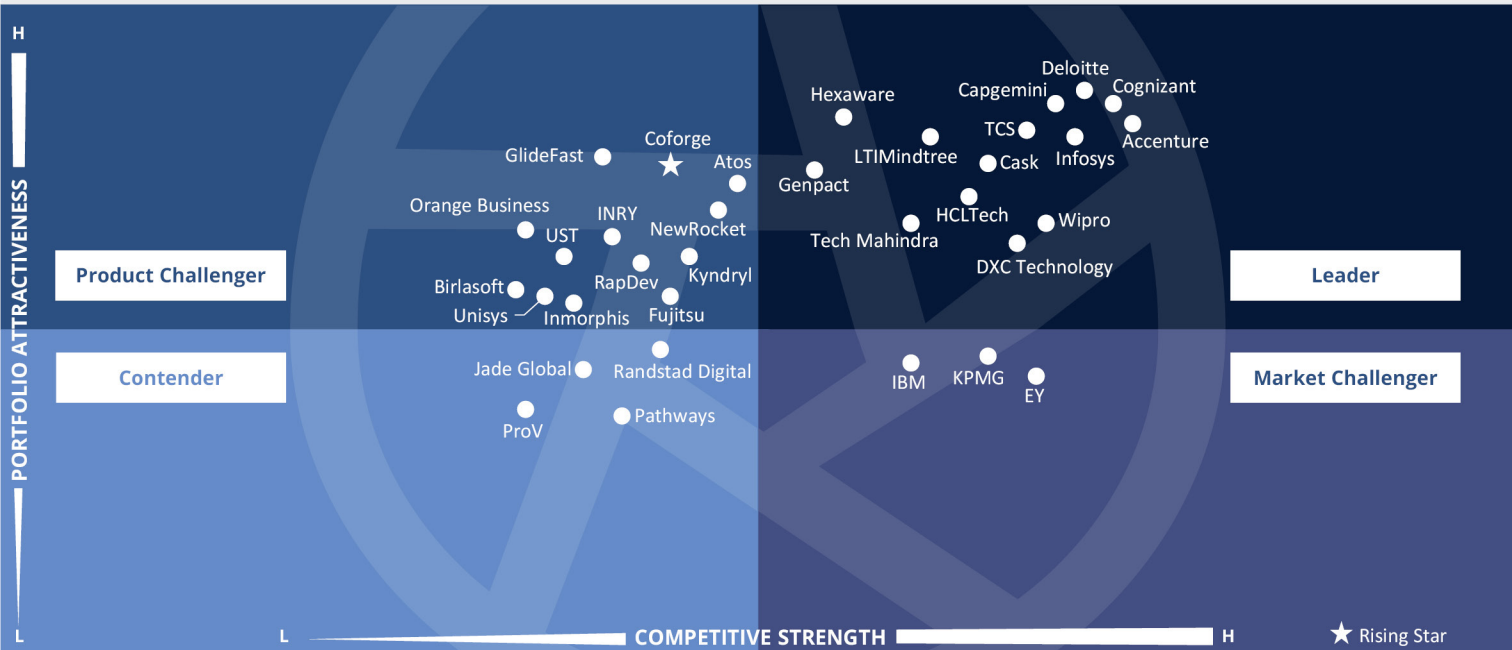
Digital transformation professionals

Should read this report to know how service providers design ServiceNow solutions and map the respective technologies.



ServiceNow Ecosystem Partners
ServiceNow Consulting and Implementation Services

U.S. 2025



This quadrant evaluates providers' expertise in transforming enterprise workflows across portfolios and configuring ServiceNow solutions. It emphasizes implementing and integrating various IT and non-IT modules across enterprises.

Tapati Bandopadhyay



Definition

ServiceNow consulting and implementation services help enterprises optimize workflow management across IT and non-IT functions, responding to changing economic pressures and enterprise needs. Consulting and implementation services help enterprises with adoption, development and ongoing operational support. Enterprises focus on maximizing returns from ServiceNow investments, prioritizing the implementation of strategic functionalities across HR, finance, legal, ESG and GRC workflows.

ServiceNow serves as an integrated workflow platform that bridges internal and external stakeholders, meeting diverse requirements while simplifying organizations' internal complexity. Successful implementation requires expertise to ensure integration with other applications and systems, enabling intelligent workflows while minimizing data conversion. This approach includes deploying industry-specific and functional solutions using new ServiceNow capabilities, which act as differentiators for clients seeking digital workflows for strategic outcomes.

Eligibility Criteria

- 1. Reference models, templates and frameworks:** best practices for opportunity identification, assessments for ServiceNow competencies, frameworks/tools for ROI and business case development, and value benchmarks
- 2. Workflow and service management experience:** client road maps to use ServiceNow as an integrated platform of platforms for operations, IT services, ESG and integration with GRC and security policies
- 3. Certified ServiceNow professionals:** Certified System Administrator, Certified Implementation Specialist and Certified Application Developer
- 4. Opportunity identification:** AI implementation and integration, including GenAI, transformers and LLMs, and use of tools/methodologies
- 5. Certifications:** ServiceNow certifications and workflow badges; expertise in ITIL 4, COBIT and DevOps; accredited ESM experience; ESG and GRC capabilities; integration experience; and industry- and region-specific regulatory knowledge
- 6. Maintenance support:** installations, upgrades, new feature/module release management, migration, patch management, lifecycle management and maintenance after ServiceNow release migration
- 7. System, data and process integration:** integration experience with the hub-and-spoke model at starter, standard, professional and enterprise levels
- 8. Successful implementations:** completed projects validated through case studies/client testimonials



Observations

The ServiceNow partner service provider ecosystem has experienced a dynamic shift, particularly in consulting and implementation. As enterprises seek rapid value realization from their ServiceNow investments, providers offer robust advisory services, refined methodologies and advanced technology integrations. They are evolving from technical enablers to trusted partners, guiding organizations through strategic road maps and aligning ServiceNow capabilities to broader business goals.

Growth in AI-driven advisory

A notable trend is the growing integration of AI and analytics within ServiceNow projects. GenAI pilots and solutions have seen high traction, allowing organizations to leverage NLP for faster ticket triage, predictive maintenance and sentiment analysis.

Industry-focused implementation frameworks

ServiceNow partners are placing significant emphasis on verticalized solutions and accelerators propelled by increased client demand for solutions that can seamlessly

integrate into the existing workflows while catering to specific industry standards. Many providers have rolled out proprietary toolkits and templates to expedite project timelines, minimize customization and assure consistent engagement quality.

Expansion of cross-platform integration

Lastly, there has been a significant surge in the demand for broader integration capabilities. ServiceNow is no longer a standalone ITSM tool. It is the foundation for enterprise-wide workflow transformations. Implementation teams collaborate closely with advisory counterparts to ensure ServiceNow capabilities interface effectively with major ERP, CRM and HR systems.

From the 38 companies assessed for this study, 33 qualified for this quadrant, with 14 being Leaders and one Rising Star.



Accenture differentiates itself as a top transformative service provider across industries. Its proven consulting frameworks and large-scale implementation projects, augmented by its automation capabilities, make it one of the most value-driven providers.



Capgemini leverages its extensive industry-specific and contextual knowledge to deliver tailored ServiceNow solutions. This expertise helps clients optimize their service management processes and achieve improved business outcomes.



Cask NX, an organically grown Pure Play ServiceNow partner, aims to achieve rapid growth, targeting a 30 percent annual revenue increase as it expands across the Americas, including business units in South America, Canada and Mexico.



Cognizant's comprehensive approach, industry-specific expertise and focus on innovation make it a valuable partner in the ServiceNow ecosystem, driving digital transformation and delivering exceptional value to clients.



Deloitte helps deliver effective ServiceNow solutions across industries. It has functional expertise to transform client operations through accelerators such as FastForward EX (unites technology and HR strategy) and Accelerated Workplace Solution (streamlines workplace management).



DXC Technology has over 15 years of experience as a leading Global Elite ServiceNow Ecosystem Partner, with more than 1,880 experts and over 7,200 global implementations. Its services span the entire ServiceNow ecosystem, including ITSM, ITOM and CSM.



ServiceNow Consulting and Implementation Services



Genpact supports various non-IT functions, including banking and finance, source to pay, healthcare, and accounts payable and receivable processes. It uses ServiceNow to implement automation and self-service functionalities, enhancing UX and minimizing operational costs.

HCLTech

HCLTech offers comprehensive implementation and consulting services, including platform configuration, workflow optimization and system integration. It showcases expertise and customer success through proven practices across multiple ServiceNow modules.

HEXAWARE

Hexaware has over a decade of global strategic and comprehensive 360-degree partnership with ServiceNow, encompassing roles as a partner, customer and vendor. It

ensures quality and seamless experience while migrating customers from incumbent tools to ServiceNow.



Infosys has a robust consulting and implementation practice with ServiceNow, aimed at helping organizations streamline their operations and enhance service delivery. It has led over 500 ServiceNow engagements for more than 200 clients across various industries and geographies.



LTIMindtree uses several proprietary intellectual properties (IPs), accelerators and frameworks for ServiceNow consulting and implementation. PRISM, its flagship offering, focuses on creating connected and engaging experiences for IT and non-IT personas.



TCS' consulting strategy involves understanding client needs using technology and innovation and providing tailored solutions through the ServiceNow platform. It is a reliable partner to optimize IT service management and streamline enterprise operations using ServiceNow.



Tech Mahindra boasts a high customer satisfaction score, reflecting its commitment to delivering quality services and ensuring client success. It has a high innovation quotient through technical excellence driven by industry-specific leadership in the ServiceNow space.



Wipro offers robust consulting and implementation capabilities for ServiceNow, designed to help organizations achieve seamless digital transformation, especially in the cybersecurity and risk, intelligent operations management, customer service and ESG domains.



Coforge (Rising Star) uses advanced technologies and proprietary frameworks, such as ProcessGym, to drive digital transformation and optimize business processes. ProcessGym helps clients identify process inefficiencies, eliminate waste and enhance service delivery.





“HCLTech’s ServiceNow consulting approach helps enterprises realize cost savings and enhance cross-department efficiency and productivity.”

Tapati Bandopadhyay

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 227,400 employees across over 215 delivery centers worldwide. In FY24, the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. It has created several programs to ensure the effective implementation and integration of the ServiceNow platform for clients. For example, its ValueNow program stands out for its thorough analysis of platform configurations, workflows and integrations, addressing issues related to platform complexity, performance bottlenecks and compliance with industry best practices.

Strengths

Codeveloping industry solutions: HCLTech has significantly advanced its ServiceNow consulting and implementation, focusing on integrating GenAI to enhance workflow efficiency and utilize its ESM capabilities. This strategic direction paves the way for the co-development of industry-specific innovative solutions on ServiceNow across various industries in the U.S. market.

Transforming service delivery: HCLTech has been helping clients across the size spectrum to use ServiceNow to transform its integrated enterprise service delivery with an intelligence value stream spanning ERP, SCM and CRM. The company and ServiceNow are also partnering to deliver new GenAI-led solutions. This collaboration is aimed at helping enterprises adopt ServiceNow’s

GenAI capabilities across their businesses quickly and efficiently.

Robust partnership with ServiceNow:

HCLTech offers consulting, design, implementation and managed services across ServiceNow’s entire suite of products. By blending the power of ServiceNow products with HCLTech’s industry expertise, intellectual properties (IPs), thought leadership and global delivery capabilities, the partnership delivers use cases and solutions that enable enterprises to adopt ServiceNow’s industry domain-specific GenAI to transform their operations.

Caution

HCLTech should elevate its ServiceNow partnerships to strategic differentiation by delivering legacy transformation use cases and solutions. This approach should enable even traditional enterprises to adopt ServiceNow’s industry domain-specific GenAI to transform their operations.





ServiceNow Managed Services

ServiceNow Managed Services

This report is valuable for service providers offering ServiceNow managed services in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers and examines how each provider addresses key regional challenges.

Strategy professionals

Should read this report to understand service providers' capabilities to manage and support the maintenance of ServiceNow solutions across portfolios.

Service delivery professionals

Should read this report to understand how ServiceNow managed service providers retain their credibility and service quality.

Service line and functional professionals

Should read this report to rationalize the fitment of ServiceNow resources and workflows across services.



ServiceNow Managed Services

Definition

This quadrant assesses ServiceNow partners offering lifecycle support for maintenance, including monitoring; remote support; and centralized management of the Now platform®, workflows and applications. With the growing popularity of DevOps, managed service providers must comply with new requirements.

They must be prepared for the platform's continuous evolution, which can challenge the existing solutions' status quo, and to quickly manage two new releases. Effective management involves balancing platform costs and licensing against the strategic value and ROI, focusing on CloudOps, FinOps and RiskOps to manage the platform's lifecycle and functionalities. Key provider evaluation parameters are maintenance effectiveness, data quality management, security, compliance, deployment options, addressing data privacy concerns and the provision of flexible pricing.

With the complexity of workflows, providers must deliver services globally and across domains. They must manage a sophisticated and integrated application landscape and operate within or integrate with a multivendor environment, emphasizing customization and modernization.



Eligibility Criteria

- 1. Experience with support:** experience with the Now platform®, workflows, third-party applications, integrators and accelerators, new features/modules and upgrades
- 2. Delivery capabilities:** delivery with proximity to clients
- 3. Technology partnerships:** partnerships with key software providers and a comprehensive AMS portfolio
- 4. Service integration and management (SIAM) and delivery models:** expertise in managing ServiceNow in broader CloudOps Go to Template Contents applications, including AIOps, MLOps, FinOps, RiskOps and ITOps
- 5. Delivery and contract models maturity:** ability to manage multiple vendors and dependencies between toolchains while adhering to SLAs
- 6. Broad customer base:** local use cases and references
- 7. Intelligent, adaptive and progressive maintenance:** alignment with upgrades and functionality enhancements from ServiceNow and technology ecosystems, service integrators, and in-house engineering teams (external partners and specialized tool providers)
- 8. Ability to manage decentralized deployment within an organization:** low-code/no-code and citizen developer techniques; training for identification and delivery; and user knowledge updates on new releases, versions, features and modules



ServiceNow Managed Services

Observations

ServiceNow's managed services have evolved significantly, driven by clients' growing demand for a more strategic and outcome-focused approach. Providers are no longer confined to basic platform administration. Instead, they embrace more holistic and proactive support models that ensure continuous platform optimization and alignment with broader business goals.

Emphasis on platform operations

In the last 12 months, service providers have emphasized supporting the entire lifecycle of ServiceNow operations. While traditional tasks such as system administration and license management remain essential, providers are increasingly incorporating value-added services such as cloud observability, risk operations (governance, risk and compliance) and FinOps. This holistic approach allows enterprises to optimize resources and scale flexibly, ensuring their ServiceNow environments evolve with changing business requirements.

Outcome-focused performance management

Another prominent trend is the shift toward outcome-focused performance management. Rather than solely monitoring uptime and ticket resolution times, providers are now tracking and reporting ROI and tangible business outcomes. This approach offers personalized dashboards, advanced analytics and proactive alerts to continuously refine workflows.

Elevating UX and engagement

With ServiceNow becoming a central hub for multiple business functions, UX management has gained prominence. Providers have responded by creating more intuitive and consumer-oriented interfaces, tailored service portals and custom apps to address unique organizational needs. These efforts are bolstered by regular experience reviews and feedback loops, ensuring services remain relevant and effective.

From the 38 companies assessed for this study, 33 qualified for this quadrant, with 14 being Leaders and one Rising Star.



Accenture' full suite of managed services for complex business processes integrates cloud and GenAI with new and traditional managed services and provides improved ROI to clients. Extensive sector-specific knowledge helps it to develop solutions for different sectors.



Capgemini's extensive Digital SIAM assets accelerate client transformations by customizing components to maximize the value delivered through its ServiceNow module. The company has established multiple digital SIAM-specific CoEs worldwide to further support this initiative.



Cask NX has achieved significant recognition in the ServiceNow ecosystem with eight validated practices, the highest among pure play partners in the U.S. As a ServiceOps partner, Cask NX was awarded the best ServiceNow portal by customers based on a contest.



Cognizant's managed services enhance IT effectiveness and promote business stability through reimagined solutions. It offers a consistent service model and comanagement approach across global regions for seamless service delivery.



Deloitte has taken significant steps to reimagine cost-effective service delivery with Breakthrough.ESM. This managed services solution combines ServiceNow solutions with Deloitte's industry-leading design, capabilities and domain experience.



ServiceNow Managed Services



DXC Technology's managed services focus on maintaining service health, optimizing cloud delivery and ensuring operational resilience. It uses intelligent automation, AI and ML to maximize IT investments and improve service delivery.

HCLTech

HCLTech provides its in-house accelerators, bundled with managed services such as Auto Pilot and Go Mapping on the ServiceNow Store, to drive customer success. These services offer support, maintenance and optimization of ServiceNow environments.

HEXWARE

Hexaware's all-encompassing HexAssure solution addresses every facet of ServiceNow platform management and growth, delivering a holistic approach. It offers services such

as platform and license advisory, upgrade management, platform adoption and architecture design.



Infosys, in 2024, strengthened its collaboration with ServiceNow to provide end-to-end managed services by leveraging the AI capabilities of the Now Platform and the Infosys Enterprise Service Management Café solution.

kyndryl

Kyndryl offers a comprehensive suite of managed services and solutions on the ServiceNow platform, including IT service management (ITSM), IT operations management (ITOM) and IT asset management (ITAM). It has successfully implemented these IT solutions for several clients across the U.S.



LTIMindtree employs proprietary frameworks for service optimization and continuous improvement, driving efficiency, reducing costs and delivering tangible ROI for its clients.



TCS' managed services for ServiceNow provide end-to-end support to enhance the efficiency of the ServiceNow platform. By offering comprehensive administration, continuous optimization, and robust training and support, TCS ensures clients use ServiceNow to drive digital transformation.



Tech Mahindra's One E2E Platform combines advanced analytics, AI and automation to optimize network operations and drive business growth. Operating in more than 90 countries, Tech Mahindra delivers solutions combining digital innovation and robust industry processes.



Wipro focuses on network managed services, especially in the telecom industry. It has a structured approach to managing network operations and services. Its services are priced competitively, ensuring alignment with the pricing structures of its end customers.

Atos

Atos (Rising Star) has more than 4,500 agents using ServiceNow 24/7 to deliver digital workplace service desk services. It also holds an advanced level of architecture certification.





“In collaboration with ServiceNow, HCLTech’s managed services offerings ensure the continuous delivery of successful business outcomes.”

Tapati Bandopadhyay

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 227,400 employees across over 215 delivery centers worldwide. In FY24, the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech assists clients in simplifying their ServiceNow deployments, minimizing technical debt and avoiding expensive and excessive customizations. With a robust team of ServiceNow experts, HCLTech offers 24 by 7 support, ensuring seamless business operations and reducing downtime.

Strengths

Domain- and industry-aligned managed services:

HCLTech offers end-to-end managed services for the enterprise implementation of ServiceNow by leveraging its industry expertise and in-depth knowledge of domain-specific IT landscapes. This collaboration between industry, domain and platform experts aims to help customers manage operational and technology needs through strategic enhancements in technology applications and infrastructure stacks.

Leveraging AI in managed services:

HCLTech’s strategic initiatives in ServiceNow managed services, along with the integration of GenAI and agentic AI, strengthen its position as a leader in digital business systems on the platform. Through internal

optimization and collaborative partnerships, HCLTech continues to set new benchmarks in delivering value-driven solutions to enterprises across the U.S.

Co-owning outcomes: HCLTech’s AI-powered industry-focused managed services help enterprises reduce costs and enhance cross-department efficiency and productivity following costly ServiceNow platform implementations. HCLTech helps clients participate in the ideation and implementation of digital solutions that drive business outcomes.

Caution

HCLTech’s cost-efficient and outcomes-driven managed services offerings should help clients implement the right digital solutions and gain value by driving successful business outcomes. Assessing both direct and indirect outcomes rather than focusing solely on process productivity can be a transformative approach.





Innovation on ServiceNow

Innovation on ServiceNow

This report is valuable for service providers offering ServiceNow solutions in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers and examines how each addresses key regional challenges. It showcases providers' ServiceNow innovation capabilities through the NowAssist platform, facilitating increased adoption of the ServiceNow platform.

Chief strategy and innovation professionals

Should read this report to understand how ServiceNow supports digital transformation and competitiveness, helping in strategic planning and long-term growth through innovation.

Business line managers

Should read this report to understand the ServiceNow platform's IT and non-IT capabilities, including Build with NOW and Build on NOW solutions, helping achieve cost-reduction goals.

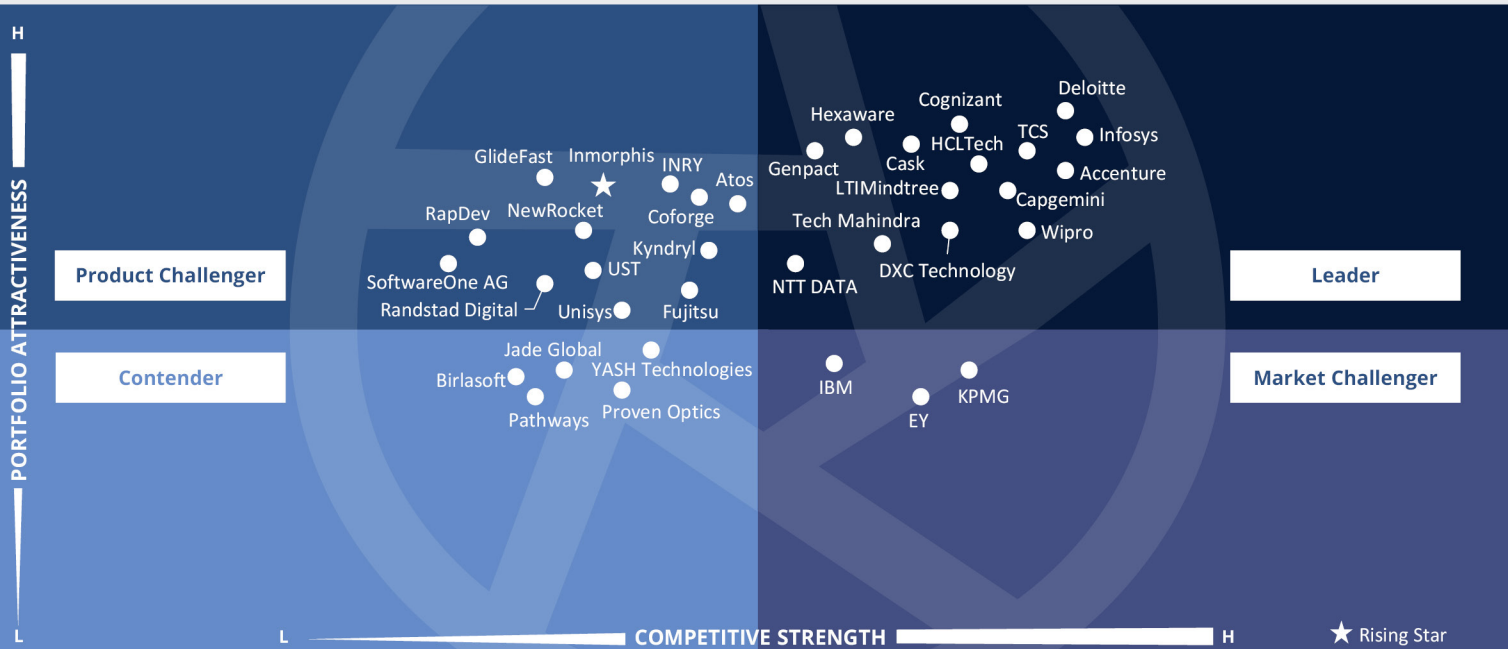
Engineering teams

Can read this report to gain insights into software solution development and thus build IPs/ accelerators for cloud platforms/industries by analyzing the best fit ServiceNow solution.

Technology and application development professionals

Should read this report to learn about the latest ServiceNow features, functionalities and components, as well as their configuration and integration.





This quadrant evaluates providers focusing on **digital transformation by developing out-of-the-box solutions on Now Platform** – a high-focus area for all the stakeholders in the ServiceNow ecosystem.

Tapati Bandopadhyay



Definition

This quadrant evaluates ServiceNow partners creating and delivering comprehensive offerings to promote innovation and digital transformation. The Now platform® acts as the base for these offerings, generating solutions that improve workflows and support automation aligned with specific industries and business functions. It facilitates both Build with Now (allowing for the development of new solutions) and Build on Now (utilizing existing capabilities for customization). The platform's core is Now Assist GenAI, which integrates AI-driven services like AIOps (predictive ML services) and enterprise service knowledge automation to streamline operational efficiency and predictive analytics. The platform also includes industry- and function-specific solutions. App Engine, Automation Engine and Integration Hub offer scalable tools for application development, process automation, and seamless integration, enhancing ServiceNow's ability to create.

Eligibility Criteria

1. **Low-code/no-code development expertise:** proficiency in using ServiceNow's low-code/no-code development tools
2. **Track record of innovation:** case studies and references for innovative solutions built on and built with ServiceNow
3. **AI-driven solutions:** integration of AI and ML services on ServiceNow, using predictive ML models and AI-powered analytics
4. **Expertise in AIOps:** predictive analytics, anomaly detection, and automation of ITOps, using AIOps within ServiceNow
5. **Industry specialization:** expertise in the industry served, such as finance, healthcare, ITSM and HR
6. **App Engine development experience:** a portfolio of custom applications using App Engine
7. **API and integration expertise:** integration of third-party applications and services using ServiceNow's APIs, ensuring seamless data flow and process integration
8. **Automation implementation:** deployment of automated workflows using Automation Engine
9. **Seamless integration:** use of Integration Hub to connect different enterprise systems, ensuring smooth data exchange and process continuity
10. **Experience in multisystem integration:** successful integrations across various enterprise platforms (ERP, CRM and HRM) and IT systems



Observations

The ServiceNow partner ecosystem has intensified its focus on innovation and custom-built services, responding to the accelerating need for tailored digital transformation. Global system integrators are leveraging the Now Platform's® expanding toolset, ranging from low-code/no-code App Engine capabilities to advanced AIOps and integration features, to develop industry-specific applications and automated workflows. Partners are embracing coinnovation engagements, aiming to deliver agile solutions beyond traditional ITSM boundaries.

Accelerated adoption of GenAI

Providers are experimenting with AI-driven capabilities such as automated knowledge base creation, predictive maintenance and natural language-driven workflows. These AI-first solutions are particularly relevant for large-scale enterprises seeking continuous improvement, as they can detect patterns, flag anomalies and suggest improvements in real time, driving quick resolutions and a more proactive service approach.

Emphasis on industry-specific frameworks

ServiceNow partners have increasingly rolled out vertical-focused frameworks that combine the platform's core modules with specialized domain expertise. From healthcare compliance solutions to financial risk and regulatory controls, this approach allows clients to deploy prebuilt functionalities that address unique industry challenges.

Expanding integration ecosystem and coinnovation

Broader ecosystem integrations include service providers developing advanced APIs and connectors for critical enterprise applications. By interlinking ServiceNow with ERP, CRM and data analytics tools, these build services enable end-to-end process automation and actionable insights.

From the 38 companies assessed for this study, 35 qualified for this quadrant, with 15 being Leaders and one Rising Star.



Accenture has developed accelerators on the ServiceNow platform and expanded the AI Lighthouse program to assist customers across industries in designing, developing and implementing new GenAI use cases.



Capgemini was one of the first partners eligible to install Now Assist on a demo instance. This early access enabled its innovation teams to immediately begin working on out-of-the-box (OOB) use cases.



Cask NX has developed GenAI offerings targeting the C-Suite. For instance, Cask NX's GenAI acceleration offering in the ServiceNow Store is designed to help organizations leverage GenAI to significantly improve productivity, experiences and outcomes.



Cognizant's strategic partnership with ServiceNow emphasizes accelerating the adoption of AI-driven automation, including the integration of Cognizant's AI-led Neuro® suite of platforms with Now Assist, ServiceNow's intelligent platform.



Deloitte continues to scale its AI capabilities and offerings on the ServiceNow platform. Both companies have codeveloped the blueprint for GenAI integration, balancing between risks and opportunities to generate business value for clients.



DXC Technology and ServiceNow have established a joint CoE to drive coinnovation and accelerate the adoption of GenAI solutions. Its AI consultants guide clients through their AI journey, ensuring adherence to data privacy, governance and compliance standards.



Innovation on ServiceNow



Genpact integrates GenAI into its ServiceNow practice, enhancing its value proposition. It has expanded its ServiceNow practice from 40 to approximately 300 resources and aims to achieve the Global Elite partnership status.

HCLTech

HCLTech integrates Now Assist with its Total Experience (TX) approach, encompassing innovation, user, customer and business experiences. This holistic approach eliminates silos and fosters interconnected experiences, enhancing satisfaction and engagement across all touchpoints.

HEXAWARE

Hexaware has partnered with ServiceNow to codevelop applications and utilities, implementing joint GTM strategies for customer acquisition. These efforts target areas such

as RPA, wealth management, underwriting, Anywhere Employee™, AIOps and connector development.



Infosys has significant innovation experience on the Now Platform® with eight offerings built with ServiceNow. Apart from the ESM Café, Infosys is creating a Pro Plus BOT factory, offering over 100,000 Now Assist-powered chatbots to help customers realize value in their AI journey.



LTI Mindtree has adopted existing AI solutions instead of developing AI technologies in-house, allowing the company to remain agile and avoiding the rapid obsolescence that can come with in-house development.

NTT DATA

NTT DATA uses the ServiceNow Built With platform to integrate and unify ESG processes through its Enterprise DX Platform for ESG. Its Enterprise Experience Platform helps enterprises improve UX, optimize costs and derisk upgrade paths with its ERP system.



TCS leverages advanced technologies such as AI and ML to automate routine tasks and orchestrate complex workflows in verticals such as manufacturing, BFSI and life sciences. This strategy results in improved service efficiency and reduced operational costs for ServiceNow customers.



Tech Mahindra has introduced innovative service offerings for clients and demonstrated robust capabilities in developing solutions

on the ServiceNow platform, especially in integrating GenAI through the Build on Now and Build with Now initiatives.



Wipro's GenAI initiatives, leveraged through the ServiceNow platform, encompass the development of tailored accelerators, HR workflow innovations and comprehensive consultative services.

inMorphis

inMorphis (Rising Star), with its proprietary GenAI Accelerator, helps clients accelerate adoption of GenAI technologies by identifying gaps and aligning solutions with their organizational LLM strategies. Its unique partnership with Confluent enables the integration of large data streams with Now Assist.





“HCLTech’s leadership in GenAI applications built on the ServiceNow platform has been consistently recognized in the industry and by clients.”

Tapati Bandopadhyay

HCLTech

Overview

HCLTech is headquartered in Noida, India. It has more than 227,400 employees across over 215 delivery centers worldwide. In FY24, the company generated \$13.3 billion in revenue, with IT and Business Services as its largest segment. HCLTech uses the Now Assist platform to provide advanced AI-driven support and automation, enhancing decision-making and operational efficiency. It also develops low-code/no-code solutions that enable rapid app development and deployment, helping businesses swiftly adapt to changing needs and drive innovation.

Strengths

Dedicated AI lab: HCLTech and ServiceNow have strengthened their partnership by inaugurating a dedicated AI Lab. This facility allows customers to pilot, navigate and scale innovative solutions tailored to address industry-specific challenges. These experiences are accessible globally in the HCLTech AI & Cloud Native Lab. The labs use HCLTech’s industry-leading and proven methodologies to assist clients in their GenAI and agentic AI journeys with ServiceNow, driving efficiencies in enterprise service management and various industries.

Enhanced productivity: HCLTech’s global deployment of ServiceNow offers industry-driven examples of the platform’s impact. The partnership between HCLTech and ServiceNow has enabled enterprises to adopt

GenAI and agentic AI capabilities in a vertical solutions approach quickly and efficiently across their businesses. This results in cost savings and enhanced cross-department efficiency and productivity.

Talent leadership: HCLTech’s leadership in GenAI on the ServiceNow platform has been consistently recognized in the industry. The company’s consultative approach and collaboration with ServiceNow ensure the continuous drive of business outcomes. It cocreates transformation offerings and invests in a large pool of industry and technology experts.

Caution

HCLTech should expand their clients’ capabilities to envision, codesign and cobuild on Now Assist GenAI use cases by cocreating transformation offerings and investing in top-quality industry and technology experts. The company must focus on the new modules and functionalities available in the advanced Xanadu platform.





Appendix

The ISG Provider Lens 2025 – ServiceNow Ecosystem Partners research study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

Aman Munglani

Lead Author:

Tapati Bandopadhyay

Editors:

Dona George and Priyanka Richi

Research Analyst:

Megha Dodke

Data Analyst:

Kruthika Sulghur

Project Manager:

Akshaya Hegde

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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

Lead Author



Tapati Bandopadhyay
Lead Author

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



Megha Dodke
Research Specialist

Megha Dodke, joined as a Research Specialist in October 2024. Megha is from Bangalore, India, and holds a Master's degree in Retail Management & Marketing as well as Product Strategy certification from IIM-K. Megha possess over 11 years of professional experience in Business Research, Market Intelligence, Competitive Intelligence, Sales enablement and Strategy across industry verticals. She has extensive experience in leading the development of competitive marketing and sales content, focusing on identifying and articulating key winning attributes.

Specializing in enterprise services and enterprise platforms (ServiceNow, Workday), she has successfully collaborated with global clients and stakeholders to deliver actionable research.



Author & Editor Biographies

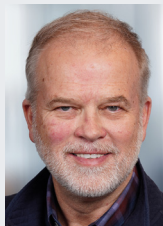


Study Sponsor

Aman Munglani
Director Ecosystem Studies,
Custom Research & Digital innovative series

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews.

He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



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 partner 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™

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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





APRIL, 2025

REPORT: SERVICENOW ECOSYSTEM PARTNERS