

# Omdia Mobile Workspace Services Assessment: HCL

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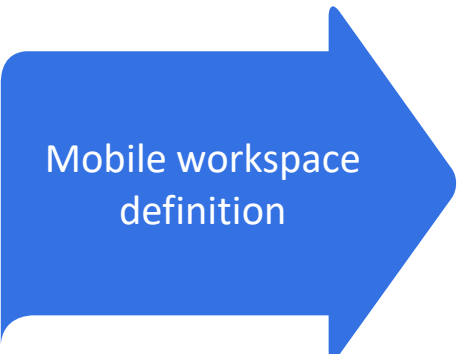
# Introduction, definition, and scope

# Introduction and definition



## Mobile Workspace Service Assessments

- The Omdia Services Assessments cover the mobile workspace offers of key service providers. The assessments evaluate these service providers, rate their mobile workspace capabilities, and give high-level recommendations to enterprise buyers.
- Mobile workspace is the enablement and development of infrastructure that supports an increasingly mobile and flexible workforce with the access, tools, and applications they need to work in a productive manner.
- Important capabilities include managed mobile connectivity (including 5G), devices and device management, mobile productivity applications and applications delivery, mobile analytics, and holistic service management and support.
- From a CIO/IT manager perspective, orchestration, security, and management of these tools and applications without inhibiting accessibility and user experience is critical.
- A broad range of challenges and opportunities are driving business interest in developing a digital workspace. These include the need to improve employee well-being and engagement, demands to modernize physical spaces, legacy solutions going end of life, and adopting tools to support better team working.



## Mobile workspace definition

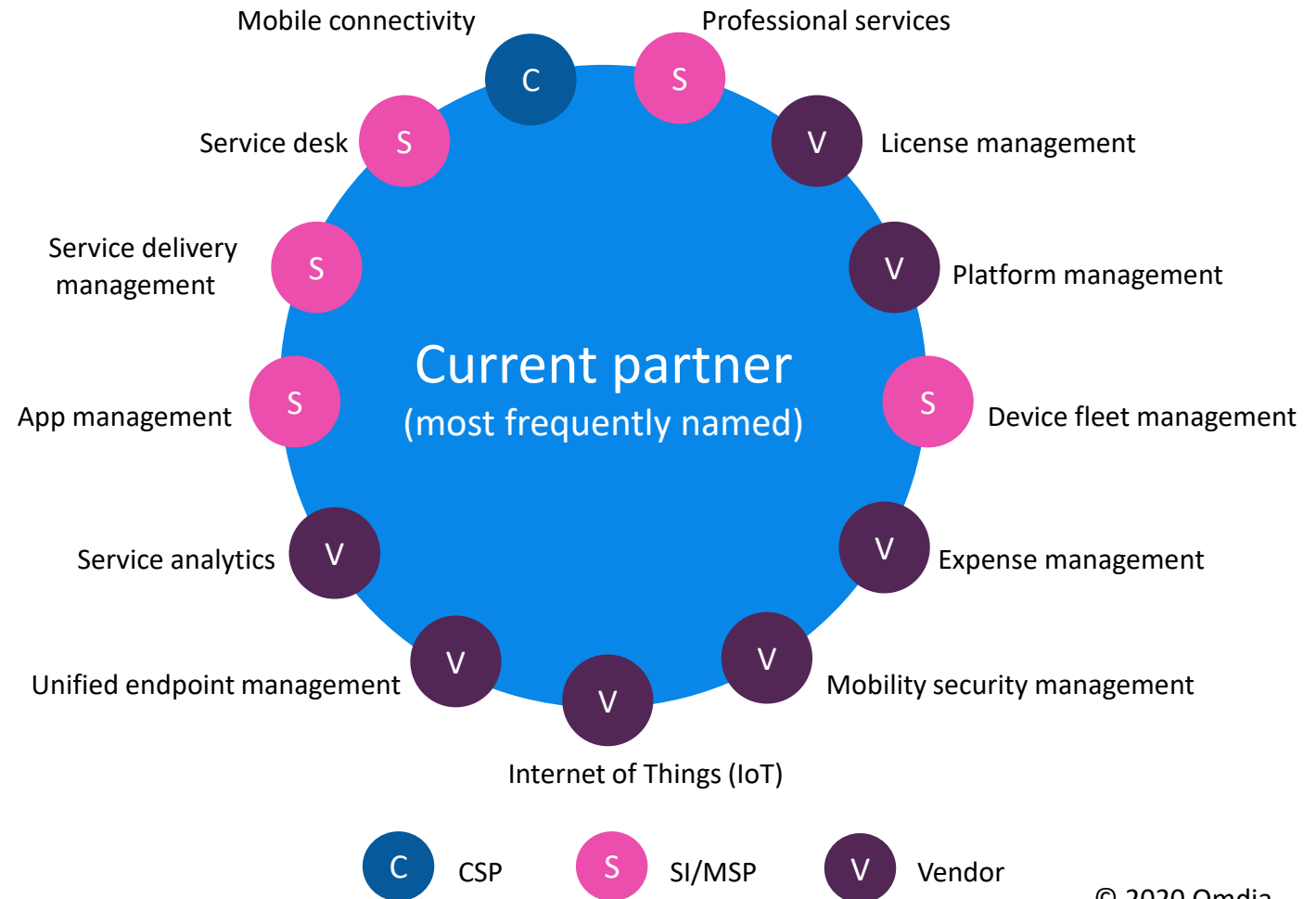
# Mobile workspace value proposition

- A mobile workspace enables employees with an ecosystem of different technologies, services, and practices that support flexible and remote approaches to work in a secure manner.
- Different factors are influencing the way that people work. Omdia has defined five workplace characteristics (see below) that provide insight and understanding into the dynamics affecting how employees in different roles now work.
- A mobile workspace should support these characteristics in helping employees work in a more aligned, empowered, engaged, and collaborative fashion – improving business efficiencies in the process.

Mobile workplace characteristics				
<b>Flexible</b> New mobile technologies enable employees to work in a more flexible and untethered fashion, across different locations, and via various device types.	<b>Informed</b> Employees must be informed on a wide range of role-specific, general business, and external information and insights. Employees must also be encouraged and feel able to lend information and insights of their own to help improve business operations.	<b>Connected</b> A connected employee is one that has easy, on-demand access to important business data and insights, as well as to other people that support them in doing their job effectively.	<b>Equipped</b> Employees must be equipped with the right technology and tools, in addition to being supported by effective working practices. Employees need a working environment and physical space that can help them work effectively.	<b>Knowledgeable</b> Having breadth and diversity of knowledge and skills. Some employees will have skills that are focused more on their specific role, while others have those that are less specific and are more widely applicable to a business.

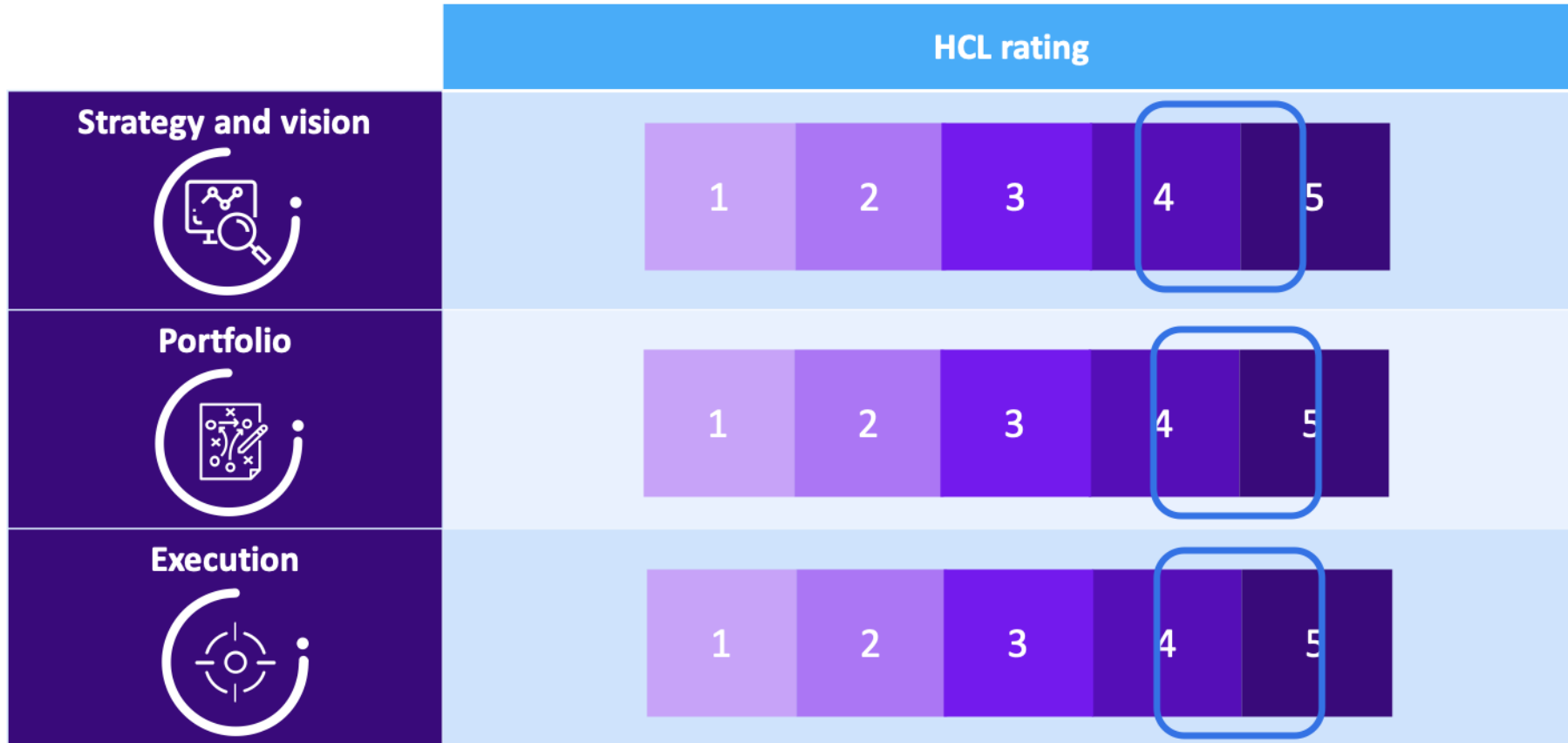
# Mobility is a vital digital workspace element

- Most enterprises already have many components of a digital mobile workspace, even if they see themselves as in the early stage of transformation.
- The issue for many businesses is often not about which tools to use but about understanding how to integrate and optimize these tools to deliver maximum business value, and understand and plan around what the impact of these tools will be on people and processes.
- Currently, there is a very diverse supply situation with many enterprises juggling multiple partners across enterprise mobility management/unified endpoint management (EMM/UEM), app management, mobile security, unified communication and collaboration (UC&C), service desk, connectivity, analytics and reporting, professional services, and other areas.



# Omdia view and recommendations


# Omdia view: HCL



Source: Omdia


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# Vision: HCL's strengths



A detailed mobility consulting approach


- Before deploying any mobile solution, HCL carries out a detailed mobility consulting exercise that helps the service provider create a path to devise a transformation and mobility strategy for its customers. The objective here is for HCL to develop an understanding of the possibilities that exist in a customer environment to improve workforce productivity, rationalize mobility services using automation, analytics, natural language processing (NLP)/machine learning (ML), and to broaden mobility experience through custom integrations. The goal is to ensure the right services are deployed when creating a well-integrated mobility ecosystem. It is a good approach, and one that will not only help ensure any services deployed are impactful, but will also help HCL build meaningful partnerships with its customers.



HCL offers a comprehensive mobility portfolio


- HCL offers a broad range of mobility solutions. Beyond just managed mobility, employee support is a particular area of strength; HCL offers a cognitive virtual assistant, in addition to its BigFix platform and WorkBlaze solutions that help foster more proactive end-user support approaches.
- Finally, HCL has strong and longstanding partnerships in place with many leading mobile technology providers. HCL has access to partner technological advancements before they are generally available, helping the provider deliver solutions to customers built on new technologies in a timely manner.

# Vision: Areas of further focus for HCL



Differentiating in a competitive market

- By the company's own admission, workplace business consultancy services will be important for HCL going forward. However, the market around consultancy services is a competitive one, populated by a mix of large organizations such as Accenture, in addition to smaller but more specialized consultancy firms. HCL must continue to invest and build its workplace consultancy into a service component that can help it differentiate.



Integrating and automating service management

- The simplification of service portfolios and a more connected and integrated service management approach are common trends among most service providers at present. In supporting the digital needs of enterprises, HCL offers many different solutions and platforms. The consulting-led approach adopted by the service provider will certainly help improve understanding around how services delivered to customers translate into business outcomes. However, in going a step further, integrated service management capabilities that help further digitize HCL's customer service activities and automate workflows between the service provider and its customers will be valuable in delivering clear insight for HCL into customer needs and progress against digital initiatives. Automation and integration between HCL and its customers around processes such as provisioning, contract management, incident management, and request management will deliver many benefits.

# Vision: Opportunities for HCL



Target SMBs

- More than 85% of HCL's business currently comes from medium-sized and large enterprises, but the company has expressed its intent to improve its small and medium-sized business (SMB) focus. SMBs are also challenged by the same rapid rate of change and digital complexities that larger businesses are, and are looking to a range of different providers for support. HCL should look to deliver solutions that are aligned with the needs of small businesses, but can also be tailored based on individual requirements (such as mobility enablement for sales, and digital signage solutions for retail).



5G services

- 5G and new cloud-based networking capabilities are bringing about many new opportunities, with an important one from a service provider perspective being that of private networking. New networking solutions and cloud architectures are presenting service providers and tech vendors with an opportunity to offer new network connectivity services. In the context of 5G, this is a significant opportunity, as it is now becoming possible for these providers to bypass traditional telcos (should they wish) in delivering 5G services directly to business customers. The rapid setup and provision of private mobile networks and indoor 5G solutions are some examples of the types of services that could be offered by companies such as HCL in the future.

# Enterprise buyer recommendations: HCL


- **HCL’s consultancy-led approach is focused on delivering relevant and impactful business outcomes, not just new digital solutions.** Work patterns and workstyles have changed significantly in recent times, with the huge surge in remote working in particular being a good example. Digital needs such as this mean that supporting employees with more fluid ways of working that help them remain productive and secure, both in and away from the office, will be very important. Enterprises must look to work with providers that can help them navigate the complexities, helping them securely and effectively deliver against these mobile and flexible working needs.
- **In helping enterprises measure success against digital initiatives, HCL offers a diverse range of service-level agreements (SLAs) in addition to more people-focused experience-level agreements (XLAs).** HCL’s XLAs aim to measure and help build understanding around how the employee experience looks within an organization. They are built on what HCL calls a “user delight score” (UDS) – a monthly score based on the weighted average rating of operational parameters such as mean time to resolution (MTTR), first call resolution (FCR), and average handle time (AHT), in addition to parameters such as system performance, application performance, and customer satisfaction (CSAT) score. The different metrics that can be built into an XLA can be weighted depending on significance and value. These types of measurements are a good complement to the more traditional and operationally focused SLAs that many businesses rely on.
- **Adoption of HCL’s managed mobility solutions is very good, with the company reporting strong revenue and growth associated with the service.** HCL has a healthy managed mobility service customer base, with the majority of its customers being multinational companies and large national organizations. HCL works with businesses across multiple verticals, with traction of its managed mobility solutions being particularly strong with financial services and manufacturing firms.

# Strategy and vision

# Vision: HCL




Support B2E needs




Mobile and cloud  
first

- New digital technologies, ever-evolving employee demands, and new regulatory requirements and guidelines present enterprises with many challenges and opportunities. HCL aims to support businesses through these complexities by providing a range of digital workplace services that help businesses realize value from digital initiatives and support customer efforts in enabling the future of work.
- Workplace mobility can be complex and embody many different elements and considerations. Organizations need partners that can help provide best-in-class technologies, support in modernizing processes, and practical solutions on how to better enable people. Guided by such needs, HCL's vision is to be a best-in-class digital workplace services provider, delivering smart workplace solutions to enterprises that help better enable employees.
- Increasingly, employees are working in a more flexible and fluid fashion, with access to resources, business systems, and data wherever and whenever they need it. HCL supports businesses by providing services that can help enterprises develop this boundaryless workplace to ensure employees can work productively at all times.

# Differentiators: HCL



Kaleidoscope-led digital workplace consulting



Solutions built on new, disruptive technologies

- Understanding where to start and how to deliver a mobile digital workspace can be a daunting proposition for businesses. HCL offers a data-driven assessment of an enterprise with the aim of measuring what the company labels the “Digital Dexterity Index.” This service helps establish a customer’s digital workspace baseline of sorts by enabling HCL to understand the technical, data, and user needs. Once they have been established, HCL creates a digital workplace track, complete with user personas. Additionally, improvement initiatives can be developed around things such as workplace GDPR compliance, communication and collaboration improvements, managed mobility, and disruptive technology consulting in areas like smart spaces and IoT.
- In addition to core digital workspace solutions such as managed mobility and UC&C, HCL offers a range of solutions that leverage some quite cutting-edge technologies. HCL WorkBlaze, for example, helps enterprises proactively improve user support by analyzing and detecting endpoint device performance events, application performance, and user activities. BeeHive is HCL’s smart meeting room solution, which includes a virtual meeting assistant for booking spaces and taking meeting notes and a smart digital canvas to assist and improve collaboration. Finally, HCL Onsite is an AR/VR immersive support solution, which delivers a fully collaborative remote presence environment to help teams troubleshoot, assess, and rapidly resolve issues by bringing in experts virtually.

# Portfolio roadmap

- **IoT in the workplace.** HCL aims to improve the employee experience by better connecting people with the physical environment around them. With its IoT-enabled workplace offering, HCL aims to further connect the workplace, ensuring costs associated with running and maintaining workplace equipment can be optimized and resources can be effectively utilized. The solution will enable businesses to equip offices with lights that turn off automatically when a room is vacated, while also alerting admins when connected office equipment is malfunctioning.
- **Mobile monitoring and analytics** is an area of future focus and investment for HCL. These enhancements will be introduced by way of HCL's WorkBlaze – a solution that monitors IT environments with smart sensors to provide visibility and insights into physical environments. HCL plans to expand this solution's capabilities with monitoring and analytics from end-user mobile devices with a view to enhancing reporting capabilities and proactively resolving issues.

# Mobility services portfolio

# Workplace mobility portfolio: HCL

## Connectivity

### On-site connectivity

Nucleus is a software-defined access network offering that enables central management and automation of wired and wireless LAN that can be deployed on-premises as an appliance or virtually in the cloud. Nucleus is a vendor-agnostic platform that automates configuration, device discovery, and provisioning of access switches and remote access points from multiple vendors. Nucleus provides network insights through features like app prioritization, app performance analysis, and heat mapping that aids in understanding usage patterns and helps enterprises make informed business decisions.

### Wide-area connectivity

Transport Independent Site (TIS) is HCL's SD-WAN architectural framework that leverages existing investments in MPLS and enables offloading of internet traffic, supporting areas such as hybrid cloud adoption and providing the capability to be carrier agnostic.

## Communication and collaboration

### UC&C

HCL offers migration, transformation, and maintenance services for Microsoft Teams, SharePoint, Google Drive, and OneDrive. HCL services for UC&C include web conferencing, smart meeting rooms, smart collaboration tools, smart screens for meeting rooms, Microsoft Teams, and a mobile application for conferencing.

# Workplace mobility portfolio: HCL

## Mobility management

### Unified endpoint management

HCL's UEM solution combines traditional client management of desktop and PC systems, with modern enterprise mobility management (EMM) capabilities that enable the management of mobile, IoT, rugged devices, and wearables. Additionally, HCL BigFix is being developed with new management features to better control and support endpoints – this includes UEM as a key feature.

### Device lifecycle management

HCL FlexSpace: Experience as a Service is a device lifecycle management offering that bundles devices with HCL IPs and offers in a subscription model. It embodies the procurement, provisioning, deployment, support, maintenance, refresh, and disposal of desktop, laptop, and mobile devices. HCL acts as the sole point of contact for all IT/hardware issues while customers consume this service in a pay-as-you-go model.

### Workplace virtualization

Cloud Workspaces is an all-inclusive, fully managed offering that brings virtualization, identity, and access management together with enterprise mobility – mobile device management (MDM) and mobile application management (MAM).

Source: Omdia

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# Workplace mobility portfolio: HCL

## Application management and development

Mobile application management

As part of its digital workplace practice center of excellence (CoE), HCL has a standalone consultancy practice dedicated to managed mobility services, of which application management and modernization is within its purview.

App catalog and provisioning

HCL OptiBot App Station offers a unified app catalog across software-as-a-service (SaaS), web, and mobile apps that are context-aware of the device platform and its compliance.

Source: Omdia

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# Workplace mobility portfolio: HCL

## Mobile applications

Mobile productivity	HCL’s offerings are integrated with the productivity suites delivered by both Microsoft and Google. Integrations with other productivity applications may also be achieved using REST APIs.
BI and analytics	HCL WorkBlaze monitors IT environments in real time and proactively remediates issues. It utilizes big data analytics to draw insights, and subsequently takes necessary actions.
CRM	Microsoft Dynamic 365, Zoho CRM, Salesforce, SAP, NetSuite CRM, and Oracle are systems that can be integrated with HCL’s offerings. For other CRM solutions, HCL can integrate its unified communication-as-a-service (UCaaS) solution with these tools.
Employee support	HCL’s “Lucy” is a virtual assistant capable of managing IT issues, in addition to those associated with finance, HR, and legal. Key features include smart meeting management, including automated note taking, NLP, context-based reasoning ability, and multilingual support.

Source: Omdia

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# Workplace mobility portfolio: HCL

## Commercials and contract management

### Commercials

#### Utility and transaction-based pricing

- Per active user model
- Per device per user
- Usage-based pricing – all resource units consolidated
- Ticket-based pricing
- Pay-as-you-go model – consumption-based
- Time and material
- Fixed price

### Mobile contract management

- Customer environment assessment to capture savings opportunities, bill errors, late penalties, surcharges, etc.
- Cost allocation for mobility project phases
- Initial and ongoing contract management
- Usage-based plan optimization
- Accounting multiple carrier plans to identify discrepancies
- Dispute management

Source: Omdia

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# Workplace mobility portfolio: HCL

## Mobile expense management

Unified Financial Services Management Platform

- Visibility of telecom plans for mobile and fixed devices
- Visual representation with drill-down capabilities

Consolidated billing

- License charges for mobile application used
- Telecom expenses: data and call
- Financial commitment tracking
- Reimbursement management

Source: Omdia

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# Customer care and support

- HCL offers dedicated on-site support and field services for all major customer sites, VIP users, and critical remote offices.
- Help desk: HCL has service desk agents, spread across 46 global delivery centers (GDCs), providing support in 44+ languages globally. The company has also strengthened its local delivery capabilities in the last year and now has presence in Dalian (China), Sofia and Varna (Bulgaria), Fukuoka (Japan), Pittston and Morristown (US) and new offices in Tier 2 cities in India (Madurai, Vijayawada, and Nagpur), Sri Lanka (Colombo), the US (Hartford, Connecticut), Vietnam, New Zealand (Hamilton), the UK, and Canada (New Brunswick and Toronto).
- SLAs for continuous service improvement:
  - User experience index (device and application)
  - XLAs based on UDS
  - Context-aware CSAT
  - Forward and reverse logistics handling time
  - Platform uptime
- Standard SLAs include call per end-user reduction, defense systems approach to training (DSAT), MTTR, net promoter score (NPS), context-aware CSAT, first contact resolution (FCR), call abandonment rate, fault rate for services, tighter SLAs for field support by leveraging wearables, user productivity index, and invoice loading time.

# Professional services: HCL

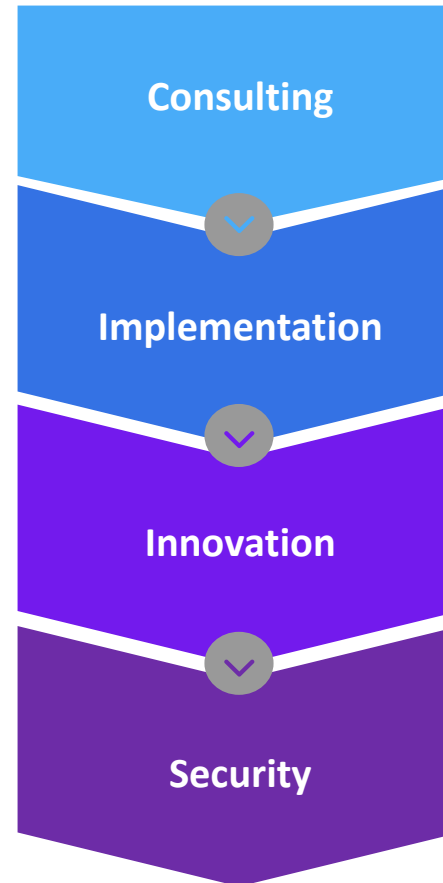
## Consulting

- Kaleidoscope-led Digital Workplace Consulting is a data-driven assessment of an enterprise to measure what HCL refers to as a Digital Dexterity Index. This assessment marries technical and functional data to derive users' needs and accordingly create a digital workplace track, complete with user personas.

## Supporting innovation

- HCL hosts technology days where it educates customers on the latest technologies, its new and enhanced offerings, and trends in the industry. HCL monitors customer environments in helping identify clients' challenges – insights that help the company instrument better service offerings.

Source: Omdia



## Implementation support

- A fleet of specialists support all HCL's transformational IPs on automation, cognition, mobility, analytics, virtualization, etc. Niche technologies such as Azure AD, smart spaces, Teams, IoT, AR/VR, etc. are also supported. In remote and small office locations, HCL leverages partners for onsite support or deskside support services.

## Security services

- HCL offers security consulting services and capabilities, including secure access to mobile apps, single sign-on, multi-factor authentication, OneDrive/Box secure access, device policies, endpoint device security, BYOD security and mobile content management.

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# Mobility services execution

# Verticalization approach and future strategy: HCL

- HCL global operations caters to various industries, spanning healthcare, agriculture, oil & gas, manufacturing and construction, retail, media & communications, public sector, transportation, banking, financial services & insurance (BFSI), and education. Use cases of note include:
  - **Retail:** HCL offers solutions to manage POS, proactive analytics on POS devices, provide real-time experience management or feedback of consumers from retail stores by analyzing their facial expressions, and can provide digital signage solutions.
  - **Manufacturing and Oil & Gas:** HCL offers an industry-specific version of its “Lucy” virtual support agent. HCL also provides AR/VR-based immersive solutions that help customers in these industries to remotely inspect sites.
  - **Education and SMB:** HCL offers solutions such as Chrome for business, delivering a cloud-powered workplace.
  - **Healthcare:** HCL delivers IoT solutions that can track the movement of medical equipment from inventory rooms, check the expiry dates, and provide insights on ordering and restocking. Additionally, HCL’s acquisition of C3i solutions in 2018 enables the service provider to deliver more specialized support to healthcare customers.
- HCL’s vertical strategy is to take the software-defined workplace vision to its customers and to support them in delivering on it – the goal being to enable platform-agnostic access to work resources anywhere, on any device, and via any location. HCL’s solutions are aligned with specific verticals and can be further altered based on the requirements of individual customers, such as with the examples above.
- Recent acquisitions have further enhanced HCL’s vertical capabilities. For example, the 2018 acquisition of H&D delivers HCL in-country front-office and delivery capabilities in Germany and enhanced domain expertise in the global automotive sector. H&D’s existing delivery center in Gifhorn, Germany, has become part of HCL’s global delivery footprint, supporting its IT service delivery both in Germany and globally. The acquisition of C3i in the same year has aided HCL in gaining a more specific foothold in the medical and life sciences sector.

# Partnerships: HCL

## Partner type

### Technology

HCLs technology and platform partners span large enterprise technology vendors, including the likes of Microsoft, Google, Intel, Dell, HP, Citrix, and VMWare. Additionally, HCL partners with a range of more specialized technology partners in delivering mobile services.

Source: Omdia

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### HCL mobile workspace partner program:

- Mobility Workplace Certification Program (MWCP): HCL has a team of mobility experts that have been certified by the likes of VMware and Citrix. These consultants deliver bespoke solutions tailored to customer needs.
- HCL has a mobile innovation center in India exploring next-generation mobile technology use cases and applications.

# Market positioning and organization: HCL

- The Digital Workplace Practice is a center of excellence (CoE) within HCL and a custodian of all business-to-employee (B2E) requirements. HCL's CoE team works closely with delivery, sales, and pre-sales. All HCL's mobile workspace initiatives lie with the CoE team – the team is at the center of what the provider delivers and enables all other functions such as delivery, sales, and pre-sales.
- Over the last financial year, HCL's workplace services revenue (of which mobility is an element) increased by 23%.
- 83% of HCL's revenue comes from large enterprises and multinationals, and 16% come from the midmarket.
- Traditionally, the average length of customer contracts is 36–48 months; however, HCL advises that contract lengths are increasingly extending to a five-year timeline, whereby an initial three-year contract is signed but renewed for an additional two years.
- The service provider delivers support across 46 countries and in 44 languages.
- HCL should look to bring expense management capabilities more to the forefront of its mobility offering, as managing and optimizing mobile-related costs remains an important activity for businesses.

# Appendix

# Ratings criteria: Overview

Strategy and vision	Portfolio	Execution
Vision	Mobile connectivity	Organization
Differentiators	Mobility management	Partnerships
Portfolio roadmap	Mobile applications and management	Regional/global depth
	Commercials	
	Professional services	
	Vertical solutions	

Source: Omdia

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# Ratings criteria: Scoring basis

- In the strategy and vision assessment, Omdia evaluated service providers' view of market developments and their ability to act as long-term partners for their large enterprise customers. We assigned each service provider a score of zero to five (with five being excellent) for each of the criteria. We weighted the scores in each category, and then combined them to give an overall rating.
- In the portfolio analysis, Omdia evaluated service providers' ability to provide mobility solutions and services for enterprise customers. We assessed a range of existing capabilities, and we assigned each service provider a score of zero to five (with five being excellent) for each of the criteria. We weighted the scores in each category, and then combined them to give an overall rating.
- In the execution assessment, Omdia evaluated service providers' success. We focused on the number of customer wins, sales, operations, organization, and current market position. We assigned each service provider a score of zero to five (with five being excellent) for each of the criteria, and we weighted the scores in each category, and then combined them to give an overall rating.

# Appendix

## **Methodology**

The Omdia Mobile Workspace Services Assessments are based on interviews with senior executives, analyst briefings, and publicly available source material. Omdia analysts make comparative assessments of service providers based on research and knowledge of the workspace services market.

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# Appendix

## **Omdia Consulting**

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help you. For more information about Omdia's consulting capabilities, please contact us directly at [consulting@omdia.com](mailto:consulting@omdia.com).

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