Future of Work Services

A research report comparing provider strengths, challenges and competitive differentiators

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U.S. SLED agencies need help in modernizing their work environments for a secure and efficient future of work

Digital workplaces: Transforming the future of U.S. public services

State and local government and educational (SLED) institutions are undergoing a significant transformation. They are rapidly transitioning to digital workplaces that are more manageable, efficient and equipped to handle the demands of a technology-driven society. This shift is driven in large part by the sector's widespread and accelerating adoption of the following:

- Remote and hybrid work models: Offering employees greater flexibility and attracting a wider talent pool
- Cloud-based infrastructure: Providing scalable and cost-effective solutions for data storage and application access
- Digital tools for collaboration and communication: Enabling seamless teamwork across diverse locations

However, these advancements come with their own set of challenges for SLED organizations. The most impactful challenges through at least year-end 2025 include the following:

- Overburdened IT teams: SLED IT departments, often understaffed, struggle to keep pace with the evolving digital landscape, requiring innovative solutions and outsourcing of some tasks.
- Fragmented solutions: Many agencies have implemented digital tools and services in silos, creating management challenges and hindering data integration. Streamlining and consolidation are necessary to mitigate this.
- Citizen service expectations: Citizens increasingly expect seamless online interactions with government agencies. Services must thus be user-friendly, accessible and efficient.

SLED agencies must **embrace digitalization** to keep pace with worker and citizen expectations.

Critical capabilities for digitalizing public sector workplaces

SLED agencies must prioritize the following critical capabilities to address the abovementioned challenges while enabling, improving, integrating and managing digital workplaces and workers:

- Workflow automation: Leveraging tools such as RPA to streamline routine tasks, freeing HR for more strategic work
- Unified communications and collaboration: Implementing unified-communication-as-a-service (UCaaS) platforms to enhance communication and collaboration across diverse teams, regardless of location
- Advanced data analytics: Utilizing data insights from various sources to improve decision-making, optimize resource allocation and identify areas for service improvement
- Integrated cybersecurity: Ensuring robust security across all services and devices with a focus on data protection, threat prevention and user authentication
- Mobile and remote work support: Providing employees with the necessary tools and policies to succeed in a mobile, remote or hybrid work environment
- Training and change management: Implementing comprehensive training programs to help employees adapt to new digital work practices and fostering a culture of continuous learning

Unique SLED considerations

In addition to including the critical capabilities outlined above in their digital workplace strategy, planning, development and implementation initiatives, SLED agencies face unique considerations when building their digital workplaces as follows:

- HR versus IT focus: SLED agencies may prioritize either HR or IT leadership for digital workplace initiatives; determining the appropriate balance depends on the specific agency's needs and existing structures.
- Comprehensive UX: Digital solutions must cater to both internal and external users. Services should be citizen-centric, ensuring a positive and efficient UX.
- Regulatory compliance: Adherence to data security, privacy and accessibility regulations such as Health Insurance Portability and Accountability Act (HIPAA), Family Educational Rights and Privacy Act (FERPA) and Americans with Disabilities Act (ADA) is paramount when developing and implementing digital solutions.
- Legacy system integration: New solutions must seamlessly integrate with existing IT infrastructure to avoid data silos and ensure smooth operation.
- Scalability and flexibility: Services should adapt to the changing needs and technological advancements for the agency's future growth.
- Accessibility and sustainability: Agencies must ensure inclusive services that cater to users with disabilities and incorporate environmentally conscious practices into their digital strategies.
- Procurement regulations: Understanding and navigating government procurement processes is crucial to ensure regulatory-compliant and cost-effective acquisition of digital solutions.
- SLAs and contracts: Clearly defined SLAs with vendors are essential to guarantee performance, uptime and support for the chosen digital workplace solutions.

Future disruptions in public sector workplaces

Several emerging and rapidly evolving trends will disrupt and transform the future of work in the U.S. public sector in the coming years. This will likely drive providers to accelerate and expand portfolios while enforcing innovative use of technologies, tools and solutions to address the rising challenges in the sector. The current key disruptive trends in the sector include the following:

- Advanced AI: Using ML and large language models (LLMs) to automate complex tasks, generate data-driven insights and provide personalized citizen services

- Evolving workforce models: Increased prevalence of remote and hybrid work models, potentially including a surge in contract and freelance workers
- Immersive technologies: Using AR and VR to enhance training experiences, facilitate collaboration across locations and improve remote work environments
- IoT for efficiency enhancement: Deploying connected devices to improve operational efficiency, automate data collection and personalize the UX for both citizens and employees
- Blockchain for security: Using blockchain technology for its potential to increase trust and security in digital workplaces by ensuring data immutability and secure transactions
- Human-machine collaboration: AI possibly acting as an assistant rather than a replacement, augmenting human capabilities and enabling more seamless collaboration between humans and machines
- Ethical technology adoption: Intensifying focus on responsible AI use, data privacy and algorithmic fairness, requiring robust policies and regulations in the public sector

What makes a leader in the digital workplace

Leading service providers stand out mostly through a keen understanding of clients' current and emerging needs in the digital workplace. This feature translates into a comprehensive portfolio that addresses the present challenges and is adaptable to overcome those on or just over the horizon.

Leaders often go beyond simply offering services by curating specific tools, technologies and solutions tailored to the unique requirements of government agencies and educational institutions. This targeted approach ensures that clients receive solutions that directly address their strategic goals and enable improved day-to-day operations without unnecessary complexity.

However, a strong portfolio is just one piece of the puzzle. Leading providers further solidify their advantage through deep sector presence and influence, allowing them to closely understand government and educational clients' specific needs and challenges. With the resources necessary to deliver exceptional value, leaders can build strong, long-term client relationships.

Strategic partnerships are essential to being a leader in the digital workplace. Partnering with other industry leaders, emerging technology developers and toolmakers, service providers expand their portfolios, allowing for greater adaptability and a comprehensive range of solutions to address clients' evolving needs. Leading providers also leverage partnerships to strengthen their competitive presence by multiplying client relationships, industry influence and access to broad channel networks.

U.S. SLED agencies need robust digital workplaces to meet worker and citizen expectations, manage hybrid work environments and leverage data for better decision-making, all while ensuring security and compliance.

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Accenture	Leader	Leader	Leader	Leader	Leader
Atos	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Bell Techlogix	Contender	Not In	Contender	Contender	Not In
Capgemini	Product Challenger	Product Challenger	Rising Star ★	Product Challenger	Product Challenger
CGI	Leader	Leader	Market Challenger	Leader	Leader
Coforge	Not In	Not In	Contender	Not In	Not In
Cognizant	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
Computacenter	Contender	Contender	Product Challenger	Contender	Not In
Deloitte	Leader	Leader	Not In	Not In	Not In
DXC Technology	Contender	Contender	Product Challenger	Product Challenger	Product Challenger
Fujitsu	Product Challenger	Contender	Product Challenger	Not In	Product Challenger

Provider Positioning

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	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
HCLTech	Leader	Leader	Leader	Rising Star ★	Leader
Hexaware	Product Challenger	Contender	Product Challenger	Contender	Not In
HPE	Not In	Not In	Market Challenger	Not In	Not In
Infosys	Leader	Leader	Leader	Leader	Leader
KPMG	Market Challenger	Leader	Not In	Not In	Not In
Kyndryl	Leader	Market Challenger	Leader	Leader	Market Challenger
Leidos	Not In	Contender	Not In	Not In	Not In
Microland	Not In	Not In	Not In	Contender	Not In
Movate™	Contender	Contender	Contender	Contender	Not In
Mphasis	Contender	Contender	Contender	Contender	Contender
NTT DATA	Leader	Leader	Leader	Leader	Leader

Provider Positioning

	Workplace Strategy and Enablement Services	Collaboration and Next-gen Experience Services	Managed End-user Technology Services	Continuous Productivity Services (including Next-gen Service Desk)	Smart and Sustainable Workplace Services
Pomeroy	Contender	Contender	Not In	Contender	Contender
Red River	Market Challenger	Not In	Not In	Leader	Not In
TCS	Product Challenger	Contender	Product Challenger	Product Challenger	Contender
Tech Mahindra	Product Challenger	Contender	Product Challenger	Product Challenger	Product Challenger
Unisys	Leader	Leader	Leader	Leader	Leader
UST	Not In	Not In	Contender	Not In	Not In
Wipro	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Zensar Technologies	Contender	Contender	Product Challenger	Contender	Contender
Zones	Market Challenger	Market Challenger	Leader	Leader	Not In

This study evaluates provider capabilities in delivering key **future of work services to clients in the U.S. public sector,** especially state and local government and educational (SLED) organizations.

- **Workplace Strategy and Enablement Services**
- **Collaboration and Next-gen Experience Services**
- **Managed End-user Technology Services**
- **Continuous Productivity Services (including Next-gen Service Desk)**
- **Smart and Sustainable Workplace Services**

Simplified Illustration Source: ISG 2024

Definition

The traditional office environment is evolving into a hybrid model, where flexibility is the driver for employee satisfaction and organizational success. Technological advancements, notably generative AI (GenAI), fuel this evolution, promising increased efficiency and productivity. However, their effective implementation requires expert guidance.

To attract and retain workers — and increasingly comply with workplace regulatory changes — state and local government and educational (SLED) organizations must ensure a consistent and positive work experience. This requires ubiquitous access to essential work tools and data, adaptable approaches and solutions, and robust security.

Effective communication and collaboration are essential components for organizational success. In the evolving landscape, this necessitates integrating both internal and external tools and, in some cases, even emerging technologies such as AR, VR and XR. However, integrating pre-pandemic infrastructure with these emerging capabilities presents a unique challenge for government agencies.

While GenAI offers promising possibilities for boosting employee productivity and streamlining workflows, its successful implementation and adoption require careful consideration and expert assistance. By embracing innovative approaches and partnering with the right expertise, SLED clients can pave the way for future-proof workplaces that empower employees, foster collaboration, and deliver exceptional service to citizens.

This report focuses on providers and offerings promoting next-gen thinking to improve current SLED workplace environments and enable adaptable future workplace landscapes.

ISG's Future of Work Framework

- Encapsulates what enterprises are doing to design new ways of working plus the Future of Work / Workplace models and helps connect them to digital solutions
- Represents convergence of supply and demand within the market
- Inner tiles represent themes of enterprise objectives
- Outer tiles represent initiatives
- Behind each outer tile is a specific set of capabilities with unique market-leading providers and solutions

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services:

- Workplace Strategy and Enablement Services
- Collaboration and Next-gen Experience Services
- Managed End-user Technology Services
- Continuous Productivity Services (including Next-gen Service Desk)
- Smart and Sustainable Workplace Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- 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 (exceptionsare 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.

Workplace Strategy and Enablement Services

Who Should Read This Section

This quadrant is relevant to U.S. SLED organizations across industries for evaluating providers of workplace strategy and enablement services. In this quadrant, ISG highlights the current market positioning of providers offering workplace strategy and enablement services to U.S. SLED organizations and how they address the key enterprise challenges in the region.

In the hybrid work era, SLED organizations prioritize seamless workflow by embracing AI-driven solutions. They focus on AI-led risk analysis and mitigation and data-driven predictive planning for workplace infrastructure and secure collaboration. SLED organizations also focus on RPA and GenAI-powered workplaces with copilots, voice-enabled assistants and private large language models (LLMs) to automate routine workflows and reduce human error. Continuous threat management through ongoing security strategies in digital collaboration is a key focus for SLED organizations adapting to the hybrid work landscape.

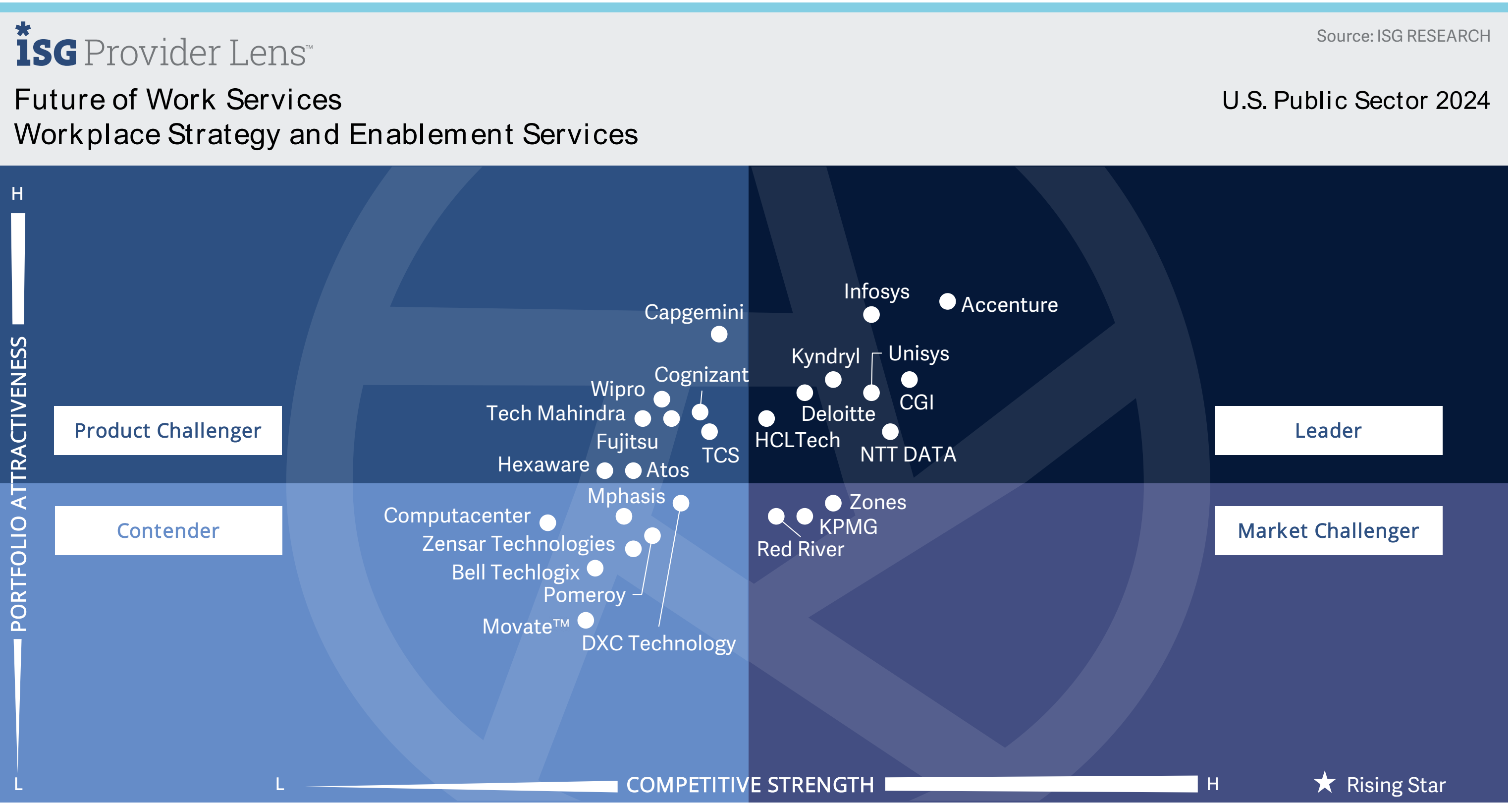
Service providers are offering advanced business and talent models to address these needs, thorough guidance, compliance adherence and strategic planning tailored to human, digital and physical workplaces. They offer advisory services addressing both traditional and evolving workplace strategies. The providers prioritize workplace-transformation-led business delivery models by adopting a vendor-neutral approach. Integrating local and remote workplaces to ensure parity of experience is also a key requirement. SLED organizations navigating the changing work landscape highly value service providers with expertise in asset strategy, assessments and workplace-driven sustainability strategies.

Consulting professionals should read this report to advise companies on workplace strategies and performance, ensuring they stay up-to-date on the latest industry trends and developments.

Strategy professionals should read this report to identify the best workplace strategy and enablement service providers for companies to help develop and implement a winning workplace strategy.

Chief experience officers (CXOs) should read this report to understand how leading providers can help them better prepare workforces for the changing business models and dynamics in the post-pandemic world.

Technology professionals, including workplace technology leaders, should read this report to understand the positioning and capabilities of providers to enhance employee services.



The providers in this quadrant are **strategy, operational and technology consultants with sector expertise** across functional areas, encompassing regulatory compliance, talent model adaptation and overall workplace improvement.

Bruce Guptill

Definition

This quadrant evaluates providers offering workplace strategy and enablement services, including implementations, across various industries. Providers aiming to help clients navigate the complex strategies and regulations of the workplace landscape must possess the expertise and the nuanced ability to tailor advice and strategies based on specific regional nuances, market directions and organizational responsibilities. They must also provide strategic capabilities and services spanning several integrated areas related to organization-wide workplaces.

Workplace service providers must focus on considerations such as advanced business models and innovative talent models. These considerations require a multifaceted approach, entailing thorough guidance, compliance adherence and strategic planning suited to human, digital and physical workplaces and must be considered collectively instead of in silos.

Key aspects to be included as part of assessed workplace services are as follows:

- Designing business models that enable and adapt to evolving work delivery models
- Providing guidance on digital capabilities that can impact human or physical workplaces
- Introducing new talent models
- Integrating local and remote physical workplaces
- Formulating physical asset strategy and assessments
- Developing a workplace-driven sustainability strategy

Eligibility Criteria

1. Established or intend to establish a **business presence in public sector** organizations, especially U.S. SLED organizations
2. Provide advisory services **addressing traditional and evolutionary** workplace strategy development and improvement
3. Offer advisory services for **vendor-neutral approaches** to workplace transformation-led business delivery models
4. Develop **talent models**, including diversity, equity and inclusion considerations
5. Integrate **local and remote** workplaces to ensure experience parity
6. Demonstrate expertise in **asset strategy and assessments**, including property and infrastructure usage and bottom-line performance
7. Showcase experience with examples of **workplace-driven sustainability strategy**
8. Present industry-focused workplace strategy case studies **demonstrating measurable improvement**

Observations

After grappling with the chaos of workplace and services provision during the COVID-19 pandemic, U.S. state and local government and educational (SLED) institutions are now better equipped to understand and, increasingly, guide the ongoing rapid digital workplace changes both within and beyond their traditional work environments.

ISG identifies the following two key aspects of workplace change that have the most significant impact, requiring the utmost support and offering the greatest business value:

- **Embracing hybrid work models:** Most SLED organizations are shifting quickly toward flexible work arrangements to address the challenges of enabling, implementing and managing hybrid workplaces, with a focus on skill-based hiring and fostering collaboration across a distributed workforce. This transition necessitates investment in digital tools and solutions for communication, collaboration, project management and secure remote access.
- **Focus on citizen-centric services:** The unique aspect of the SLED environment is its internal workplaces, frequently extending outside organizations to include services access and delivery for citizens and other constituents. The emphasis is on leveraging technology to improve service delivery with increased citizen engagement. This includes citizen portals, data-driven decision-making and automation of routine tasks. The goal is to make SLED services more efficient, accessible and user-friendly while integrating them securely and reliably with a growing range of internal staff and other resources.

From the 44 companies assessed for this study, 27 qualified for this quadrant, with eight being Leaders.

accenture

Accenture's emphasis on continuous improvement in clients' structure and operations, along with its outstanding metaverse expertise and user-centric five-layer architecture, addresses both existing and emerging needs in workplace strategy development and enablement.

CGI

CGI leverages a deep understanding of public sector IT needs and a user-centric approach that prioritizes business context to deliver digital workplace strategy consulting and enablement services.

Deloitte.

Deloitte significantly focuses on business organizations, operations and financial insights to deliver outcomes that are aligned with sector clients' goals, leveraging expertise in building connected workplaces and smart building environments.

HCLTech

HCLTech combines dedicated public sector resources with frameworks such as HCL Fluid Workplace and UWX, positioning the firm as a strong provider for designing, implementing and managing efficient public sector digital workplaces.

Infosys

Infosys' deep digital workplace services portfolio, which includes human-centered design, AI, EX and sustainability, positions the firm as a strong partner for public sector clients seeking to improve their digital work environments.

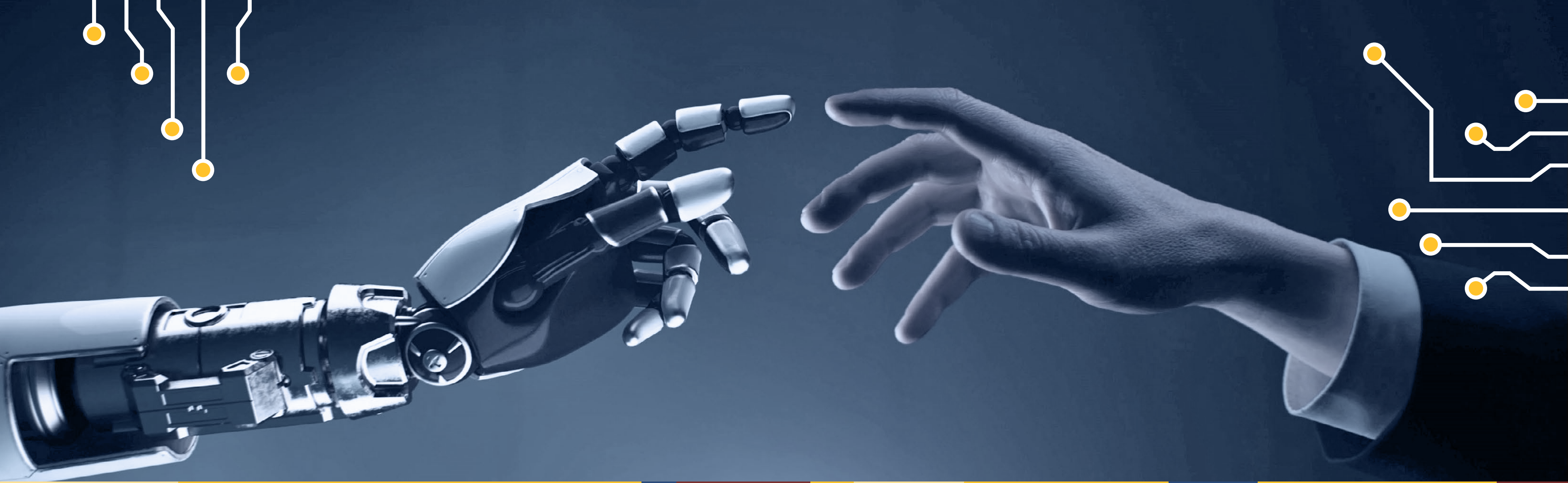
kyndryl

Kyndryl is considered a strong partner for digital workplace strategy with public sector expertise, focus on measurable results through XLAs, and emphasis on UX, automation and AI.

NTT DATA

NTT DATA's deep U.S. public sector experience, AI-powered support and expertise in digital workplace strategy position the company as a strong provider for government clients.

Unisys stands out in digital workplace strategy for public sector clients with its deep sector experience, user-centric approach and investment in AI-powered solutions for enhanced UX and data-driven decision-making.



Collaboration and Next-gen Experience Services

Who Should Read This Section

This quadrant is relevant to U.S. SLED organizations across industries for evaluating providers of collaboration and next-gen experience services. In this quadrant, ISG highlights the current market positioning of providers offering collaboration and next-gen experience services to U.S. SLED organizations and how they address the key enterprise challenges in the region.

Emerging technologies are shaping the future of collaboration and workforce development in the U.S. SLED organizations. These organizations are facing numerous challenges with their aging premise-based communications system. To address their concerns, providers are offering on-site touchscreen kiosks and new phone apps, enabling seamless cloud migration and bridging skill gaps with adequate training. Providers are also ensuring optimal performance by offering advanced support, comprehensive communication, collaboration and productivity stacks using AI and GenAI technologies.

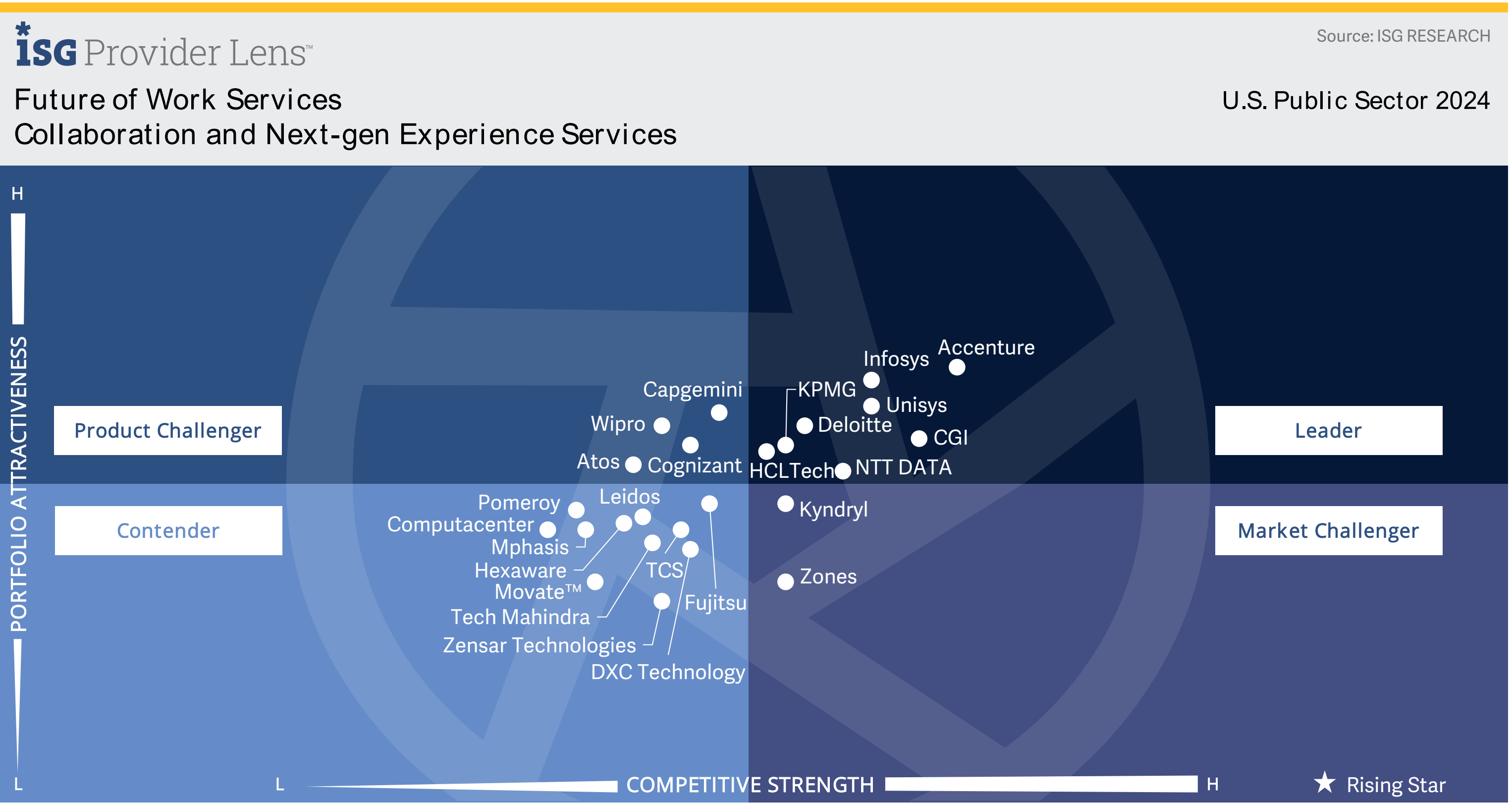
Providers are implementing an XLA-focused delivery approach and supporting unified communication and productivity to enhance the collaborative experience. They are also promoting digital dexterity, learning and skills evolution with advanced UX capabilities. The U.S. SLED organizations prefer to engage with service providers that offer an outcome-focused model using an XLA approach. They seek providers with experience in transformation and management services capabilities, including data and analytics, sentiment analysis, ML and change management activities to enhance and improve EX.

Customer service professionals should read this report to see how service providers address the challenges related to compliance and security while maintaining a seamless EX.

Digital professionals should read this report to understand how unified communication and collaboration service providers can support and align with their digital transformation initiatives.

Technology professionals should read this report to understand the relative positioning and abilities of communication service providers that can help them effectively plan and select a unified communication and collaboration as a service (UCCaaS) tool.

Procurement professionals should read this report to better understand the current landscape of unified communication and collaboration service providers.



Providers in this quadrant are **sector experts** with a solid understanding of how sector employees **work within and across functional and departmental lines and work with citizens** and other external constituents.

Bruce Guptill

Definition

This quadrant assesses service providers' capabilities in enhancing end-to-end UX and EX, offering value-added managed services to enable the workplace technology ecosystem and enhance the end-user experience.

Typically, providers offer services enabling group leaders, line-of-business (LoB) representatives and CXOs to provide enhanced collaboration capabilities, resulting in improved experience. These services associate experience with measurable business results and help align digital workplace transformation with worker needs.

Next-gen experience extends beyond technology implementation, including professional services promoting technology adoption. Service providers engage with clients in an outcome-focused model using an XLA approach. Experience management and improvement are accomplished through data and analytics, sentiment analysis, ML and change management activities.

These providers enhance collaboration and support comprehensive communication, collaboration and productivity stacks using AI and GenAI technologies. They also extend their offerings to consulting and advisory services, addressing the requirements of various business functions such as HR and operations. They provide expert guidance on effective change management and technology adoption, using cutting-edge technologies to ensure seamless transitions. These providers also offer services promoting digital dexterity, fostering an environment conducive to learning and skill development essential for navigating the evolving workplace landscape.

Eligibility Criteria

1. Established or intend to establish a business **presence in public sector** organizations, especially U.S. SLED organizations
2. Implement an **XLA-focused delivery approach** to enhance the collaborative experience
3. **Leverage AI and GenAI technologies** to provide value-added experience transformation and management services (for example, Copilot)
4. Enable **collaboration solutions** such as Teams, Cisco and Zoom
5. Support unified **communication, collaboration and productivity**
6. Facilitate proper **change management** and technology adoption, including with HR and associated employee management
7. Support **centralized experience management** capabilities
8. Promote **digital dexterity**, learning and skills evolution with advanced UX capabilities (for example, AR and VR)
9. Present industry-focused workplace strategy **case studies** demonstrating measurable improvement

Observations

Government and public sector workers face distinct challenges and needs in workplace collaboration and UX compared to their commercial counterparts. Typical challenges in enabling and improving collaboration, let alone next-gen worker experience, include:

- **Citizen engagement and public service:** Public servants frequently collaborate with citizens, requiring user-friendly interfaces built on secure platforms for enabling interaction with controlled access. Public sector UXs should prioritize efficiency and user-friendliness to enhance public service delivery.
- **Highly diverse environments:** Public sector employees increasingly collaborate across agencies with diverse priorities, requiring a strong emphasis on transparency, data security and interoperability. Many agencies struggle with outdated IT infrastructure, requiring adaptable UXs that function well on older systems.
- **Limited resources:** Budgetary constraints often limit the adoption of cutting-edge workplace technologies, requiring innovative solutions that optimize existing resources.
- **Regulation and compliance:** Strict adherence to regulations and compliance mandates specific communication channels and record-keeping within collaboration tools.
- **Security concerns:** Public sector employees handle sensitive data from citizens and related to classified or restricted resources and operations, demanding high-security features and user authentication.
- **Geographic and device dispersion:** Government agencies often have geographically dispersed, highly mobile workforces, necessitating robust conferencing and virtual collaboration tools that can function reliably in low or no bandwidth environments across various device types and capabilities.

From the 44 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders.

accenture

Accenture combines cocreation with user-centric design and leverages its deep business expertise to deliver next-gen EX and collaboration. It also invests in advanced virtualization (Citrix, VMware, AVD/Win365) to power measurable UX improvements across virtual environments.

CGI

CGI combines human-centered design with business transformation expertise and uses workshops and partnerships to deliver user-centric EX and collaboration solutions for SLED clients.

Deloitte.

Deloitte leverages its deep sector and business consulting experience to craft layered next-gen EX and collaboration solutions emphasizing AI-powered automation and workflow management.

HCLTech

HCLTech offers a comprehensive suite of next-gen EX and collaboration solutions through its Fluid Workspace portfolio, which features virtual environments, experience consulting and seamless hybrid workplace integration.

Infosys delivers a comprehensive next-gen EX and collaboration strategy and environment through its human-centric Orbit platform, extensive partner network and AI-powered IWS suite for seamless digital workplace management.

KPMG leverages its partnerships with ServiceNow and Microsoft to offer a unique approach to public sector EX. It combines HR and HCM expertise with AI-powered platforms and tailored change management for optimized EXs across work environments.

NTT DATA delivers next-gen EX solutions, combining traditional collaboration tools with AI, IoT and advanced features such as smart workplaces for a data-driven and personalized work environment.

Unisys utilizes multiple accelerators and frameworks, as well as managed services around Microsoft Copilot, to develop, deploy and optimize next-gen EX and collaboration solutions.

Managed End-user Technology Services

Who Should Read This Section

This quadrant is relevant to large enterprises across industries in the U.S. public sector for evaluating providers of managed workplace services end-user technology. In this quadrant, ISG highlights the current market positioning of providers that offer managed workplace services to large enterprises in the U.S. public sector and how they address the key enterprise challenges in the region.

U.S. public sector organizations face the constant challenge of optimizing IT or operational costs and boosting workplace productivity. To address this, they seek managed service providers that can equip them with the right technologies and processes at affordable prices to meet the dynamic needs of their remote workforce. SLED agencies specifically look for providers offering comprehensive end-user computing (EUC) services, including device management, patch management, provisioning, virtual desktop access and lifecycle management. These managed services enable public sector organizations to efficiently manage their digital workplaces and enhance overall efficiency.

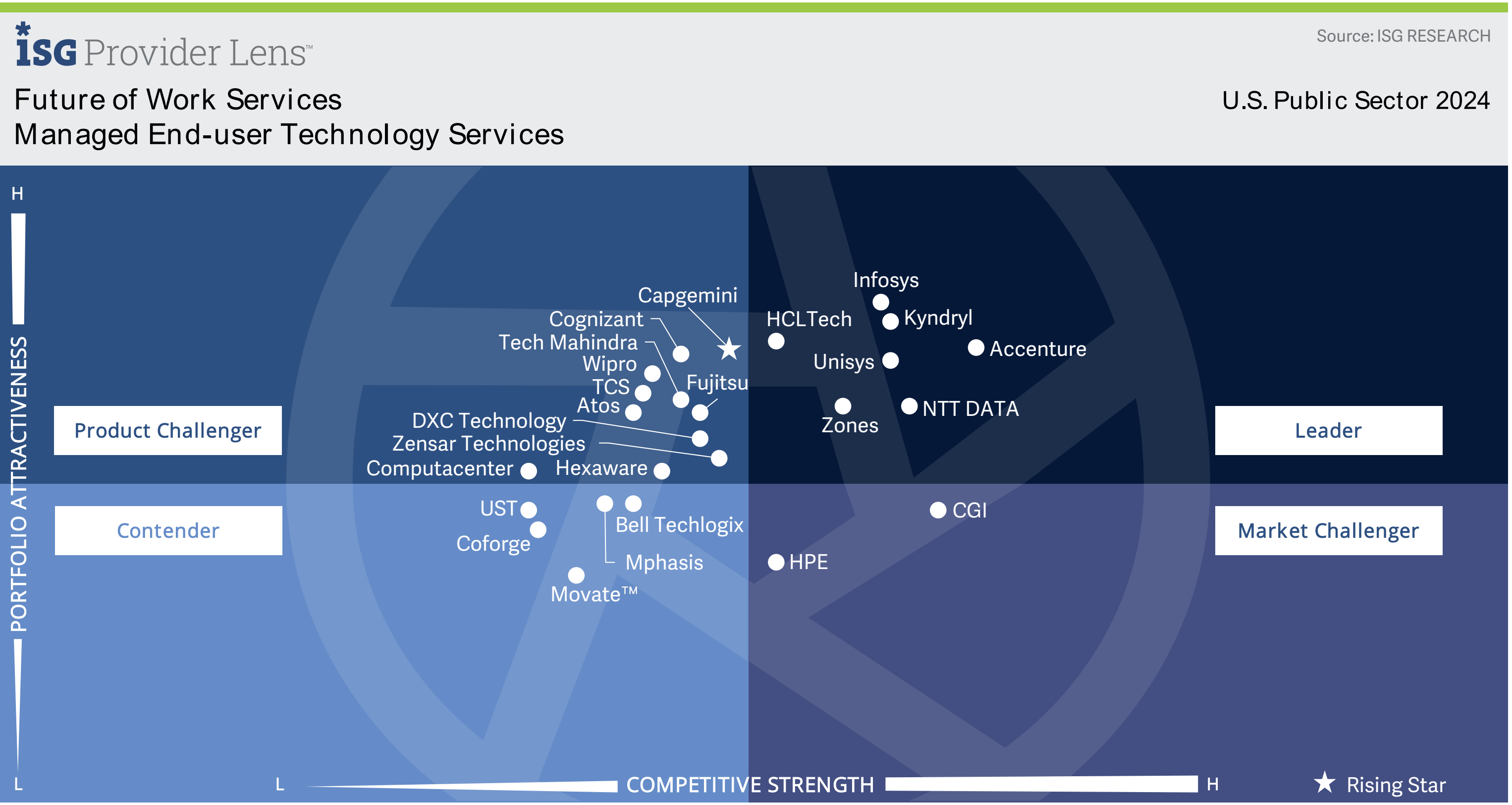
Driven by the rise in proactive experience management, digital employee experience (DEX) support and BYOD, U.S. public sector organizations have a heightened need for robust endpoint management and security services. This has led to a demand for device-as-a-service (DaaS), the Zero Trust security model and Microsoft Defender for Endpoint to provide administrators greater visibility into security and vulnerabilities, enhancing overall workplace security. The public sector organizations seek providers that offer a comprehensive portfolio of end-to-end managed security services and governance frameworks to address their evolving digital workplace requirements.

Chief information officers (CIOs) should read this report to understand how current processes and protocols influence an enterprise's use of workplace technologies and the potential limitations while adopting new capabilities.

Digital professionals, including facility management leaders, should read this report to know how managed workplace service providers can support them and align with their digital transformation initiatives.

Cybersecurity professionals should read this report to understand how providers address the significant challenges of compliance and security while maintaining a seamless EX.

Technology professionals should read this report to understand how providers' relative positioning and abilities can help them effectively plan and select managed digital workplace services.



This quadrant assesses and positions providers that offer **managed services** associated with **end-user devices and technologies** typically deployed, provisioned and secured by SLED IT departments **for end users and employees**.

Bruce Guptill

Definition

Hybrid remote-plus-office and increasingly mobile work environments are driving a growing need for coordinated, secure, reliable and uniformly managed services. These services enable employees to effortlessly use a variety of devices whenever and wherever necessary. The initial step in creating a digital workplace involves provisioning, managing and securing end-user devices, including phones, tablets, desktops and specialized devices. This process is followed by integrating these devices with collaboration and productivity capabilities.

This quadrant assesses service providers that offer managed services associated with technologies deployed, provisioned, secured and managed by SLED IT departments for end users and employees. These services include end-user enablement through services related to devices, applications, cloud workspaces and endpoint security.

Providers assessed in this quadrant offer complete end-user computing (EUC) services that form the core of the digital workplace. Such services include device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. Their service portfolios support both centrally provisioned and bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX) support.

Eligibility Criteria

1. Established or intend to establish a **business presence in public sector** organizations, especially U.S. SLED organizations
2. Provide **secure collaboration** and productivity capabilities
3. Support **unified endpoint management (UEM)** and mobility management
4. Complete device **lifecycle management services**, including procurement, enrollment, application provisioning, support, management, disposal and recycling (device as a service). Services should address device sourcing and logistics
5. Provide **digital employee experience** (DEX) solutions for automated issue resolution
6. Demonstrate experience in providing **remote virtual desktop services** on-premises and on the cloud (desktop as a service)
7. Present industry-focused **case studies** demonstrating measurable improvement

Observations

SLED organizations' shift to hybrid work environments has spurred demand for secure, centrally managed services that empower employees on various devices. Service providers address this using various managed services, including device management, application provisioning and security, making them increasingly attractive partners for resource-constrained agencies.

Key trends shaping the growing sector preference for external expertise for the above include the following:

- **Increased cybersecurity threats:** Cyberattacks push governments to adopt robust security solutions. MSPs offer current and critical expertise and capabilities.
- **Skilled IT workforce shortage:** Outsourcing device management can bridge the public sector's IT skills gap.
- **Focus on cost optimization:** Predictable billing by MSPs allows agencies to better manage IT budgets and potentially reduce overall expenditures.
- **Cloud adoption:** MSPs offer expertise in cloud migration, management and security, enabling governments to leverage cloud benefits such as scalability and flexibility.
- **Automation and AI integration:** Automation and AI are rapidly improving operational efficiency and allowing IT staff to focus on strategic tasks.
- **Focus on data governance and compliance:** MSPs with strong compliance expertise help navigate complex data regulations and meet data protection obligations.

Concerns around data privacy and vendor lock-in persist. Some agencies might also lack the expertise to effectively manage MSP partnerships. Successful engagement hinges on addressing data privacy and vendor lock-in concerns and fostering strong partnerships with experienced and qualified providers.

From the 44 companies assessed for this study, 25 qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture's comprehensive Managed End-user Technology Services include modern device management, device as a service with a sustainability focus and support for emerging technologies, all designed to optimize UX within digital workplaces.

HCLTech

HCLTech's Managed End-user Technology Services for the U.S. public sector currently manage over 230,000 devices, with desktop-as-a-service solutions and experience as a service combined with device lifecycle management.

Infosys

Infosys delivers comprehensive Managed End-user Technology Services, including secure device management, field service mobility, UX focus and mobile-plus device management with real-time insights for data-driven service improvement.

kyndryl

Kyndryl offers customizable end-user device management solutions encompassing desktops, laptops, tablets and smartphones across platforms, with features such as zero-touch enrollment, application management and advanced security, all backed by data analytics and user support.

NTT DATA

NTT DATA provides a comprehensive suite of Managed End-user Technology Services, including self-service device provisioning, centralized device control, AI-powered monitoring and automation, and a sustainable device-as-a-service option.

unisys

Unisys offers Managed End-user Technology solutions, including device subscriptions, best-in-class device management through partnerships, and a future-oriented approach to cloud-based endpoint management.

ZONES

Zones offers tiered device management bundles, device optimization with security integration and support for Microsoft environments, with exceptional experience in SLED client organizations.

Capgemini

Capgemini (Rising Star) offers a robust suite of relevant services, including unified endpoint management, device as a service and virtual desktop solutions across leading platforms. It excels in managing user devices, applications and experiences.

Leader

"A leader in managed services for end-user devices and technology, Zones offers tiered management bundles, device optimization services and security integration for public sector clients in the U.S."

Bruce Guptill

Zones

Overview

Zones is a global services and solutions provider founded in 1986 and headquartered in Auburn, U.S. It serves clients in over 100 countries using a services-plus-reseller business model, with retail, healthcare and public sector as its key verticals. The company is privately held and employs about 3,000 staff globally. The firm maintains a dedicated U.S. public sector business unit supporting several hundred client organizations, including municipal, state and federal government agencies. Zones' sector strengths have been built on managed services and support.

Strengths

Tiered device management bundles: Zones' multitiered approach bundles core functionalities such as installation, support, updates, patching and remote monitoring, from basic packages to comprehensive options encompassing mobile device management and data backup or recovery. Zones leverages robust remote monitoring and management (RMM) tools for proactive device management and secure remote access for efficient troubleshooting.

Managed services for device optimization: Zones' device-focused managed services include mobile device management, application control and content security, as well as policy consulting, telecom expense optimization and the entire device lifecycle, including equipment staging, provisioning and recycling. Zones provides modern management solutions for Windows 10 and beyond, along with device-as-a-service options to streamline procurement and deployment of mobile assets.

Security as integral to device management: Zones' unified management platform enables role-based access control on tools and applications with professional and managed services for identity access configuration, implementation and management. Recognizing the scope of Windows and Azure among SLED clients, Zones supports Microsoft Active Directory services (on-premises), Azure AD and AD on Azure. Its additional robust security includes encryption, multifactor authentication and user training.

Caution

Despite its rapid growth and demonstrated capabilities in serving public sector clients, Zones remains a relatively smaller player than established IT services leaders. This might lead some sector clients to prioritize larger, more well-resourced providers.

Continuous Productivity Services (including Next-gen Service Desk)

Who Should Read This Section

This quadrant is relevant to enterprises across industries in the U.S. public sector for evaluating providers of continuous productivity services (including next-gen service desk). In this quadrant, ISG highlights the current market positioning of providers offering continuous productivity services (including next-gen service desk) to the U.S. public sector and how they address the key enterprise challenges in the region.

SLED organizations in the U.S. are constantly focusing on redefining their IT support and service desk services to deliver seamless user experiences and drive efficiency. The organizations aim to reduce their IT management burden and streamline support services, enhancing productivity and cost-effectiveness. Consequently, service providers are offering prompt issue resolution to minimize downtime and restore critical business systems, ultimately improving efficiency, ensuring successful network expansion and minimizing critical cybersecurity incidents.

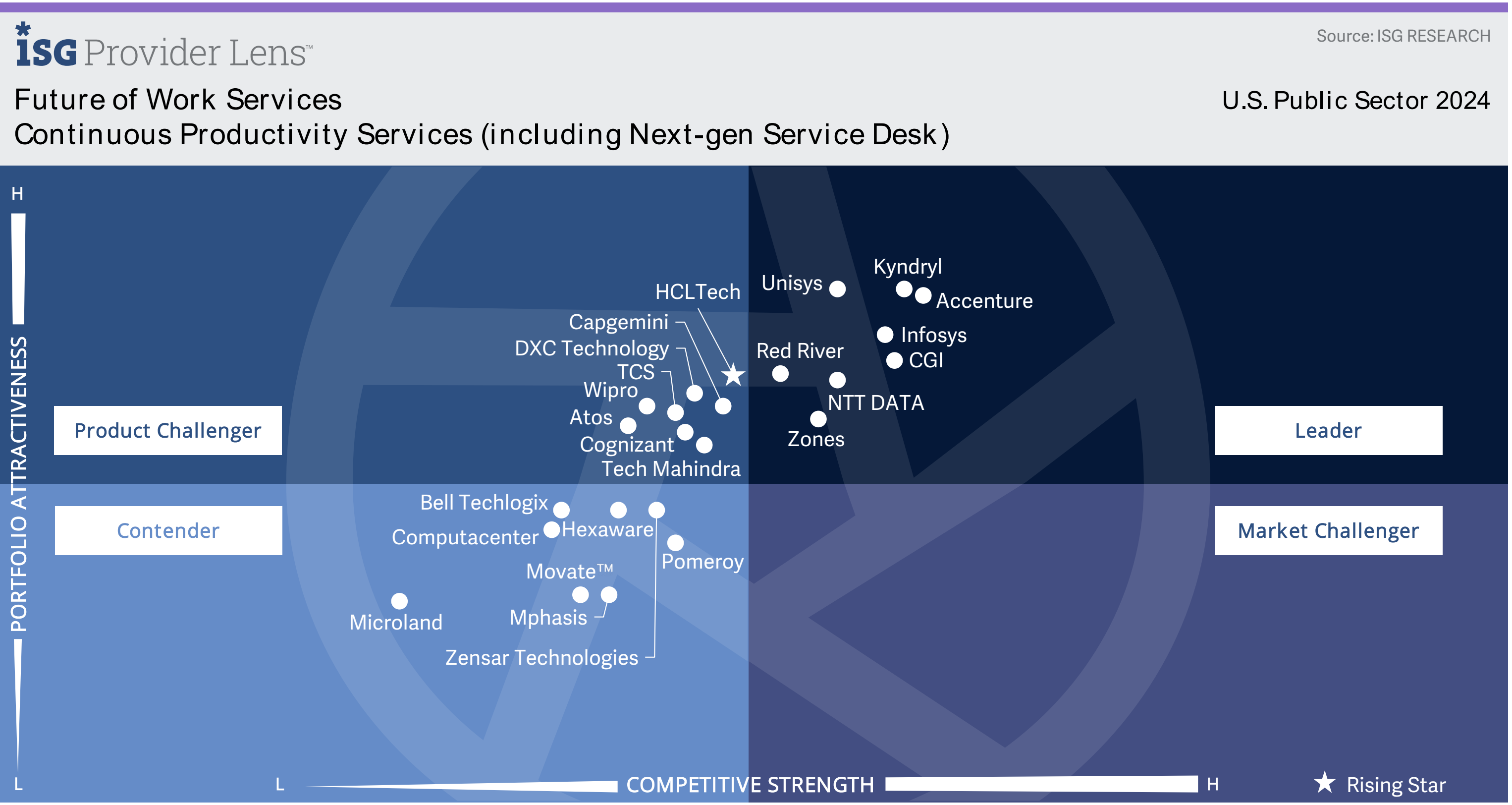
Intelligent service desk and workplace support services continue to gain traction among U.S. SLED organizations. This growing interest is attributed to the digital transformation initiatives supporting the U.S. federal government. As a result, these organizations are seeking providers with robust knowledge management processes to support chatbots and agents in resolving issues, a shift-left strategy to drive efficiencies and improve the end-user experience, and advanced AI-based analytics capabilities to derive data-driven insights that enhance service delivery improvements. Providers are also integrating with ServiceNow and Amazon Connect to drive innovation in support services.

Public sector professionals should read this report to understand the relative provider positioning and capabilities that can help them effectively plan and select digital workplace services.

Field service professionals should read this report to understand how service providers implement and increase the use of workplace services to better manage field service operations.

Digital professionals, including facility management leaders, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives.

Procurement professionals should read this report to better understand the current landscape of the digital service desk and workplace support service providers in the U.S. public sector.



Public sector clients **benefit most from next-gen providers** leveraging **deep sector expertise** and experience regarding rapidly changing internal user needs **and constituent experiences** and expectations.

Bruce Guptill

Definition

This quadrant assesses service providers' capabilities in enabling and sustaining the continuous productivity needs of next-gen workplaces, traditional workplaces and fully integrated hybrid working patterns.

For today's workforce, being productive means having the ability to work from anywhere, anytime. Users require a different IT operating model, driven by changes in business models and market channels, which they must operate and support. The current workforce needs autonomy, constant connectivity and total productivity regardless of location, work pattern or device. Meeting these needs requires providers to offer enhanced support capabilities, rendering typical service desk offerings less appealing yet available. Next-gen services include sentiment analysis and automated DEX triage to ensure always-on IT is managed, AI-powered health monitoring for managed services and emerging devices such as AR and VR. These services encompass automated and proactive technical support and cloud platforms to offer always-on systems. Providers leverage AI and cognitive technologies for user-facing tasks, achieving significant cost savings.

Success is measured through XLAs linked to business outcomes rather than SLAs. Providers can enhance business outcomes by offering advanced productivity support. Previously, these services included field and onsite support, requiring expert technicians to visit user locations. Currently, providers leverage automation and use more remote and self-service options, such as AR self-fix, workplace support, service desk, tech bars and cafés, DigiLockers, omnichannel chat and voice support.

Eligibility Criteria

1. Establish or intend to establish a **business presence in public sector organizations**, especially U.S. SLED organizations
2. Provide deliver-anywhere **autonomous workplace support**
3. Offer fully **integrated analytics and automation** for issue resolution
4. Deliver **contextualized AI support** for workplace
5. Provide **service desk augmentation**
6. Offer **XLA-driven support** instead of SLA-driven decisions
7. Set up and deliver **intelligent support via** self-help kiosks, tech bars, IT vending machines and digital lockers
8. Provide **automated and contextualized support** for end users based on their roles and work
9. **Quantify workplace support** function performance beyond traditional service metrics
10. Present industry-focused **case studies** demonstrating measurable improvement

Observations

Owing to the constant need for reliable means of providing continuous services to citizens and other constituents, public sector agencies are increasingly interested in outsourcing service desk and support functions, particularly tier-1 support. The potential to combine improved service availability and reliability with reduced staffing needs is driving significant interest and engagement.

This growing demand is attracting a wider range of service providers. ISG's 2022 study identified 18 qualified providers, including five Leaders. For the 2024 study, the number of qualified providers has grown to 24, with an increase in leadership positions from five to eight.

ISG research and work with client organizations continue to support the growing importance of next-gen service desks and support services for public sector clients, especially SLED organizations. These services are positioned as a cornerstone of sector digital workplace evolution and improvement, offering significant benefits as follows:

- **Improved UX:** Reduced tier-1 response times and improved resolution rates lead to a more efficient and satisfying user (and citizen) experience.
- **Cost savings:** Measurable and sustainable cost reductions are achievable through streamlined operations and potentially reduced support staff needs.
- **Advanced AI integration:** ML and large language models (LLMs) enable faster resolution of complex issues, either at first contact or through efficient routing to qualified staff. Several Leaders in this quadrant report consistent first-call resolution rates exceeding 90 percent with significant reductions in service queue times.

From the 44 companies assessed for this study, 24 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture leverages deep public sector expertise with AI-powered service desks, user support solutions and consulting to optimize IT service and support management for improved user productivity and performance.

CGI

CGI offers a next-gen service desk with technical support, expert guidance and resources for continuous improvement to boost public sector client productivity.

Infosys

Infosys leverages a global network of experts, AI-powered tools such as Topaz and ESM Café built on ServiceNow and a strong partner ecosystem to deliver next-gen service desk solutions that boost user productivity and self-service capabilities.

kyndryl

Kyndryl leverages deep industry expertise and next-gen service desk capabilities with AI-powered automation to deliver seamless, personalized productivity and support for public sector clients.

NTT DATA

NTT DATA offers SLED clients next-gen service desk solutions with AI-powered automation and a proven public sector track record for maximized productivity.

Red River

Red River supports U.S. SLED clients' digital workplace needs with a next-gen service desk, AI tools, virtual desktops, on-site IT and government contracting expertise.

Unisys offers a comprehensive next-gen service desk and continuous productivity suite featuring AI-powered support, self-service options and automation tools to streamline IT operations and improve UX.

Zones offers wide-ranging service and support solutions using bespoke combinations of AI, automation and a focus on UX and proactive problem prevention.

HCLTech (Rising Star) empowers SLED clients with a comprehensive suite of next-gen service desk and productivity solutions, leveraging automation, AI and continuous improvement methodologies to enhance UX and security.

Leader

"Zones stands out as a leader in next-gen public sector support through its comprehensive approach, leveraging automation and data for proactive issue resolution and optimizing performance metrics to ensure user satisfaction and productivity."

Bruce Guptill

Zones

Overview

Zones is a global services and solutions provider founded in 1986 and headquartered in Auburn, U.S. It serves clients in over 100 countries using a services-plus-reseller business model, with retail, healthcare and public sector as its key verticals. The company is privately held, with more than 3,000 staff employed globally. The firm maintains a dedicated U.S. public sector business unit with more than 1,000 FTEs supporting clients' digital workplace needs, including more than 200 dedicated to continuous productivity and next-gen support services.

Strengths

Broad-reaching approach beyond IT: Zones' approach to the service desk and continuous productivity support combines IT expertise involving HR, facilities and other departments. Its next-gen service desk utilizes AI, ML, automation and a user-friendly self-service portal with knowledge bases for easy issue resolution. Zones applies data analytics for proactive problem prevention and ensures seamless integration with existing enterprise tools.

Critical capabilities: Zones provides a single point of contact for user inquiries and offers remote troubleshooting and multilingual support. Zones enhances UX through mobile device management (MDM) and digital experience management (DEM) solutions, including device management, automation and analytics. This fosters continuous productivity through efficient issue resolution and proactive problem identification.

Quantifying workplace support performance: Zones goes beyond traditional metrics such as first contact resolution (FCR) and mean time to resolution (MTTR) for a more holistic view of support effectiveness. It analyzes user sentiment, impact on business processes, proactive problem-solving cost savings and employee productivity metrics. This, combined with automated resolution rates, identifies improvement needed beyond resolution times and presents the support function's true value.

Caution

Zones has experienced significant growth and a strong track record of success within the public sector. However, its size relative to established IT services leaders may influence some public sector clients to prioritize providers with a large market presence and more comprehensive resource availability.

Smart and Sustainable Workplace Services

Who Should Read This Section

This quadrant is relevant to enterprises across industries in the U.S. public sector for evaluating providers of smart and sustainable workplace services. In this quadrant, ISG highlights the current market positioning of providers offering smart and sustainable workplace services to the U.S. public sector and how they address the key enterprise challenges in the region.

SLED agencies are increasingly adopting sustainable workplace solutions to reduce carbon emissions and assist in developing strategies and metrics for reporting on environmental, social and governance (ESG) aspects. Providers are offering platforms that simplify data collection and reporting on public sector sustainability efforts. By leveraging provider capabilities, the public sector can reduce its environmental impact, manage resources better, improve public health and gain public trust. Providers are ensuring that their digital workplace services align EX with organizational business goals, including sustainability targets.

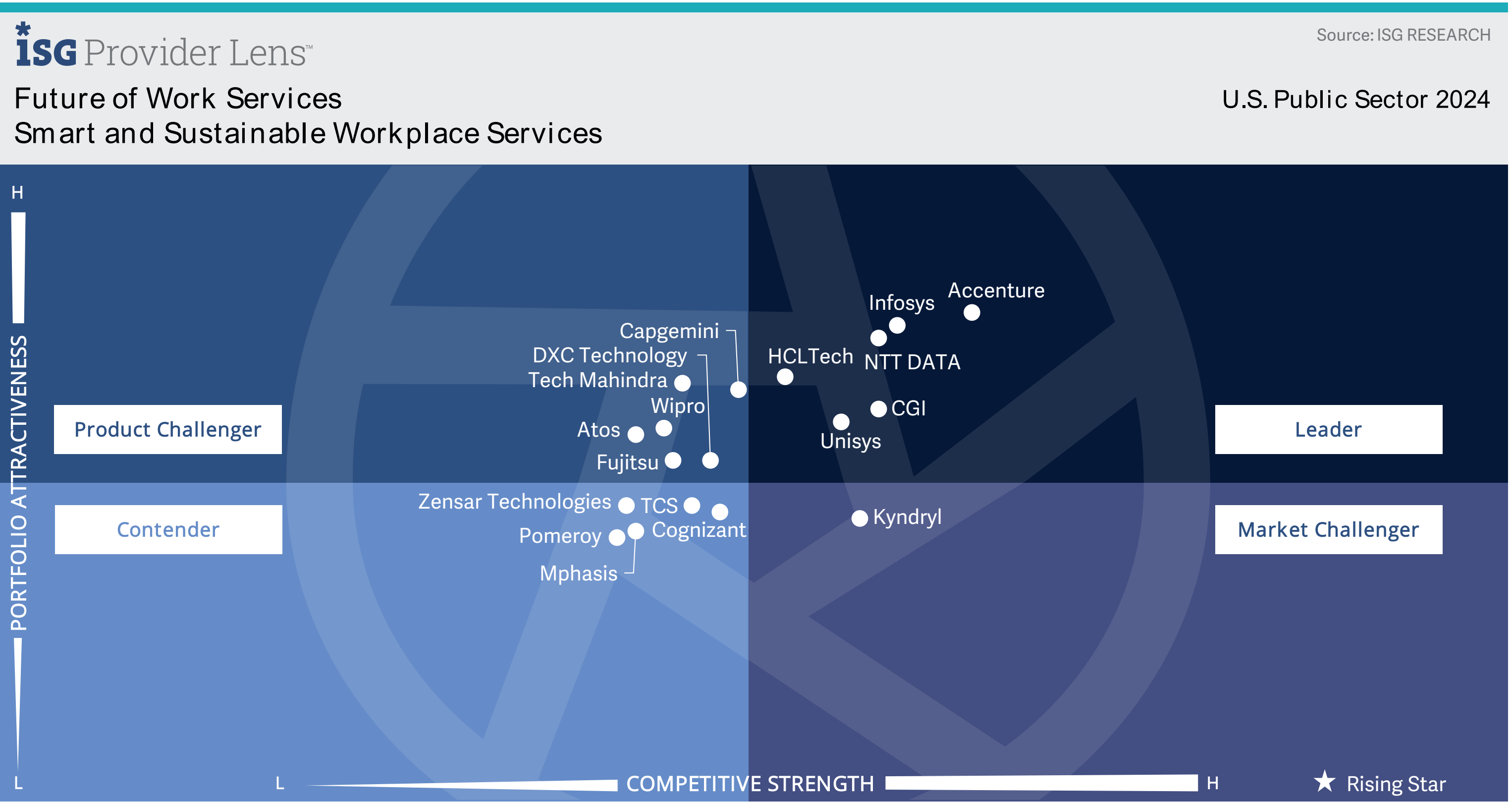
SLED agencies are seeking providers with performance metrics that encompass both business efficiency and sustainability-related parameters, such as carbon savings and employee work impact. They are looking for providers that offer support for smart office spaces by leveraging IoT and the best technologies to provide workplace analytics, hot desking, smart building and facility management. They also seek providers extending inclusive, adaptable and integrated hybrid working solutions to drive sustainable workplace practices.

CEOs, CFOs and other C-suite executives should read this report to understand the latest smart and sustainable workplace services trends to assist in resource allocation and strategy development.

Strategy professionals should read this report to identify the best smart and sustainable workplace service providers for companies to help develop and implement a winning ESG strategy.

Chief sustainability officers and ESG professionals, including sustainability managers and ESG analysts, should read this report for updated insights to develop and implement effective, sustainable strategies.

Consultant professionals should read this report to advise companies on sustainable strategies and performance, ensuring they stay up-to-date on the latest industry trends and developments.



The value assessed among providers in this quadrant derives from **consulting and managed services** that enable clients to **optimize** digital, physical and hybrid **workplace efficiency and sustainability**.

Bruce Guptill

Definition

This quadrant assesses service providers supporting smart, IoT-enabled physical workplaces and assisting clients in achieving sustainability goals. The modern workplace combines human, digital and physical workplaces to enable remote, hybrid or in-person collaboration and productivity. It helps build integrated, inclusive and sustainable spaces that increase user appeal.

Evolving hybrid workplace environments, changing work cost structures and shifting real estate conditions push agency and department leaders to collaborate with service providers to create more holistic workplace approaches. Providers must draw on technology and sustainability to design, implement and manage workplace environments that enhance operational efficiency, employee well-being and environmental responsibilities. As enterprises struggle with return-to-office strategies, service providers can help build an environment with smart meeting and facility management solutions. Besides traditional office management, these services include an adaptive, efficient, inclusive and responsible environment, contributing to creating spaces that meet the current needs of employees and businesses and anticipate future challenges and opportunities in the evolving work landscape.

Providers must also integrate experience parity capabilities into their offerings, with tangible outcomes irrespective of remote, virtual or hybrid models. They must incorporate unified communications and collaboration capabilities and offer smart, collaborative workspaces. Their services include IoT-enabled functionality to control the environment, resulting in a smart campus with an intelligent physical workspace while focusing on environmental, social and governance (ESG) initiatives.

Eligibility Criteria

1. Establish or intend to establish a business **presence in public sector** organizations, especially U.S. SLED organizations
2. **Support smart office** spaces by leveraging IoT and the best technologies to provide workplace analytics, hot desking, smart building and facility management
3. Offer **support for asset efficiency** and address energy management requirements
4. Provide inclusive, adaptable and integrated **hybrid working solutions** and spaces
5. Deliver services to **reduce carbon emissions** from workplaces
6. Assist clients in developing strategies and metrics for reporting the **social and governance aspects of ESG**, with the inclusion of workspace use in reporting
7. Present industry-focused **case studies** demonstrating measurable improvements

Observations

Public sector demand for sustainability is driving a recent and growing wave of interest in sustainable digital workplace solutions. SLED clients are increasingly focused on integrating environmental, social and governance (ESG) goals into RFI and RFP activities, making carbon footprint reduction a key factor in device procurement and management as well as in overall organizational operations and performance. Modern device management tools now offer carbon emission measurement, aiding clients in tracking and optimizing workplace technology's environmental impact. OpEx-based DaaS models, emphasizing device lifecycles and recycling, align perfectly with this shift.

Beyond devices, public sector clients seek support to measure their facilities' carbon footprint as they implement return-to-office (RTO) policies. Flexible work arrangements offer significant emission reduction potential by reducing employee commutes. Clients also aim to create smarter and more collaborative physical workspaces.

All of the above presents a significant opportunity for service providers — especially as SLED organizations embrace outsourcing of important IT and business services.

This quadrant evaluation categorizes providers in a way that is similar to ISG's 2024 U.S. regional study on digital workplace services and the future of work. Leaders demonstrate expertise in both UX and sustainable device management. Product Challengers differentiate themselves through a strong ESG and DEI (diversity, equity and inclusion) focus. Market Challengers, while possessing strong digital workplace offerings, tend to lack a dedicated sustainability focus. Ultimately, Leaders stand out with proven success stories in creating sustainable workplaces and enabling smart RTO strategies that adapt to growing client needs over time.

From the 44 companies assessed for this study, 18 qualified for this quadrant, with six being Leaders.

accenture

Accenture offers public sector clients smart and sustainable workplaces through a multiyear strategy emphasizing UX, collaboration and IoT-powered building optimization, all developed through cocreation and deep industry knowledge.

CGI

CGI builds around consulting and data-driven approaches to create environmentally friendly and technologically advanced workplaces for government agencies.

HCLTech

HCLTech offers public sector clients a suite of services, including smart asset management, workspace optimization and gamified sustainability programs to reduce environmental impact and optimize workplaces.

Infosys

Infosys helps public sector clients achieve smart and sustainable workplaces through a comprehensive framework, cloud-based reporting solutions and robust data security expertise.

NTT DATA

NTT DATA emphasizes cocreated smart building solutions, integrated building management and data-driven space utilization tools to optimize public sector workplaces.

unisys

Unisys offers consulting, implementation and ongoing support for smart and sustainable public sector workplaces, leveraging IoT sensors, data-driven insights and partnerships for resource optimization, employee well-being and environmental sustainability.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till June 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Future of Work Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Procurement / Vendor Management

Region

▲ **Most satisfied**
Western Europe

▼ **Least satisfied**
Eastern Europe

Industry

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Insurance

Industry Average CX Score

75.3

▲ Highest CX: 95
▼ Lowest CX: 50

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 980

Most Important CX Pillar

Business Continuity and Flexibility

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	18.7%
Offshore	22.1%

Appendix

The ISG Provider Lens 2024 – Future of Work Services study analyzes the relevant software vendors/service providers in the U.S. Public Sector market, 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 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 Future of Work Services 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

Lead Author

Bruce Guptill
Analyst and Advisor

Bruce Guptill brings more than 30 years of technology business and market experience and expertise to ISG clients.

Bruce has helped develop and lead ISG's enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption, adaptation and change. He currently leads U.S. public sector research for ISG's Provider Lens global research studies and IPL studies in procurement and software vendor partner ecosystems.

Bruce holds a Master's degree in Marketing and Finance and a bachelor's degree combining business and mass media communication psychology. He also holds certifications in a wide range of software, hardware and networking technologies, as well as mechanical and electrical engineering disciplines.

Research Analyst

Khyati Tomar
Research Analyst

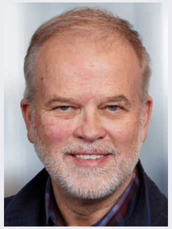
Khyati Tomar is a Research Analyst at ISG. She is responsible for supporting and co-authoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work — Services and Solutions, and OCM. Khyati supports lead analysts in the research process and authors the Enterprise Context and Global Summary reports. Prior to this, she had over 2.5 years of experience in the technology research industry.

She carried out various consulting and custom projects and co-authored CIS reports, mostly focusing on the public sector vertical.

Study Sponsor

Iain Fisher
Director

Iain leads ISG's Future of Work, Customer Experience and ESG solutioning redefining business models and operating models to drive out new ways of working with a CX and ESG focus. He joins up end to end value chains across a number of markets and advises clients on where digital and technology can be used to maximise benefit. A regular Keynote speaker and online presenter, Iain has also authored several eBooks on these subjects.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

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

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 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.

OCTOBER, 2024

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