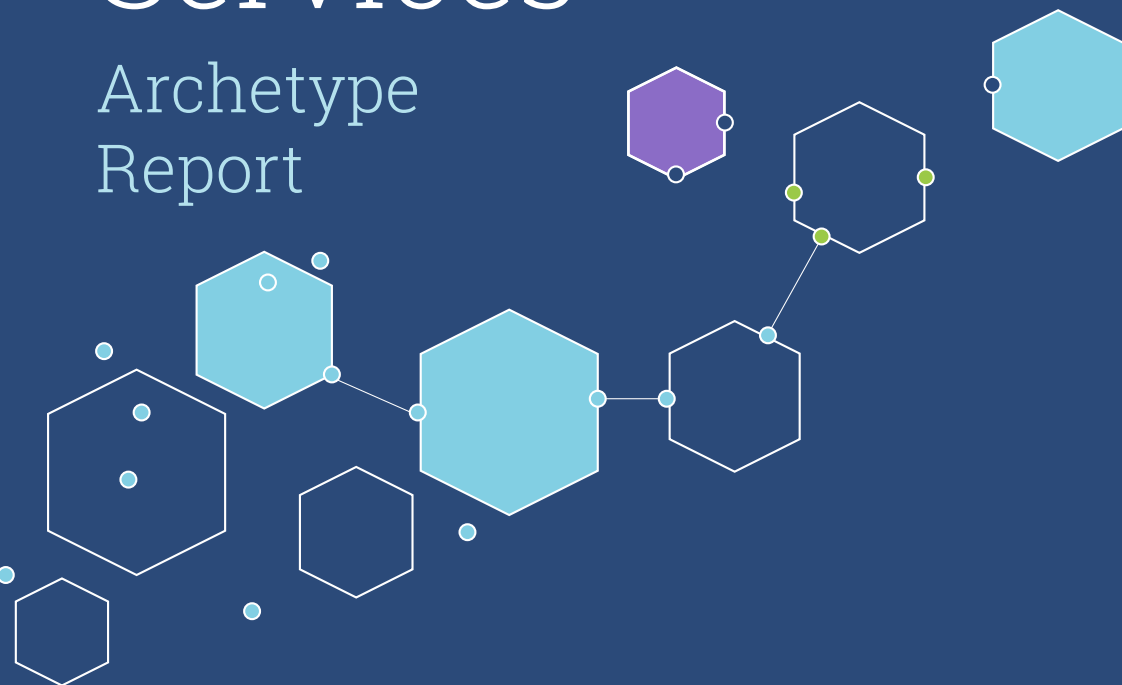


Digital Workplace Services

Archetype
Report



A research report
aligning enterprise
requirements and
provider capabilities

August 2017

Customized report courtesy of:



About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers, and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of May 31, 2017. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

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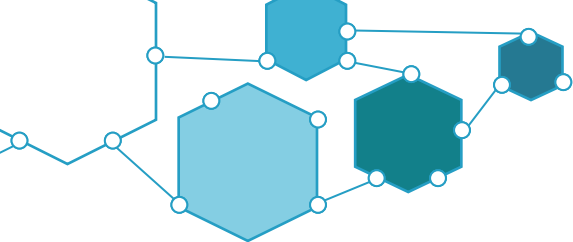
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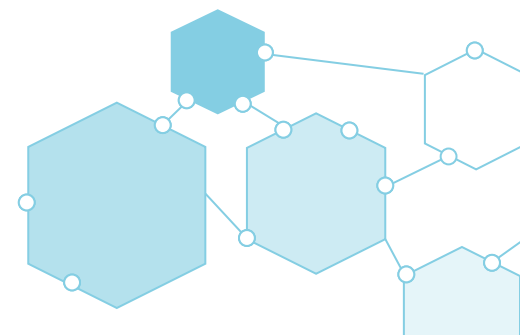
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EXECUTIVE SUMMARY

The Age of Digital Workplace

The world of computing has continued to change. We live in a connected world where people are much closer to machines than they ever were in the past. Previously, technology was used to decide or, in most cases, limit our thoughts and actions. In the current digital era, it is human thoughts and actions that guide and, in most cases, control the technology.

Similar changes are being observed in the workplace. With advancements in digital technologies, the workplace is no longer defined by machines, technology and business directives, but rather by how people use technology and set the business direction that define and represent it. A workplace is no longer confined to a physical location, a device or a corporate intranet. A workplace is defined by the end user and is carried by the end user wherever he or she goes, on whatever device he or she uses. This is the age of the “anytime, anywhere, any device” workplace, or “workspace” as it is often called.



The growth in handheld and other mobile devices and cloud computing has accelerated workplace transformation. Enterprise workforces are now mostly comprised of the millennial generation (Gen Y and Gen Z), which is self-empowered, especially when it comes to technology. A millennial user is not expected to call the IT support desk anytime he or she encounters a problem with a device or application. These end users usually like to solve problems themselves. The growing numbers of self-empowered millennial employees and end devices have led enterprises to look at options like allowing employees to bring their own devices (BYOD) to work, or allowing them to choose from an approved set of corporate devices (known as choose your own device, or CYOD). ISG has observed growing trends in mobility and BYOD adoption among many enterprises.

End-user computing (EUC) traditionally has been considered a siloed, disjointed IT function. However, with increased support for BYOD and increased focus on improving the user experience, enterprises are re-examining how they can empower employees to increase productivity via technology. Many organizations believe they can achieve positive ROI from such enablement. As a result, we see business offices other than the CIO getting involved in projects related to workplace transformation. For example, the HR department may help develop policies to enhance the user experience, which has benefits for morale and for employee on-boarding and off-boarding. Marketing, sales and other customer-facing departments may get involved to help enable field workers to connect to the workplace irrespective of device and location.

ISG has observed increased involvement of non-IT departments in transformation initiatives. Some organizations may call it workplace transformation, others call it digital strategy.

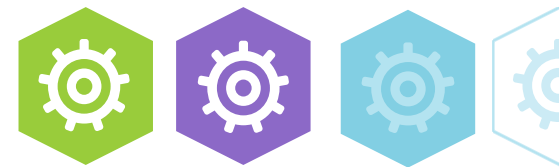
End-user workplace enablement has opened the door for more transformation initiatives. The enterprise IT support function, which until now was limited to the thankless job of taking calls from frustrated end users, also is transforming. Digital technologies have enabled the use of data, analytics, automation and cognitive computing to enhance IT support systems. Enterprises are looking for ways to eliminate the need to call the service desk for the most common issues. Some of the ways enterprises are transforming their support systems include providing self-help systems, creating a multi-channel approach for accessing the help desk, automating the most common support tasks and applying predictive analytics to prevent incidents from happening.

The increasing use of collaboration techniques is an important component of today's workplace. Enterprise social collaboration, which until quite recently was limited to the corporate intranet, is now being relied on to support business transformation. The popularity and success of trends like DevOps and agile application development have accentuated the importance of collaborative engagement. An important step in transforming the workplace is to make sure strong collaboration capabilities are in place. Beyond having proper file sharing and sync features, a collaborative workplace also should support team collaboration, microblogging, knowledge-sharing and integration with business processes. ISG has observed a growing trend in which social collaboration elements are being included in workplace transformation initiatives.

In sync with the aforementioned trends, the current workplace often is called a “digital workplace” because it leverages digital technologies to enhance the end-user experience, which in turn is tied to productivity enhancement and business goals. The digital workplace is well connected, device- and location-agnostic, automation- and analytics-focused and aimed at enhancing the end-user experience.

There is no standard definition of digital workplace. However, it is always closely associated with the end-user experience and end-user behavior not only in the workplace, but also on the periphery. Different organizations have different meanings of the digital workplace as part of their digital transformation journeys. In this report, we identify five such client archetypes, all of which want to transform their workplace but to achieve different objectives.

Introduction



This ISG Provider Lens™ report summarizes the relative capabilities of 25 workplace services providers and their abilities to address the requirements of five typical, frequently encountered categories of enterprise buyers (“archetypes”). Each archetype represents a unique set of business and technological needs and challenges.

Our research found no shortage of providers with capabilities adequate to satisfy the workplace transformation requirements of most user enterprises. However, it is rare to find one workplace services provider than can address all workplace transformation needs across a majority of user archetypes. This is due in large part to two core realities regarding the archetypes:

- 1 The characteristics of each archetype are moving targets because, while the core requirements rarely change, the relative importance of different requirements can vary based on business and/or technological environment changes.
- 2 Most enterprises, especially larger firms, tend to include multiple archetypes. As each archetype’s requirements evolve and adapt based on business and technological changes, so too does the presence and value of each archetype within the enterprise.

Therefore, enterprise IT leaders, service owners, procurement managers and others involved in a workplace transformation initiative have an ongoing series of choices when it comes to workplace services provider selection. They will need to strike a balance between optimal business value and relative cost of the provider engagement, integration and management. Market changes, new business models, fluctuating economic factors and other variables will continually add to and subtract from user needs.

The assumption that an organization fits solely within a single archetype will limit the value received over time from workplace transformation services. For providers, slotting customers into a single archetype and failing to anticipate that their needs will change can prevent effective value from being delivered, leading to customer frustration and dissatisfaction.

About the Report

This report uses research and analysis from ISG’s long-running work with enterprise user clients and IT services providers to identify and examine key changes in, approaches for and buyers of workplace services. We map the user-side requirements to provider-side offerings and capabilities.

Not every user enterprise has the same requirements for workplace transformation. In this report, we use five “buyer archetypes” – detailed in the following sections – to identify and assess buy-side requirements for business value relative to provider-side offerings and capabilities. The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their services requirements, and from working with providers to understand how those buyer requirements influence the development of suitable solutions and go-to-market strategies.

This report assesses the capabilities of 25 providers. Some services providers that are typically included in our work are not included in this report because they were unable to or declined to participate. They may be included in future versions of this report, based on merit and on the services providers' willingness to provide current and relevant materials. Readers should not make any inferences based on a services provider's absence from this report.

How to Use This Report

The intent of this report is to provide advice founded on ISG's experienced-based, proprietary assessment of services providers' relative suitability to the needs of the typical workplace services customer. This advice is then applied across each of the five archetypes as profiled. No recommendation or endorsement is indicated, suggested or implied. Clients must make the decision to engage with any provider based not only on their specific, current workplace needs, but also other factors such as cost, culture and timing.

This report is organized as follows:

Client Archetype Descriptions. This section identifies and describes each of the five most common user-side archetypes that we have identified in our ongoing research and analysis.

Assessments by Archetype. These sections first detail each of the five client archetypes, along with the types of service offerings that each typically requires to realize the most business value. Each archetype section includes our assessment of the relevant capabilities and positioning of the services providers surveyed and interviewed. It covers the relative suitability of the providers for each archetype based on the information they have provided us. These assessments are developed using the data, analysis and comparative methodology described in the methodology section.

Methodology. In this section, we outline and explain how we developed and applied the data, analysis and insights provided in this report.

Please note: *This report presents services providers' known capabilities in the context of user enterprises' typical project needs (which are categorized as specific archetypes). This report is not meant to rank providers or to assert that there is one top provider with capabilities that can meet the requirements of all clients that identify themselves as a particular archetype.*



CLIENT ARCHETYPE DESCRIPTIONS

The client archetypes used in this report (and in our ongoing advisory and consulting engagements) represent the various types of clients ISG has observed as we classify them according to their relative outsourcing maturity and objectives. Each client archetype encapsulates the typical characteristics of a specific type of buyer that is considering outsourcing one or more processes or functions. Using archetypes enables us to develop sets of characteristics and needs that can be applied uniformly and repeatedly across multiple environments, industries, provider types and elements within one service line.

The archetypes are not meant to be comprehensive examinations of all potential or likely client situations and requirements. They are meant to provide a simple, relevant and repeatable set of user-side requirements against which we can assess a similarly simple, relevant set of provider capabilities.

The archetypes included in our report are based on the most current marketplace knowledge regarding prevalent buy-side goals, resources, initiatives and requirements. Archetype characteristics are also developed (and refined over time) based on our advisory and consulting work with enterprise clients and IT service providers and on our global business IT market research and advisory programs.

THE AD-HOC ARCHETYPE

These clients usually have a legacy-heavy enterprise IT function that has multiple silos and is disjointed from the business. For these organizations, enterprise IT is usually a cost center, not a value generator. These clients undertake the journey of workplace transformation because of an ad-hoc requirement, such as an acquisition, merger, divestiture or an initiative to enter a new geography or adopt a completely new technology. A digital workplace would represent a great new resource for such organizations, but these organizations often are not well prepared to leverage digital workplace technology. Therefore, these clients need proper advisory and consulting services for workplace transformation.



THE TRANSFORMATION-ORIENTED ARCHETYPE

These clients adopt digital workplace initiatives to improve their service delivery and operational efficiency. Their IT organizations may have a silo structure and be disjointed. For these clients, automation-focused IT service delivery is of paramount importance.



A3

THE CLOUD-ENABLED ARCHETYPE

These clients want to adopt cloud-based technologies for workplace delivery on any device anytime. To deliver legacy applications on modern devices, these clients look for virtual desktop infrastructure (VDI) on cloud solutions. Tools that enable cloud-based work, unified communication and workplace productivity will be key for these clients.

A4

THE DIGITAL ARCHETYPE

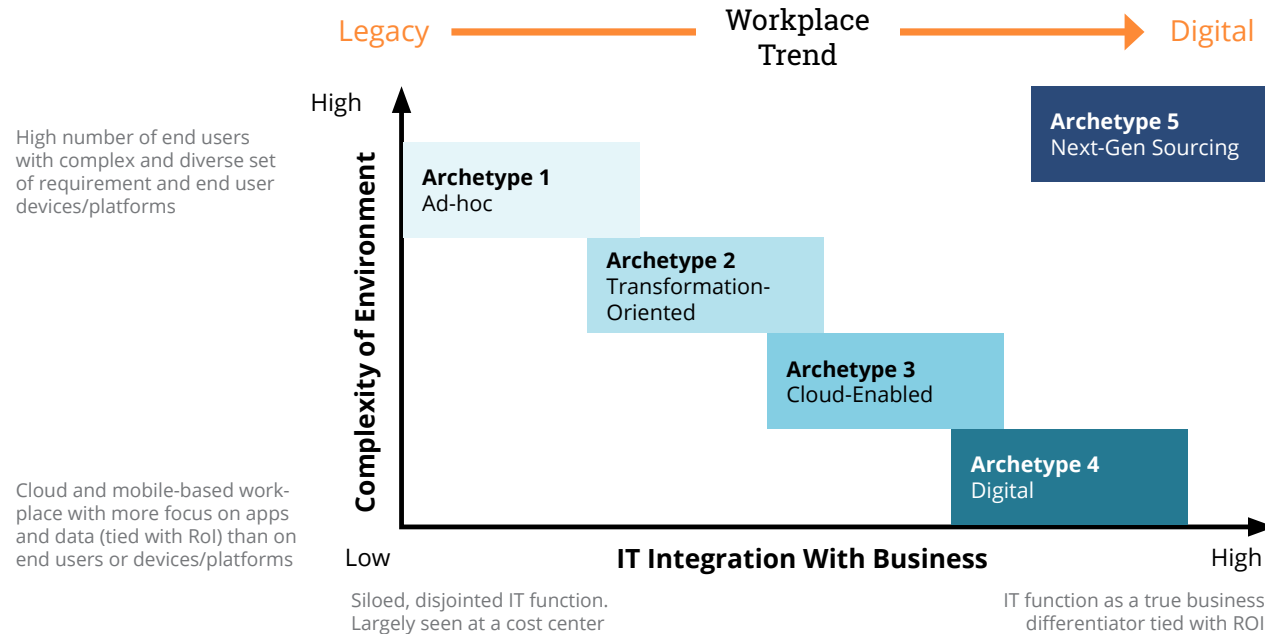
These clients look beyond BYOD and anytime, anywhere access. They require help for their field workers to use digital technologies, which are usually deployed for customer-facing functions. Key requirements and competencies for these clients include the use of advanced analytics, automation and business process mobilization and an enterprise mobility practice.

THE NEXT-GEN SOURCING ARCHETYPE

These clients have deep experience in sourcing their workplace services. They do not have a disjointed IT operation but rather one that enables business differentiation. These clients will look for a digital workplace solution that is oriented to achieving business objectives and enabling business growth.

A5

Workplace Archetypes in Context



Source: *ISG Research **ISG Automation Index 2017

Client Archetype Descriptions

A1 Y/Y growth in handheld devices sold, 4.9 billion* unique mobile users globally. Millennial generation forms the majority of workforce, 34-40%* in U.S. alone

A2 Traditional end-user computing contracts decreasing every year, only 8-10%* of the total ITO deals; analytics-based automation provides productivity and cost-saving gains in workplace services as high as 70%**

A3 cloud-based Workplace initiatives part of larger digital strategy engagement, related to cloud and mobility with non-CIO/IT function participating in around 61%* of these contracts. VDI is a key component in 62%* of workplace transformation contracts and Desk-top-as-a-Service forms 25%* of VDI contracts

A4 Social Collaboration is area of focus for around 20%* of workplace transformation contracts

A5 Contracts with aim to achieve digital workplace increasing every year*



Workplace Services Archetypes





AD-HOC ARCHETYPE

Ad-hoc Archetype clients are those that undertake workplace transformation initiatives because of a specific development. Examples of Ad-hoc Archetype requirements that may trigger workplace transformation initiatives include the obsolescence of legacy systems, a foray into a new geography and acquisitions or divestures that spur large-scale IT consolidation. A deep urge or directive from the CXO level to go digital without realizing the true potential, effort and need is also categorized as an ad-hoc requirement. Ad-hoc clients may be in industries that are very sensitive to compliance and regulatory issues or have heavy dependency on legacy systems.

The most common trait of an Ad-hoc Archetype client is IT systems that are disjointed silos and an IT organization that is seen as a support function and cost center. These clients often tend to source workplace transformation services without realizing the full potential that could extend beyond the boundaries of traditional IT support.



Other typical characteristics of the Ad-hoc Archetype client include:

- The need to consolidate and manage their enterprise IT and workplace environment, often on an urgent basis following an activity.
- The view of IT as a cost center and the need for ways to reduce cost per ticket or to contain device costs through a consumption/usage model.
- IT support that is metrics-oriented and operational tasks that are driven by traditional KPIs.
- A service desk that may be inefficient because of failed integration among heterogeneous suppliers.
- A lack of proactiveness and a hesitation to adopt mobile technology and BYOD. Mobility support is often provided only for VIPs.
- End users may be allowed to use their own devices. If any mobile management support is provided, it will likely be focused on controlling rights and enabling remote wipe.

Ad-hoc Archetype clients look for the following services and capabilities when it comes to workplace transformation:

- Migration to the transformed workplace without disrupting the legacy environment.
- Services providers with deep experience and understanding in the client's industry.
- Essential and traditional EUC services for managing the growing number of devices.
- Tighter security control, governance and compliance.

Workplace transformation for an Ad-hoc Archetype client will require a services provider to offer at least the following:

- Vision, focus and experience in helping clients with either a large legacy setup or clients that are in initial stages of a workplace transformation journey.
- Excellent metric-based workplace support services that can be determined by peer comparison on standard service desk parameters (KPIs), with strong focus on the most common ones.
- Sufficient operational scale, which can be determined by peer comparison on the number of devices managed, full-time equivalents (FTEs) for workplace services or EUC services, languages supported and geographic coverage.
- Basic mobility management, including basic mobile device management (MDM), VIP support and install, move, add and change (IMAC) services.
- Ability to support multiple providers of service, compliance, governance and security solutions or services.



Ad-hoc Archetype Client Imperatives

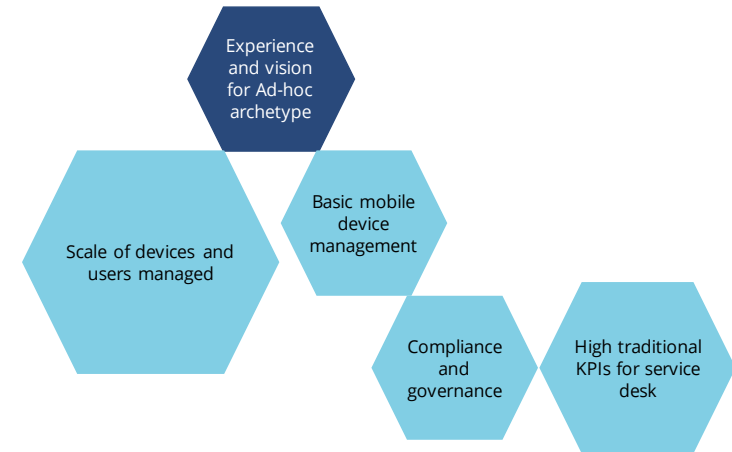
- Manage increasing number of end-user devices
- High performance and low cost for IT support and service desk services
- Workplace transformation initiatives for ad-hoc requirements
- IT consolidation after M&A activity
- Compliance to industry-specific regulations and security requirements
- Enable mobility for VIP support only



Fig 1

Ad-hoc Archetype Provider Capabilities Importance

■ Increasing Future Importance ■ Decreasing Future Importance



Size based on relative current importance in the archetype profile

Fig 2

Ad-Hoc Archetype Leaders



Score 4 out of 4



Score 3 out of 4


































Score 2 out of 4



Score 1 out of 4

Of the 25 providers included in our research, we found six that stand out above the others for serving the Ad-hoc Archetype client based on our assessment of their capabilities as described in the Methodology section in the Appendix. The six, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 2, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

	Focus on Ad-hoc Archetype Clients	Metric-based Workplace Services	Scale of Operations	Mobility Management	Compliance, Governance, Security and SIAM
Atos					
Computacenter					
DXC					
Fujitsu					
HCL Technologies					
Unisys Corporation					

Atos

Atos has a well-established workplace services practice and has clients with extreme ad hoc transformation requirements. Atos has many case studies in different industries, including the public sector, that profile clients wanting to transform their workplaces because of acquisitions, mergers, divestitures, consolidation or geographic expansion. Atos is a leader among peers when it comes to the scale of traditional device management services, with approximately 3.2 million devices and 2.4 million end users supported. With delivery capabilities in 72 countries and support in 115 countries, Atos has a strong presence in Europe and the larger EMEA region, and has considerable presence in the U.S., North America and Asia Pacific regions. Atos is investing in and developing industry-specific solutions and ways to integrate analytics-based services into its existing multi-supplier SIAM practice. Atos has partnerships to provide mobility services with leading technology vendors including Microsoft, VMware and Citrix.

Computacenter

Computacenter has strong credentials in managed workplace services. The company has experience assisting large European-based enterprises with setting up programs to manage their workplaces and provide end-user support. Computacenter's clientele includes firms in diverse industries like manufacturing and banking. The company says it manages more than 4.2 million end users. Computacenter recently acquired TeamUltra, a ServiceNow gold partner, to enhance its capabilities by linking its global service desk with ServiceNow to provide services for ITSM, SIAM and governance compliance. Computacenter's portfolio is geared toward helping the CIO office prepare for challenging ad-hoc requirements that could emerge.

DXC

DXC was recently formed by the merger of HPE Enterprise Services and CSC. It has a well-known track record in managed workplace services that was inherited from both parent companies. DXC has a strong geographic presence with credentials to serve in 150 countries. With 8.8 million managed devices, 7.5 million end users supported, and over 1,000 customers, DXC is another leader in scale-based metrics. It offers a workplace advisory practice to help enterprises assess their current workplace environments and decide on next steps. DXC has some success stories related to meeting Ad-hoc Archetype client requirements. For example, it cited engagements where it helped a manufacturing client whose data delivery was impacted by natural disasters and assisted a consumer packaged goods company in transforming its workplace following a major divestiture. DXC's offerings for clients with traditional legacy setups include its advisory and assessment services, which are well suited for Ad-hoc Archetype clients. Its advisory services use a phased approach to transition to a future-ready state. DXC also has multi-supplier management capabilities. Its reference cases showcase its interactions with multiple suppliers, which not only include other IT service providers but also in-house IT groups, offshore vendors and hardware providers. These services help DXC serve clients with M&A requirements.

Fujitsu

Managed infrastructure services form approximately 60 percent of Fujitsu's business. Fujitsu has experience in managing workplaces for clients with large legacy infrastructures in Europe and the Oceania region. The company has limited presence in the Americas, but is growing that practice. Fujitsu has experience with clients that want to transform their workplace processes and technology perspective. According to the company, Fujitsu operates at large scale, with approximately 6 million devices and 3.2 million users supported. Fujitsu's EUC services for legacy ad-hoc clients include managed desktop and remote desktop support services.

HCL Technologies

HCL Technologies does not proactively target clients heavily dependent on legacy setup, but the company does have rich experience in helping clients move from traditional models to a transformation-ready state. HCL provides basic mobility management services and has approximately 500,000 mobile devices under management. HCL has developed a framework called Next-Gen Gold Standard Assessment (GSA) to evaluate clients' IT readiness for a next-generation operating model. The framework is based on many advanced ITSM concepts, including IT4IT and SIAM.

Unisys

Unisys traditionally has been a strong player in the managed workplace and EUC spaces. Unisys also has experience in managing workplace transformation initiatives for clients during M&A activity and in helping clients adopt modern technology. Unisys recently combined its separate consulting practices for mobile, cloud and traditional endpoint security and device consulting into its workplace offering to provide a holistic workplace solution. The company is very experienced and has a considerable number of engagements with large legacy workplace clients. Unisys also has a mobility practice that provides basic mobility management for clients based on their business requirements. The practice leverages Unisys' partnerships with leading mobility vendors. Unisys has focused on and has an understanding of some industry-specific security and compliance requirements for the public sector and BFSI industries. Approximately 30 percent of Unisys' clients are in the legacy transformation phase.

OTHER NOTEWORTHY PLAYERS – AD-HOC ARCHETYPE

Some other providers scored high in one or more areas that are important for an Ad-hoc Archetype client. However, they were not categorized as leaders for this archetype because they did not rate highly in enough categories.

Noteworthy providers (services providers with a high score in one or more parameters) for Ad-Hoc Archetype clients are:

Fig 3 Other Noteworthy Service Providers – Ad-Hoc



Focus on Ad-hoc Archetype Clients

Cognizant
Zensar Technologies

Metric-based Workplace Services

Dimension Data
IBM
Mphasis
TCS
Wipro

Scale of Operations

Cognizant
CompuCom
Genpact
IBM
NTT DATA
Stefanini
TCS
Wipro

Mobility Management

Capgemini
IBM
KPiT
TCS
Tech Mahindra

Compliance, Governance, Security and SIAM

Capgemini
Cognizant
IBM
KPiT
NTT DATA
Tech Mahindra
Wipro

A2 TRANSFORMATION-ORIENTED ARCHETYPE

The Transformation-oriented Archetype client is focused on improving its workplace with the double aim of saving costs and improving efficiency. In most cases, though a Transformation-oriented Archetype treats enterprise IT as a siloed and disjointed function, it has a desire and readiness to transform and embrace digital and cloud disruption, often with a clear roadmap.

With growing adoption of automation and analytics in IT service delivery, IT organizations in a Transformation-oriented Archetype would like to transform the way end users are serviced. Increased use of automation and analytics will help achieve two objectives any transforming IT organization would have: reducing cost and raising user satisfaction. Automation and analytics can help reduce the cost of service provision because most low-level support tickets (Level 1 tasks) could be handled by an automated system, reducing the need for humans. The second benefit is increased end-user satisfaction. Analytics-driven support can help achieve a much better satisfaction rating than a traditional one. When it comes to mobility, a Transformation-oriented Archetype client would like to apply policy setting and compliance to mobile device management (MDM), including the abilities to push app updates and remotely wipe devices.

The definition of digital workplace for a Transformation-oriented Archetype is to have an efficient, automated IT function that gives end users options in an omnichannel model to reach out for support, and an automated system that can help solve problems and enhance the end users' experience. A Transformation-oriented Archetype client will look at many ways to achieve the desired results. The solution may require moving from on-site support to an offshore model, assessing the current IT scenario, reducing the number of tickets and implementing self-help and automation-based workplace support services. These clients would want to adopt a "shift left" strategy to reduce the instances of Level 1 tickets and eliminate Level 0 tickets through self-help and predictive analytics.



The key characteristics that identify the Transformation-oriented Archetype are:

- Desire for operational excellence through standardization
- Lack of automation and self-help in IT support services
- High incidents of ticket volume and associated cost
- Dissatisfaction at the end-user level
- Disjointed IT function; IT mostly seen as a cost center

The main characteristics of a workplace transformation for Transformation-oriented Archetype clients are:

- Automation-based workplace support services to provide intelligent pre-informed end-user support
- High end-user satisfaction for service desk and IT support
- Support for basic mobility services like MDM, push services and remote wipe
- Vision to adopt digital workplace

To achieve their vision of an efficient and future-ready workplace, a Transformation-oriented Archetype would expect a services provider to have:

- Capabilities to assess the existing IT environment along with the consulting and expert advice around improvement of provision with a focus on understanding transformation phase requirements, such as change management, security and support services
- A vision and high priority for clients who are mid-way in the digital transformation journey and experience in helping clients achieve the vision of an efficient service desk and IT support service
- EUC capabilities with a sharp focus on improving related KPIs and on-premises desktop virtualization to support legacy applications on multiple devices and scale operations
- Automation and analytics in workplace support services, which include self-service, automation analytics in ITSM and service desk
- Mobility management services, including integration of back-end legacy applications, mobile management for Apple, Android and other mobile devices with existing enterprise capabilities
- A commitment to the workplace of the future, which includes a vision for the digital workplace, a dedicated practice for transformation services, legacy application deployment via VDI and services related to social collaboration, such as file sharing, groupware, social community and others.



Transformation-oriented Archetype Client Imperatives

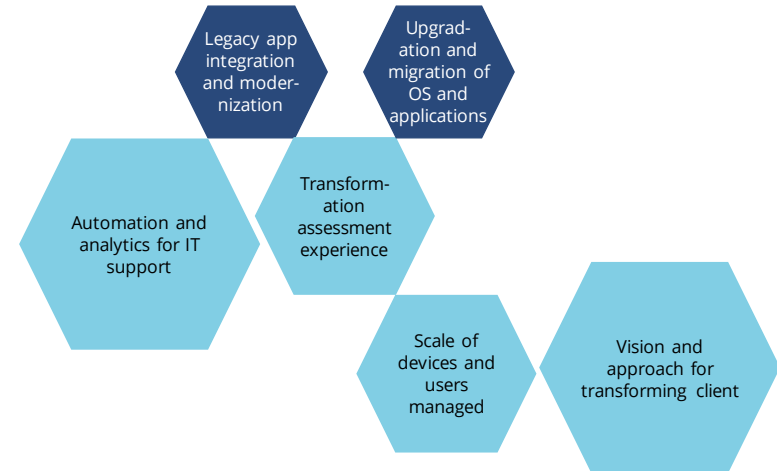
- Assessment of the current environment and identify areas of improvement
- Security and change management
- High performance and quality with reduced cost in workplace management
- Decrease in number of tickets and improved end-user satisfaction
- Increasing number of end-user devices
- Integration of mobility with legacy applications
- Transition and migration to new and improved workplace environment



Fig4

Transformation-Oriented Archetype Provider Capabilities Importance

■ Increasing Future Importance ■ Decreasing Future Importance



Size based on relative current importance in the archetype profile

Fig 5 Transformation-oriented Archetype Leaders

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

Of the 25 providers included in our research, we found twelve that stand out above the others for serving the Transformation-oriented Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The twelve, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 4, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

A2	IT Requirement and Assessment	Vision and Focus	Technology Capabilities Including Scale	Integration of Mobile in Enterprises	Automation in Workplace Support Services	Focus on Transition to Digital Workplace
Atos	●	●	●	●	●	●
Cognizant	●	●	●	●	●	●
CompuCom	●	●	●	●	●	●
Computacenter	●	●	●	●	●	●
DXC	●	●	●	●	●	●
Fujitsu	●	●	●	●	●	●
HCL Technologies	●	●	●	●	●	●
IBM	●	●	●	●	●	●
Stefanini	●	●	●	●	●	●
TCS	●	●	●	●	●	●
Unisys Corporation	●	●	●	●	●	●
Wipro	●	●	●	●	●	●

Atos

Atos has experience with public sector, energy and other industry clients that want to transform their workplaces and service desk services. The transformation services Atos provides include moving from on-site to offshore support, improving support services efficiency and centralizing and consolidating IT support services. Atos also has recently incorporated change management and business adoption management in its consulting and advisory practice, competencies that are much needed for the Transformation-oriented Archetype. Atos follows a global automation delivery strategy. It has adopted an automated approach for ticket resolution that starts with structured data analysis or standard automation, followed by RPA, then cognitive and finally AI-enabled support. Increased automation (including self-help) has improved Atos' gross first call resolution (FCR) rate, which now is approximately 66 percent. Atos has partnerships with leading automation and analytics vendors, like Clickfox, for providing end-to-end analytics and visibility to support services.

Cognizant

Cognizant gives very high priority to clients that are in the process of transformation and are modernizing workplace applications and systems. The company is providing automation and AI-based services to help enhance support service productivity and simplicity. Cognizant has experience in transforming the workplace support services for clients with inefficient support functions and non-automated systems. Cognizant has partnerships with RPA, password management and AI providers. Cognizant's Symphony Works platform has self-service features including an endpoint-alert agent, knowledge management via bot support, knowledge search, RPA/scripts, a self-help kiosk and peer-to-peer support.

CompuCom

CompuCom has case studies in the retail, financial and healthcare sectors in which it has helped clients improve their service desk and IT support services. CompuCom has a strong delivery presence in the United States and has global coverage for its clients. The company's IT kiosk services and performance bar/solution café are major differentiators for its onsite support. CompuCom offers Smart Desk, analytics-enabled service desk services that include automated support features. The company claims to have an end-user satisfaction rating of 4.8 out of 5, which is higher than the industry average.

Computacenter

Computacenter has many success stories about transforming its clients' service desks. Approximately half of the company's clients belong to the Transformation-oriented Archetype category. Computacenter's "Digital Me" initiative provides a user-centric approach to transforming the workplace through enhanced use of transformation-related technologies, self-service and enterprise collaboration. The company's multi-channel service desk, also called the Next-Gen Service desk (NGSD) is an automation-focused offering that includes a shared library of 87,000 knowledge articles. Computacenter's IT support transformation solution focuses on improving self-help and self-logged incident tickets at Level 0 and Level 1 severity. Computacenter also provides self-service kiosk bars for onsite client support.

DXC

DXC has experience in enhancing the IT support and end-user experience for clients in different industries including healthcare and financial services. Its transformation-oriented services, coming from the legacy strength of CSC and HPE Enterprise Services, have helped clients achieve cost savings of up to 40 percent and raise end-user satisfaction to 92 percent or higher. DXC offers end users a personalized choice of automated solutions. Besides providing self-service portals and robotic self-healing technologies, DXC also offers retail-like walk-in centers, video support kiosks, automated vending solutions and system and incident analytics. DXC provides a self-service portal that is accessible from any end-user device. The company is enhancing its self-help portal and application to include auto-translation and auto-response capabilities.

Fujitsu

Fujitsu's "Workplace Anywhere" approach is aimed at delivering workplace transformation services for clients. The company has experience in improving the end-user support services for many manufacturing and public-sector clients in the Europe and Asia Pacific regions. Approximately 40 percent of Fujitsu's clients can be categorized with the Transformation-oriented Archetype. Fujitsu's "Social Command Center" provides shift-left support with data analytics, automation and proactive maintenance support. This converged support service is user-persona based and recognizes the user's identity, the device being used and location at the time of service. Fujitsu has partnerships with leading players for monitoring IT assets and providing predictive analytics. For example, Fujitsu uses Lakeside Systrack software for end-user analytics and experience monitoring.

HCL Technologies

HCL Technologies is highly focused on the Transformation-oriented Archetype. It offers many frameworks and homegrown solutions to provide automation and self-help services to improve workplace support service efficiency. HCL's OptiBot™ is an end-user empowerment and automation framework driven by a behavior change management program. HCL has leveraged OptiBot™ to help clients in different industries, including media publishing, banking, financial services and insurance (BFSI), to reduce manual effort and human error and to improve efficiency. HCL reported one major client used OptiBot to reduce its service contact scripts by 10 percent and reduced average handling time from minutes to seconds. HCL also offers WorkBlaze™, which provides end-user monitoring and predictive analytics. With its automated solutions in place, HCL reports first-level resolution rates near 80 percent, and end-user satisfaction ratings of 80 to 85 percent. HCL also offers cognitive powered enterprise chatbot called Lucy™ to resolve all employee issues.

IBM

IBM's Watson platform provides cognitive and self-healing capabilities to the company's service desk services. IBM has grown its Watson knowledge base with pre-packaged questions and answers for known support issues for systems and devices. This service is self-learning and improves and provides a rich repository to run automated scripts for self-healing. IBM reports its clients can achieve 30 to 40 percent cost savings with these automated services, and that client adoption is increasing. IBM also provides a "genius bar" style walk-in IT support service for clients. IBM is a leader in technical solutions related to traditional EUC services and supports approximately 6 million end devices and 9 million users globally. IBM has achieved high levels of support service efficiency and performance: its rates are near 80 percent for first-call resolution, 88 percent for end-user satisfaction and 99 percent for SLA compliance.

Stefanini

Approximately 80 percent of Stefanini's clients can be categorized as Transformation-oriented Archetype organizations. Stefanini offers automation and self-help as part of its services to improve its client efficiency for EUC support. The company offers advanced self-service interactive voice response (including speech recognition and biometric voice authentication) for high-value transactions. The company has experience in delivering analytics-led predictive-insights solutions to clients. Stefanini also offers walk-up service bars in large office facilities with a custom storefront look and feel to welcome end users and encourage utilization. Stefanini reports its end-user satisfaction levels are as high as 98 percent in service desk transition engagements.

Tata Consultancy Services (TCS)

TCS is committed to this archetype, which accounts for approximately half of its clients. The company provides automated, virtualized service desk and automated desktop support under the umbrella of workplace transformation services. Self-healing and user experience are key components of TCS's next-generation digital workplace solution, USER, which uses automation, self-healing, bots and innovative security measures, such as biometric authentication. TCS has helped clients introduce features like chat and automated self-healing to modernize their legacy IT support systems. With a first-call and first-level resolution rating of about 85 percent, TCS has helped multiple clients improve their service desk services, reduce their mean-time-to-resolution (MTTR) and increase end-user satisfaction. TCS' ignio™ automation platform provides cognitive support that features self-learning and automated resolution. TCS ignio™ analytics provides persona analysis to create user-centric workplace solutions such as Mobitio App for IT support, ELF (Endpoint Lifestyle Mgmt Factory) for workplace provisioning and TCS Karma engine for gamification-based user adoption. TCS digital workplace solutions deliver enhancements of end-user business productivity.

Unisys

Unisys is oriented to serve the Transformation-oriented Archetype. It is a strong player with many success stories from the CPG and Life Sciences/Healthcare industries, having helped clients achieve efficiency gains and other improvement to end-user support services. The company has helped clients in manufacturing industries achieve end-user satisfaction levels as high as 98 percent. Unisys offers automation and click-to-fix self-help automated script solutions that use a rich knowledge base and provide end users with capabilities to alleviate problems themselves. Unisys provides a standard Hypercare solution for the increased support workload that typically occurs at the start of any new service. Unisys self-help is centered on its persona services. The company describes its end-user experience monitoring services as support for end users that are “suffering in silence” and offers its Digital Tech Café for walk-in on-site support services. Unisys’ service support is dependent on the company’s knowledge management capabilities for the most frequently encountered issues.

Wipro

Wipro has many case studies in the energy, healthcare and manufacturing industries that showcase how it helped reduce support calls and increase service-request resolution rates, though the company reports only 12 percent of its clients have transformation and workplace modernization projects underway. Wipro offers IT support and service desk services with automation as a key feature. Wipro reports it has achieved a first-level resolution rate of approximately 79 percent and an end-user satisfaction rating of 86 percent. Wipro HOLMES™, chat bots, intelligent service desk, RPA and cognitive capabilities can eliminate the need for human intervention in Level 1 and Level 1.5 support, which means service desk agents only need to intervene in cases of critical hardware/software support, maintenance and replacement that users cannot handle themselves. Wipro has integrated its HOLMES™ automation platform, which has natural language processing capabilities, with its digital workplace offering to eliminate various manual processes. The platform can be deployed to perform end-user IT analytics, monitor virtual desktops, execute self-healing functions through chat bots, and develop predictive, prescriptive and anticipatory models. Wipro automation solutions can lead to cost optimization of up to 35 percent.

OTHER NOTEWORTHY PLAYERS – TRANSFORMATION-ORIENTED ARCHETYPE

Some other providers scored high in parameters related to one or more aspects of the Transformation-oriented Archetype. However, they were not categorized as leaders in this archetype. It may be because of lack of focus or experience with this client archetype.

Noteworthy providers (services providers with high score in one or more parameters) for Transformation-oriented Archetypes are:

Fig 6 Other Noteworthy Service Providers – Transformation-oriented



IT Requirement and Assessment	Vision and Focus	Technology Capabilities, Including Scale	Enterprise Mobile Integration	Workplace Support Services Automation	Focus on Transition to Digital Workplace
Hexaware	Hexaware	Genpact	Dimension Data	Hexaware	Capgemini
NTT DATA	KPIT Technologies	NTT DATA	KPIT Technologies	Tech Mahindra	Dimension Data
Tech Mahindra	NTT DATA			Zensar Technologies	KPIT Technologies
Zensar Technologies	Tech Mahindra				Zensar Technologies
	Zensar Technologies				

A3 CLOUD-ENABLED ARCHETYPE

A Cloud-enabled Archetype client is one that believes in a true consumption-based and as-a-service model. These clients believe in and work toward enabling their end users with access to applications and data irrespective of physical location and devices. They understand the potential of BYOD and cloud-based solutions and have the risk tolerance to adopt them. These clients believe in achieving true differentiation and market leadership by leveraging the as-a-service model. So, for a Cloud-enabled Archetype client, adopting transformative cloud technology is not motivated just by cost savings, but by leveraging the technology for competitive advantage.

Cloud-enabled Archetype clients define digital workplace as an enabling environment where end users can access their work-related data and applications from any device and any location. They focus on specific line-of-business applications and not just IT support.



The key characteristics of a Cloud-enabled Archetype client are:

- A highly dispersed and mobile workforce with real-time needs to access information from any location, or they have multiple small locations with complex workplace services
- Lack of a huge backlog and dependency on historic legacy application and data, and are open to take the cloud journey
- Desire to increase BYOD adoption among their end users
- Support for BYOD and bring your own service (BYOS), including cloud-based virtual desktop solutions that give the workforce global access and a common interface and that protect corporate resources
- First-time outsourcing or limited or zero legacy infrastructure

To work toward achieving its vision, a Cloud-enabled Archetype client has multiple priorities, including:

- Partners with a vision for developing a cloud-based environment and adopting cloud solutions such as Windows 10, Office 365 and Online Sharepoint
- A very high level of user experience for end users
- The ability to move data and applications in the cloud and provision personal devices so end users can access their data and applications any time
- Partners that can provide access to data and applications on mobile devices via Desktop-as-a-Service (DaaS) or VDI on cloud solutions
- Partners that interact not only at the CIO level but also at the business unit level or with shadow IT personnel.

Services providers for the Cloud-enabled Archetype client need to have a strong partner ecosystem plus capabilities in the following areas:

- Vision for and focus on clients whose outlook is to adopt and deploy cloud-based solutions
- Strong experience with Cloud-enabled Archetype clients and the ability to successfully interact with non-CIO functions
- Capabilities around cloud-based initiatives, such as migration to Office 365, Skype for Business and Windows 10 in addition to strong DaaS services
- Innovative workplace services, like innovation-focused service delivery, collaboration-friendly services, innovative security measures like biometric, Two factor authentication and the ability to bring innovation
- A digital workplace orientation with a dedicated brand for digital workplace capabilities, workplace services that include IoT devices, mobile app store, single sign-on and identity and access management.

A3 Cloud-enabled Archetype Client Imperatives

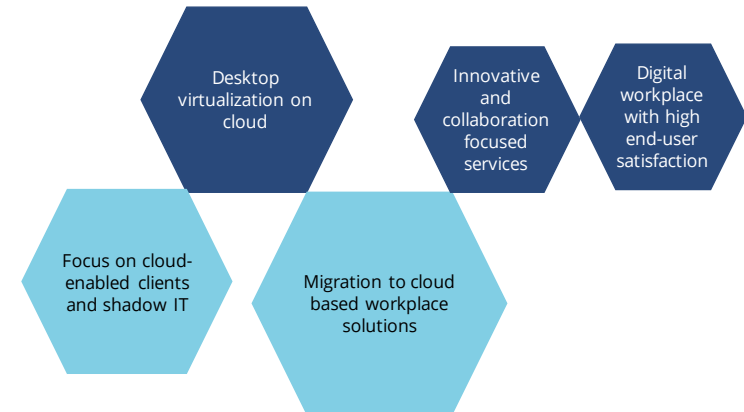
- Cloud readiness assessment
- Management of Shadow IT requirements
- Application and workload migration to cloud
- End-to-end cloud solution for workplace productivity
- Critical applications that stay in house or on a private cloud with access from anywhere on any device
- Integration of cloud-based collaboration solutions



Fig 7

Cloud-enabled Archetype Provider Capabilities Importance

■ Increasing Future Importance ■ Decreasing Future Importance



Size based on relative current importance in the archetype profile



Cloud-enabled Archetype Leaders

Score 4 out of 4
 Score 3 out of 4
 Score 2 out of 4
 Score 1 out of 4

Of the 25 providers included in our research, we found nine that stand out above the others for serving the Cloud-enabled Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The nine, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 8, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

A3	Vision for & Focus on Cloud Clients	Cloud-based Initiatives	Innovation Services	Digital Workplace Orientation
Atos	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Capgemini	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Cognizant	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
DXC	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Hexaware Technologies	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
IBM	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
NTT DATA	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Unisys	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Wipro	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>

Atos

Atos has identified moving to cloud-based and as-a-service solutions as one of the primary needs of its CIO clients. Atos offers its cloud-based workplace-as-a-service that uses its own Digital Private Cloud (DPC). The company is already executing many cloud-based enterprise file sync and share (EFSS) services projects. Atos provides EFSS services over a private cloud and supports 330,000 users and around 3 PB of data. Atos reported it had worked on approximately 20 projects in the preceding months for its Office 365, mobile, BYOD cloud offerings. Atos has developed a dedicated competency center for Office 365 and reports managing approximately 600,000 Office 365 users. Identity and access management for cloud services is a key investment area for the company. Atos also provides hosted virtual desktop services (DaaS) for most of its clients that have hybrid clouds. Atos focuses specifically on industries where application presentation is more important than providing a complete VDI. Atos recently acquired ESM, a ServiceNow gold partner and cloud-based service management provider.

Capgemini

Capgemini's credentials include many examples of clients with complex workplace environments, including in the public sector. Capgemini can document how it has helped such clients transition to cloud environments; approximately 40 percent of its clients fall in the Cloud-enabled Archetype. Capgemini's My Workspace digital workplace offering aims at delivering any-time, anywhere, any device access to data and applications. My Workspace provides orchestration for cloud-provisioned applications. Capgemini has success stories that demonstrate how it has enabled real-time collaboration over public and private clouds leveraging its partnerships with OneDrive, Google Drive, Box, Dropbox and other leading cloud file storage and EFSS vendors and services. Capgemini uses its consulting practice to assess its clients' workplace environments for readiness to move to Office 365, Skype for Business and other as-a-service offerings. Capgemini's My Workspace provides containerized access to SaaS applications.

Cognizant

Cognizant has undertaken initiatives to develop and enhance its skills in cloud-based solutions. The company is focused on continuous and extensive training for application containerization tools like Docker in addition to cloud-based solutions from Google, AWS, Microsoft Azure, Cloud Foundry, VMware and Oracle. Cognizant also offers a cloud-based virtualized desktop service called FlexD. This service is offered on-premises in a hybrid or public cloud configuration. This solution was developed with Cognizant's Cloud360 offering and Microsoft solution components. Cognizant has experience delivering cloud-based VDI solutions for clients in the BFSI and healthcare verticals. Cognizant offers strategy, assessment, consulting and build-then-run services for its cloud workplace solutions. Cognizant's DaaS offering also has a self-service automation element, supports desktop and application provisioning and can offer 99.9 percent SLA adherence. Cognizant also can reduce storage requirements by an 8:1 ratio. Cognizant's offerings have helped clients achieve anytime, anywhere, any device access and have supported widespread BYOD deployments.

DXC

At least 22 percent of DXC's global clients (i.e., legacy CSC and HPE Enterprise services clients) fall into the Cloud-enabled Archetype category. The company's cloud-based workplace support services include mobility-as-a-service, desktop-as-a-service, cloud-based file sharing and dedicated practices for Office 365 and Windows 10. DXC offers assessment and consulting services to help clients migrate to cloud offerings like Office 365. DXC provides a workload assessment for cloud migration based on business objectives. DXC's mobility-as-a-service includes cloud identity and access management with single sign-on services. DXC's cloud-based workplace solution called Client Virtualization Services is targeted to enterprise customers that require virtualization for custom line-of-business applications. DXC's Skype for Business service is available in a hybrid cloud solution that combines Office 365 and a globally deployed Skype private cloud solution. DXC's cloud file-sharing services include cloud file management integration with productivity suites and enable files to be securely accessed over any device. DXC has a particularly strong relationship with Microsoft. DXC also has partnerships with leading vendors in public cloud, single sign-on and cloud file-sharing services, plus it has dedicated practices for Office 365 and Windows 10.

Hexaware Technologies

Hexaware provides workplace solutions in a hybrid-cloud environment and can support clients with as much as 80 percent of their data and workloads in a public cloud. Hexaware offers desktop-as-a-service through its DockIT platform. The company has experience in providing services with limited infrastructure (i.e., zero DC) and all-cloud environments. Its entire service catalog is offered in the as-a-service model. Hexaware cloud-based solutions are targeted at collaboration and unified communication. Hexaware also offers cloud-based messaging, file sharing and endpoint security services. The company has incorporated options to use multiple operating systems in a VDI and enable self-service provisioning at the same time. That capability is especially helpful for developers because they often switch between operating systems during testing and other tasks. Hexaware is one of the few companies that provides support for complex workloads, such as those from specialized software, 3D modeling and GIS systems. For cloud application and desktop virtualization services, Hexaware has partnerships with leading vendors including Microsoft, Citrix, VMware and AWS.

IBM

IBM has extensive cloud-based XaaS capabilities. IBM's cloud-based mobility-as-a-service (MaaS360) is intended to provide complete lifecycle support for mobility management. IBM workplace support services also leverage a cloud automation platform and charges customers on per-user basis. IBM offers its secure-hosted virtual desktop services (DaaS) via IBM SmartCloud. IBM Connections is for enhancing enterprise social collaboration via a cloud platform that features social, email, meetings, chat, documents and more. IBM also provides a unique cognitive capability suite of services for Office 365. It offers services like sentiment analysis and engagement analytics on social collaboration tools like Yammer. To help clients take advantage of these capabilities, IBM uses a design-thinking approach to help its clients design their Office 365 collaboration strategies.

NTT DATA

NTT DATA offers Workplace-as-a-service (WaaS) through its own data centers. At least 33 percent of the company's clients fall in the Cloud-enabled Archetype category. NTT DATA's cloud-based workplace solution supports most Windows operating systems. It also has support for 3D CAD applications via custom GPU enhancement. A differentiator for NTT DATA is their End User Analytics tool that continuously analyzes worker's experience with their systems to improve that experience, increase productivity and reduce cost. NTT DATA offers a web-based environment to test its WaaS offering. NTT DATA has experience in implementing its VDI cloud offering for clients in digitally advanced industries like media. NTT DATA's desktop virtualization solution is part of its BizXaaS service, which includes email, file servers and other resources that are offered from the company's private cloud. NTT DATA has partnerships with several leading vendors in the VDI space, including Citrix, VMware, Microsoft and Nutanix and provides a virtual workspace solution in the cloud that focuses on application delivery and persona management.

Unisys

With at least 30 percent of clients falling in the Cloud-enabled Archetype category, Unisys provides Workspace Productivity as a Service (WPaaS), a private hybrid-cloud offering. WPaaS leverages Microsoft productivity solutions offered on-premise in a hybrid cloud and in a public cloud. Unisys also has cloud-based services related to Office 365 and unified end-point management to enable anytime, anywhere, any device access to cloud data and applications. WPaaS provides self-provisioning services both on-premise or in the cloud. This digital workspace solution also leverages technologies such as Microsoft Systems Center Configuration Manager, Microsoft Enterprise Mobility Suite and Windows Intune. Unisys' solution delivers an app store accessible via WPaaS and makes managed desktops and enterprise mobility support available as a service. Unisys has helped many of its public-sector clients with their cloud-based workplaces by providing them services like single sign-on authentication and Office 365 implementation, migration and support.

Wipro

At least 20 percent of Wipro's clients can be categorized as the Cloud-enabled Archetype. Wipro's homegrown IP for desktop virtualization on cloud, VirtuaDesk™ is a solution for virtual desktop and application delivery and recently has been gaining more traction. It can be deployed on-premises or in a hybrid-cloud setup with globally distributed, decentralized management. It also can be implemented in a distributed configuration, like remote office, back office or distributed office, on a hyper-converged platform and can be hosted in a public cloud through Wipro's partnerships with leading providers. Wipro provides end-to-end integrated management and monitoring, an end-user administrator portal, workflow automation platform and image management fabric that can run on any virtualization and hardware platform. VirtuaDesk™ implementations have helped reduce VDI cost and incidents by approximately 30 percent for Wipro clients. Wipro has implemented its cloud workplace solutions for clients in the manufacturing and CPG industries to help them migrate to Office 365, Skype for Business and cloud-based collaboration platforms. The company reports its services result in highly scalable configurations with nearly 100 percent accuracy.

OTHER NOTEWORTHY PLAYERS – CLOUD-ENABLED ARCHETYPE

Some other providers scored high in one or more areas that are important for a Cloud-enabled Archetype client. However, they were not categorized as leaders for this archetype because they did not rate highly in enough categories.

Noteworthy providers (services providers with a high score in one or more parameters) for Cloud-enabled Archetype clients are:

Fig 9 Other Noteworthy Service Providers – Cloud-enabled



Vision for and Focus on Cloud-enabled Client	Cloud-based Initiatives	Innovation Services	Orientation to Digital Workplace
Fujitsu	Dimension Data	HCL Technologies	HCL Technologies
Infinite Computer Solutions	Fujitsu	TCS	TCS
KPIT Technologies	HCL Technologies	Zensar Technologies	UST Global
UST Global	KPIT Technologies		
Zensar Technologies	TCS		
	Tech Mahindra		
	Zensar Technologies		

A4 DIGITAL ARCHETYPE

A Digital Archetype client has a “cloud first” or “mobile first” strategy and wants to achieve business differentiation by leveraging digital technologies and tools. These clients look beyond BYOD and anytime, anywhere, any device access. The Digital Archetype client would use data, analytics, enterprise mobility and cloud solutions to enable the field user carrying IT and non-IT devices or to directly enable the interaction with the end customer.

The Digital client can be a CIO or a non-IT business unit, also called shadow IT. A Digital Archetype client will look to mobilize its line-of-business (LoB) applications or at least make them mobile-ready. A Digital Archetype client will have an enterprise mobile strategy or will be looking to develop one. In addition to features like mobile device management and single sign-on, a Digital Archetype client would also look for enabling access to business applications via handheld devices carried by field users. Clients that use data analytics tools to enable customer interactions via different devices and platforms also fall into the Digital Archetype category.

The definition of digital workplace for a Digital Archetype client is a highly collaborative, empowering, automated and smart workplace, rich with data and analytics. For a Digital Archetype client, enterprise IT is not a disjointed function, but a key ROI-generating business function.

A4

A Digital Archetype client typically has the following characteristics:

- A cloud-first, mobile-first or nearly 100 percent BYOD enablement approach
- A heavy ROI dependency on client-facing applications and interactions, with end-user experience being of paramount importance
- Self-empowered, millennial end-users or field workers who interact directly with clients
- Rapid application deployment and a prevalent DevOps culture that contributes to more collaborative support
- The workplace is often called “Digital Workspace,” indicating non-dependency on a physical location.

To help achieve the goal of transforming the workplace, a Digital Archetype client will have the following priorities:

- Desire for a consumer-like end-user experience
- Extensive use of data analytics to support and enable field users and end customers
- Smart Internet-of-Things (IoT) devices that are part of the workplace come with support services
- Enterprise social networking and collaboration
- Advanced use of automation, such as bots, intelligent conversation agents or virtual assistants.

A services provider partner is deemed a best fit to serve a Digital Archetype client if, at a minimum, it provides the following:

- A resonating vision for digital workplace with experience with clients that have cloud-first and mobile-first strategies. The more interaction the service provider has in the client organization outside the IT office, the better position it will be in to understand the business impact of workplace transformation.
- Capabilities for consulting, implementing and integrating mobility in business processes. Providers should offer more than basic MDM and security features and be able to provide a consumer-like experience to end users.
- Key initiatives that aim at enabling the digital end-user experience. This may include capabilities related to managing smart wearable devices and VDI on cloud.
- A strong focus on enterprise social collaboration plus partnership with leading vendors. Focus and capabilities also should extend to services for enterprise-networking suites, social business transformation consulting and initiatives like gamification.

A4

Digital Archetype Client Imperatives

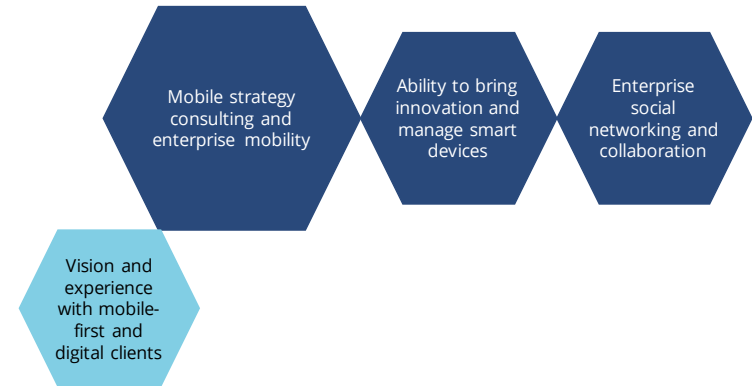
- Field workers with non-IT devices are able to connect with digital workplace
- Complete BYOD or mobile-first approach
- Mobilized business processes/business processes are becoming mobile-ready
- Digital workplace tied with ROI and business differentiation
- Dynamic workplace transformation for agile and flexible business requirements
- Consumer-like end-user experience



Fig10

Digital Archetype Provider Capabilities Importance

■ Increasing Future Importance ■ Decreasing Future Importance



Size based on relative current importance in the archetype profile

Fig11 Digital Archetype Leaders

Of the 25 providers included in our research, we found seven that stand out above the others for serving the Digital Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The seven, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 11, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

	Score 4 out of 4	Score 3 out of 4	Score 2 out of 4	Score 1 out of 4
	Digital-First Client Focus	Enabling Mobility in Business Processes	Digital Workplace Aimed at End-User Experience	Collaboration Focus
Atos	●	◐	●	●
Capgemini	●	◐	●	●
Cognizant	◐	●	◐	◐
Dimension Data	●	◐	●	◐
DXC	◐	●	◐	●
Hexaware Technologies	●	◐	●	◐
IBM	●	●	●	●

Atos

At least 40 percent of Atos' clients can be categorized as Digital Archetype clients. Atos has enhanced its digital transformation services capabilities through several organic and inorganic growth initiatives. The acquisition of Unify in particular has been instrumental in enhancing Atos' unified communications and collaboration services. Unify's leading workstream collaboration and communication product Circuit and its unified voice and video collaboration product OpenScape are true differentiators of Atos' capabilities in the digitally connected and collaborative digital workplace. Atos is already using these products to deliver value to clients in different industries, including media, retail and the public sector. Atos also has created industry-specific solutions to aid field workers in the public sector, BFSI, retail, entertainment and hospitality industries. Atos' recent partnership with Cognicor, which provides cognitive and artificial intelligence support for the service desk, will enhance its ability to meet the digital demands.

Capgemini

Capgemini has experience providing Digital Archetype clients with services to automate business processes via RPA, and enabling field employees to access data and applications from handheld devices. In addition, Capgemini has helped clients drive collaboration via gamification and develop next-generation mobility solutions for their own use. The approach of enabling end users to collaborate and create something to benefit their own work environments is a key component of the digital workplace. Capgemini's digital workplace approach also has an important self-service feature via the My Services portal. This all-in-one catalog enables end users to access their applications, ask for help and explore and interact throughout the entire organization. The service is available for all devices and is accessible through the cloud. At least 40 percent of Capgemini's clients fit the Digital Archetype.

Cognizant

Cognizant is one of the few service providers whose transformative infrastructure services also include DevOps specialization. Cognizant's new Constantly Ready Infrastructure Framework includes elements of agile application delivery and DevOps capabilities with infrastructure services. The application-infrastructure synergies in this approach help IT infrastructure management and application development teams to work in sync. Cognizant has experience helping customers define and implement digital strategies to enhance end-user satisfaction. The solutions they have developed for field users that directly interact with customers have provided a tangible ROI. At least 20 percent of Cognizant's clients can be categorized as the Digital Archetype.

Dimension Data

This subsidiary of NTT Group, headquartered in South Africa and with presence in 49 countries around the world, has many end-user computing services capabilities and has success stories where it helped clients provide secure data and application access to workers with multiple mobile device types. Dimension Data's Digital Practice specializes in mobile application development and has helped Dimension Data serve many clients with enterprise mobility and mobile app development services. Most of these applications have provided analytics-backed data and insights for workers in sales and marketing functions. Through the End-user Computing and Digital Practice and other NTT sister companies, Dimension Data has a strong enterprise mobility and digital workplace offering that can help workers and other customer-facing end users in different industries transform their day-to-day operations. At least 35 percent of the company's clients are in the Digital client Archetype.

DXC

The heritage of CSC and HPE Enterprise Services give great strengths and scale in traditional workplace services; however, the company's credentials also include cases where it helped the clients mobilize line-of-business applications that improved the connection with their customers through mobility solutions. It has prominent examples in the media, BFSI and retail industries. DXC launched a secure and innovative mobile payment and banking service covering all payment situations including cardless cash withdrawal from ATMs. For a railway company, DXC optimized business processes by deploying My Work application across 13,000 devices to enable frontline workers to better capture and access railway asset information. At least 28 percent of DXC's clients fall in Digital Archetype category. The company offers a set of comprehensive mobility assessment and advisory services. DXC moved to a user-centric model for all its advisory, transformation and managed services in 2016 executing on its vision of a modern enterprise. The MyWorkStyle portfolio of services also is focused on the security aspects of the employee experience, which is a key concern for this archetype.

Hexaware Technologies

At least 30 percent of Hexaware's clients fall in the Digital Archetype category. Hexaware developed its workplace solutions to deliver a consumer-like experience for end users. Its collaboration services were inspired by end-user behavior in engaging social applications. The company aims to provide a workplace solution that is intuitive, immediate, simple and convenient for end users. A key differentiator in Hexaware's approach is inclusion of design-thinking elements for end-user onboarding and offboarding. Hexaware's collaboration-focused approach can be significant for some asset-light Digital Archetype clients and for those looking for a zero-infrastructure environment. Hexaware leverages DevOps and ChatOps concepts in its self-service for end users. The company's next-generation collaboration services allow integration with external social networks and perform analytics to enhance the end-user knowledgebase.

IBM

IBM has experience with many clients for which it has delivered analytics-driven digital workplaces using its Watson platform. IBM has particular experience delivering real-time analytics to BFSI clients needing to identify the most relevant products and services and deliver them to end users interacting with customers in branch offices, online or via the contact center. IBM also has experience helping field workers better serve their customers by applying analytics to data collected from smart IoT devices. The company has developed mobility solutions useful for industries, including travel, transportation, BFSI, energy and healthcare. At least 50 percent of IBM clients can be categorized as Digital Archetype clients.

OTHER NOTEWORTHY PLAYERS – DIGITAL ARCHETYPE

Other providers scored high in parameters related to one or more aspects important for a Digital Archetype client. However, they were not categorized as leaders for this archetype because they did not score high enough across different parameters.

Noteworthy providers (services providers with high scores in one or more parameters) for Digital Archetype clients include:

Fig12 Other Noteworthy Service Providers – Digital



Digital-First Client Focus	Enabling Mobility in Business Processes	Digital Workplace Aimed at End-User Experience	Collaboration Focus
Infinite Computer Solutions	KPIT Technologies	Fujitsu	HCL Technologies
HCL Technologies	NTT Data	HCL Technologies	TCS
KPIT Technologies	UST Global	KPIT Technologies	Unisys
NTT Data	Wipro	TCS	Zensar Technologies
TCS	Zensar Technologies	Unisys	
Unisys		UST Global	
UST Global		Wipro	
Wipro			
Zensar Technologies			

A5 NEXT-GEN SOURCING

There is yet another client archetype that may not have adopted a cloud-first or mobile-first approach. Their workplace digital transformation journey is still in progress, and they do not view enterprise IT only as a cost center. These clients, referred to as the Next-Gen Sourcing Archetype, have not structured their IT functions in silos. For a Next-Gen Sourcing Archetype client, the enterprise IT function is deeply integrated with its business functionalities. Workplace transformation demand will come from the business side, rather than from operations, and workplace transformation is expected to have a business outcome impact, which will be much more than cost savings.

A Next-Gen Sourcing Archetype client is mature in terms of sourcing its enterprise IT-related services. These clients often use a focused operating expense business model to minimize sunk technology costs for owned devices. For these clients, workplace transformation is not intended to improve operational efficiency. They may have additional goals related to measurably enhancing employee productivity, achieving a competitive advantage or creating business differentiation.

A Next-Gen Sourcing Archetype client will view the digital workplace as the defining model of modern EUC in the cloud and mobile era. They believe the digital workplace should be simple for the end user and business-oriented for the enterprises. When a Next-Gen Sourcing Archetype client has a requirement of workplace transformation, it is not ad-hoc but results from a well-planned vision.



The key characteristics of a Next-Gen Sourcing Archetype client are as follows:

- Deep experience in sourcing services; typically not first-time outsourcers unless pursuing greenfield projects in which IT requirements originate from the business side
- The workplace is an aggregation of the latest technologies driven by business integration, rather than technology end users
- A focus on agility and speed in deploying new capabilities to support a rapidly changing business landscape
- IT organizations that may have an IT service brokerage function, a focus on agility and accelerated deployment of applications that support access from any device, anywhere and anytime.

To help achieve the goal of transforming the workplace, a Next-Gen Sourcing Archetype client will have the following priorities:

- Highly flexible contractual arrangements with service providers; for example, they may request hourly, fixed, outcome-based or any other type of pricing
- Highly automated IT support systems that make extensive use of self-service and knowledge asset features
- Consolidated IT in a near-shore or on-site location, which may require proximity of service desk locations from the site of operations

A Next-Gen Sourcing Archetype client may need advisory and consulting help to realize its vision. Typical characteristics, requirements and capabilities of this archetype and/or service provider include:

- Agility, flexibility and innovation in services and service pricing
- A partner that has a vision for and experience with business-integrated IT aimed at improving ROI or business differentiation
- A partner with agile and innovative solutions, backed by continuous improvement and organic/inorganic growth in its portfolio to be able to demonstrate how fast it can respond to market changes
- Scale-based parameters related to EUC and service desk support services
- A partner with a digital workplace orientation that has an industry-specific focus and a dedicated digital practice.

A5 Next-Gen Sourcing Archetype Client Imperatives

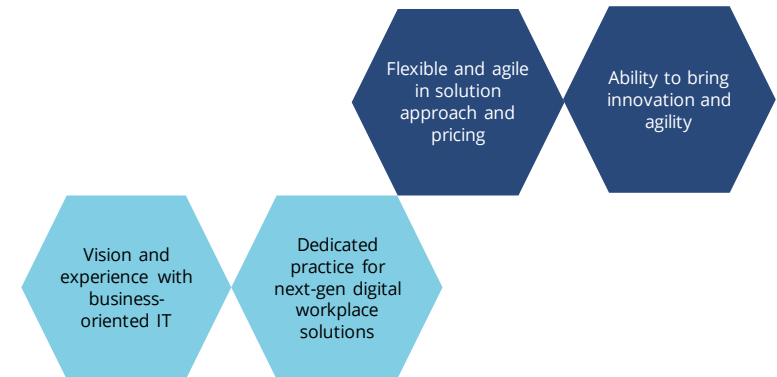
- Workplace transformation initiatives tied with dynamic business requirements
- Increased end-user experience and high efficiency in service delivery
- Digital workplace targeted at increasing end-user productivity
- Cloud, mobility and legacy app access solutions as per business requirements
- A future-ready and automation-enabled digital workplace



Fig13

Next-Gen Sourcing Archetype Provider Capabilities Importance

■ Increasing Future Importance ■ Decreasing Future Importance



Size based on relative current importance in the archetype profile



Next-Gen Sourcing Archetype Leader assessments across capability parameters

● Score 4 out of 4 ● Score 3 out of 4 ● Score 2 out of 4 ● Score 1 out of 4

Of the 25 providers included in our research, we found eight that stand out above the others for serving the Next-Gen Sourcing Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The eight, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 14, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

A5	Vision for and Focus on Next-Gen Clients	Flexibility and Agility in Pricing and Contracting	Agile and Innovative Solutions	Digital Workplace Solutions for Next-Gen Clients
	Atos	●	●	●
	Cognizant	●	●	●
	Dimension Data	●	●	●
	DXC	●	●	●
	HCL Technologies	●	●	●
	NTT DATA	●	●	●
	Wipro	●	●	●
	Zensar Technologies	●	●	●

Atos

At least 30 percent of Atos' customers are taking the Next-Gen Sourcing approach. Atos' strategy is to offer gainsharing to such clients to further strengthen the relationship. Atos' philosophy of viewing all end users as knowledge workers is key to its digital workplace offering. Atos has immense experience in the end-user and workplace services space. This experience, combined with its industry knowledge and expertise, has helped make Atos a preferred choice for an end-to-end workplace transformation partner. The company has longstanding relationships with some large and mature clients and has built trust among them. Atos also has experience with and is a leader in all the previously mentioned archetypes.

Cognizant

Cognizant has experience with Next-Gen Sourcing Archetype clients from diverse industries including BFSI, healthcare and media. At least 30 percent of its clients can be categorized as Next-Gen Sourcing clients. The company has developed the Constantly Ready Infrastructure Framework delivery model that is oriented to providing agile business solutions, which is a key requirement of the Next-Gen Sourcing client. Cognizant believes that end-user enablement via personalized services and security over digital engagement platforms must be aligned with business objectives.

Dimension Data

At least 40 percent of Dimension Data's clients belong to the Next-Gen Sourcing category and the company has particular experience in the FSI, media publishing, healthcare and petrochemical industries. Digital Workplace is Dimension Data's service offering for helping clients understand their business-aligned workplace requirements, inclusive of network, security and applications. Dimension Data's assessments result in the creation of a project plan that defines a clients' as-is state and the deliverables for future state; this is inclusive of end-user personas for different business roles. The company's experience in mobile device management and enabling enterprise mobility is a key differentiator for empowering end users with business-focused, mobility-based solutions. Dimension Data's approach is to help clients extend their end-user computing technology to business processes. It has many case studies where it has provided business differentiation and delivered value well beyond end-user computing support. These case studies include examples of enhanced mobility support, collaboration-focused solutions and how Dimension Data has built trusted relationships with clients.

DXC

DXC has emerged as a leader in all the previously mentioned archetypes and at least 20 percent of its clients fall in the Next-Gen Sourcing Archetype category. Its success among different archetypes indicates that the company understands different buyer behaviors and is experienced with multiple client types. With its rich experience coming from both CSC and HPE Enterprise Services, DXC offers advisory, assessment, transformation and managed services for transforming the workplace to a converged state, which it believes provides maximum value. DXC engagements help clients align their business and IT goals with new business priorities. For example, clients have asked DXC to change IT-driven SLAs to SLAs that are driven by business-critical processes. DXC is helping clients create a competitive advantage. For one direct sales company, DXC's mobile application services has empowered the workforce, increasing productivity by 29 percent and the sales conversion rate by 17 percent. The company also has been asked by multiple clients to realize a transformation vision to change business and IT operations and culture for both employees and clients.

HCL Technologies

HCL has recently grown its workplace services and aligned all managed services around analytics-driven assessment and consulting. HCL Technologies' vision for its digital workplace offering is that enterprise IT should enable business growth by leveraging technology, rather than using technology to constantly catch up with business needs. Another HCL philosophy is to "enable people, not things." HCL assesses clients' environments and helps develop business-centric end-user personas through its Kaleidoscope analytics-driven consulting and assessment practice. HCL has won many industry accolades and claims to be the pioneer in key models and parameters for workplace services, such as end-user experience and digital-maturity assessment. HCL has experience with clients from highly competitive and technologically advanced industries like retail and BFSI, to whom it provided agile and scalable IT services to match the pace of its clients' business-oriented initiatives. HCL has developed business-oriented solutions for different industries.

NTT DATA

A lot of NTT DATA's clients (about 30 percent) are in the Next-Gen Sourcing Archetype category, but the company does not take a one-size-fits-all approach to this segment. It is practical about providing different transformational services to its clients, assessing each client's viability for adopting transformation-oriented technology for its business. NTT DATA's focus always has been to save clients from "shiny object syndrome" that can distract companies with advanced capabilities and make them lose sight of their important requirements and goals. This focus is particularly important for Next-Gen Sourcing Archetype clients, which need to be pragmatic when embarking on a digital workplace journey. NTT DATA has client examples from the business services and manufacturing industries that showcase its ability to handle clients with a mature understanding of their IT systems.

Wipro

Wipro Technologies has unique experience dealing with clients with green-field and turnkey projects where the engagement itself starts with a business requirement. Wipro has worked with clients to help them define IT strategy for the first time, but at least 30 percent of its clients are from the Next-Gen Sourcing category. LiVE Workspace is Wipro's digital workplace offering. It is based on IT4IT standard and treats enterprise IT as an enabler and service orchestrator for the business. Wipro is a veteran in the infrastructure services space and is well positioned to understand the business and industry implications of transforming to a digital workplace. Adding to its credentials, Wipro has received many awards, including ISG's Challenge the Future Award, which recognizes organizations and individuals that best demonstrate leadership and innovation and challenge the future of business through the application of automation and emerging technologies.

Zensar Technologies

Zensar Technologies believes the business effectiveness of a digital workplace can be measured by its ability to deliver services that demonstrate the "three p's": preventive, proactive and predictive. Predictive refers to automated predictive analytics that would prevent (the second p) an incident from occurring and help improve system efficiency. Proactive refers to self-healing systems that resolve issues without disrupting the end user's work. This in turn helps prevent business activity disruption and hence improves end-user productivity. Instead of relying only on traditional end-user support KPIs, Zensar's digital workplace practice emphasizes business-driven KPIs. Zensar Technologies digital workplace services are geared toward business differentiation. It focuses on the manufacturing, retail, banking, insurance, health-care, utilities, airline and other industries. At least 14 percent of its clients can be categorized as the Next-Gen Sourcing Archetype.

OTHER NOTEWORTHY PLAYERS – NEXT-GEN SOURCING ARCHETYPE

Other providers scored high in some parameters related to one or more aspects important for a Next-Gen Sourcing Archetype client but did not qualify as leaders.

The noteworthy providers (services providers with high score in one or more parameters) for the Next-Gen Sourcing Archetype are presented below.

Fig15 Other Noteworthy Service Providers – Next-Gen Sourcing



Vision for and Focus on Next-Gen Sourcing Archetype Clients

Fujitsu
IBM
Stefanini
TCS

Flexibility and Agility in Pricing and Contracting

Computacenter
Hexaware
TCS
Unisys

Agile and Innovative Solutions

Computacenter
Unisys
UST Global

Digital Workplace Solutions for Next-Gen Sourcing Archetype Clients

Computacenter
Fujitsu
IBM
KPIT

SERVICE PROVIDERS ACROSS ARCHETYPES

	Ad-hoc Archetype	Transformation-oriented Archetype	Cloud-enabled Archetype	Digital Archetype	Next-Gen Sourcing Archetype
Atos	★	★	★	★	★
Capgemini	✓✓	✓	★	★	
Cognizant	✓✓✓	★	★	★	★
CompuCom	✓	★			
Computacenter	★	★			✓✓✓
Dimension Data	✓	✓✓	✓	★	★
DXC	★	★	★	★	★
Fujitsu	★	★	✓✓	✓	✓
Genpact	✓	✓	✓✓	✓	✓
HCL Technologies	★	★	✓✓✓	✓✓✓	★
Hexaware Technologies		✓✓✓	★	★	✓
IBM	✓✓✓✓	★	★	★	✓✓

★ Indicates Leaders

✓ Indicates Noteworthy Players (*number of check marks indicate degree of alignment with the capability requirements of each client archetype*)

	Ad-hoc Archetype	Transformation-oriented Archetype	Cloud-enabled Archetype	Digital Archetype	Next-Gen Sourcing Archetype
Infinite Computer Solutions			✓	✓	
ITC Infotech	✓	✓			
KPIT	✓✓	✓✓✓	✓✓	✓✓✓	✓
MphasiS	✓				
NIIT	✓	✓			
NTT DATA	✓✓	✓✓✓	★	✓✓	★
Stefanini	✓	★			✓
TCS	✓✓✓	★	✓✓✓	✓✓✓	✓✓
Tech Mahindra	✓✓	✓✓✓	✓		
Unisys	★	★	★	✓✓✓	✓✓
UST Global			✓✓	✓✓	✓
Wipro	✓✓✓	★	★	✓✓✓	★
Zensar	✓	✓✓✓	✓✓✓	✓✓✓	★

★ Indicates Leaders

✓ Indicates Noteworthy Players (*number of check marks indicate degree of alignment with the capability requirements of each client archetype*)

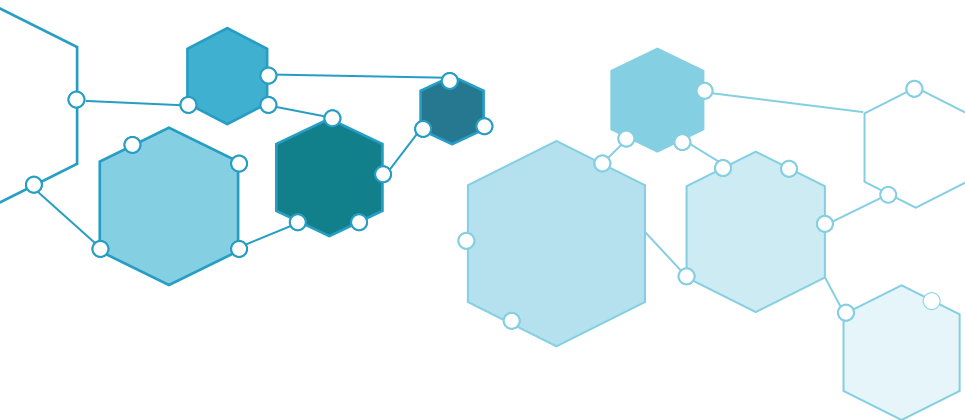
GUIDANCE

This report highlights five different client archetypes for workplace transformation. All five are based on one key theme: How well your enterprise IT is tied to your business. The report distinguishes buyer behavior based on how buyers view IT and where they would place their back-end IT infrastructure when it comes to digital transformation. For example, the Ad-hoc Archetype client and Transformation-oriented Archetype client consider enterprise IT a cost-eating function and think the only way it can bring value to the business is by improving its operational efficiency and reducing cost. The Cloud-enabled and the Digital Archetype clients, on the other hand, treat enterprise IT as an ROI

generator. For those clients, the digital workplace is linked to business differentiation. The Next-Gen Sourcing Archetype client incorporates best practices from all other archetypes. They would transform their workplaces to improve efficiency and enable business.

Since all the archetypes follow a “crawl, walk, run” pattern, it is expected that the Ad-hoc Archetype client may lose its prominence in the next three to five years. Mergers, acquisitions and divestures may continue to happen at a high rate, but the limitations and challenges of legacy system integration may diminish as more enterprises adopt modern technology. The Transformation-oriented Archetype may experience the same trends, but those companies will transform into other archetypes. If a Transformation-oriented Archetype organization chooses to adopt more cloud solutions and a complete BYOD approach, they may transition into a Cloud-enabled or Digital Archetype client. If, however, a Transformation-oriented company becomes more mature in managing its disparate business units and integrates them with IT, it would become a mature Next-Gen Sourcing Archetype client.

In the next few years, we may see different types of client archetypes emerging: one with an asset-light, cloud-dependent approach and another with a well-integrated business IT setup.



Enterprise Leadership Actions

It's about users and not devices. It is time for enterprises to stop taking a one-size-fits-all approach to EUC. It is important to note that the workplace is not just devices, and devices are not just end users. It is particularly important for clients falling into the Ad-hoc Archetype category to change their thinking. Fortunately, many organizations have started looking at implementing the end-user persona approach, which matches devices and services to the end user's role and needs.

A digital workplace offers much more than cost savings. Enterprise leaders should make an effort to understand the impact and opportunities a transformed digital workplace can offer. A digital workplace is more than an automated IT support service. A truly digital and collaborative workplace can help achieve many objectives other than cost savings. The Digital Archetype client and Next-Gen Sourcing Archetype clients are perfect examples.

Adopting a digital workplace doesn't mean everything has to change. Implementing a digital transformation concept for your workplace involves proper planning and assessment. The assessment not only requires analyzing the current end-user environment, but also assessing your business needs and requirements. In most cases, while employing an enterprise-wide transformation may be counterproductive, enabling certain business units with mobility and cloud-based solutions can prove to be effective. It is important to understand your disparate business needs. There is ample opportunity to pursue digital initiatives, but they should be used in the right place. For example, to become a Digital Archetype client, an enterprise may be inclined to use a next-generation collaboration tool across the organization, even though the application development team may be the only group in the organization that really needs collaboration via technology.

Take a practical, phased approach to transformation. Take a phased approach to digital workplace adoption. Technology and processes that work well in your current operations don't need to change just for the sake of moving to digital. A digital transformation should work well if it is applied in a phased manner. The first adopters of digital workplace in an organization should become change agents. They can propagate the value of the new systems and ease the change management challenge.

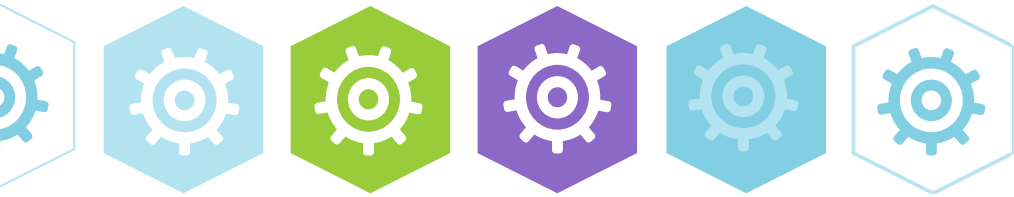
Provider Leadership Actions

A digital workplace is more than automated service desk support. The same criteria this report uses to distinguish enterprise buyer types also is applicable to service providers. It is important to understand that traditional EUC services cannot be renamed digital workplace offerings simply by adding automation components to workplace support services. As highlighted in the report, the traditional workplace is very different from a digital workplace. Therefore, measures that serve the existing client workplace through use of advanced automation and analytics may not make the offering a digital offering. No enterprise-wide digital initiatives can be accomplished by one department single-handedly; similarly, digital transformation cannot be offered or accomplished by a service provider team offering only the infrastructure management solution. Delivering a digital workplace will require close integration with other teams that enable digital solutions, such as application services, digital consulting, business integration services and business process related services.

Change management is the key. Establishing a digital workplace is much more than putting in place enabling technology. Since the digital workplace is born out of changing end-user behavior, the service provider's transformation initiative must take human behavior into consideration. Change management and integration are vital components of workplace transformation initiatives. It is important to include change management elements in the offering to help end users adopt to the transformed workplace.

Stay current and stay competitive. Just as the consumer world is changing rapidly in terms of device proliferation and social media, the workplace also is changing rapidly. End users want their devices and their workplace to support the latest capabilities, and they want them now. To stay competitive and current, service providers need to make sure they develop and incorporate technical capabilities to support almost all the major trends affecting consumer demands on the periphery of the digital workplace. Current trends indicate enterprises are becoming more cautious about their application access and deployment and less focused on device management. The growing importance of enterprise mobility management over mobile device management is an example. In the coming years, service providers may de-emphasize the pride they take in the number of devices and users they manage and shift more focus on capabilities related to secure application access and performance.

Appendix



APPENDIX

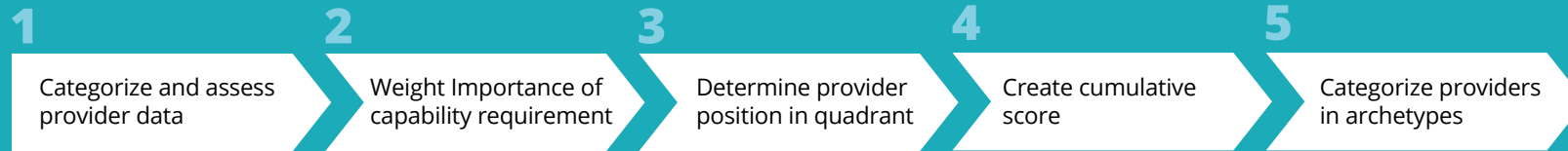
Methodology

As noted above, this report uses five archetypes of buy-side client requirements to assess the relative suitability of 25 workplace services providers. Data regarding the providers' capabilities and positioning was provided to ISG via briefings, surveys, ISG advisor interviews and client references as appropriate.

The following service providers were considered in this report: Atos, Capgemini, Cognizant, CompuCom, Computacenter, Dimension Data, DXC, Fujitsu, Genpact, HCL, Hexaware, IBM, ITC Infotech, Infinite Computer Solutions, KPIT, Mphasis, NIIT, NTT DATA, Stefanini, Tech Mahindra, TCS, Unisys, UST Global, Wipro and Zensar.

Service providers shared data about different dimensions of workplace services. These dimensions cover their technological competency, preferred engagement models, scope of work performed, service capability, functional expertise and industry and regional presence.

Overview of Methodology



Methodology Details

1 Categorize and assess provider data.

The data provided by service providers was categorized and assessed according to the workplace services requirements described for each of the five client archetypes. If the provider descriptions and data were not worded or structured as precisely as our archetype requirements, our workplace analysts relied on their expertise and experience to classify the provider capabilities.

2 Weight importance of capability requirement.

Based on our advisor and analysts' insights and expertise, each archetype capability requirement was weighted based on its relative importance to that archetype's typical requirements. Weightings for each archetype's requirements add up to a total of 100 percent. Specific weightings are not disclosed in this report. The relative importance of each capability requirement is depicted in illustrations at the beginning of each archetype section using differently sized hexagon icons.

3 Determine provider position in quadrant.

Once we assessed the provider's relative ability for each of the archetype requirements, we then positioned that provider in a relevant quartile (e.g., top 25 percent, second 25 percent, and so on). Those in the top quartile were awarded a numerical "capability score" of 4/4; the second quartile earned a score of 3/4, the third quartile earned a score of 2/4, and the fourth quartile earned a score of 1/4.

4 Create cumulative score.





We then multiplied the provider capability scores from Step 3 by the weightings developed for each client archetype requirement in Step 2. We totaled the results for each provider to develop a cumulative score. These cumulative scores are not disclosed in this report.

5 Categorize providers in archetypes.

We used the cumulative scores to identify the providers most well-suited for each archetype's requirements. These providers are listed alphabetically and are briefly profiled in each archetype section. Where relevant, additional providers with noteworthy capabilities also are mentioned (for example, providers that may have scored well on a specific requirement but not across all the requirements for that archetype).

Please note: This report presents service providers' known capabilities in the context of user enterprises' typical project needs. This report is not meant to rank providers or to assert that there is one top provider with abilities that meet the requirements of all clients that identify themselves with a particular archetype.

Fig16 Provider Capability Scores as Harvey Balls

Score	Harvey Ball representation
Score 4 out of 4	
Score 3 out of 4	
Score 2 out of 4	
Score 1 out of 4	

The cumulative score for each of the selected service providers against each archetype requirement is represented using Harvey Balls. For example: if a provider is assessed with a score of 4 out of 4, then a full Harvey Ball is used to represent its capability against that requirement. Similarly, if a provider is assessed a score of 1 out of 4, then a one-quarter Harvey Ball is used, and so on.

Additional Relevant Workplace Service Providers

The capabilities of 25 providers were assessed in this report. Some service providers that are typically included in our work are not included in this report. Some of the companies that were not included were not able to participate and others declined. Providers that do not offer a full portfolio of workplace services have not been included in the study. They may be included in future versions of this report, based on merit and on the service providers' willingness to provide current and relevant materials. Readers should not make any inferences about a service provider's absence from this report.

Appendix: Additional Relevant Workplace Service Providers

Other Relevant Service Providers	Headquartered Country
Accenture	Ireland
Bell Techlogix	US
CGI	Canada
Diebold Nixdorf	Germany
EPAM Systems	US
Getronics	Netherlands
IndependenceIT	US
Infosys	India
LTI	India
Long View Systems Corp.	Canada
Microsoft	US
Mindtree	India
OneNeck IT	US
Pariveda Solutions	US
Persistent Systems	India
Pomeroy	US
SAIC	US
Softtek	Mexico
Syntel	US
Tieto	Finland
T-Systems	Germany
VirtusaPolaris	US

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ISG Provider Lens™ Archetype Report

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