

Future of Work Services

A research guide to evaluate providers' strengths, challenges and differentiators in the modern workplace



Introduction	3	Contacts for this Study	15
About the Study		Advisor Involvement	
Quadrants Research	4	Advisor Involvement - Program	
Definition	6	Description	16
Quadrants by Regions	11	Advisory Team	16
Schedule	12		
Client Feedback Nominations	13	Invited Companies	17
Methodology & Team	14	About our Company & Research	19



The future of work is constantly evolving, with enterprises either mandating employees' return to offices or adopting hybrid working models. The advancements in generative AI (GenAI) and the need to assimilate new business models to meet dynamic customer demands also contribute to the evolving future of work.

Enterprises no longer partner with service providers to provide laptops, mobiles, Wi-Fi and service desks and allow employees to work as they want. Instead, they embrace a flexible workplace open to new technological possibilities.

A continuum extends from traditional, low-tech approaches to sustainability-focused agendas, incorporating AI, XR and immersive experiences into EX. Experience parity is becoming a significant differentiator in the market. Thus, workplaces must deliver seamless EX regardless of location or customer interaction.

Employees seek the freedom to select both their workspace and the required technology. They need ubiquitous access to devices, applications, data, workflow, documents

and processes, irrespective of location. These requirements demand security, entailing established platforms, protocols and access rights.

Collaboration and communication are equally critical, involving internal and external tools such as AR, VR and XR. However, enterprises face challenges when integrating pre-pandemic infrastructure with post-pandemic capabilities.

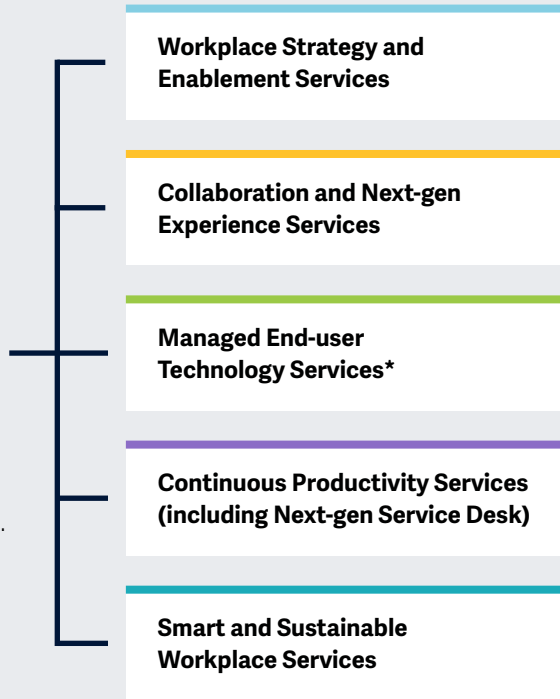
GenAI opens new avenues for increased employee productivity and efficiency. It allows enterprise IT to better manage back-end workplace technologies. Still, enterprises need expert help strategizing, implementing and adopting this technology.

This report focuses on the approaches where next-generation thinking changes the future workplace landscape.



This study evaluates providers' capabilities in delivering key **Future of Work** services across different regions.

Simplified Illustration Source: ISG 2024



The ISG Provider Lens™ Future of Work Services 2024 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on markets, including the U.S., U.K., Germany, Switzerland, Brazil and Australia

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

***Quadrant to be split into two: one covering large accounts and another for local specialists as applicable in the respective regions.**



ISG's Future of Work Framework

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



Workplace Strategy and Enablement Services

Definition

This quadrant evaluates providers offering workplace strategy and enablement services, including implementations, across industries. Organizations aiming to help clients navigate the complex strategies and regulations of the workplace landscape must be able to tailor advice and strategy by region, market direction and organizational responsibility. They must also provide strategic capabilities and services spanning several integrated areas related to enterprisewide workplaces.

Workplace service providers must focus on considerations such as advanced business models and new talent models. These considerations require guidance, compliance and strategy suited to human, digital and physical workplaces and must be considered collectively instead of in silos. Newer aspects that should be included as part of workplace services are listed as follows:

- Market change and new business model design, including the creation of a circular business delivery model
- Guidance on digital capabilities that can impact human or physical workplaces
- New talent models
- Integration of local and remote physical workplaces
- Physical asset strategy and assessments
- Workplace-driven sustainability strategy

While some providers can develop strategies, the key to minimizing potential issues is to work on procurement, project management, change, CX and workplace strategy delivery. Delivering these capabilities across several industries is crucial as the regulations vary by industry.

Eligibility Criteria

1. Provide **advisory services and new business model designs**
2. Have a vendor-neutral approach for **workplace transformation-led business delivery models**
3. Offer **advisory services for human, digital or physical workplace strategy**
4. **Adopt new talent models impacting workforces.** The models should integrate diversity, equity and inclusion and eliminate modern slavery risks
5. **Integrate local and remote physical workplaces to ensure experience parity**
6. Deliver **asset strategy and assessments**, including property and infrastructure usage and bottom line performance
7. Have **experience and references in delivering workplace-driven sustainability strategy**
8. Have **industry-wide case studies for workplace strategy** leading to human, digital and physical workplace benefits



Collaboration and Next-gen Experience Services

Definition

This quadrant assesses service providers' capabilities in enhancing end-to-end CX and EX and offering value-added managed services to enable workplace technology ecosystem and enhance end-user experience. Typically, providers offer services that enable business leaders, line-of-business (LoB) representatives and CXOs to provide enhanced collaboration capabilities, resulting in improved experience. Their services associate experience with measurable business results and help align the digital workplace transformation with human needs.

Next-generation experience extends beyond technology implementation, including professional services promoting technology adoption. Service providers engage with clients in an outcome-focused model using an XLA approach. The experience management office (XMO) gathers actionable insights through data and analytics, sentiment analysis, ML and change management activities.

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

Eligibility Criteria

1. Provide an **XLA-focused delivery approach** to enhance collaborative experience
2. Leverage **AI and GenAI technologies** to provide value-added experience transformation services
3. Deploy **collaboration solutions** such as Teams, Cisco and Zoom and manage by monitoring analytics from deployed hardware
4. Support **unified communication, collaboration and productivity stack**
5. Provide **services to support the needs of other business functions**, such as human resources outsourcing (HRO) and operations
6. Provide **services that enable proper change management and technology adoption**, leveraging the latest technologies such as Copilot
7. Support **XMO and associated services**
8. Provide **services to support digital dexterity, learning and skills evolution and deploy integrated AR and VR capabilities**



Managed End-user Technology Services

Definition

This quadrant assesses service providers offering managed services associated with technologies that enterprise IT departments deploy, provision and secure for end users and employees. These managed infrastructure services in the digital workplace include end-user enablement through services related to devices, applications, cloud workspaces and endpoint security. Providers assessed in this quadrant offer complete end-user computing (EUC) services that form the core of the digital workplace. These services include device management, patch management, device and application provisioning, virtualized desktop access and device lifecycle management. Their service portfolio extends to support bring-your-own-device (BYOD) initiatives, mobility and telecom expense management, proactive experience management and digital employee experience (DEX) support. Provisioning, managing, and securing the devices remain the first primary step to enabling a digital workplace and providing devices with integrated collaboration and productivity capabilities to employees. The increasing focus on experience

through endpoints has transformed services and helped providers cater to clients' respective industries. While these services are typically associated with traditional computing devices and tablets, their scope can be expanded to include industry-specific scenarios, such as point-of-sale or handheld devices for retail and hospitality or medical equipment devices for healthcare and more traditional workplace setups.

Eligibility Criteria

1. Provide **connected, always-on and updated end-user devices** for secure collaboration and productivity
2. Support **unified endpoint management (UEM), enterprise mobility management, application provisioning and patch management**
3. Offer **complete device lifecycle management services**, such as device procurement, enrollment, app provisioning, support, management, disposal and recycling (device as a service), along with device sourcing and logistics
4. Provide **DEX solutions for automated issue resolution**
5. Demonstrate **experience in providing virtual desktop services on-premise and on the cloud** (desktop as a service)
6. Offer **related field services**, IMAC and break/fix services. Provide remote and onsite field support and in-person technical assistance
7. **At least 75 percent of regional contracts must include end-user technology services management**



Continuous Productivity Services (including Next-gen Service Desk)

Definition

This quadrant assesses service providers' capabilities in supporting the continuous productivity needs of next-generation workplaces, human workplaces and fully integrated hybrid working patterns.

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

and cloud platforms to offer always-on systems. Providers leverage AI and cognitive technologies for user-facing tasks, achieving significant cost savings.

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

Eligibility Criteria

1. Provide **deliver-anywhere autonomous workplace support**
2. Offer **fully integrated analytics and automation** for issue resolution
3. Deliver **contextualized AI support** for workplace
4. Provide **service desk augmentation**
5. Offer **XLA-driven support** instead of SLA-driven decisions
6. **Set up and deliver intelligent support** via self-help kiosks, tech bars, IT vending machines and DigiLockers
7. Provide **automated and contextualized support for end users** based on their roles and work
8. **Quantify workplace support function performance** beyond traditional service metrics
9. Have a **robust local presence** with most workplace engagements around service desk services



Smart and Sustainable Workplace Services

Definition

This quadrant assesses service providers that support smart, IoT-enabled physical workplaces and assist clients in achieving sustainability goals. The modern workplace combines human, digital and physical workplaces to enable remote, hybrid or in-person collaboration and productivity. Buildings and spaces must be integrated, inclusive and sustainable, offering users a purpose to attend.

With commercial retail facing major occupancy issues, workplace service providers must collaborate with enterprise leaders and create a holistic office strategy. Providers must draw on technology and sustainability to design, implement and manage workplace environments that enhance operational efficiency, employee well-being and environmental responsibilities. As organizations focus on a return-to-office strategy, service providers can help build an environment with smart meeting and facility management solutions. Besides traditional office management, these services include an adaptive, efficient, inclusive and responsible

environment. These help create spaces that meet the current needs of employees and businesses and anticipate future challenges and opportunities in the evolving work landscape.

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

Eligibility Criteria

1. Support **smart office spaces by leveraging IoT and the latest technologies** to provide workplace analytics, hot desking, smart building and facility management
2. Offer **support for asset efficiency and address energy management requirements**
3. Provide **inclusive, adaptable and integrated hybrid working solutions and spaces**
4. Provide **services to reduce carbon emissions from workplaces**
5. Assist in **aligning client strategies and metrics for reporting the ESG aspects**, particularly focusing on workspace utilization within the social and governance dimensions



Quadrants by Regions

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Future of Work Services 2024:

Quadrant	U.S.	U.K.	Germany	Switzerland	Brazil	Australia
Workplace Strategy and Enablement Services	✓	✓	✓	✓	✓	✓
Collaboration and Next-gen Experience Services	✓	✓	✓	✓	✓	✓
Managed End-user Technology Services	✓	✓	✓	✓	✓	✓
Continuous Productivity Services (including Next-gen Service Desk)	✓	✓	✓	✓	✓	✓
Smart and Sustainable Workplace Services	✓	✓	✓	✓	✓	✓

ISG is also conducting a study parallelly to compare service providers specializing in offering the same services in the U.S. Public Sector. Another study is being conducted to analyze the global future of work solutions market, comparing technology providers offering DEX and connected and collaborative work management solutions.



The research phase falls in the period between March and August 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2024.

Milestones	Beginning	End
Survey Launch	March 12, 2024	
Survey Phase	March 12, 2024	April 10, 2024
Sneak Previews	August, 2024	
Press Release & Publication	September, 2024	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2024 research agenda

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:

ISG.star@isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2024 – Future of Work Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

Iain Fisher

Lead Analysts:

Mrinal Rai, Roman Pelzel, Kevin Turner, Craig Baty, Cristiane Tarricone and Iain Fisher

Editor:

Upasana Hembram

Research Analysts:

Ayushi Gupta, Khyati Tomar and Bruno Nakozone

Data Analysts:

Pooja Rani Nayak and Kruthika Sulghur

Project Manager:

Swathi Amin

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2024, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.



Contacts For This Study

Study Sponsor



Iain Fisher
**Program Director
and Lead Analyst,
Strategy Industry**



**Swathi
Amin**
**Lead Project
Manager**



**Mrinal
Rai**
**Lead Analyst –
Global, U.S.**



Roman Pelzel
**Lead Analyst –
Germany and
Switzerland**



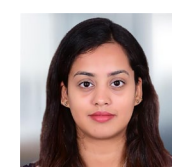
**Kevin
Turner**
**Lead Analyst –
UK**



**Craig
Baty**
**Lead Analyst –
Australia**



**Cristiane
Tarricone**
**Lead Analyst –
Brazil**



Ayushi Gupta
**Senior Research
Analyst – UK, Germany,
Switzerland, Australia**



**Khyati
Tomar**
**Research Analyst –
U.S., Global**



**Bruno
Nakozone**
**Research Analyst –
Brazil**



**Pooja Rani
Nayak**
Senior Data Analyst



**Kruthika
Sulghur**
Data Analyst



ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Jim
Kane

**Director
(U.S and Global)**



Jason
McAuliffe

**Director, Technology
Modernization
(Australia)**



Iain
Fisher

Director (U.K.)



Jochen
Steudle

**Senior Consultant
(Switzerland)**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Accenture*	Blackbox	Datacom	HPE*
ACP Group	Brennan IT	Dedalus*	Ilegra*
adesso SE	Brillio	Deutsche Telekom*	Infosys*
Agilisys	CANCOM*	Dexian	Innofactor
Algar Tech*	Capgemini*	Digital Workplace Group	Insight
All for One Group*	Capita	DXC Technology*	IPNET*
AppSphere	CDW	ELCA/EveryWare*	iSolutions*
Arvato Systems	CGI	Fujitsu*	ITC Infotech
ASG Group	Cloud4C	GAVS Technologies *	JMC Software*
Atos	Coforge*	Genpact	Kinetic IT*
AVASO	Cognizant*	Getronics*	Kyndryl*
Aveniq	Compucom*	Happiest Minds	Leidos
Bechtel*	Computacenter*	HCLTech*	Logicalis*
Bell Techlogix*	Connectis*	Hexaware*	Long View Systems
Birlasoft*	Data#3*	Hitachi Digital Services	LTIMindtree*



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* Rated in previous iteration

Microland*	SHI	Tietoevry
Milestone Technologies	Softcat	TIVIT*
Movate™*	Softchoice	Trianz*
Mphasis*	Softtek	Unisys*
Multiedro*	SONDA	UST*
NCS	Sopra Steria*	Venha Pra Nuvem*
NEC	SS&C Technologies*	Vodafone
Noventiq	Stefanini*	Wipro*
NTT DATA*	Swisscom	XMA*
Orange Business Services*	TCS*	YASH Technologies*
Pomeroy*	Tech Mahindra*	Zensar Technologies*
Processor*	TEKsystems	Zones*
PwC	Telefonica	
Ricoh*	Telstra*	
SantoDigital*	TET	



ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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

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

ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





MARCH, 2024

REPORT: FUTURE OF WORK SERVICES