

Future of Work Services

Assessing digital workplace possibilities and
improvements for the public sector



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

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

Effective communication and collaboration are essential components for organizational success. In the evolving landscape, this necessitates integrating both internal and external tools and, in some cases, even emerging technologies such as AR, VR and XR.

However, integrating pre-pandemic infrastructure with these emerging capabilities presents a unique challenge for government agencies.

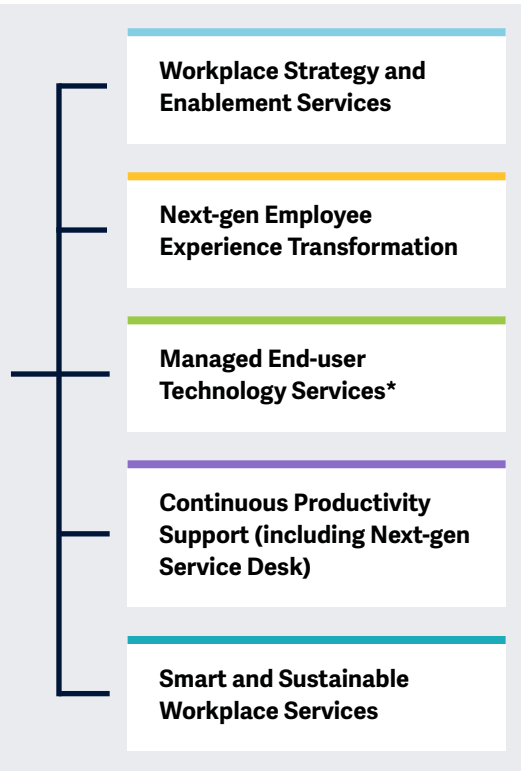
While GenAI offers promising possibilities for boosting employee productivity and streamlining workflows, its successful implementation and adoption require careful consideration and expert assistance. By embracing innovative approaches and partnering with the right expertise, SLED clients can pave the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

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



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

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 different markets, including the U.S. Public Sector market

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 various industries. Providers aiming to help clients in navigating the complex strategies and regulations of the workplace landscape must possess not only the expertise but also the nuanced ability to tailor advice and strategies based on specific regional nuances, market directions and organizational responsibilities. They must also provide strategic capabilities and services spanning several integrated areas related to organization-wide workplaces.

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

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

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

Eligibility Criteria

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



Next-gen Employee Experience Transformation

Definition

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

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

Next-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. Experience management and improvement are accomplished through data and analytics, sentiment analysis, ML and change management activities.

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

Eligibility Criteria

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



Managed End-user Technology Services

Definition

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

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

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

Eligibility Criteria

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



Continuous Productivity Services (including Next-gen Service Desk)

Definition

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

For today's workforce, being productive means having the ability to work from anywhere, anytime. Users require a different IT operating model, driven by changes in business models and market channels, which they must operate and support. The current workforce needs autonomy, constant connectivity and total productivity regardless of location, work pattern or device. Meeting these needs requires providers to offer enhanced support capabilities, rendering typical service desk offerings less appealing yet available. Next-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. Establish or intend to establish a **business presence in public sector organizations**, especially U.S. SLED organizations
2. Provide deliver-anywhere **autonomous workplace support**
3. Offer fully integrated analytics and automation for issue resolution
4. Deliver **contextualized AI support** for workplace
5. Provide **service desk augmentation**
6. Offer **XLA-driven support** instead of SLA-driven decisions
7. Set up and deliver **intelligent support via** self-help kiosks, tech bars, IT vending machines and DigiLockers
8. Provide **automated and contextualized support** for end users based on their roles and work
9. **Quantify workplace support** function performance beyond traditional service metrics
10. Present industry-focused **case studies** demonstrating measurable improvement



Smart and Sustainable Workplace Services

Definition

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

Evolving hybrid workplace environments, changing work cost structures and shifting real estate conditions push agency and department leaders to collaborate with service providers to create more holistic workplace approaches. Providers must draw on technology and sustainability to design, implement and manage workplace environments that enhance operational efficiency, employee well-being and environmental responsibilities. As enterprises struggle with return-to-office strategies, service providers can help build an environment with smart meeting and facility management solutions. Besides traditional office management, these services include an

adaptive, efficient, inclusive and responsible environment, contributing to creating spaces that meet the current needs of employees and businesses and anticipate future challenges and opportunities in the evolving work landscape.

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

Eligibility Criteria

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



Quadrants by Region

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. Public Sector
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., U.K., Brazil, Germany, Switzerland and Australia. 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 between March and August 2024, during which survey, evaluation, analysis and validation will occur. 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 directly influence the providers' 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.

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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.



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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



Randy
Meek

**Director,
Public Sector Services**



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*

Allied Digital

Atos*

AVASO

BCG*

Bell Techlogix*

Birlasoft

Blackbox

Brillio

Capgemini*

CDW

CGI*

Citrix

Cloud4C

Coforge

Cognizant*

Compucom

Computacenter*

CVA Consulting

Deloitte*

Dexian

Digital Workplace Group*

DXC Technology*

Fujitsu*

GAVS Technologies

Happiest Minds

HCLTech*

Hexaware*

HPE*

IBM

Infosys*

Insight

ITC Infotech

KPMG*

Kyndryl*

Leidos*

Lenovo

Long View Systems

LTIMindtree

Microland

Milestone Technologies

Movate*

Mphasis*

NTT DATA*

Persistent Systems

Pomeroy

PwC*

Ricoh

SHI

Softchoice

SoftwareONE

Stefanini

TCS*

Tech Mahindra*

TEKSystems

Unisys*

UST*

Wipro*

WWT

Zensar Technologies*



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](#).

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ISG

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

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

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