

Digital Business Innovation Services

Analysis of service companies that help
accelerate business through digital innovations



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Introduction

Digital innovation services encompass solutions that use emerging technologies such as AI, blockchain and IoT to address complex business challenges. These services play a crucial role in optimizing and continuously improving organizational processes. They are also fundamental for developing products and services, enabling companies to meet market demands and anticipate future trends, thereby creating growth opportunities.

Transformation services help organizations adapt quickly and effectively to rapid market changes and technological innovations by implementing digital strategies that include cloud orchestration, application management, cybersecurity, advanced analytics, AI and ML.

The customer journey covers all customer experiences when interacting with an organization, from the initial contact to after-sales support. Services in this area aim to understand customer needs, expectations and behaviors, using tools such as design thinking, customer journey mapping, omnichannel strategies and CRM.

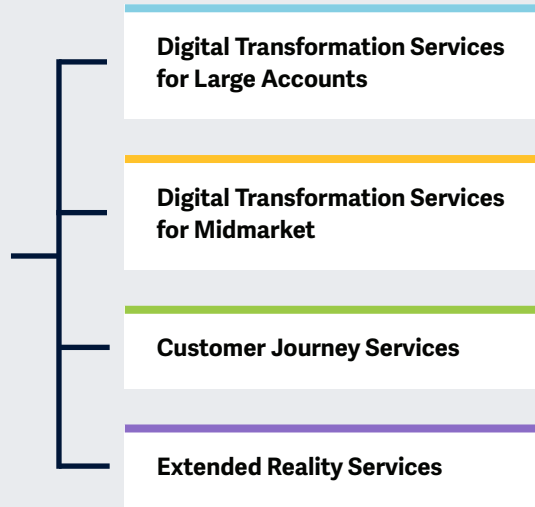
Extended reality (XR) refers to technologies that alter our perception of reality, such as VR, AR and mixed reality (MR). These services create immersive and interactive experiences through applications in training, entertainment, marketing, education and healthcare.

Using these technologies, organizations can solve complex problems, improve organizational processes and develop products and services that align with their audiences' needs and expectations.



Main areas identified in the **Digital Business Innovation Services 2024** study based on **demands** in the Brazilian market.

Simplified Illustration Source: ISG 2024



The ISG Provider Lens™ Digital Business Innovation Services 2024 study offers the following to business and IT decision-makers:

- Transparency about the strengths and areas of concern of relevant providers;
- A differentiated positioning of providers by assessing their competitive strengths and the attractiveness of their portfolios;
- Focus on the Brazilian market.

Our study serves as an important decision-making basis for understanding and positioning providers, key relationships and market entry considerations. ISG's consultants and corporate clients also use the information in these reports to evaluate their current provider relationships and potential engagements.



Digital Transformation Services for Large Accounts

Definition

This quadrant evaluates providers of digital business transformation services for large clients, focusing on customer and employee journeys, digital business strategy and operations. These services help companies build new business models using existing resources across various market opportunities.

Service providers in this area must help organizations transform and optimize their environments, seeking operational efficiency through research, benchmarking and consulting. Their focus includes technology, business process transformation, program management services and organizational change management.

Participating companies should support their clients throughout the digital journey, from conceptualizing the vision to implementing the necessary actions for transformation in different sectors.

Eligibility Criteria

1. Offer one or more **consulting and innovation services** throughout organizations' **digital journeys**;
2. Ability to **advise clients** on the different facets of the digital journey, including **strategy, data, technology, organizational change management, operations and industry process consulting**;
3. Help clients **formulate digital road maps and develop digital** short- and long-term strategies;
4. Offer guidance on **process optimization** to deliver tangible benefits;
5. Solve **business problems** by developing solutions and applications;
6. **Focus on delivering a digital journey** supported by advanced technologies such as AI, ML and analytics;
7. Use methods to **analyze customer scenarios and optimize spending**;
8. Exhibit strong **thought leadership** skills;
9. Demonstrate proven capacity through **resources, R&D projects and a partner ecosystem**, including hardware and software providers;
10. Present **success stories** from major clients that prove **effective results and value generation**;
11. Demonstrate experience adhering to **regulations and compliance standards relevant** to clients' industries.



Digital Transformation Services for Midmarket

Definition

This quadrant assesses providers of digital transformation services for mid-market clients, addressing less complex requirements and smaller project scales. It includes services for companies in their customer and employee journeys, digital business strategy and operations. These services help companies build new business models using existing resources across various market opportunities.

Service providers in this quadrant must help organizations transform and optimize their environments, seeking operational efficiency through research, benchmarking and consulting, with a focus on technology, business process transformation, program management services and organizational change management.

Participating companies must support their clients throughout the digital journey, from conceptualizing the vision to delivering the necessary actions for transformation in different sectors.

Eligibility Criteria

1. Offer one or more **consulting and innovation services** throughout organizations' **digital journeys**;
2. Ability to **advise clients** on various facets of the digital journey, including **strategy, data, technology, organizational change management, operations and industry process consulting**;
3. Help clients **formulate digital road maps** and develop short- and long-term **digital strategies**;
4. Offer guidance on **process optimization** to deliver tangible benefits;
5. Provide **solutions to business problems** by developing effective solutions and applications;
6. **Focus on delivering a digital journey** supported by advanced technologies such as AI, ML and analytics;
7. Utilize methods to **analyze the customer scenario** and help them **optimize spending**;
8. Exhibit strong **thought leadership** skills;
9. Present **success stories** that demonstrate **effective results and value generation**;
10. Demonstrate experience in complying **with regulations and compliance standards** relevant to clients' industries.



Customer Journey Services

Definition

This quadrant assesses providers' ability to offer consulting and implementation services covering all consumer journey stages. Providers must demonstrate innovation throughout this journey, from creating personalized experiences to implementing advanced technologies such as generative AI (GenAI), predictive analytics and intelligent automation. This includes services focused on the continuous improvement of CX, leveraging real-time insights to adapt and optimize each interaction.

The customer journey requires real-time monitoring of touchpoints, supported by the necessary technology, to ensure a seamless and consistent experience. Integrating systems, such as CRM and marketing automation, is necessary to offer a unified view of the customer and optimize their experience across all channels.

Eligibility Criteria

1. **Offer consulting, integration and managed services** to enhance CX services;
2. Ability to **adapt the consumer journey to meet clients' specific business needs**;
3. **Focus on delivering an end-to-end customer journey** supported by advanced technologies such as AI, ML, IoT and data analytics;
4. **Utilize innovative technologies** such as GenAI, AR, VR and AI to personalize the consumer journey;
5. **Ability to manage omnichannel experiences**, ensuring consistency and quality across all touchpoints, online and offline;
6. **Showcase competence in personalizing and hyperpersonalizing actions with users and consumers**, adapting purchasing processes to each client's unique preferences and needs;
7. **Offer high-quality customer support**, including rapid problem resolution, personalized service, technological updates and process optimizations;
8. Established a robust **CX governance structure**.



Extended Reality Services

Definition

The Extended Reality Services quadrant evaluates service providers that offer strategic consulting, integration and delivery to support clients in adopting digital reality solutions. Providers must actively collaborate with corporate clients throughout the process, from ideation and consulting to evaluation, storyboarding, prototyping and user testing, using a personalized approach.

Providers assessed in this quadrant must map and measure the ROI for implemented solutions, ensuring that investments in extended reality (XR) align with strategic objectives and generate tangible value. To guarantee an immersive and complete experience, providers must use a comprehensive methodology, integrating technologies such as IoT, ML, AI and advanced analytics while providing scalable solutions and suited to business challenges.

Eligibility Criteria

1. Experience in **using XR technologies to create immersive experiences** in marketing, sales or customer support;
2. Develop **RM solutions, AR and VR applications** for various sectors and **implement XR solutions** for training, simulations or product design;
3. Maintain a **team of certified professionals specialized** in XR technologies;
4. **Hold certifications and technological partnerships** with major industry players;
5. **Provide training in XR solutions** to ensure clients can use them effectively;
6. **Experience in integrating one or more technologies** such as IoT, analytics, computer vision, AI, ML and 3D;
7. **Develop solutions, tools, accelerators** and other sector-specific IPs;
8. **Present delivered use cases** or POCs ready for pilot implementation;
9. **Provide ongoing support, updates and maintenance** for XR solutions.



Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we present the following four quadrants in Digital Business Innovation Services 2024:

Quadrant	Brazil
Digital Transformation Services for Large Accounts	✓
Digital Transformation Services for Midmarket	✓
Customer Experience Services	✓
Extended Reality Services	✓



The research phase takes place between October 21 and November 14, 2024, during which the survey, evaluation, analysis and validation will take place. The results will be presented to the media on February 24, 2025.

Milestones	Beginning	End
Survey Launch	28 October 2024	
Survey Phase	28 October 2024	18 November 2024
Sneak Preview	January 2025	February 2025
Press Release & Publication	February 2025	

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™ 2025 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!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Digital Engineering Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

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



Methodology & Team

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

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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



Contacts For This Study

Study Sponsor



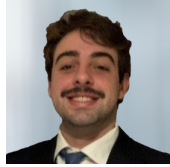
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ISG Provider Lens Advisors Involvement Program

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.



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*	Deal*	IPNET*	Spassu*
ARVORE*	Dedalus*	iTeleport	Squadra Digital
Atile*	Deloitte Digital*	Kumulus*	Stefanini*
Atos	Driven.CX*	Logicalis*	TCS*
Beenoculus*	DXC Technology*	MadeinWeb*	Tech Mahindra
Birlasoft*	FCamara*	Mazelabs	TIVIT*
Brivia*	Flex Interativa	MedRoom*	Transformação Digital
BRQ*	GhFly*	MJV Technology & Innovation	T-Systems
Builders*	Globant*	Nação Digital*	V8.Tech
Cadastra*	Guiropa	NTT Data	Vetor Zero/ Vetor Lab
Capgemini*	Hipocampus Edtech	Pixit	Virtual.Town*
Cast Group	HRocks	ProdWeb	Vitrio*
Choveu	IBM*	PwC*	VRMonkey*
CI&T*	IDC Global Brasil	Sauter*	W3 Brasil
Cognizant	Ilegria*	Sinqia*	Wipro*
Compass.Uol	Indra	Skyone*	YDreams Global*
DB1	Inmetrics*	Smart Consulting	



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

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

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

For more information, visit isg-one.com.





OCTOBER, 2024

BROCHURE: DIGITAL BUSINESS INNOVATION SERVICES