

*ISG Provider Lens™

Annual Plan

2023



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About ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 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 1,300 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 www.isg-one.com.

ISG Research

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Message from the Global Head of ISG Provider Lens™

Greetings from the entire ISG Provider Lens™ team!

We, at IPL, are once again gearing up for another year of robust research where we find the pulse of the industry and highlight what is critical for its various stakeholders. As always, the provider community remains at the heart of our efforts. We continue to seek your participation as we chalk out plans for the year ahead.

This would be a year of many firsts! For the first time ever, we are going to introduce clusters of studies that are related. For instance, Private Hybrid Cloud Data Center Services, Public Cloud Services, Google Ecosystem Partners, Microsoft Ecosystem Partners and AWS Ecosystem Partners. This is with the intent to streamline the surveys for the studies that are connected — now the survey for the three related studies (mentioned above as an example), could be available in one go, allowing you to fill in your responses throughout the year. Some questions could be added closer to the study launch dates.

We are also planning to introduce a new category of studies — OCM and Training — primarily to support ISG partner and global OCM leader, Randy Geoghagan. Randy has long been involved in guiding and facilitating process changes for clients, where employee experience is at the core of the OCM products and platforms in which he has extensive experience.

We would be modifying our Digital Business Transformation study, by splitting it into ESG and Supply Chain. Despite our strong intent, we could not launch our CPG study, but your feedback has encouraged us to keep CPG and Retail as one study.

Our efforts to keep the IPL program dynamic and interesting continue with what we are defining as “snackable content”. Under a new series called the Focal Points, we will be extracting 8-10 focal points for each study/region. We believe that these will enhance our sales packages and, alongside our Leader badges, be of immense value to clients.

Message from the Global Head of ISG Provider Lens™

Keeping in mind the growing relevance of social media, IPL will be taking a strong step into this domain with our podcast series. Peering beyond the Lens — hosted by well known podcast creator, Ken Presti — will be focused on the U.S. and the global markets, where a podcast will be ready for each of our press releases.

Award ceremonies continue to be an integral part of IPL, and will now include the ISG Provider Lens Insights Forum. This forum, conducted during the day before the awards ceremony, will have IPL Lead Analysts presenting findings from their studies. Attendees can invite two clients for the ceremony and the subsequent dinner. ISG advisors will be a part of the forum, inviting their clients to attend the forum and dinner.

In this buoyant environment, IPL's Star of Excellence™ program continues to grow. This year, many of our studies included the findings on client experience from this program. We are aiming to include client experience rating and scores, for each participating provider, in all the studies conducted in 2022 and going forward, in 2023.

All ISG Provider Lens™ reports are available on an industry-leading content management platform designed for research. Subscribers have online access to search, tag, share, download and take notes on research reports, and can reach out to study analysts. In addition to hundreds of IPL quadrant and archetype reports published each year, subscribers have access to thousands of archived reports as well as Briefing Notes, Global Summaries, Focal Points, articles posted on the ISG Web site and other research materials.

I take this opportunity to thank you again for your feedback and active participation in IPL studies.

Thank you for your continued support and loyalty to the IPL program.

Happy IPLing.



Jan Erik Aase
Partner and Global Head – IPL

Research Calendar 2023

Study Name	Launch Month	Publish Month	Archetype	Australia	Brazil	Europe	France	Germany	Global	Netherlands	Nordics	Singapore & Malaysia	Switzerland	U.K.	U.S.	U.S. Public Sector
Procurement BPO & Transformation Services	September	March							✓							✓
Procurement Software Platforms and Solutions	September	March							✓							
Mainframe Services and Solutions	October	March				✓									✓	✓
Enterprise Service Management – Services	November	March							✓						✓	
Microsoft Cloud Ecosystem	November	April		✓	✓			✓				✓	✓	✓	✓	
ServiceNow Ecosystem Partners	November	April		✓	✓			✓							✓	
Digital Engineering Services	December	April				✓									✓	
Salesforce Ecosystem Partners	November	April			✓		✓	✓						✓	✓	
SAP Ecosystem	November	May			✓			✓			✓			✓	✓	
Private Hybrid Cloud - Services	December	June	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cybersecurity Solutions and Services	December	June		✓	✓		✓	✓			✓	✓	✓	✓	✓	✓
Network - Software Defined Solutions and Services	December	June						✓						✓	✓	
Power and Utilities Industry - Solutions and Services	January	June												✓	✓	
Internet of Things – Services and Solutions	January	June			✓			✓							✓	
Payroll Solutions & Services	February	July													✓	
Insurance Platforms	February	July				✓									✓	

* New study New region

Research Calendar 2023 (continued)

Study Name	Launch Month	Publish Month	Archetype	Australia	Brazil	Europe	France	Germany	Global	Netherlands	Nordics	Singapore & Malaysia	Switzerland	U.K.	U.S.	U.S. Public Sector
Workday Ecosystem	February	July				✓									✓	
Retail & CPG Services	February	July				✓									✓	
HR Outsourcing and Transformation Services	February	July													✓	
MarTech Service Providers	February	July			✓											
Google Cloud Partner Ecosystem	March	August		✓	✓	✓									✓	
Digital Banking Technology and Platforms	March	August							✓							
Finance and Accounting Outsourcing Services	March	August	✓						✓							
Contact Center - Customer Experience Services	March	August		✓		✓			✓							
Contact Center as a Service	March	August							✓							
Future of Work (Workplace) - Services	March	August	✓	✓	✓			✓					✓	✓	✓	✓
Future of Work (Workplace) - Solutions	March	August							✓							
Next Gen ADM Services	April	September	✓		✓	✓									✓	
Next Gen ADM Solutions	April	September													✓	
Digital Banking Industry Services	April	September			✓				✓							
Supply Chain Services *	April	September			✓										✓	
AWS - Ecosystem Partners	April	September			✓			✓							✓	

* New study ■ New region

Research Calendar 2023 (continued)

Study Name	Launch Month	Publish Month	Archetype	Australia	Brazil	Europe	France	Germany	Global	Netherlands	Nordics	Singapore & Malaysia	Switzerland	U.K.	U.S.	U.S. Public Sector
Organizational Change Management Platforms and Tools *	May	December							✓							
Analytics Solutions and Services	May	October			✓	✓									✓	
Media and Communication Services	May	October													✓	
Insurance Industry Services	May	October				✓									✓	
Multi Public Cloud Services	June	November			✓	✓	✓	✓	✓		✓		✓	✓	✓	✓
Multi Public Cloud Solutions	June	November							✓							
Manufacturing Industry Services	June	November				✓									✓	
Oil and Gas Industry - Services and Solutions	June	November				✓									✓	
Intelligent Automation Platforms and Products	June	November				✓									✓	
Intelligent Automation Services and Solutions	June	November				✓									✓	
Healthcare Digital Services	June	November												✓	✓	
HCM Technology Platforms	June	December													✓	✓
Oracle Ecosystem	July	December			✓	✓									✓	
Environmental, Social and Governance Services *	July	December	✓		✓	✓									✓	

* New study ■ New region

Study Descriptions (alphabetical)



Analytics Solutions and Services

Overview

The ISG Provider Lens™ Analytics Platforms and Services report is focused on technologies such as cloud computing, IoT, data science, machine learning and deep learning that foster improvements in business performance. With the large volume of data being generated, companies are looking for service providers with the expertise to do more with the data to which they have access, such as reduce complexity and glean better insights, thus enabling business success.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants for Analytics Platforms:

- Embedded Analytics and Business Analytics Platforms
- Data Governance Platforms

With respect to the said market and its requirements, ISG is going to focus on the following quadrants for Analytics Services:

- Data Science Services
- Data Engineering Services
- Data Monetization Services



AWS - Ecosystem Partners

Overview

The ISG Provider Lens™ AWS Ecosystem Partners report is focused on providers of technologies and services that leverage AWS to develop and deliver an array of enterprise IT and business services. This group of certified partners addresses all types of customer queries related to architecture and strategy consulting, implementation, migration, and the professional use of solutions, based on AWS infrastructures and platforms.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- AWS SAP Workloads
- AWS Data Analytics and Machine Learning
- AWS Internet of Things (IoT) Services
- AWS Migration Services
- AWS Managed Services
- AWS Consulting Services



Contact Center - Customer Experience Services

Overview

The ISG Provider Lens™ Contact Center – Customer Experience Services report is focused on providers of outsourcing services and the associated aspects of contact centers, including strategies and technologies that improve end-to-end customer experience (CX).

With respect to the said market and its requirements, ISG is going to focus on the following quadrants for the Contact Center Customer Experience Services study:

- Digital Operations
- Work From Home Services
- AI & Analytics
- Social Media CX Services
- Debt Collection Services

With respect to the said market and its requirements, ISG is going to focus on following quadrant for the Contact Center as a Service study:

- Contact Center as a Service (CCaaS)

Study Descriptions (continued)



Cybersecurity Solutions and Services

Overview

The ISG Provider Lens™ Cybersecurity –Solutions and Services report is focused on providers of professional services and technologies and independent software vendors engaged in the challenge of securing IT/OT systems, immense and often horizontally integrated, that are increasingly being connected to public networks. This involves strategy development and special technical competencies and includes user authentication solutions as well as enterprise-grade solutions within the framework of risk and compliance management.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Advanced Endpoint Threat Protection, Detection and Response (AETPDR)
- Identity & Access Management (IAM)
- Data Leakage/Loss Prevention (DLP)
- Technical Security Services
- Strategic Security Services
- Managed Security Services



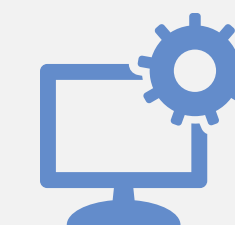
Digital Banking Industry Services

Overview

The ISG Provider Lens™ Digital Banking Industry Services report is focused on relevant providers offering consultative and professional services. Banks are seeking the support of service providers to embrace innovation and deal with the evolving challenges of the digital world, while trying to stay competitive and attracting/retaining customers. They are undertaking large transformation programs to build resilience in capital, talent and, most importantly, technology related infrastructure.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Core Modernization and Integration Services
- Banking Governance, Risk and Compliance (GRC) Services
- Technology Transformational Services for Digital Banking
- Payment and Card Processing Services



Digital Banking Platforms

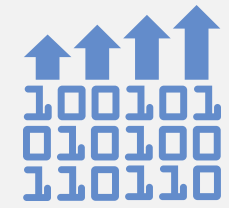
Overview

The ISG Provider Lens™ Banking Technology/Platforms report analyzes relevant vendors, offering software solutions for the banking industry. Increasing business agility, fast decision-making by flattening hierarchies, empowering employees, and introducing flexible workplaces and workforces are some of the core actions being taken by banks toward sustainability. These efforts involve changing the core banking applications.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Core Banking Platforms
- Open Banking Solutions
- Payment Processing Platforms
- Digital Banking Engagement Solutions

Study Descriptions (continued)



Digital Engineering Services

Overview

The ISG Provider Lens™ Digital Engineering Services report is focused on service providers engaged in all the relevant phases of product lifecycle management and engineering. Digital engineering services encapsulate conceptualization, design and consulting, prototyping, application engineering, value engineering, test and validation, engineering process, sourcing support, maintenance, sustenance and after-market support, electrical and electronics hardware and software, technical publications, detail engineering, and asset information management. Digital aspects include efficient leveraging of digital technology stacks such as machine learning algorithms and digital twins for rapid prototyping, determining a rapid go-to-market approach and enhancing features and functions incrementally.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Design & Development (Product, Services, Experience)
- Connected and Intelligent Operations – Discrete Industries
- Connected and Intelligent Operations – Process Industries
- Integrated Customer/User Engagement and Experience
- Platforms and Applications Services



Enterprise Service Management – Services

Overview

The ISG Provider Lens™ Enterprise Service Management (former ITSM) report is focused on providers offering services and solutions that help enterprises with the technical integration of different data sources, software solutions and products. The report encompasses services for building and executing/implementing a holistic (enterprise grade) approach that encompasses IT-based services and products across business units. The goal is to enable enterprises to rely on self-service by translating business requirements into IT-SLAs – through manual intervention, case-by-case, as required, if workflows are not automated – thus ensuring the deep integration of all enterprise departments into existing IT processes.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- ESM Consulting Services
- ESM Managed Services for Converged IT & Business Ops
- ESM Implementation & Integration Services



Environmental, Social and Governance (ESG) Services

Overview

The ISG Provider Lens™ Environmental, Social and Governance (ESG) Services report focuses on providers for their ability to deliver quantifiable improvements in their clients' ESG targets — a fact that is becoming increasingly relevant among various stakeholders. Service providers have to offer added value and support in the areas of IT, innovation, management and strategy, as well as organization and process consulting, with the aim of establishing sustainable business models in these connected areas. Sustainable enterprises need to be aligned with the UN's 17 Sustainable Development Goals (SDG), targeted to be achieved by 2030. Provider solutions need to be highly integrated to collect data as a part of an organization's ESG program that includes various metrics to calculate impact, generate reports, share data for analysis and provide actionable insights.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Strategy Consulting Services
- Value Chain Transformation
- Governance, Risk and Compliance Services
- Accounting & Process Advisory

Study Descriptions (continued)



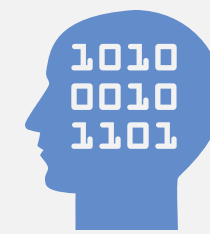
Finance and Accounting Outsourcing Services

Overview

The ISG Provider Lens™ Finance and Accounting Outsourcing Services report is focused on providers involved in FAO engagements as they evolve from transactional to holistic, in keeping with changing business and technological needs. Service providers work with enterprises wanting to transform their finance and accounting (F&A) operations and on embracing digital technologies to make their processes efficient, increase productivity, improve data accuracy, reduce costs and enhance customer experience. Automation and analytics have been an integral part of every contract signed in the finance and accounting outsourcing (FAO) services space in the last two years, thereby empowering CFOs with real-time insights to enable quick decision making and, subsequently, help finance departments function more efficiently.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Procure to Pay (P2P)
- Order to Cash (O2C)
- Record to Report (R2R)
- Financial Planning and Analysis (FP&A) Services



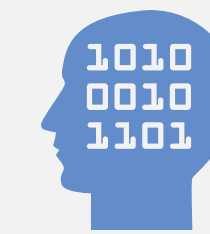
Future of Work (Workplace) - Services

Overview

The ISG Provider Lens™ Future of Work (Workplace) – Services report is focused on service providers that enable an enterprise to improve digital dexterity and employee productivity — enabling them to connect and collaborate with co-workers efficiently in an increasingly remote/virtual work model. Service providers here support clients in their workplace transformation journeys — create or review workplace strategies based on best practices, assess a workplace environment, and manage the technical environment that includes providing support to leverage the latest and emerging technologies.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Workplace Strategy Transformation Services
- Managed Workplace Services – End User Technology
- Digital Service Desk and Workplace Support Services
- Managed Employee Experience Services



Future of Work (Workplace) - Solutions

Overview

The ISG Provider Lens™ Future of Work(Workplace) - Solutions report examines two categories of providers. The first category includes the ones that offer technology solutions and platforms, which enable enhanced collaboration among end users. The other category of providers are those that offer solutions to manage the technology ecosystem, along with required observability and experience measurement.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Digital Employee Experience (DEX) Solutions
- Unified Endpoint Management (UEM) for SMBs
- Unified Communications and Collaboration as a Service
- Productivity and Collaboration Solutions for SMBs

Study Descriptions (continued)



Google Cloud Partner Ecosystem

Overview

The ISG Provider Lens™ Google Cloud Partner Ecosystem report is focused on providers that can serve as the top partner companies, providing differentiated services on Google Cloud and its Google Cloud Platform (GCP). The focus in these partnerships with Google is on provider specialization, certification and industry background, which would enable clients to unlock the next level of business growth. The report considers partners that have achieved specialization in a solution area, have an established Google Cloud services practice, have seen consistent customer success, have proven technical capabilities, and employ certified personnel that have the technical knowledge and advanced skills to address clients' needs by implementing Google Cloud technologies.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Implementation and Integration Services
- Data Analytics & Machine Learning
- Managed Services
- SAP Workloads
- Workspace Services



HCM Technology Platforms

Overview

The ISG Provider Lens™ HCM Technology Platforms report focuses on providers offering HCM technology suites, designed to support the full spectrum of HR processes and enhance employee journey. With the way of working evolving rapidly, firms of all sizes are increasingly adopting cloud-based HCM technology solutions to enhance employee experience, digitalize and transform HR operations and enable greater organizational agility to support strategic growth. HCM technology providers are meeting this rapid change with advanced digital HCM solutions, specifically designed to innovate and redefine the future of work.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Core HCM Technology Plus Talent Management (Large Market)
- Core HCM Technology Plus Talent Management (Mid Market)
- Best-of-breed Recruiting Technology



Healthcare Digital Services

Overview

The ISG Provider Lens™ Healthcare Digital Services report is focused on service providers working across segments of the healthcare industry as they comply with new regulations, integrate the changes brought about by competitive M&A and adapt to the needs of an aging population. The service providers also advise on and undertake high cost, but required, integration efforts. Also, consumers expect advanced and convenient digital service delivery. Digital transformation services help payer and provider segments evolve to better serve their constituents.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Payer Digital Transformation Services
- Provider Digital Transformation Services
- Healthcare Interoperability Services and Solutions
- Value-based Care Services and Solutions

Study Descriptions (continued)



HR Outsourcing and Transformation Services

Overview

The ISG Provider Lens™ HR Outsourcing and Transformation Services report focuses on providers offering managed services that include advanced cloud HCM technologies with the intent of transforming HR operations. Employers, globally, are increasingly seeking transformative solutions for the operational effectiveness of HR functions and organizational agility and resiliency. Therefore, HR transformation has become a key strategic investment area across sectors, with firms seeking to engage with managed HR service providers capable of supporting large-scale transformations by leveraging advanced cloud HCM technologies through a consult-to-operate service model.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- HR Transformation Services and Solutions
- Multi-process HR Services and Solutions
- HCM Technology Platform Deployment and Support Solutions



Insurance Industry Services

Overview

The ISG Provider Lens™ Insurance Industry Services report is focused on solution providers addressing the rapidly growing demand of core system capabilities — operational efficiencies, straight through processing (STP) and roadmap to digital operations — from insurance companies in their quest to deliver improved employee and customer experiences.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Life & Retirement Insurance BPO Services
- Property & Casualty Insurance BPO Services
- Insurance Digital ITO Services
- BPaaS and TPA Insurance Services



Insurance Platforms

Overview

The ISG Provider Lens™ Insurance Platforms report is focused on vendor offering relevant platform solutions to insurance companies. The insurance platform solutions landscape has changed significantly in the last couple of years; it is no longer limited to on-premises policy admin, claims, billings modules or simply integrated core systems suites. Instead, an increasing number of insurance companies are seeking cloud native, low/no code capabilities to improve their time and speed to market, for seamless API integration and to harness in-built deep analytics and AI/machine learning tools, with the aim of achieving precise data visualizations and a single view of customer/risk portfolio. This is with the intent to effortlessly leverage the advantages of the ecosystem, while bringing down total cost of ownership (TCO) over a period of time and growing sustainably in the current digital world.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Insurance Platform Solutions (further segmented into Life & Retirement and Property & Casualty Quadrants [U.S. and UK/Europe Markets])

Study Descriptions (continued)



Internet of Things – Services and Solutions

Overview

The ISG Provider Lens™ Internet of Things – Solutions and Services report is focused on providers engaged in services related to the Internet of Things (IoT) – a cluster of functions such as consulting and implementation (planning, cost analysis and business case development), technology integration and execution (device, platform, analytics, application and security) and overall OT ecosystem management (managed services). It refers to the interaction and exchange of a large volume of data through fast and active network connectivity, and the analysis of the data to produce meaningful insights that support decision making. Sensors collect the data, and applications, software and platforms build on the data, in a secure way, to help make useful business cases across industries.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Strategy Consulting
- Implementation and Integration
- Managed Services
- Mobile Asset Tracking and Management
- Data Management and AI on the Edge



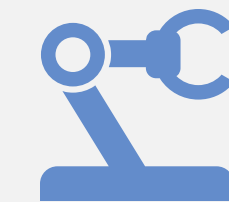
Mainframe Services and Solutions

Overview

The ISG Provider Lens™ Mainframe Services and Solutions report assesses service providers that modernize mainframe applications or convert applications to run in the cloud, and the ones that offer mainframe outsourcing and MFaaS. Software vendors of automation tools for refactoring, rehosting, re-platforming, rewriting and reengineering applications are also evaluated.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Mainframe Modernization
- Mainframe Application Modernization and Transformation Services
- Mainframe as a Service (MFaaS)
- Mainframe Operations
- Mainframe Application Modernization Software



Manufacturing Industry Services

Overview

The ISG Provider Lens™ Manufacturing Industry Services report is focused on tracking and analyzing offerings around engineering and R&D – from the intricacies of 3D simulation to shop floor robotics. The report examines the role of service providers across the entire value chain of product and manufacturing engineering – from virtual layout or simulation of the shop floor and ergonomics for machinery and IT/OT convergence, to aftermarket services such as leveraging digital twins to check the condition of machinery reaching the wear-out period of its lifecycle.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Product Engineering - Airlines and Airports
- Product Engineering - Automotive Autonomous, Connected, Electric and Shared (ACES)
- Product Engineering - Semiconductor and Hi-Tech
- Mobility Security Solutions
- OT Security Solutions

Study Descriptions (continued)



MarTech Service Providers

Overview

The ISG Provider Lens™ MarTech Service Providers report is focused on examining the providers that work with digital marketing professionals to develop marketing technologies. New technologies and new consumer behavior (they are already experiencing digital transformation in their daily lives) require a new approach to marketing that involves a transformation of mindsets rather than just tools. By combining creativity, the ability to develop digital campaigns, digital tools and methodologies such as design thinking and agile processes — to meet the expectations of digital customers — MarTech companies, with a wide scope of services, are growing worldwide.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Strategic MarTech Services
- Digital Presence & Digital Ads
- Digital Experience & Content
- Social & Relationship
- Digital Commerce Optimization
- Analytics & Intelligence



Media and Communication Services

Overview

The ISG Provider Lens™ Media and Communications study focuses on key providers of information technology outsourcing (ITO) and business process outsourcing (BPO) services to end-users in the communication and media industries. The industries are characterized by low margins, low ARPUs and high level of customer churn. Therefore, the end-users require ITO/BPO solutions that can improve the agility of their networks and help seamlessly migrate to new services such as 5G.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Communications Business Services
- Communications Next-gen IT Services
- Media Business Services
- Media Next-gen IT Services



Microsoft Cloud Ecosystem

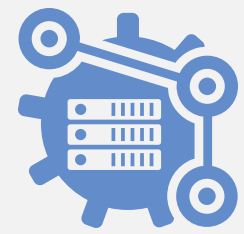
Overview

The ISG Provider Lens™ Microsoft Cloud Ecosystem report is focused on service providers that have knowledge about Microsoft solutions and are, therefore, able to offer well-founded consulting, implementation, integration and managed services. The increasing complexity of integration, with expanding use areas, is leading to a dynamic market for professional services. The Microsoft Ecosystem, one of the largest in the world, comprises thousands of partner companies that support enterprise users of all sizes, and across industries, across the globe.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Managed Services for Azure
- Microsoft 365 Services
- SAP on Azure Services
- Dynamics 365 Services
- Power Platform Services

Study Descriptions (continued)



Network - Software Defined Solutions and Services

Overview

The ISG Provider Lens™ Network - Software Defined Solutions and Services report examines the different kinds of provider offerings related to enterprise networks and software-defined networking. These include software defined wide area networks (SD-WAN) in the form of managed SD-WAN services and consulting and advisory, leading to implementation support; and enterprise networks technology and services supply, concentrating on providers of technologies and services related to networks that enterprises implement and operate on their own (including full and partial SD-WAN solutions, OSS/BSS, O-RAN, etc), covering all areas, from network core to edge-branch technology services. The study also looks at Edge technologies and services, including universal/virtual customer premises equipment (u/vCPE) and software defined local area network (SD-LAN), including the ones delivering through mobile and 4G/5G technologies and the services related to these segments. The study will also examine the all-important Secure Access Service Edge (SASE), which is an overarching secure and fully integrated network environment for businesses.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Transformation Services (Consulting & Implementation)
- Managed (SD) WAN Services
- Enterprise Networks Technology and Service Suppliers
- Edge Technologies and Services
- Secure Access Service Edge (SASE)



Next Gen ADM Services

Overview

The ISG Provider Lens™ Next Gen ADM Services report is focused on evaluating providers and their ability to work with enterprises embarking on a journey toward agile modernization and transformation. Service providers are augmenting their traditional application development and maintenance (ADM) offerings with advanced technologies (AI in operations or microservices-based development) and customized roadmaps (combining digital, operational and technology goals) to meet clients' objectives. ISG calls such contracts next-gen ADM contracts.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Agile Application Development Outsourcing
- Agile Application Development Projects
- Application Managed Services
- Application Quality Assurance
- Continuous Testing Specialists



Next Gen ADM Solutions

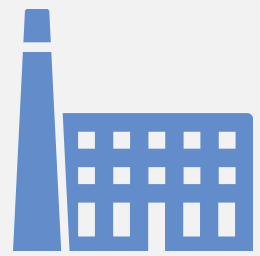
Overview

The ISG Provider Lens™ Next Gen ADM Solutions report is focused on vendor offerings/solutions with regard to low-code/no-code development platforms. Such platforms and their use are not associated with technical talent and trained developers – they are designed for so called citizen developers or line of business users. Low-code/no-code development platforms are being adopted by forward-looking, innovation-driven and highly advanced enterprises. The two primary benefits are business agility and speed, as well as implementation simplicity. They also include several secondary benefits such as the ability to work with legacy IT infrastructure; a reduction in development, testing and maintenance costs; and improved cross-team collaboration.

With respect to the said market and its requirements, ISG is going to focus on the following quadrant:

- Low-code/No-code Development Platforms

Study Descriptions (continued)



Oil and Gas Industry – Services and Solutions

Overview

The ISG Provider Lens™ Oil and Gas Industry - Services and Solutions report is focused on evaluating the offerings and capabilities of providers that have deep expertise, including capabilities in related digital technologies and innovation, in the oil and gas industry. Companies in this industry are making significant investments to counter the challenges associated with rising oil and gas prices, decline in global oil inventory and rising geopolitical tensions. In addition, the industry has identified energy transition as a key focus area for 2022, and beyond. Many companies have been transforming their portfolios by replacing maturing legacy assets with low-carbon resources. Also, these companies are increasingly focusing on digital innovation and operational efficiency through the adoption of cloud, AI, machine learning, mobility, automation and operational technology (OT) security.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Enterprise Asset Management (EAM)
- Next-gen IT/OT Services
- Capital Projects Management
- Data Management and Cloud Computing
- Energy Transition Services



Oracle Ecosystem

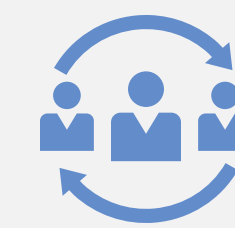
Overview

The ISG Provider Lens™ Oracle Ecosystem report is focused on identifying the leading and most relevant partners of Oracle. The community of partners that has expanded over the years is particularly valuable for its expertise in areas such as enterprise performance management, enterprise resource planning (ERP), human capital management (HCM), Oracle Cloud platform, Oracle E-business suite, Oracle Exadata Database Machine and supply chain and manufacturing.

Since ISG will be covering the Oracle Ecosystem for the first time in an IPL study, the scope will be somewhat narrow toward the main implementation and integration work and managed services clients typically avail from Oracle partners.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Consulting and Advisory Services
- Implementation and Integration Services
- Managed Services



Organizational Change Management Platforms and Tools

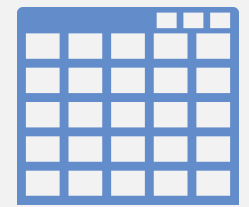
Overview

The ISG Provider Lens™ Organizational Change Management Platforms and Tools report focuses on providers offering technologies and tools to support activities/execution related organizational change management (OCM). Firms of every size, and in all sectors and geographies, have recognized that OCM is a critical capability that enables transformative change. However, OCM activities are often manual, involving tools that are not connected and require considerable updating throughout the project. Therefore, enterprises are now seeking tools and technology solutions that provide for OCM, provide enhanced analytics with guidance on where to focus resources, and have the ability to manage a portfolio of change and identify measurable ROI. This report will focus on OCM platform and tools that are available to support project work, as well as tools that support sustainable change within client organizations.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- OCM Platforms
- Training Platforms
- Communications Platforms

Study Descriptions (continued)



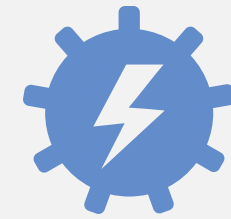
Payroll Solutions & Services

Overview

The ISG Provider Lens™ Payroll – Solutions and Services report focuses on technology and managed service providers offering advanced digital solutions to enable payroll operational transformation worldwide. Firms of every size, and in all sectors and geographies, have recognized that payroll is a critical and foundational element of employee experience (EX) and a key asset for a business. Therefore, firms are now seeking advanced digital capabilities and managed services to elevate the critical payroll process for increased organizational value and to future-proof related operations for greater agility, resiliency and continuity.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Managed Payroll Services
- Employer of Record (EoR) Services



Power and Utilities Industry - Solutions and Services

Overview

The ISG Provider Lens™ Power and Utilities Industry - Solutions and Services report is focused on evaluating the offerings and capabilities of providers that have deep expertise in the said industry, as well as capabilities in related digital technologies and innovation. Companies in this industry are making significant investments to modernize aging infrastructure, transform distribution and storage systems, leverage smart grid technologies and predictive analytics, transition to renewable energy and address climate change — all while focusing on the need to reduce operational and maintenance costs. The pandemic has changed customer expectations. Concurrently, stringent regulatory guidelines are also compelling the industry to seek transformative sourcing options to improve its processes.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Intelligent Business Process Management Services (IBPMS)
- Next-gen IT Services
- Grid Modernization
- Enterprise Asset Management (EAM)
- Customer Information Systems (CIS)



Private Hybrid Cloud - Services

Overview

The ISG Provider Lens™ Private Hybrid Cloud – study focuses on evaluating providers of outsourcing, hosting, colocation and managed services. The scope of their offerings is in keeping with security and governance requirements, large data volume management and the need for tight integration with other enterprise applications and workflows – spanning across clouds. In this scenario, the data center may be owned by an enterprise, a service provider or a third-party colocation provider. A hybrid cloud combines the best of on-premises, private and public cloud infrastructure, and the goal is to combine services and data from a variety of cloud models to create a unified, automated, well-managed and distributed computing environment.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Managed Services
- Managed Hosting
- Colocation Services

Study Descriptions (continued)



Procurement BPO Services and Platform Solutions and Transformation Services

Overview

The ISG Provider Lens™ Procurement BPO and Transformation Services report is focused on evaluating business process outsourcing (BPO) providers and the way they are helping to change enterprise-side procurement functions — from managing procurement and overseeing transactional activities to a more holistic participation within an enterprise. The transition requirements have become more inclusive for digitally agile business environments and are covered by an approach that enables optimization (and ideally future-proofing) of enterprise procurement, while minimizing direct enterprise investments in new software, infrastructure, tools and capabilities. The report, therefore, looks at two types of service providers: procurement BPO providers that enable efficient and sustainable procurement functionalities and operation; providers of services that transform traditional procurement into a future-ready, digitally agile functions that provide improved value to enterprises.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Procurement BPO Services
- Procurement Digital Transformation Services
- Procurement Optimization and Transformation Platforms



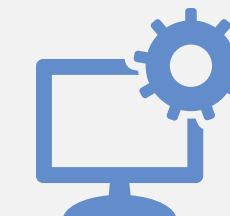
Public Cloud – Solutions and Services

Overview

The ISG Provider Lens™ Public Cloud –Solutions and Services report is focused on evaluating providers for their public cloud expertise. The report evaluates the partners of hyperscalers for their consulting and managed services expertise and the hyperscalers themselves for their Infrastructure-as-a-Service (IaaS) and Platform-as-a-Service (PaaS) offerings. ISG particularly looks at the qualifications from the respective partner programs to ensure that they meet customers' multicloud requirements and have the appropriate expertise in all main platforms.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Consulting and Transformation Services for Large Accounts
- Consulting and Transformation Services for Midmarket
- Managed Public Cloud Services for Large Accounts
- Managed Public Cloud Services for Midmarket
- Hyperscale Infrastructure and Platform Services
- SAP HANA Infrastructure Services



Retail & CPG Services

Overview

The ISG Provider Lens™ Retail and CPG Services report is focused on identifying, analyzing, and rating the leading technology firms (and their platforms) and IT service providers catering to retailers' technology requirements. The quadrants covering technology firms delve into areas such as digital commerce, order management, retail planning and assortment and supply chain management. On the other hand, the quadrants covering IT service providers evaluate their service competence, quality, and experience in the areas of platform migration, managed services, omnichannel integration, performance engineering, data analytics, and custom development capabilities such as building a microservices-based commerce platform and progressive web applications (PWAs).

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Omnichannel Commerce Platform
- Merchandise Planning and Management

Study Descriptions (continued)



Salesforce Ecosystem Partners

Overview

The ISG Provider Lens™ Salesforce Ecosystem Partners report is focused on leading Salesforce partner companies. ISG examines various offerings around the Salesforce platform, where a basic distinction is made between implementation services (the Change Business) and managed application services, focusing on operational support for productive applications (the Run Business). In both these basic segments, a further distinction is made between large enterprise clients and the midmarket due to the significantly greater need for Salesforce integration into the complex application landscape of large enterprise clients. Furthermore, these clients primarily have globally operating businesses that require corresponding delivery capabilities from the service providers.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Multicloud Implementation and Integration Services for Large Enterprises
- Implementation Services for Core Clouds Midmarket
- Implementation Services for Marketing Automation Midmarket
- Managed Application Services for Large Enterprises
- Managed Application Services for Midmarket
- Implementation Services for Industry Clouds



SAP Ecosystem

Overview

The ISG Provider Lens™ SAP Ecosystem report is focused on identifying the top SAP partner companies that can provide differentiated client services and deliver the best results from S/4HANA investments. The study also covers customer experience (CX) services related to SAP S/4HANA. By engaging with the best partners, clients can optimize their operating expenses (OpEx) and achieve high ROI. For clients that have adopted S/4HANA, this report assesses managed service providers that can contribute to superior application performance, including offering stability, availability and security. Cloud migrations and technology innovations are also assessed. For support services, AI and machine learning are incorporated into application maintenance and operations.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- SAP S/4HANA System Transformation – Large Accounts
- SAP S/4HANA System Transformation – Mid Market
- Managed Application Services for SAP ERP
- Managed Platform and Cloud Services for SAP ERP
- SAP Business Technology Platform



ServiceNow Ecosystem Partners

Overview

The ISG Provider Lens™ ServiceNow Ecosystem Partners report is focused on identifying and rating prime ServiceNow partner companies offering workflow-enabled service management software solutions. For end-users to fully utilize ServiceNow's broad functionalities requires professional services from process (re)design – through software implementation and integration – to application management services and training. The various offerings and certifications indicate the focus of the partner companies, ranging from full-scale lifecycle support to focused services for specific tasks. For managed service providers, the ServiceNow platform is the ideal base for building additional functionalities or for integrating it with industry specific frameworks to support enterprise operations. Some of the other aspects of relevance here are security related capabilities to support the platform and tool usage for cloud management.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- ServiceNow Consulting Services
- ServiceNow Implementation and Integration Services
- ServiceNow Managed Services Providers

Study Descriptions (continued)



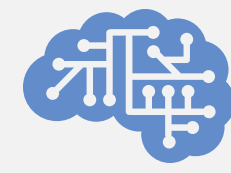
Supply Chain Services

Overview

The ISG Provider Lens™ Supply Chain Services report is focused on providers offering supply chain services and solutions, with capabilities such as supply chain consulting, implementation and integration, managed services and digital transformation. The report also considers independent supply chain software vendors for their planning, execution and insights, in addition to helping clients in achieving ESG goals. The providers leverage a comprehensive framework for the use of digital technologies such as IoT, machine learning, AI, predictive analytics and data orchestration to enable clients to optimize their ecosystem of suppliers, customers, employees and third-party partners to balance their business risk profiles, demand and supply management, operational revamp, continuous innovation and deliver on net carbon neutrality. Supply chain systems require content-rich real time collaborations, continuous analysis of what-if scenarios and tradeoffs between competing metrics and objectives to take data-driven actions in case of unplanned scenarios (internal and external factors).

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Supply Chain Advisory & Consulting Services
- Supply Chain Planning Services
- Supply Chain Execution & Fulfillment Services
- Supply Chain Transformation Services
- Supply Chain Platforms



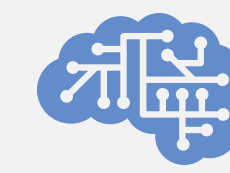
The Intelligent Automation Platforms and Products

Overview

The ISG Provider Lens™ Intelligent Automation Platforms and Products study is focused on evaluating the functionalities and capabilities of software vendors and platform providers that have built offerings around conversational AI platforms, at times called chatbots or virtual agents, that use natural language processing (NLP) and machine learning to engage in human-like interactions with customers and employees. Intelligent document processing (IDP) uses computer vision and image extraction capabilities to digitize, analyze and automate large volumes of structured and unstructured data from electronic and paper-based sources. Process discovery and task mining consist of a range of tools to help enterprises better understand and optimize their processes and tasks, either from the analysis of log data or by tracking human actions. This study aims to provide the platforms and products with differentiated positioning, based on competitive strengths and portfolio attractiveness.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Conversational AI platforms
- Intelligent Document Processing
- Process Discovery and Mining



The Intelligent Automation Services and Solutions

Overview

The ISG Provider Lens™ Intelligent Automation Services and Solutions study focuses on the capabilities of automation service providers and global system integrators (GSIs) offering consulting and implementation support across enterprise portfolios. The report covers GSI/service providers' ability to harness automation to transform business services, corporate functions and the IT landscape with proprietary solutions and accelerators, utilizing the lifecycle management approach. GSIs and service providers are enhancing their capabilities in areas such as ESG, innovation and futuristic solutions by aligning their resources accordingly. This study on intelligent automation services and solutions aims to understand enterprise requirements and provider capabilities in meeting these demands.

With respect to the said market and its requirements, ISG is going to focus on the following quadrants:

- Intelligent Enterprise Automation
- Artificial Intelligence for IT Operations (AIOps)
- Next-gen Automation

Study Descriptions (continued)



Workday Ecosystem

Overview

The ISG Provider Lens™ Workday Ecosystem report is focused on identifying relevant, leading partner companies. Service partners enable efficient workday deployments as well as adoption of new capabilities, while the implementation partners ensure seamless integration, enabling information to flow from Workday to internal systems, cloud applications and third-party services. Beyond pure technology implementation, this ecosystem is critical for assisting enterprise clients in reducing the complexity of implementation and migration to next-gen solutions that includes creating comprehensive roadmaps for implementations, streamlining internal business processes, managing internal and external stakeholder expectations, crafting new strategies to minimize disruption to critical business operations, and ensuring that the implementation of the solution stays within budget and time.

With respect to the said ecosystem and its requirements, ISG is going to focus on the following quadrants:

- Consulting and Strategy Services
- Implementation and Integration Services
- Managed Services

Points to Note:

1. Please note that the quadrant names mentioned in this plan may not be final. These are subject to change based on market dynamics, advisors' inputs, client inputs and analysts' views.
2. With the start of the research phase for each study, the launch email will include a project brochure that will contain final quadrant names, descriptions of the topics and analyst names for each region.
3. The timeline is indicative and is subject to change.
4. The dates of research phase will be included in the project brochure.
5. Project brochures will also contain the names of the project manager who will be the key liaison between providers and analysts. They will be the first point of contact for all providers during and after the research phase.
6. For further details please visit [ISG website](#)



ISG Provider Lens

Service Provider Comparison

ISG Provider Lens™ is a practitioner-led service provider comparison, empowered by ISG's advisory experience and data-driven research. Research reports provide independent vendor evaluations and enterprise buying behavior segmentation. Provider positioning is based on a neutral and independent research and evaluation process; participation in the study is **FREE OF CHARGE**. Your participation in these studies is just a click away. You can now use our IPL Portal for submitting information. If you have not enabled your credentials, please use your email ID as UserName and generate your individual password by clicking "forgot password" option. If you haven't ever registered with ISG Provider Lens™, send an email to our project management team and we will contact you shortly to establish your credentials.

Service provider data, from primary and secondary research, translate into different outputs, categorized as:

- [ISG Provider Lens™ Quadrant Reports](#)
- [ISG Provider Lens™ Archetype Reports](#)

Our 2021 research agenda will provide continuous research and covers both ITO and BPO areas. To view and participate in this program, click [here](#) to download the 2021 Research Agenda.

[Download Agenda](#)

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About ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research and consulting services across business processes, IT services and technology. These reports are focused on providing independent vendor/service provider evaluations, outlining strengths and weaknesses of the companies that are positioned relative to their peers in the market. These reports provide influential insights to enterprises and are widely accessed by our large pool of advisors who are actively supporting enterprises to transform and optimize their operational environments.

Often a starting point of discussion, ISG Provider Lens™ reports play a vital role as decision influencers for enterprises looking to outsource to a suitable service provider or find the right technology partner. To enable these insights and decisions, the data captured from providers through primary or secondary research will translate into ISG Provider Lens™ Quadrant Reports and ISG Provider Lens™ Archetype Reports.

Why ISG Provider Lens™ ?

ISG Provider Lens™ is uniquely positioned to deliver a well-rounded research, leveraging a vast ecosystem of multiple stakeholders to gather intelligence and provide insights. Adopting a 360-degree approach, ISG Provider Lens™ gives several reasons for your company to participate in our research.



Growing pool of well-connected and industry leading analysts



Vast coverage of topics spanning IT, BPO and industry verticals that helps highlight niche capabilities



800+ ISG advisors bring practitioners' views and insights to complement our findings



Create lasting impressions with our corporate marketing social presence that has 30k+ connections



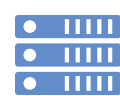
Country level research to help enterprises establish local partnerships and identify localized capabilities



Our new 'Star of the Excellence'™ program integrates with ISG Provider Lens™ and feeds our research with enterprise client insights and feedback



Reports are extensively leveraged by ISG advisors to support client engagements



Research leverages ISG's proprietary databases for provider evaluation and analysis

ISG Provider Lens™ Research Coverage

2500+

Service providers and technology companies analyzed

40+

Service lines and technology topics covered

500+

Research reports published by geography

12

Geographies covered

460+

Quadrant reports

30+

Archetype reports

2200+

Individual quadrants and archetypes published

6

Months intense research cycle

12

Months annual publication

Practice Leaders Involvement

ISG Provider Lens™ research includes advisors and consultants from industry and technology practices worldwide. ISG advisors work with private and public sector clients to determine a future vision and lead rapid change, to realize the value of digital investments, at scale. The advisory practice helps clients achieve operational excellence and rapid growth. Advisor involvement in IPL supplements the primary and secondary research conducted on service and technology providers, with field experience. More than 100 advisors participate, so on an average, there are three advisors for each study. For each of these studies, the advisors collaborate with analysts to update market trends, define the scope of the study, select the appropriate survey questions, validate the companies to be invited be a part of the study and participate in briefings and review analyses.

Quadrant Methodology

ISG Provider Lens™ quadrant evaluation framework is robust and adopts a systematic approach to arrive at the final scoring. Based on the scoring and relative positioning, the companies are identified as Leaders, Challengers, Contenders or Rising Stars.

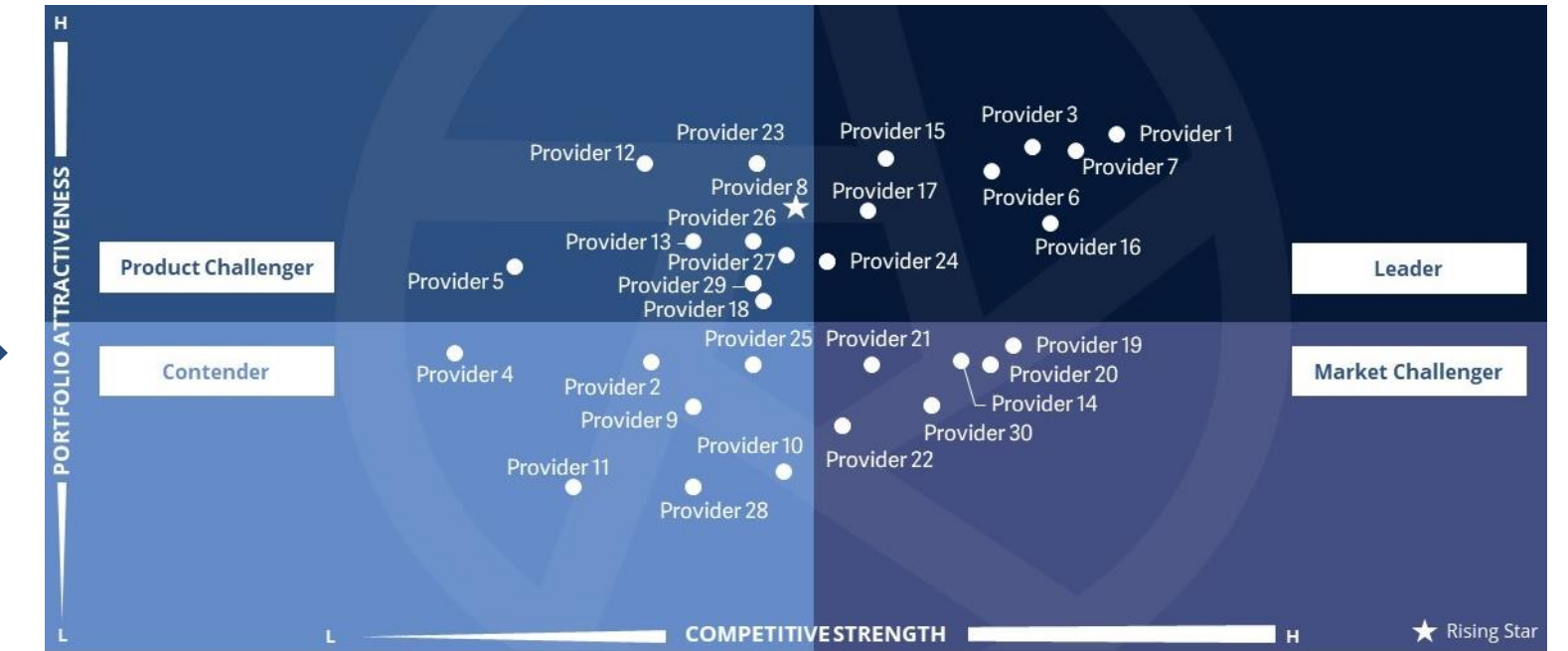
ISG compares and positions service providers in a graphical presentation based on the strength of their service portfolio and market competitiveness. These studies are conducted on multiple regions and for multiple service lines in ITO, BPO respectively industry-specific and partner ecosystem domains.

NOTE: The key parameters are highlighted as per the standard methodology. There will be variations in parameters, depending on the topic of evaluation. ISG does not disclose the weightage for any of the parameters; it depends on individual analysts and studies.

ISG Provider Lens™ Quadrant Reports

Y axis = Portfolio attractiveness

- Scope of portfolio (breadth & depth of offering)
- Portfolio quality (technology/skills, USP and security)
- Strategy & vision (product roadmap, thought leadership and investments)
- Local characteristics (product support and infrastructure)



X axis = Competitive strength

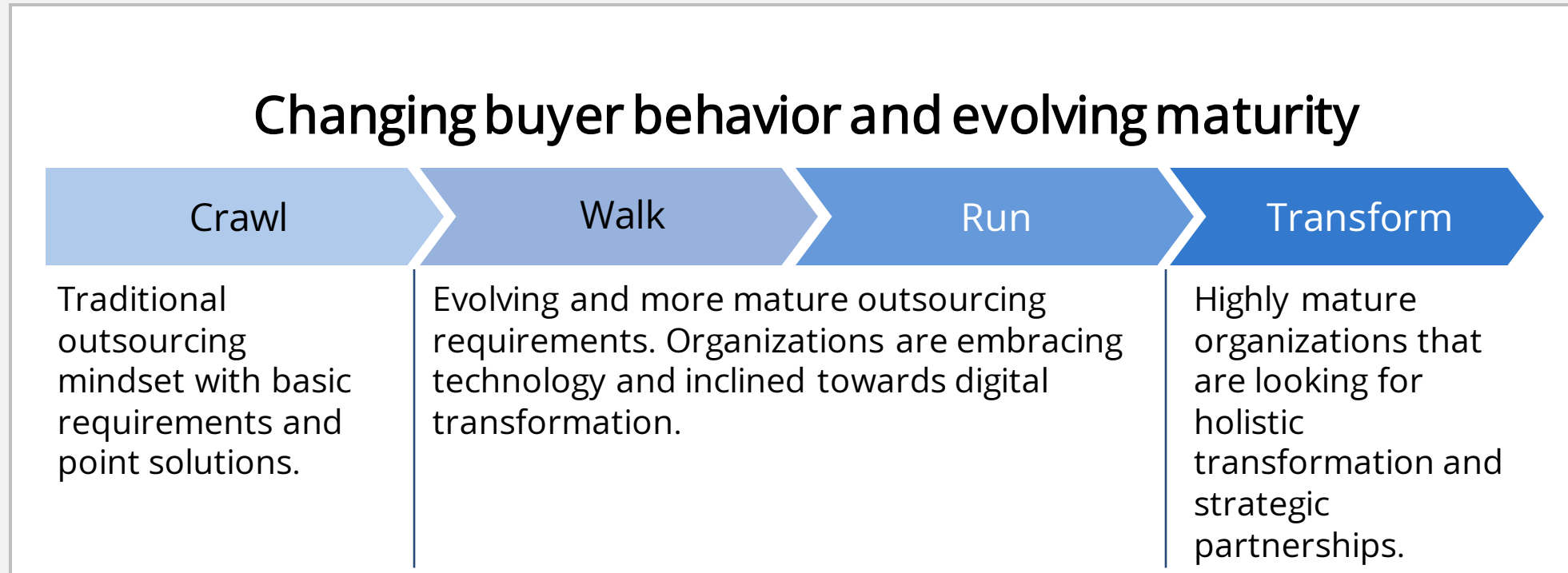
- Market position (revenues, client, FTE & growth, contracts, recent deals won and delivery locations).
- Brand reputation (awareness, website, social media presence, awards and accolades, advisor inputs and customer experience).
- Core competencies (innovative power, stability, ecosystem, business model and case studies).
- Go to market (sales, sales channel, marketing, partnerships and M&A).

Quadrant Report Characteristics

- Each report identifies a maximum of 5 to 6 quadrants
- Topics span across ITO, BPO respectively industry-specific and partner ecosystem domains.
- Complemented with global overview summarizing global enterprise trends
- Transparent methodology that follows the market definition and criteria
- Region and country focus
- Highlights local and niche players effectively

Archetype Methodology

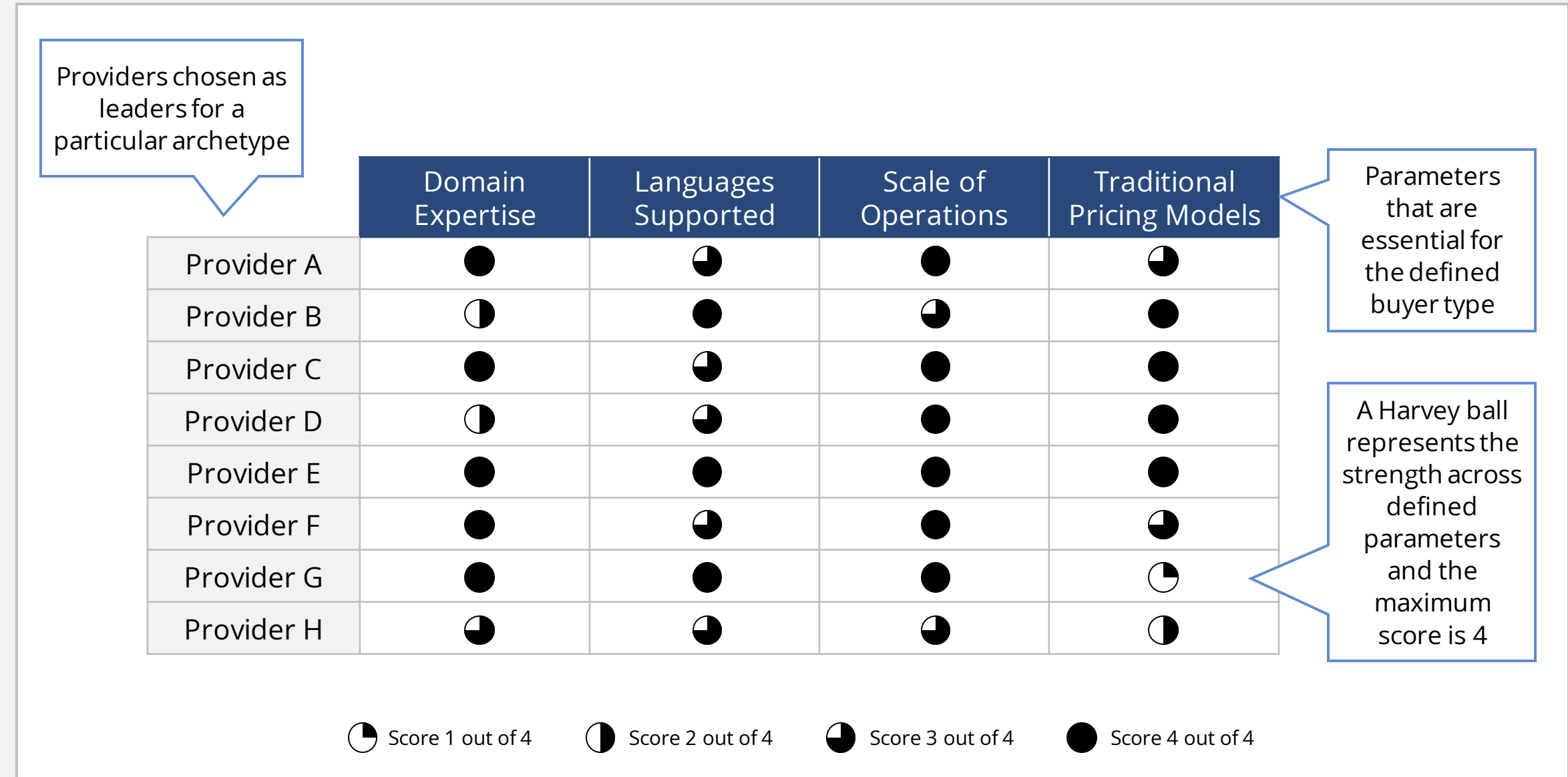
ISG Provider Lens Archetype report segments enterprise clients based on their unique buying behaviours when they outsource for technology services. It classifies differing buying characteristics, known as ‘archetypes’, highlighting their key objectives and resonating capabilities of service providers that could partner with them. It calls out unique club of providers, called ‘Leaders, who are best suited to serve each archetype.



The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their service requirements and from working with services providers to understand how these buyer requirements influence the development of suitable solutions and go-to-market strategies. The characteristics of each archetype is not constant – while the core requirements rarely change, the relative importance of the requirements can vary based on business and/or changes in the technology environment.

Archetype Report Characteristics

- Each report identifies 3 to 5 archetypes/buyer characteristics
- Globally focused reports
- Unique to ISG, archetypes derived represent ISG advisor perception
- Archetype reports are neither prescriptive nor rank-based
- Covers both ITO and BPO service lines
- Reports are capability driven and highlight emerging players



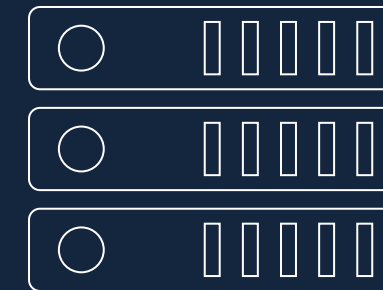
Largely based on portfolio and capability data such as vision, strategy, technology, service offerings, products, partnerships and pricing models, the Leaders chosen are the ones that qualify across all defined parameters for a particular archetype. The average score across various parameters are used to define the leaders of an archetype.

ISG Provider Lens™ – Our Data Sources

ISG Provider Lens™ research studies analyze relevant software vendors/service providers in a particular market, based on a multi-phased research and analysis process, and positions these providers based on the ISG research methodology. For both quadrant and archetype reports, the evaluation framework takes the following into consideration:

- Primary research: Survey input from service providers/vendors
- Secondary research: Desk research on publicly available data
- Advisory input: Thoughts/inputs of ISG advisors
- Star of Excellence: Client feedback about the company on multiple parameters
- ISG internal, proprietary database such as deal information

Some service providers/vendors may choose not to or are unable to provide primary data to ISG, and therefore the research team must rely 100% on the other four data sources to complete the analysis. ISG does not reveal which service providers/vendors fall into this category.



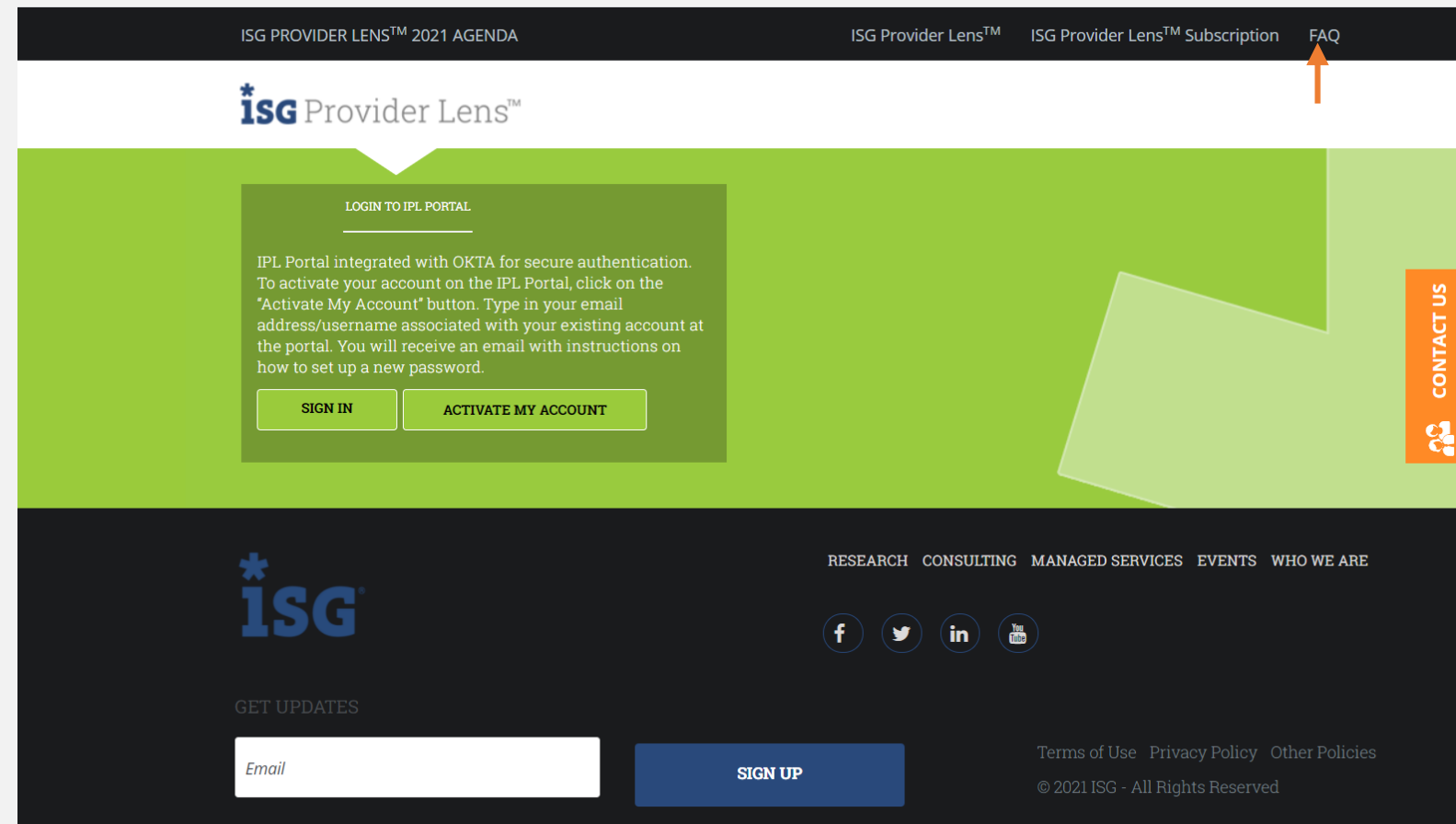
ISG Provider Lens™ – Our Data Sources



ISG Provider Lens™ Portal

ISG Provider Lens™ launched the data collection portal to provide continuous access to providers responding to our surveys and enable increased collaboration. This uniquely designed portal allows users to respond to our surveys more effectively by giving them complete visibility and control over data through the year.

In addition to enabling over 800 ISG advisors with the latest data points, the portal also engages with and offers a self-service-platform that providers can use to submit or simply update IPL-study-related information in terms of revenue, team size, qualifications, service- and product capabilities, case-studies-related references, and roadmap items.



Click on FAQ to learn about the portal and how to make best of use of it. This page also answers some of the commonly asked questions.

Note:

- **Advisors do not access the portal:** Our internal advisors do not have access to the portal. All data requests are channeled via CPQ and Provider Lens program. CPQ and ISG Provider Lens analysts work closely to address advisor requests in the most plausible way.
- **Access:** By default, SPOCs registered with us are given access to the portal. Multiple users can be granted access and the same will be done upon request.
- **Research phase:** The data entry window for a study is typically open for a period of six weeks. Once the submission of data is completed on the portal, the **SUBMIT** button changes to **UPDATE**. This implies that you are welcome to update any data point, any time of the year. However, the updated data will **NOT** be considered for evaluation post the closure of the research phase.

Portal Benefits

Access to excel questionnaires

We understand that excel is still a critical survey instrument for the purpose of internal data collection. Thus, the excel questionnaires are made available on request and can be used for internal distribution. However, the final submission of the responses must be done on the portal.

24/7 access

Respondents can access the portal anytime through the year and are also allowed to make changes to the survey through this period.

Visibility

The IPL Portal dashboard is designed to give complete visibility about the studies, participation, and new launches.

Preloaded data from last cycle

For studies that are repeated year on year, responses from the previous cycle are made available to the respondents when the studies are launched again. This feature will save a user's time significantly by allowing them to update the data wherever necessary.

Latest and greatest data

The portal allows users to update the data with latest information throughout the year. This helps us to provide the latest data to our advisors for their client engagements. This portal is a great medium to keep our analysts and advisors updated with the latest information about your company.

Candidate Provider Qualification Program

The Candidate Provider Qualification (CPQ) process is a key component of the ISG FutureSource™ methodology. The objective of the CPQ process is to identify providers qualified to provide in-scope services for a client and facilitate strong conversations between an ISG advisor and their clients on providers that should be included in the ISG FutureSource™ process. As a part of this program, ISG advisors are provided with a list of relevant service providers to create an initial recommendation or longlist for their enterprise engagements. Based on the requirements and maturity of enterprise clients, the CPQ team highlights the related strengths and weaknesses of the selected service providers along with their profiles, case studies and market experiences to support their recommendations.

How Does It Work

After gaining an understanding of clients' objectives via the CAS Outcome and Scope phase of the FutureSource™ process, the ISG Project Director submits a request to the CPQ team.

- The CPQ and ISG project teams collaborate to understand the nuances of scope of work, incumbents and enterprise expectations.
- Providers with the right set of capabilities, market experience and track record of client success are identified using the research insights described on the right.
- Typically, a longlist includes approximately 20 service providers and serves as the base for subsequent discussions to create a shortlist.
- If required, the CPQ team conducts additional research to support the specific needs of a client — this may include reaching out to a provider's advisor relations team for additional information.

The CPQ team provides the ISG project team with a client-facing deliverable that is used to support shortlisting discussions with an enterprise client.

ISG Research has **rich data** to support longlisting and shortlisting discussions with enterprise clients.

ISG Research tracks more than **2,000 providers** across multiple service lines.

No one **knows** the provider market as well as ISG.



The CPQ Process Leverages a Variety of ISG Data Sources to Identify Qualified Providers, and Answers 3 Primary Questions

 <p>Who has the capabilities to deliver for my client?</p>	<p>1</p> <ul style="list-style-type: none"> ■ ISG Provider Lens™ research studies; 45 Studies planned for 2023 ■ Analyst and advisor briefings ■ ISG advisor experience and peer insights
 <p>How often and where have they delivered similar services?</p>	<p>2</p> <ul style="list-style-type: none"> ■ ISG Contracts KnowledgeBase™ ■ ISG Research tracks more than 190,000 contracts signed between enterprises and service providers
 <p>How well have they performed when delivering similar services?</p>	<p>3</p> <ul style="list-style-type: none"> ■ Digital Case Study Research and Awards ■ Case studies from ISG Provider Lens™ surveys

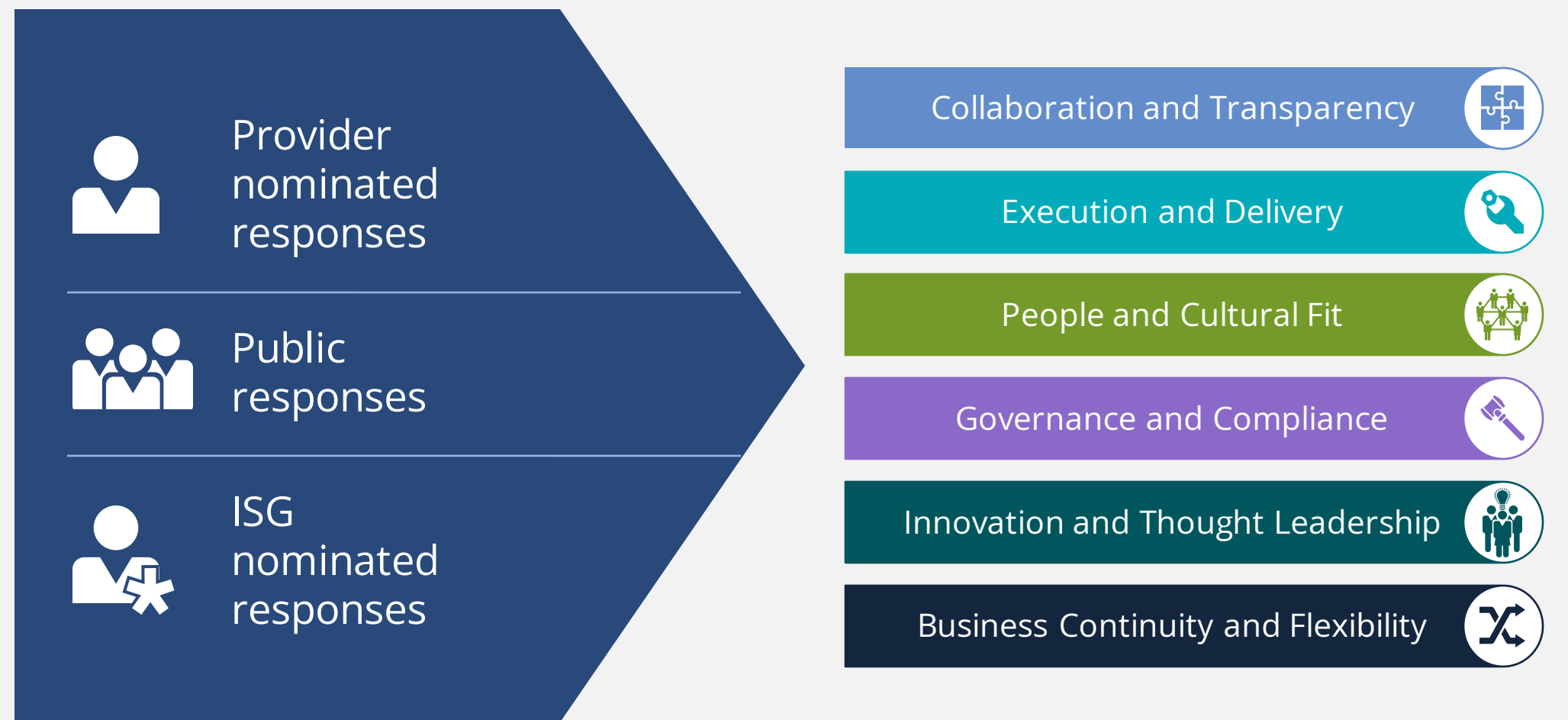
References

Note: ISG Provider Lens™ reports and data collected actively support the initial qualifying phase of the CPQ process — identifying providers with the capabilities to deliver for a client. Participation in the ISG Provider Lens™ research studies significantly increases your company's visibility among ISG advisors and enterprise clients. Also, participation increases the likelihood of you being included in longlists when your firm's capabilities align with a client's needs. Please note that participation does not automatically guarantee an inclusion in the final recommendations to an enterprise client. The shortlisting of companies is left to the discretion of advisors and enterprise clients.

ISG Star of Excellence™ Program and IPL Influence

Upcoming ISG Provider Lens™ studies will include data from the Star of Excellence program as part of their provider evaluation criteria. This independent survey of enterprise technology services users provides an in-depth look at provider delivery capabilities and will inform analysis of competitive strength. The ISG Star of Excellence™ program recognizes providers with exceptional client experiences. As part of the program, ISG collects direct feedback from service provider clients about their general experience with service providers and those providers' technology, industry, regional and emerging tech capabilities.

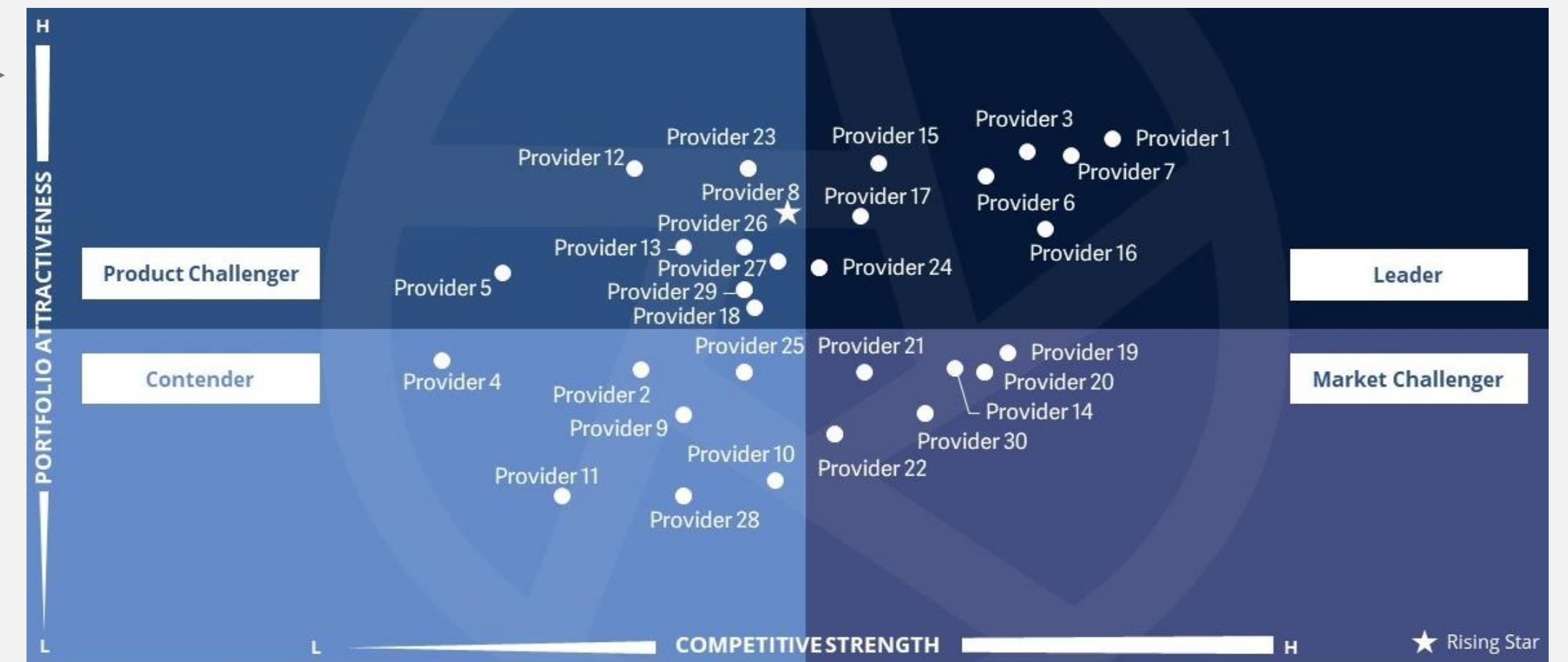
Cumulative provider score representing experience in six categories, plus an overall client satisfaction rating



IPL Survey Score

CX Score

Final Positioning



Average impact for providers is 3% to 5% on the X-axis. Maximum impact is around 9%.

ISG Star of Excellence™ Program and IPL Influence (continued)

Why participate?

Star of Excellence results offer an independent view on your clients' experience and can be used to improve your services and relationships. Furthermore, these data offer actionable insights down to satisfaction with specific services, which can be used to precisely improve client experience. Providers will be given an overview of their relevant Star of Excellence results as part of the IPL Sneak Preview process since all the 2022 IPL studies will incorporate Star of Excellence results into their evaluation of providers' competitive strength.

In addition to incorporating these results into IPL evaluations, providers that offer superlative experiences will be given awards for their achievement. For being eligible to receive an award, providers must have:

- 30+ total responses
- At least 30% of total responses from public client submissions
- Responses covering at least two topic/context areas (ADM, Cloud, etc.)
- Responses from at least two geographies

Detailed information about the program and award-related criteria can be found [here](#).

How to engage with ISG

Please visit the [nomination page](#) on the IPL Research Portal to nominate your clients. Once you submit client details, a customized email invitation along with the small survey will be sent to your clients and you will be notified. The responses submitted after the deadline will be considered for the next year's rewards program and be included in the relevant IPL evaluations.

Providers can nominate their clients to participate in the survey using [this link](#). For more information, email star@isg-one.com.

Data Usage and Privacy

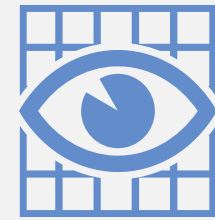
Clients participating in the survey will have their data anonymized. All client data submitted as part of this program are confidential. ISG will not share your data and/or client-related data with any third party. Only anonymized enterprise data gets transferred into the IPL research process and consequently into the advisory community's sourcing projects.

All you need to know about the ISG Provider Lens™ Report Process



Kick-off and Research Phase

- ISG Provider Lens™ analysts, in collaboration with ISG advisors, determine the quadrant definitions and the eligibility criteria for the study with inputs from providers in the space.
- This collaboration exercise, called the Communities of Interest, involves ISG soliciting feedback from various communities.
- Launch emails are sent with login details for the portal and study brochures are developed with all the details pertaining to the study like quadrant names, timelines, analysts and eligibility criteria.
- Providers are given 4 weeks to submit information via structured questionnaires.
- During this phase, the providers are encouraged to proactively suggest dates for briefing to avoid probable delays.
- Once the data has been submitted on the portal, this represents the data that will be considered for evaluation.
- Briefing calls and decks add significant value to research and report writing.



Sneak Previews

- The primary purpose of the sneak preview is to announce and present the results of the study and ensure the textual facts about the vendor/service provider are represented correctly. A fact check window will be open and each provider who is identified as a leader/Rising Star will be allowed to make any recommended changes for their content within 72 to 120 hours (3 to 5 days), post which the write-ups will be considered final, and no further changes will be entertained after the window gets closed.
- Sneak previews are 30 to 60 minutes telephonic conferences with the ISG analysts and account managers to explain the ISG Provider Lens™ study results for the respective quadrant or archetype leaders/Rising Stars.
- All results, calculations and assumptions presented within the sneak previews are business secrets of ISG; they are protected accordingly, based on the Act Against Unfair Practices, and by copyright law. No ISG content is allowed to be published on any company websites or in any marketing documents/events, etc. without intimation to ISG, IPL account managers and taking necessary permissions and adhering to the ISG norms.

Please note that Sneak Previews are not intended to dispute the ratings/positioning on the quadrant or archetype or to provide additional data to complete the survey responses. Such data will not be considered for evaluation but will be updated in the provider profiles.



Press Release and Media Publish

Upon completion, our ISG Provider Lens™ studies are published in the media through the following channels:

- Press releases, IPL™ Enterprise Subscription, ISG website, and social media.
- Providers can purchase reprint rights to the report and have the opportunity of being included in our Press Release via a landing page link. Copies of the full report can also be purchased for internal use.
- Please reach out to your respective IPL account managers for being part of the ISG Press Releases.

ISG Provider Lens™ Custom Research Program

ISG Provider Lens™ Custom Research Program strives to address the bespoke enterprise/provider clients' research requirements. The clients get access to our experienced and market-facing analysts to achieve various objectives such as gain market and industry knowledge, ensure product/service validation, benefit from thought leadership, harness competitive intelligence, accrue knowledge from market surveys, take advantage of joint point of view (POV) research.

The standard offerings under the ISG Provider Lens™ Custom Research Program include joint webinars, joint research papers, briefing notes, competitive/strategy workshops, podcasts and survey-based thought leadership papers.

Details around some of the primary custom research offerings are given below:

Offering Type	Competitive Workshop	Briefing Notes	Thought Leadership Papers	Research papers (White papers)	Webinars
Overview	ISG Analyst provides an overall assessment of the provider's performance with IPL and compares it with three top competitors (of their choice) on key parameters.	ISG's assessment of a vendor/provider's business focus or offering.	ISG's analysis and perspective on a technology area or market development, often accompanied by an enterprise survey. This survey deep dives into current adoption and initiatives, challenges, opportunities and outlook.	ISG's assessment of the market space, current market dynamics, and how the vendor/provider offering caters to the market demand.	Joint presentation covering market dynamics/trends and vendor/provider narrative.
Deliverable Format	PowerPoint	Word + PDF file	Word + PDF file	Word + PDF file	PowerPoint + Video-based engagement
Objective	<ul style="list-style-type: none"> ■ Competitive intelligence ■ Provider education and market awareness 	<ul style="list-style-type: none"> ■ Endorsement ■ Target Marketing 	<ul style="list-style-type: none"> ■ Understanding market behavior and potential ■ Showcasing promising and relevant work of provider/vendor in a marketplace 	<ul style="list-style-type: none"> ■ Establishing thought leadership ■ Indirect marketing 	<ul style="list-style-type: none"> ■ Enterprise education and marketing
Delivery Timeline	A preparation time of minimum 2 weeks	The final output is generated within 3 weeks from the briefing	The output can take 8 to 10 weeks depending on the scope (including running the enterprise survey)	The output can take 5 to 7 weeks depending on the scope	4 weeks (including the time taken by the vendor to market the webinar)

At the same time, the ISG Provider Lens™ team can work with clients on customized research agendas, including location assessment, provider intelligence, vendor identification and selection and benchmarking exercises.

ISG Provider Lens™ Custom Research Program (continued)

Details around some of the primary custom research offerings are given below:

Offering Type	Competitive Workshop	Briefing Notes	Thought Leadership Papers	Research papers (White papers)	Webinars
Scope coverage	<ul style="list-style-type: none"> ■ Key trends in that market ■ Provider vs. competition participation level ■ Provider vs. competition – Comparison on four key evaluation parameters each on the x- and y-axis ■ Pointers covered around strengths, continued efforts, need attention ■ A SWOT Analysis 	<ul style="list-style-type: none"> ■ ISG’s understanding of the provider offering(s) or business initiative or focus area ■ The value proposition on offer ■ Differentiators at a vendor or offering level ■ The ideal buyer and how it can benefit ■ Guidance concerning the offering/solution 	<ul style="list-style-type: none"> ■ Prevailing market dynamics ■ Survey findings – market analysis on various aspects (adoption, solutions, opportunities, challenges and outlook) followed by ISG inferences and conclusions ■ Summarizing the overall findings ■ Commentary around provider/ vendor offering in the space 	<ul style="list-style-type: none"> ■ Prevailing market dynamics/trends ■ Highlight what enterprises are looking for ■ The problem statement(s) ■ The business case for the proposed solution – The industry challenge it solves ■ Determine if the newfound focus or service offering is in sync with market demand ■ A summary of the proposed solution 	<ul style="list-style-type: none"> ■ The provider/ vendor highlights its understanding, solutions and case studies (can vary based on the purpose). ■ The ISG analyst contributes by adding market data, ISG’s PoV on the subject in the presentation.
Length/ magnitude of deliverable	60 to 90 minutes (4 hours/half day if it is delivered physically, onsite)	<ul style="list-style-type: none"> ■ 1,200 to 1,800 words ■ Around 4 pages 	<ul style="list-style-type: none"> ■ 2,500 to 3,500 words ■ 10 to 14 pages (inclusive of charts/graphs) 	<ul style="list-style-type: none"> ■ 2,200 to 2,600 words ■ 8 to 10 pages (all-inclusive) 	<ul style="list-style-type: none"> ■ Typically, 1 hour (with 15 minutes Q&A)

At the same time, the ISG Provider Lens™ team can work with clients on customized research agendas, including location assessment, provider intelligence, vendor identification and selection and benchmarking exercises.

Digital Innovator Series

The “Digital Innovators” series of reports highlights niche and innovative technology vendors in an industry, service line or technology area. The report educates the enterprise ecosystem about the potential of existing technologies and how they can be leveraged to shape the future. The purpose of the report is not to cover the entire vendor landscape, but to showcase a few upcoming and promising vendors. A “Digital Innovator” is a vendor, offering solutions that have the following characteristics: technologically advanced - built on emerging technologies; innovative - solve business challenges; market-ready - find real-world client implementations; unique – have limited competition; and forward-looking - bets big for the future.

The Digital Innovators studies cover the following aspects for a selective set of vendors:



Provider Overview

- Year of Incorporation
- Funding Stage
- Founders
- Number of Employees
- Total Funding
- Accelerator Program
- Awards and Recognitions



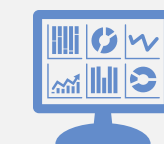
Solution Spotlight

- Features, functionalities, business problem solved and how



Key Differentiators: This section illustrates how a start-up differentiates itself from its competitors; parameters evaluated include but are not restricted to:

- Technology superiority
- Solution characteristics – Underlying technology, relevancy and deployment options
- Product maturity – Sophistication, ease of implementation and ROI
- Product effectiveness
- Pricing including unique pricing models
- Client success demonstrated
- Unique/maverick ideas
- Management experience



Key Impacts: Demonstrated client success and business impacts in terms of:

- Examples of actual client impact
- Monetary gains in terms of saving
- Process efficiencies gained
- Improvements in top line and margin figures
- Speed to market
- Partnerships

Digital Innovator Series (continued)

The Digital Innovators studies cover the following aspects for a selective set of vendors:



Product portfolio:

- Notable start-ups by vertical (healthcare, retail banking, manufacturing, utilities, insurance and retail)
- Notable start-ups by horizontal areas (AI/machine learning, IoT, big data analytics and cloud computing)
- Notable start-ups by country/regional Markets
- Focal points: Trends assessment
- Independent software vendors (ISVs) partnership advisory for vendors



The report is aimed at:

- Service providers and large software firms seeking partnerships and/or potential M&A targets
- Enterprises looking to solve long-standing industry challenges or trying to achieve a competitive advantage through technology.

Eligibility Criteria

A participating technology vendor should conform to the following:

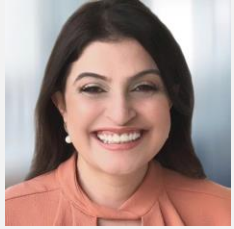
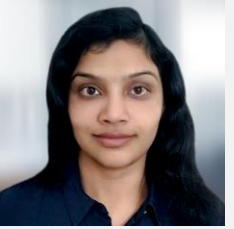

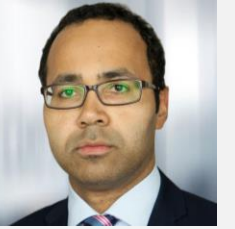
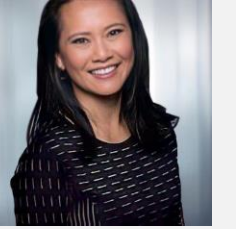


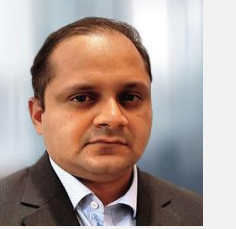
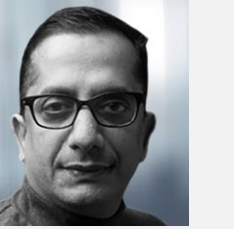





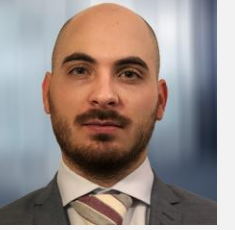







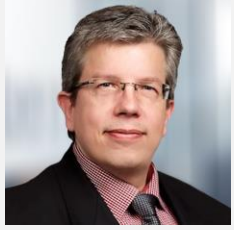
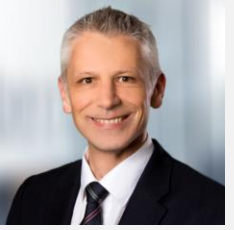







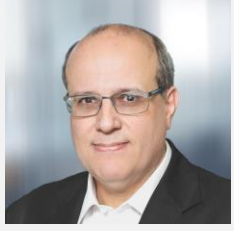
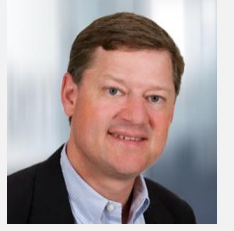
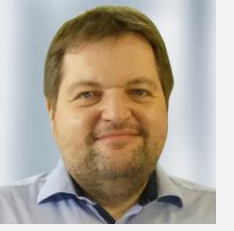

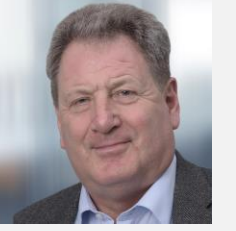
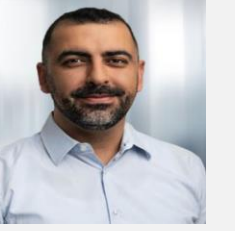

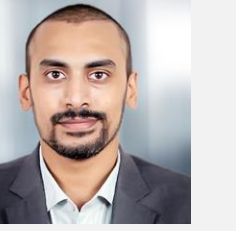










Series B and above funding

Annual revenue less than **\$125M**

Less than **200 employees**

Founded in the past **15 years**

List of Analysts for 2023

- | | | | | | | | | | | |
|---|---|--|---|---|--|---|---|---|--|---|
| 
Adriana Frantz
Brazil | 
Akhila Harinarayan
Nordics, U.K. | 
Alex Kozlov
U.S. | 
Ali Toure
Europe | 
Ana Lin
Brazil | 
Angus Macaskill
Australia and U.S. | 
Arun Kumar Singh
U.S. and U.K. | 
Arijit Datta
U.S. | 
Ashish Jhajharia
Europe, U.K. and U.S. | 
Ashwin Gaidhani
Europe and U.S. | 
Avimanyu Basu
Europe, U.K. and U.S. |
| 
Benoit Scheuber
France | 
Bruce Guptill
U.S. | 
Craig Baty
Australia, Malaysia
and Singapore | 
Dr Maxime Martelli
France | 
David Pereira
Brazil | 
Elaine Barth
Brazil | 
Florian Scheibmayr
Germany | 
Frances Grote
U.S. | 
Frank Heuer
Germany and
Switzerland | 
Gowtham Kumar
U.K. and U.S. | 
Harish B
U.K. and U.S. |
| 
Holm Landrock
Germany and
Switzerland | 
Jochen Steudle
Germany | 
Kenn Walters
France, Germany
and U.S. | 
Kevin Turner
U.K. | 
Marcio Tabach
France | 
Mark Purdy
Nordics and U.K. | 
Mauricio Ohtani
Brazil | 
Mohammed Malik
Aves
Europe and Nordics | 
Mrinal Rai
U.S. | 
Namratha Darshan
U.S. | 
Oliver Nickels
Europe, Germany
and U.K. |
| 
Pedro L. Bicudo
Maschio
Brazil, France
and U.S. | 
Peter Crocker
U.S. | 
Peter Höroldt
Germany | 
Phil Hassey
Australia | 
Rainer Suletzki
U.S. | 
Reza Sarwari
Germany | 
Rodrigo Barreto
U.K. | 
Rohan Thomas
Nordics, U.K. and U.S. | 
Roman Pelzel
Germany | 
Ron Exler
U.S. | 
Sergio Rezende
Brazil |
| 
Shashank Rajmane
U.S. | 
Steve Goldberg
U.S. | 
Swadhin Pradhan
Europe and U.S. | 
Tapati
Bandopadhyay
U.S. | 
Tarun Vaid
U.S. | 
Ulrich Meister
Germany and
Switzerland | 
Wolfgang Heinhaus
Germany and
Switzerland | | | | |

A Glimpse into ISG Provider Lens™ Award Ceremony





***ISG** Provider Lens™

Annual Plan 2023

www.isg-one.com