ISG Provider Lens™

Enterprise Service Management – Services & Solutions

A research report evaluating service management provider capabilities across enterprise portfolios

Customized report courtesy of:

wipro

U.S. | 2022 QUADRANT REPORT | MARCH 2022

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Enterprise Service Management – Convergence of Business, Corporate and IT Services

Enterprises have reengineered their approach by directing their focus towards workforce, workplace and workflow transformation. Their priority is to adopt and build a long-term strategy to converge and connect all existing business and organizational operations. Enterprise service management (ESM) has now become a critical point in executive strategy discussions. IT, as one of the major and strong lines in an organization, ensures that business and corporate services are available and accessible.

Service integration and management (SIAM) is a principal methodology that drives ESM fundamentals to evade process management singularity. It helps create an enterprise services mesh that will inherently connect services and processes at a core level. The service mesh concept involves building a scalable foundation for process frameworks and methodologies.

The fierce competition among workflow management solutions is reducing the distinction among ERP, BPM, CRM and service management solutions. ISG observes that service providers are increasingly adopting a comprehensive approach towards building a platform that helps build on top of existing features to integrate the distinguishing workplace, workforce and workflow solutions and products.

During ISG's interactions with the service and software provider ecosystem, analysts have observed that most service management providers are increasingly

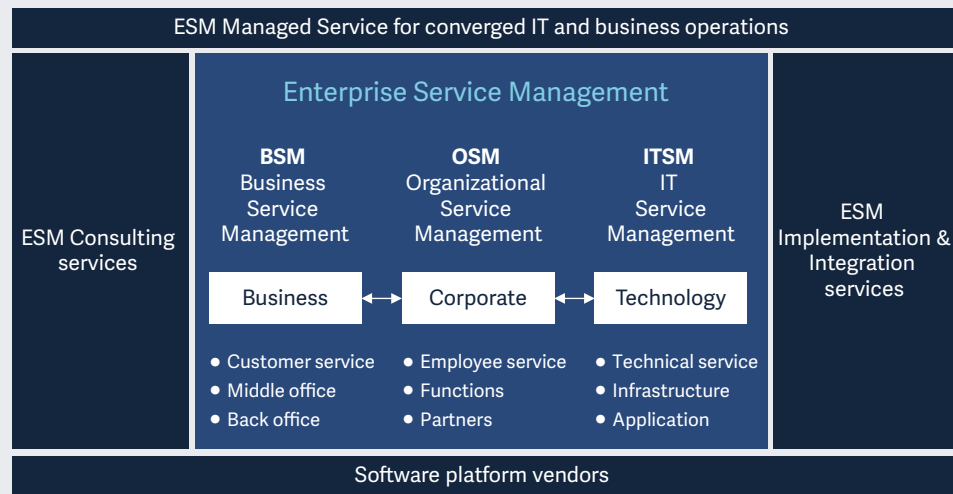# ESM – New paradigm to operate, integrate and deliver value.

adopting a product-centric approach for every domain. Their consumption mechanism, open integration with all platforms and instant value delivery persuades enterprises to build products that improve the user experience and interface. These platforms are emerging into a new source of intelligent data generation and collection, with an emphasis on process, people and combined behavior.

Emerging technologies play a crucial role in enhancing the capability to visualize and learn various unseen data dimensions. The role of AI in service management infuses the ability to infer the content, context and intent using mature machine learning models and algorithms. Enterprises are open to new corporate functions such as legal, supply chain and human capital to utilize these capabilities for streamlining and

improvising engagement while reducing the dependency on human interaction. The development of new accelerators and other intellectual property in this space is also gaining prominence. Service providers are increasingly crafting an ESM roadmap for every discipline (consulting, implementation and managed services) by adopting a forward strategy. Cloud-first strategy and digital technologies are the new measures of transcendence for enterprise resiliency, agility and suitability.

In 2021, many compelling and major mergers and acquisitions to fast-track scale took place in the service management space. These transformed organizations have enhanced their portfolio offerings, but their actual scale and benefits are yet to be recognized. This has thus become a crucial period to witness the redefining of enterprise definition and mindset.

People, processes, platforms and products are converging to refine the idea of a new-age enterprise.

ESM Managed Service for converged IT and business operations				
ESM Consulting services	**Enterprise Service Management**			ESM Implementation & Integration services
	BSM Business Service Management	**OSM** Organizational Service Management	**ITSM** IT Service Management	
	Business	Corporate	Technology	
	• Customer service • Middle office • Back office	• Employee service • Functions • Partners	• Technical service • Infrastructure • Application	
Software platform vendors				

Provider Positioning

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Providers	ESM Consulting Services	ESM Managed Services for Converged IT & Business Ops	ESM Implementaton & Integration Services	ESM Software Providers
4me	Not in	Not in	Not in	Product Challenger
Accenture	Leader	Leader	Leader	Not in
Atlassian	Not in	Not in	Not in	Leader
Atos	Product Challenger	Product Challenger	Product Challenger	Not in
BMC	Not in	Not in	Not in	Leader
Capgemini	Leader	Leader	Leader	Not in
Cask	Contender	Contender	Contender	Not in
CGI	Product Challenger	Market Challenger	Product Challenger	Not in
Cognizant	Leader	Leader	Leader	Not in
CSS Corp	Not in	Product Challenger	Product Challenger	Not in

Provider Positioning

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Providers	ESM Consulting Services	ESM Managed Services for Converged IT & Business Ops	ESM Implementaton & Integration Services	ESM Software Providers
Deloitte	Leader	Not in	Product Challenger	Not in
DXC	Product Challenger	Leader	Product Challenger	Not in
EasyVista	Not in	Not in	Not in	Product Challenger
Flycast Partners	Contender	Not in	Not in	Not in
Freshworks	Not in	Not in	Not in	Market Challenger
Fujitsu	Contender	Contender	Contender	Not in
HCL	Product Challenger	Product Challenger	Leader	Not in
Hexaware	Product Challenger	Product Challenger	Contender	Not in
Highmetric	Market Challenger	Market Challenger	Market Challenger	Not in
IFS assyst	Not in	Not in	Not in	Product Challenger

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Provider Positioning

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Providers	ESM Consulting Services	ESM Managed Services for Converged IT & Business Ops	ESM Implementaton & Integration Services	ESM Software Providers
Infosys	Leader	Leader	Leader	Not in
Ivanti	Not in	Not in	Not in	Leader
KPMG	Leader	Not in	Not in	Not in
LTI	Leader	Product Challenger	Rising Star ★	Not in
ManageEngine	Not in	Not in	Not in	Product Challenger
Matrix42	Not in	Not in	Not in	Product Challenger
Micro Focus	Not in	Not in	Not in	Leader
Mindtree	Product Challenger	Rising Star ★	Product Challenger	Not in
NTT DATA	Market Challenger	Contender	Market Challenger	Not in
Rezolve.ai	Not in	Not in	Not in	Contender
RightStar	Not in	Contender	Contender	Not in

Provider Positioning

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Providers	ESM Consulting Services	ESM Managed Services for Converged IT & Business Ops	ESM Implementaton & Integration Services	ESM Software Providers
Serviceaide	Not in	Not in	Not in	Contender
ServiceNow	Not in	Not in	Not in	Leader
Symphony SummitAI	Not in	Not in	Not in	Rising Star ★
SysAid	Not in	Not in	Not in	Product Challenger
TCS	Leader	Leader	Leader	Not in
Tech Mahindra	Rising Star ★	Leader	Leader	Not in
TEKSystems	Market Challenger	Not in	Not in	Not in
TOPdesk	Not in	Not in	Not in	Contender
Trianz	Product Challenger	Not in	Product Challenger	Not in
Unisys	Not in	Market Challenger	Not in	Not in
Wipro	Leader	Leader	Leader	Not in

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This study focuses on what ISG perceives as most critical for enterprise service management services and solutions in 2022.

Simplified Illustration Source: ISG 2022

ESM Consulting Services

ESM Managed Services for Converged IT and Business Ops

ESM Implementation & Integration Services

ESM Software Providers

Definition

Enterprise service management (ESM) solutions and service providers are transforming with time, and they are growing in numbers. Every year augments enhancements to the industry practices, and improvisations to methodologies, frameworks and reference architectures, such at ITIL 4. The evolution is empowering the use of emerging technology and new use cases. This is a crowded market without a clear distinction between an enterprise context and any independent portfolio. As a result, providers and buyers can find it challenging to identify the best-fit solution for enterprise-wide services.

Business leaders need to make these decisions using quantitative and qualitative methods. This report provides enterprises with the information required to select the right ESM managed service providers, software and partners for their business. At the same time, it evaluates

various solutions, practices and platforms that deliver various services across an enterprise.

Comprehensive business and IT software-as-a-service (SaaS) solutions now enhance capabilities for customer information management, connected workflow and smart task processing. The role of IT was limited to systems, access and technology assets; however, now IT is a strategic success partner that enables every business function at every level. ESM is expanding its coverage by integrating all departments around a single platform, providing a holistic view of end-to-end service value.

Enterprise software solutions are expected to meet the needs of cross-functional service lines, including IT. The current trend is for light, agile and customizable products with re-engineered processes, new designs and scalable architecture. These platforms are usually technology agnostic but are inclined

toward specific business units. AI and machine learning capabilities, automation and data analytics have become the base requirements. Consulting firms, service providers and integration partners thrive on this opportunity to help enterprises deliver service transformation, migration, integration and implementations.

Enterprise service management is the set of business, technology and organization support processes that cross-leverage tools, practices and methods for a holistic value creation and delivery aligned to the enterprise's vision.

The ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segments

- A perspective on the U.S market

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

Scope of the Report

This ISG Provider Lens™ quadrant study includes the following four quadrants:

- ESM Consulting Services

- ESM Managed Services for Converged IT & Business Ops

- ESM Implementation & Integration Services

- ESM Software Providers

Provider Classifications

The provider position reflects the suitability of ESM service providers and software vendors for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the customers' industry requirements or the number of employees as well as the corporate structures, and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product and Market Challenger and Contender), and the providers are positioned accordingly.

Each ISG Provider Lens quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

ESM Consulting Services

Who Should Read This

Enterprise service management (ESM) is industry agnostic and applicable to business, corporate and technology portfolios within an organization. This quadrant report highlights the present market trends and positioning of service providers that offer ESM consulting, especially in the U.S., covering various enterprise-wide functions.

Without compromising on accuracy, businesses are seeking to achieve a faster design, development and deployment cycle. Continual engagement with consulting service providers to explore possibilities in driving business transformation has thus become increasingly pertinent. Earlier, technology consulting was a prominent and preferred starting point for businesses. Competitors, customers and companies are now driving the adoption of technologies. Hence, a complete lifecycle capability such as

undertaking enterprise-wide services consulting initiatives is gaining traction.

Diversified processes, systems and tools complicate value realization and increase the cost of operations and ownership. Effective consulting is thus required to reduce the technology deficit and improve the modernization process. Inherently, consulting services drive transformation and cover every part of the business, from support and service to management.

ESM consulting is about the breadth of coverage, including all portfolios in an organization. Furthermore, as technology becomes more complex, the demand among businesses, customers and stakeholders for customized and personalized solutions increases. There is also a critical need for holistic guidance covering various aspects during the solution designing and assessment phases.

Executive leaders (CEO and CIO) in U.S.-based organizations that drive business outcomes and organizational objectives should read this report to understand the trends and changing patterns in the ESM consulting area.

Management, technology and domain consulting leaders should read this report to learn about industry-specific solutions and providers' prowess in successfully conducting consulting assignments for diverse industry verticals.

IT and business leaders from provider companies that manage large service portfolios should read this report to understand the design framework, evaluation methodologies, maturity and complexity of GRC processes in regulated industries across the U.S.
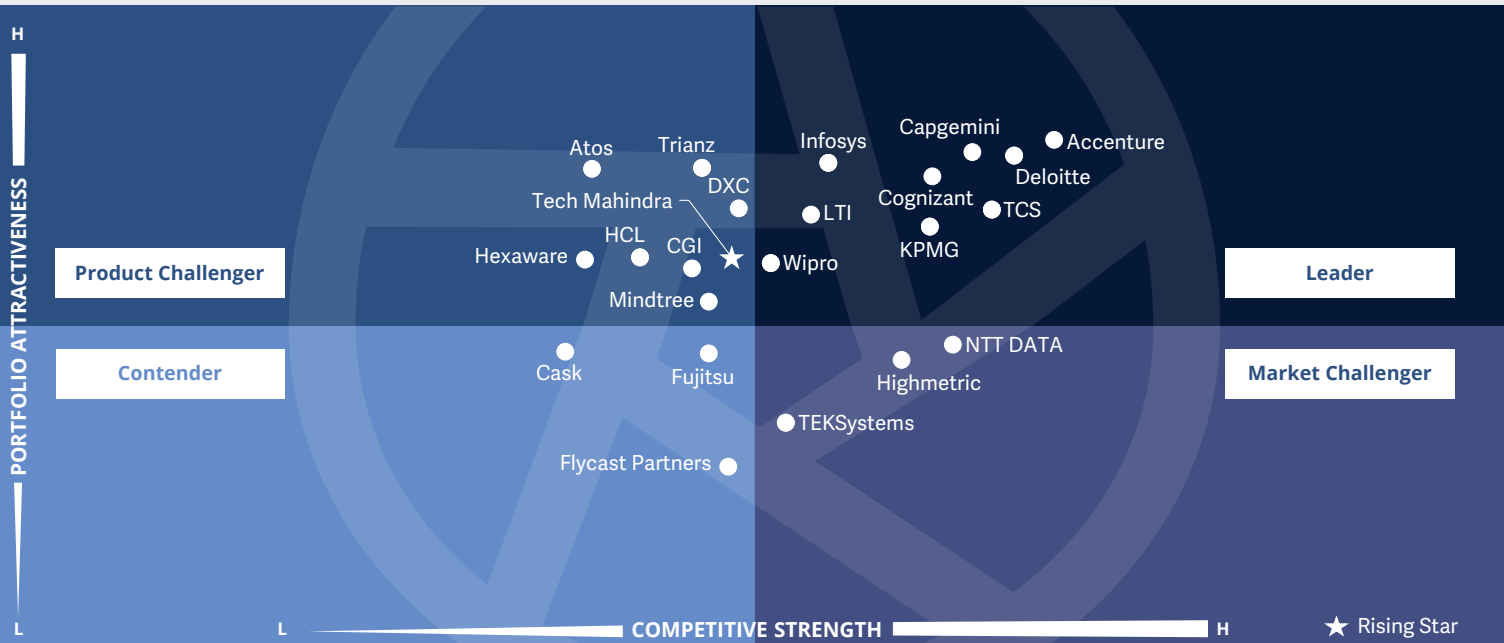
Digital transformation leaders that spearhead initiatives to build a resilient and future-proof organization should read this report to know how services providers design solutions and map respective technology solutions.

ISG Provider Lens™

Source: ISG RESEARCH

Enterprise Service Management – Services and Solutions
ESM Consulting Services

U.S. 2022

Enterprises are looking for a **consolidated consulting capability** across all their enterprise portfolios. This quadrant assesses service providers that offer ESM **consulting services across all business, technology and service** domains.

Ashwin Gaidhani

ESM Consulting Services

Definition

This quadrant evaluates the consulting service providers that transform the enterprise services landscape to improve service philosophies and strategies. These providers assist the enterprises in understanding the changing market course and guide in designing the right business, service and technology models. They also enable the enterprises to reach the future state by recommending tools and solutions to build a sustainable and resilient business. ESM consulting services bridge the gap between IT and business to connect the enterprise lines of business and build a seamless collaboration between ITSM and ESM. Translating business and IT languages helps define one enterprise objective.

Eligibility Criteria

1. Use of reference assessments models, frameworks and templates

2. Capability to design service transformation strategy and roadmap in the IT and business service management area

3. Digital business transformation competency focusing on enterprise-wide portfolio

4. Expertise in IT, organizational support and industry-specific process consulting

5. Deep knowledge about enterprise services, processes, workflows, tools and platforms

6. Tool and technology certifications, accreditations (ITSMF, PMI) and associations with standard bodies (TOGAF)

7. Experience in organizational and technology change management principles, guidance to achieve conformance with regulatory, compliance and governance frameworks

Observations

Digital transformation is on the agenda of every organization. Experiential guidance is required to ensure transformation success, and such initiatives leverage value only when adopted and promoted across the enterprise. Service providers that can address the entire lifecycle requirements from consulting to support typically lead in this market. ISG has observed a rise in consulting faculty among providers that position ESM and transformation consulting in line with the business needs.

- **Industry-leading frameworks, methodologies and reference architectures** for service management (ITIL 4, SIAM and IT4IT) have become the fulcrum points for the ESM strategy formulation and roadmaps.

- **The technology portfolio is no longer the inception point for onboarding or introducing platforms**.

Businesses services (customer) and corporate services (employee) are increasingly requiring resiliency and contiguity. Non-IT (corporate and organizational) services are being transformed due to the increased need to modernize services to support technology advancements, changing market personas and business-user expectations.

- **Industry and domain consulting have gained prominence** to help enterprises assess, adopt and adapt to the technology products and platforms that complement the industry-specific nuances.

- In industry and business consulting, **process modernization is driving business value and enhancing user experience**, which are the key ingredients and expectations of every transformation activity.

- **A calibrated fusion of strategy, technology, business and Industry consulting** is in demand, resulting in a rise in the consulting faculty. Providers are expanding into their respective deficit areas to complete the consulting lifecycle.

From the 42 companies assessed for this study, 23 have qualified for this quadrant with nine being Leaders and one as a Rising Star.

Accenture

Accenture engages with large organizations to develop an enterprise transformation roadmap and formulate the execution methodology. Its consulting capabilities are backed by broad experience in managing engagements across industries.

Capgemini

Capgemini leads in ESM with its finely crafted Connected Experience Framework, people and organizational transformation, and Digital SIAM co-design model. The company aligns its consulting services with a business focus to deliver client success. Its synergy models and maturity assessments have matured and are aligned with the critical phase of consulting.

Cognizant

Cognizant has a dedicated ESM practice with a comprehensive range of services. Its consulting services span across infrastructure, applications and emerging technologies. Its enterprise fusion narrative involves building a convergence point for all portfolios and services.

ESM Consulting Services

Deloitte

Deloitte is a prominent player in this space, with consulting being one of its inherent capabilities across technology and services. Its ESM framework for digital organization defines the value delivery across portfolios and value and service transformation. The company uses SIAM as a guiding principle plus other reference architectures and frameworks.

Infosys

Infosys' ESM Café is an AI-powered, ready-to-use solution that covers a broad spectrum of service management processes and functions across portfolios to reduce the implementation time by up to 50 percent. The company stands out from its competitors with its experience in implementing ESM for large enterprises.

KPMG

KPMG has developed an eminent competency in service management and IT service management (ITSM) principles. The company leverages its deep industry advisory and consulting legacy to build products and assets in focused business units (banking and finance, HR) for expanding the business service offering.

LTI
Let's Solve

LTI prioritizes enabling new delivery models and businesses, developing digital platforms, improving revenue growth and transforming the experience. The company also provides emerging technologies through proprietary solutions such as LTI Digital ITSM4 and ITAM, SIAMNxt and SM4ConsultNxt. It uses SIAM principles to deliver enterprise services that cover corporate, business and IT services.

TCS

TCS is building a set of assets and driving digital transformation with the Business 4.0 framework. Its focus on reimagining business, service and process by harnessing technologies for a future-ready organization contributes to its market leadership in this space.

wipro

Wipro has a mature ESM center of excellence that drives digital reusability in the ESM space. The company has invested significantly in upskilling and cross-skilling its workforce on various market-leading technologies. Through partnerships, it creates solutions to provide an integrated service experience that transform clients' business operations.

Tech Mahindra

Tech Mahindra (Rising Star) is progressing towards institutionalizing the ESM practice by leveraging digitization at source and target consulting engagements. Its consulting capabilities and complementary proprietary knowledge assets are backed by in-house developed solutions such as TransIT (to transform the IT organization) and SIGMA (SIAM-aligned methodology) based on industry standards.

Wipro

Leader

"Wipro's business consulting capability is focused on devising a roadmap for clients' digital journeys."

Ashwin Gaidhani

Overview

Wipro is headquartered in Bengaluru, India and operates in 45 countries. It has more than 220,000 employees across 132 global offices. In FY21 the company generated $8.5 billion (+1.5 percent YoY) in revenue, with IT services as its largest segment. Wipro's consulting practice is split into 12 technology domains and 13 industry verticals to drive service management and transformation. It has more than 40 facilities in 23 states across the U.S., including an innovation center in Silicon Valley and four delivery centers.

Strengths

Advisory and consulting kits for effective consulting: Wipro possesses proprietary techniques for technology assessment, process redesign and business model definition. Resources such as AIOps, an observability maturity assessment and Due-Diligence Assessment (DDA) toolkit help build a business case and engage in ESM advisory services.

Design transformation such as design thinking: Business, technology and functional consulting transform a client organization by transitioning legacy systems to a single platform. Cloud and SaaS consulting is growing and is paired with the digital design thinking strategy. This accelerates business transformation through the concepts of introducing change agents and redesigning solutions that provide efficiency, agility and client support to deliver change (OCM framework) throughout the enterprise.

Business services and business processes as focal points: Business process services is a dedicated service line that includes assessment frameworks, roadmap development and business case templates for supporting the design of cloud-native services and architecture.

Caution

Wipro has a mature consulting practice across technology and industry verticals. The consulting approach and engagement design for personalization and customization can be expanded according to business requirements.
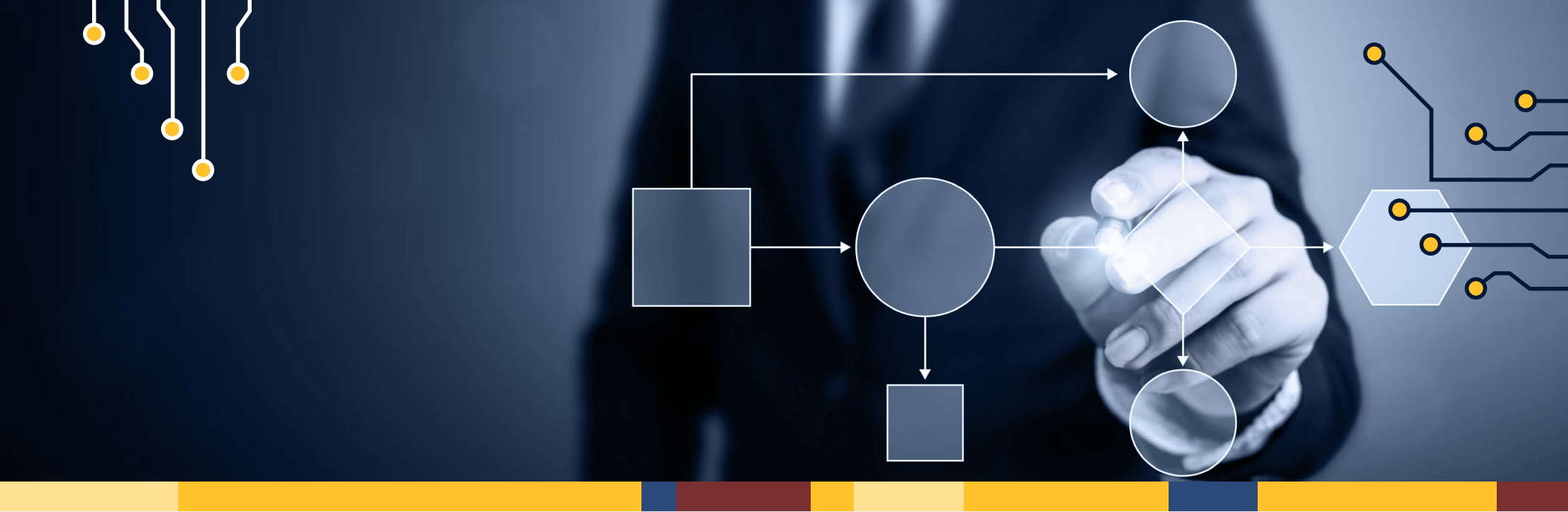
ESM Managed Services for Converged IT and Business Operations

ESM Managed Services for Converged IT and Business Operations

Who Should Read This

Business units and industries have unique requirements covered by specific tools that incorporate certain nuances for customized functions, clients and consumers. IT and business can no longer be placed in siloes. Instead, a point of convergence exists wherein methods, objectives and controls can be supported by one layer. However, an enterprise has a combination of tools that require end-to-end management to support business dynamics.

Organizations are onboarding top software providers at every competency level for their corresponding portfolios. Resources with knowledge of software integration with existing systems and applications, cloud, API interfaces, big data platforms and AI-automation and core programming languages are scarce . ESM software providers have opened their platforms for the ecosystem to host proprietary

components. Other technology product companies are building exclusive solutions to make the providers a platform that increases penetration and adoption of core services. They are cross-skilling current application development management (ADM) teams on various tool certifications to build diverse managed services teams.

Service and program delivery heads strive to meet the increasing demand for customizations, an approach that helps them win large enterprise contracts. Such setups govern dedicated centers of excellence that drive the sourcing and maintain service delivery standards. Regular investments are made for improving utilization, consumption and resources as managed services.

C-level executives (COO and CIO) in client organizations should read this report to understand the capability of providers in the U.S market to manage and support the entire software maintenance across all portfolios. Choosing the right partner will help improve operating margins and business growth.

Program and service delivery leaders that manage large accounts in the U.S and are responsible for the customer experience and Net Promoter Score (NPS) should read this report to understand how ESM managed service providers retain their credibility and service quality.

Service integration and management (SIAM) project leaders operating in the U.S should read this report to improve ESM managed services for IT and business operations, while supporting a wide range of capabilities and skillsets to run enterprise operations.

Service-line and functional leaders that lead technology, corporate and organizational functions through portfolio management, employee services and application and technology support groups will benefit from this report by rationalizing the fitment of ESM resources and workflows across all services.

iSG Provider Lens™

Enterprise Service Management – Services and Solutions
ESM Managed Services for Converged IT & Business Ops

U.S. 2022
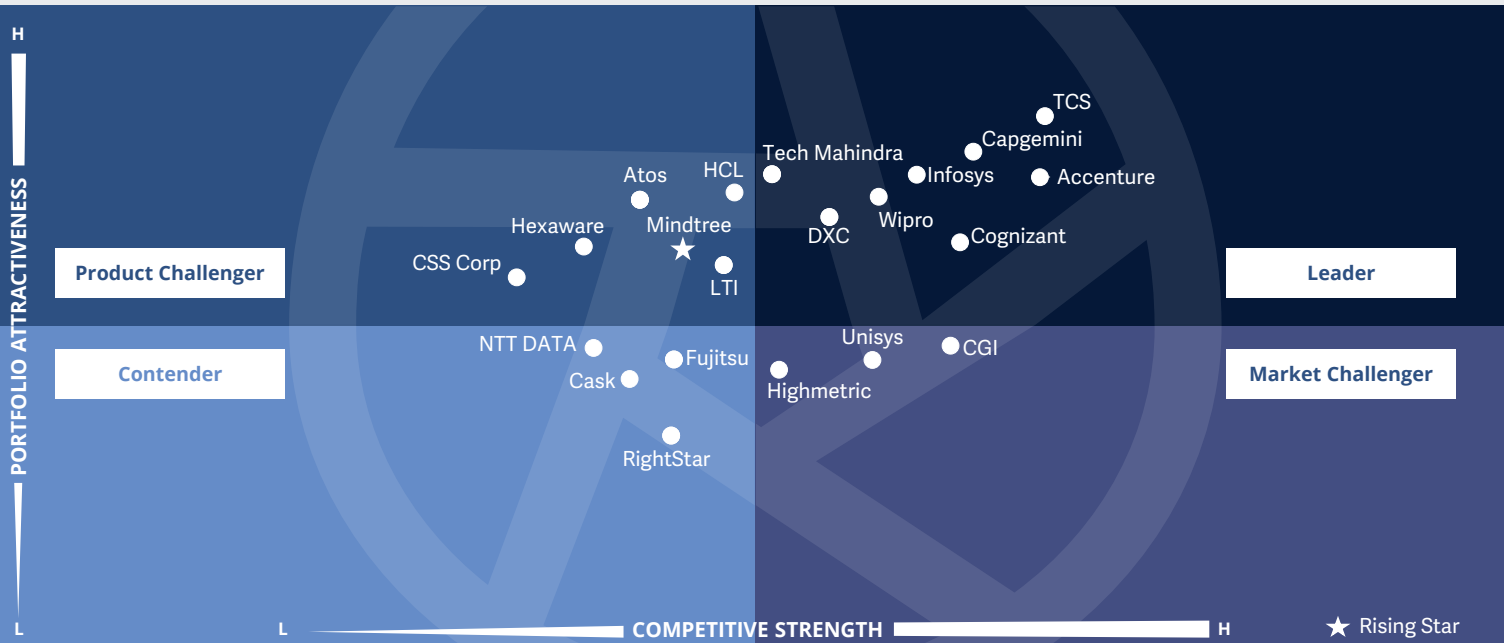
The new approach to managed services is converging IT and business operations that include software product and application maintenance, personalization across IT, business and corporate portfolios. The **new focus is on pre-built solutions** and support.

Ashwin Gaidhani

ESM Managed Services for Converged IT and Business Operations

Definition

This quadrant assesses the capability of providers to offer managed services for maintenance and support of system and centralized service management. The enterprise (converged) IT services portfolio enables direct control and monitoring of complex systems, workflows and services. These include infrastructure, applications monitoring and performance. Additionally, this study reviewed providers for their business process support and operations capabilities built around specific business verticals and organizational functions above the platform. The evaluation covered data quality management, data security and compliance-related aspects. Modernizing the service support abilities was a critical aspect to review. The quadrant coverage examines the capability of providers to offer these services in the context of global reach and sophisticated application landscapes, comprising various solutions from different software providers.

Eligibility Criteria

1. Breadth of service portfolio including IT and business process

2. Measuring success parameters of IT value drivers mapped to business value drivers.

3. Demonstrate operational and technical support experience in ESM tools and corresponding workflows

4. Breadth of application management services, functionality upgrades and custom requirements.

5. Options to choose from multiple service delivery and engagement models

6. Resources availability and competency for management of ESM software

7. Broad and diverse knowledge through partner network activities to support clients within their skill development to enhance the application practice

Observations

This service sector has always been human intensive and resource dependent. With the change in the techno-economic landscape over the past year, the focus of ESM managed services has been on continued maintenance and support for the deployed software. In addition, personalizing the software requires adept skill and experience to support business requirements.

- **Customer mindset is changing from run ops (support) to product ops (solution).** Multiple recurring issues are expected to be resolved by one solution for reducing the numerous data exchange points and dependencies.

- **The increasing use of microservices, applications and CI/CD in IT environments** pronounces the importance of DevOps transformation leading to successful and fast delivery.

This methodology links processes, IT teams and technologies to support IT and non-IT portfolios.

- **Managed services are becoming digitally native and intelligent to improve customer experience.** The entire customer journey is being tracked and evaluated to ensure convenience, speed and value in the transaction. Automated assistance to the client is being rendered by employing AI-powered conversational engines, intuitive self-help tools and automated workflows to modernize managed services.

From the 42 companies assessed for this study, 21 have qualified for this quadrant with eight being Leaders and one designated as a Rising Star.

Accenture

Accenture has robust, proven delivery methodologies it tailors to the client's size, requirements and objectives. A fine-tuned delivery strategy and a well-crafted process support model directly impact operational efficiency, reducing time to value and optimizing service cost.

Capgemini

Capgemini offers a distinct range of SIAM services, including SIAM Co-Design & Assessment Consulting, SIAM run operations and SIAM Evolution Services. These augment all dimensions of service management attributes, and continual service improvement provides consistent services across enterprise portfolios. A mature pool of resources helps ensure standard delivery by leveraging widely used tools.

Cognizant

Cognizant has an extensive range of partnerships with all hyperscalers, top ERP providers and ServiceNow in the ESM software space. A proficient workforce supports managed services in delivering streamlined, risk-managed, secure and agile operations for large and complex enterprises.

DXC

DXC Technology is highly established and well placed in the managed applications area. A strong partnership ecosystem enables it to provide a universal solution through a data-driven and intelligent automation platform called Platform X™, cutting down the implementation and management time.

Infosys

Infosys provides managed IT services for operational support and strategic services. The company also has expertise in managing legacy and new-age software solutions. Intellectual property and platforms can easily integrate services and systems to manage the entire client environment.

TCS

TCS's IT infrastructure and mobility management capability complements the digital solutions that support and accelerate managed services adoption. Observability, resolution, software customization and end-to-end maintenance and management for a large array of tools have contributed to the company's unique position in the crowded managed services market.

Tech **Mahindra**

Tech Mahindra's significant strength is its managed services portfolio (NextGen managed services, NXT.NOWS™), which provides operations support to industries (oil and gas, energy and utility, travel and hospitality, telecom, etc.). Tech Mahindra has a roadmap for enhancing current managed services to the next generation by leveraging its experiential knowledge of IT and automation, paving the path for customer success.

wipro

Wipro has built a robust and comprehensive service portfolio to match business' current technical requirements. IT and infrastructure management, application management, security operations and cloud operations services are part of its managed services offering. With digital transformation becoming

more popular, the company has bolstered its data center transformation, cloud migration and managed services to capitalize.

Mindtree

Mindtree (Rising Star) has a well-crafted strategy (4X4X4) that is strategically aligned with resources and technologies to build a compelling ESM offering for industries, service lines and geographies.

Wipro

Leader

Overview

Wipro is headquartered in Bengaluru, India and operates in 45 countries. As a service provider, it has over 221,000 employees across 132 global offices. In FY21, the company generated $8.5 billion (+1.5 percent YoY) in revenue, with IT services as its largest segment. Wipro provides AIOps, observability and service management application and platform support for IT, business and corporate services. It has more than 40 facilities in 23 states across the U.S., including an innovation center in Silicon Valley and four delivery centers.

Strengths

Well established in managed and shared services: Wipro offers an array of mature services covering technology and infrastructure, plus front- and back-office business operations. Administrative and corporate services include employee benefits, support functions and vendor management.

Heavy investment in R&D and open innovation: Wipro has expertise in digital transformation and security. Its managed services portfolio covers all support competencies in the field of application customization and custom requirements.

Strong partner ecosystem with technology service providers: The top five ESM software providers and sourcing firms can handle most market demand and Wipro works closely with them. Many ESM products are assembled on Wipro's proprietary platform to add value and enhance their capabilities.

Caution

Wipro operates with high competence and expertise in the managed services space. However, the shifting focus of businesses from support to solutions due to digital business transformation should be considered while building a domain-specific resource pool.

ESM Implementation and Integration Services

Who Should Read This

Providers' service integration and implementation capabilities have expanded with the increased complexity and a wide array of offerings. Implementation partners have already positioned their solutions with their ESM software providers, who build specific accelerators and other assets for these partners.

Technology leaders in client organizations should conduct extensive research in this area to choose the best service provider for handling their enterprise technology integration needs while avoiding the risk and complexity of working with multiple vendors. The ESM software space has a few well established players and is now witnessing the rise of new entrants. Developments are also increasing in the ERP, business process management (BPM) and CRM areas to expand the coverage of solutions into the adjacent portfolio. Technology, business and customer service software platforms

help improve the inherent capability and add new modules for business and corporate functions. The service integrator market in the U.S. has expanded from implementation and integration specialties to migration and modernization services. System integration service providers are focused on expanding their coverage of multiple tools and platforms to support combinations of technology integrations. This implementation experience in various industries demonstrates maturity and expertise.

Business leaders should ensure that end-user functionality and experience are not compromised during these implementations. Technology teams should evaluate business-specific modules and integrations with exclusive systems for well-rehearsed and standardized approaches. Enterprises require extensive information about onboarding the right partner to support technical projects in this space.

C-level executives (CDO and CTO) and digital transformation custodians that drive enterprise-wide modernization in the U.S. should read this report to decide on the right system integration partner for modernizing and delivering on the technical requirements. The study helps them understand the implementation and integration landscape and the provider capabilities that are aligned to the long-term technology roadmap.

Technology leaders that head client organizations will get the pulse of critical competencies during the onboarding of the new ESM software platform. A precise enterprise-wide portfolio support mapping exercise can help address service improvement attributes. This study also provides insights into the latest technology trends and patterns aligned with the company goals in the U.S. tech industry space.

Engineering heads and architects in provider organizations can use this report to understand the developments in software solutions in order to invest and build intellectual property and accelerators for respective activities, cloud platforms and industries. Information from this report can also help in developing connectors for systems such as observability tools, knowledge databases and mobile platforms.
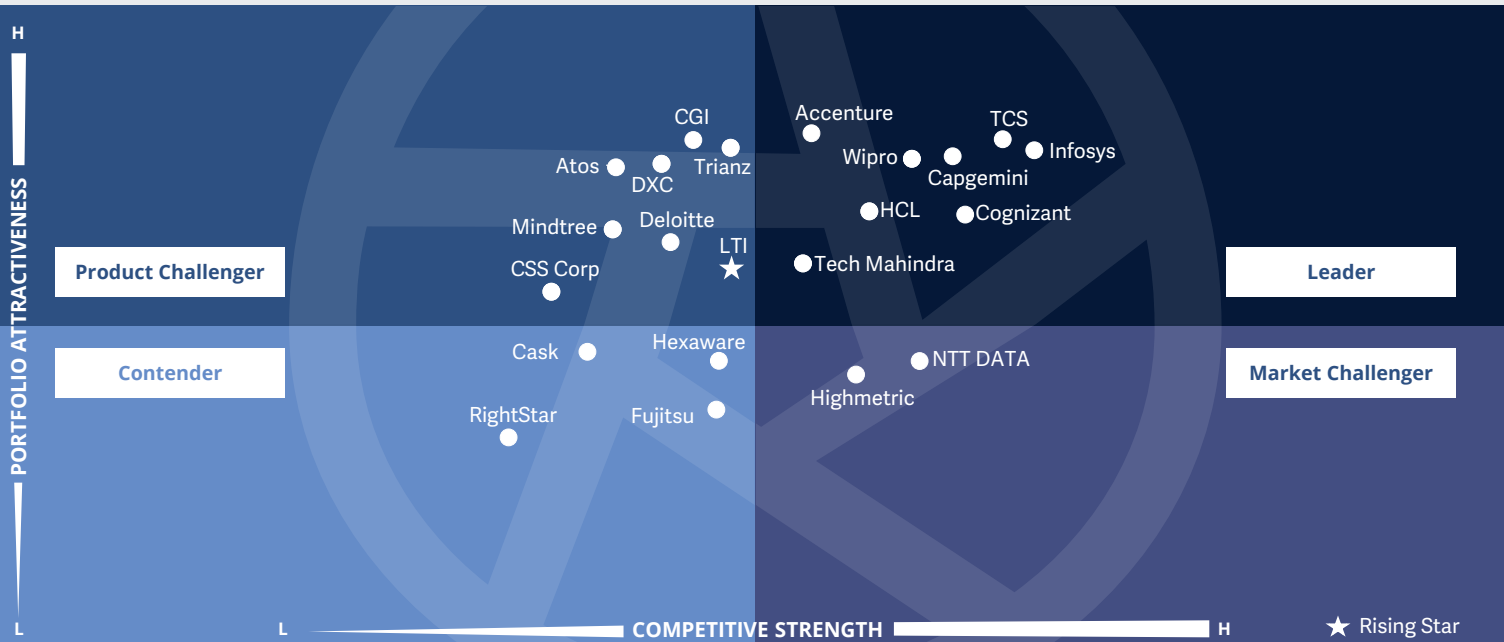
Service management tools and software solution providers in the U.S should read this report to understand the adoption and usage of a covered technology for planning the corresponding product functionalities, versions, compatibility and upgrades. This will also act as a foresight to prepare a roadmap for incorporating productivity components and covering any missed voids.

Source: ISG RESEARCH

Enterprise Service Management – Services and Solutions
ESM Implementation & Integration Services

U.S. 2022

PORTFOLIO ATTRACTIVENESS

H

L

Product Challenger

CGI

Atos
DXC
Trianz

Mindtree
Deloitte

CSS Corp
LTI ★

Contender

Cask
Hexaware

RightStar
Fujitsu

Accenture
TCS
Wipro
Infosys
Capgemini
HCL
Cognizant

Tech Mahindra

Leader

NTT DATA
Highmetric

Market Challenger

L   **COMPETITIVE STRENGTH**   H

★ Rising Star

This quadrant assesses the providers **offering integration, implementation and configuration** of ESM software platforms across technology, business, and corporate functions. The **enterprise software distinction is fading** due to productization and diversification in this space.

Ashwin Gaidhani

ESM Implementation and Integration Services

Definition

This quadrant analyzes highly specialized providers with software implementation and integration capabilities within the enterprise landscape. The focus is on deep knowledge about technical and project management practices for planning, designing, developing and delivering standard software solutions for enterprise portfolios, covering business, service lines and information technology systems.

Implementation concentrates on installation, configuration and operationalizing the tools and platforms for IT and business functions.

The integration activities link supplementary and complementary systems across all portfolios to enhance efficiency and productivity. The integration includes knowledge of different software tools and bespoke components to connect systems for data transfer, collection and analysis.

The study also evaluates the providers on the methodology, frameworks and practices exercised during the implementation and integration activities.

Eligibility Criteria

1. Expertise in technical implementation of tools, software and platforms

2. Usage of accelerators and custom solutions for software deployment

3. Ability to design solution as per reference architecture aligning to the prevailing architecture

4. Expertise in application optimization, support and testing services

5. Demonstrate the use of software deployment methodologies (agile) and practices (DevOps) during ESM software deployments and upgrades

6. Ability to drive implementations and integrations in major hyperscale providers and on-premises

7. Expertise in process integration and migration with knowledge of IT and non-IT functions

Observations

The complexity of connecting numerous applications, platforms and tools to facilitate a seamless information flow is increasing. Cloud is the common platform for delivering services where accelerators, integrations and connectors play a critical role in connecting systems to drive the business. ISG observes the following trends in the ESM implementation and integration services space, typically led by technology and platform-agnostic service providers.

- **A conscious strategy and intent are being followed** to connect platforms for engagement across all enterprise portfolios for driving workforce collaboration.

- **Integration complexity and magnitude are driving adoption of AI, automation and analytics** to build in-house products for every activity in the implementation and integration phase from assessment to monitoring. A product-centric approach is on the rise and is operationalized within every service offering.

- **Digital asset management is gaining traction** due to an increase in logical configuration items (Cis) and service relationships. Configuration management database (CMDB) is a critical area that every enterprise is refining.

- **Greater security and control are required** for digital information flow to ensure confidentiality, integrity and availability. Cybersecurity, analytics, security ops, and governance, risk and compliance (GRC) are critical areas in the ESM space and there are many acquisitions occurring on these lines.

From the 42 companies assessed for this study, 22 qualified for this quadrant with eight being recognized as Leaders and one as a Rising Star.

Accenture

Accenture's innovation and customer experience are some of its main attributes. The end-to-end application service offering includes service management implementation and integration tools with a broad spectrum of ERP, BPM and CRM platforms. Agile transformation and software engineering are delivered through a vast technology partner ecosystem.

Capgemini

Capgemini Digital SIAM 2.0 and SIAM transformation offerings include data management, security, update, license management and a modernization stack. The company has designed prebuilt accelerators (e.g. Gold Build) and other assets to seamlessly manage the end-to-end implementation and integration process.

Cognizant

Cognizant Enterprise Application Services (EAS) help clients across industry sectors to reinvent their digital customer experience. The company recruits and maintains a world-class workforce, engages the partner ecosystem more productively, and governs its operations and finance organizations.

HCL

HCL's ESM solution helps organizations take the service delivery principles beyond IT by driving services and business transformation, covering all critical facets of process, platform and product. The company amalgamates AI,

analytics and automation to drive digital transformation and ensure the desired outcomes.

Infosys

Infosys is expanding its digitized shared business functions and AI-led enterprise, putting it at the forefront of transformation. It aims to establish ESM as one of the company's top revenue-generating practices through innovation and broadening every portfolio offering.

TCS

TCS has developed products and platforms that support client transformation initiatives. These offerings focus on corporate functions, industries and technologies. TCS also incorporates automation, AI and analytics to modernize the technology stack and processes. This helps clients optimize effort, improve service and realize value.

Tech Mahindra

Tech Mahindra has extensive experience with greenfield projects and legacy transformation engagements in various industries. Service development, platform setup and migration from legacy to new infrastructure and application environments are part of its core integration services. API management, IoT integration, iPaaS enablement and microservices and container management are among services provided by the digital integration wing.

wipro

Wipro has a talented technology and engineering team focused on building new solutions. ESM is a software-intensive and integration-centric space where client success lies in seamless information flow. Wipro addresses this by formulating a framework and applying

many accelerators for connecting various service management tools and platforms to other systems.

LTI
Let's Solve

LTI (Rising Star) prioritizes enabling new delivery models, digital platforms and businesses. Other focus areas include increasing revenue growth, transforming experience and developing emerging technologies through proprietary solutions such as LTI Digital SIAMNxt and SM4Xform. The company uses SIAM principles as the foundation for delivering enterprise services across corporate, business and IT services.

Wipro

Leader

"Wipro has improvised its ESM implementation and integration capabilities with developing technologies to target client impact."

Ashwin Gaidhani

Overview

Wipro is headquartered in Bengaluru, India and operates in 45 countries. It has over 220,000 employees across 132 global offices. In FY21, the company generated $8.5 billion (+1.5 percent YoY) in revenue, with IT services as its largest segment. Wipro offers the BSM tools framework for ESM software and solution support in a combination with Wipro HOLMES™ to drive productivity by leveraging automation and AI. It has more than 40 facilities in 23 states across the U.S., including four delivery centers and an innovation facility in Silicon Valley.

Strengths

ESM integration and execution: Wipro has a mature governance and delivery assurance (DA) framework for all integration and implementation projects. The framework has in-depth control, gate reviews and risk tracking mechanisms. Wipro also has a well-established business value mapping framework that explains, defines and records leading metrics and insights, presenting a unified view of realized value.

Reforming cybersecurity to strengthen implementation and integration: Wipro is building its cybersecurity capability, expertise and offerings across regions and has made recent multiple acquisitions. With the increases in virtualization and adoption of the SaaS operating model, data security and digital risk services, Wipro has marked a presence in this space. This will lead to an increase in the critical implementation and integration nuances across platforms and systems.

Implementation and integration excellence: Wipro has led cross-platform, cross-system integrations in large enterprises with various technologies. The HOLMES™ platform plays a key role in adding cognitive computing (AI) and automation potential. Platform-approved, deployment-ready, calibrated accelerators are in the HOLMES™ library that clients can use to speed pace, accuracy and deliverables accordingly.

Caution

Wipro has substantial opportunities to improve its positioning and distinction in the highly concentrated implementation and integration services space, especially in mature markets such as the U.S. The company can achieve this by improving its marketing communication and connected storyboarding.
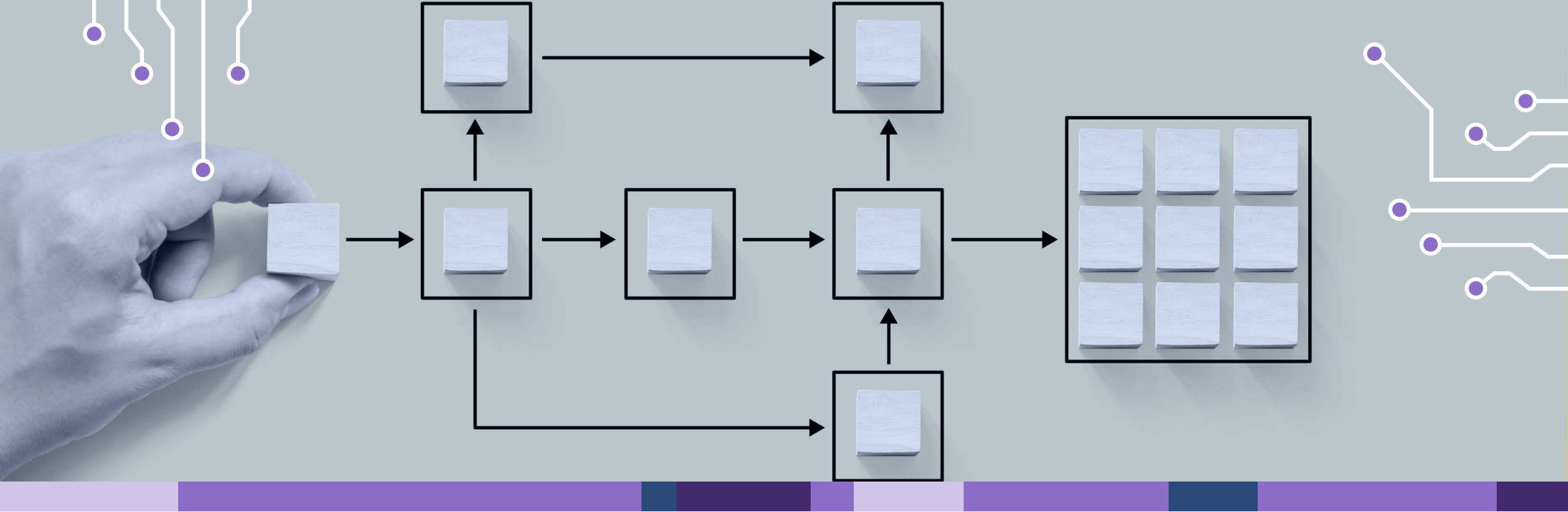
ESM Software Providers

Who Should Read This

The software industry is now focused on providing a comprehensive offering across enterprise portfolios to diminish silos. The solutions are segmented by technology, business and function-focused modules containing specific workflows. Enterprise workflow architecture consists of ERP platforms that manage and govern the master data. It also covers transactional data, business process management tools to define the business logic, regulatory controls and CRM systems that act as interfaces to capture and exchange business information. Business leaders are seeking a scalable, customizable and agile solution that can address the varied requirements of an enterprise. The aim is to evade the current complexity of running multiple software configured to manage the respective business process, corporate functions and technology requirements. These are perceived to be diverse but are fundamentally

similar in core operations and practice. Software companies attempt to resolve this multivariate challenge with the best possible single-service management solution.

User experience, workflow accuracy and service availability are success markers for every business leader. The SaaS model is the most preferred method of software consumption for enterprises to reduce maintenance and hosting costs. However, these applications can be utilized by users without any platform restriction, exposing the risk of proprietary enterprise data and causing an adverse impact on the organization. Enterprises should thus ensure a robust security framework and control objectives for service and information management software platforms. They should also focus on data management, security and access management.

C-level executives (CTO) of U.S-based client organizations involved in governing and architecting the technology platform to accommodate software solutions should read this report to understand how a robust and agile enterprise software fabric is built and considered a success factor.

ADM leaders and application and software implementation heads in the U.S should read this report to learn more about the systems and platforms that successfully deliver expectations and serve as a single solution to diverse portfolios.

Industry vertical leaders operating in various U.S.-based enterprises should use this report to understand the process flow compatibility and business alignment of the approach offered by the software platform, without compromising on security or industry compliance parameters.

Customer success leaders of client organizations operating in the U.S. should read this report to recognize the software tool's ability to accommodate business and functional process requirements, while retaining UX and UI components to delivering complete user satisfaction.

ISG Provider Lens™

Enterprise Service Management – Services and Solutions
ESM Software Providers

U.S. 2022

H

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

ServiceNow

IFS assyst   Matrix42   Ivanti   Atlassian

ManageEngine   Micro Focus   BMC

Symphony SummitAI   4me

EasyVista

SysAid   Leader

Serviceaide   TOPdesk   Freshworks   Market Challenger

Rezolve.ai

L   L   COMPETITIVE STRENGTH   H   ★ Rising Star

Software platforms are continuously expanding the workflow **modules to support enterprise portfolios**. The infusion of digital and **emerging capabilities such as task automation, inferencing engines**, autonomous decision making and smart self-service stand out as differentiators.

Ashwin Gaidhani

ESM Software Providers

Definition

This quadrant assessed providers that offer software (tools and solutions) and deliver capabilities to manage services across the enterprise. These tools drive workflows and work management activities across various functions catering to specific needs. The OEMs build on-premises and cloud (SaaS) solutions for focused groups, covering technology, service line, organizational support and business process systems. The study covers the functionalities and customization abilities, while offering customer-, business- and organization-specific solutions. The providers offer IT service management software, business process management tools and components supporting enterprise applications. This quadrant covers the work administration solutions driving technical and functional processes, in addition to domain-specific tools, to supplement, complement and conduct work management activities. This includes new emerging technology components and digital elements inclusion to enhance the effectiveness, efficiency and experience.

Eligibility Criteria

1. Organizational support capabilities for key enterprise services such as IT, human resources (HR), finance and accounting (F&A), facilities management and others

2. Ability to build multitenancy, access control and user/role management

3. Offer industry-specific business processes, components and accelerators

4. Integration capabilities with adjacent systems and other systems

5. Demonstrate infusion of digital technologies (automation, analytics and AI)

6. Ability to provide guidance on regulatory, compliance and governance frameworks

Observations

Software platforms are driving the ESM market and have encouraged enterprises to break the silos within service management. These platforms are focused on replicating best practices and translating the workflow dynamics to increase correlation. ESM is about understanding the various organization layers, the interactions at every layer, and building homogeneity of how information is captured and transferred.

- **The current focus of most software players is to become the platform of platforms.** They are welcoming external and open source partners to build proprietary solutions to be consumed by the client and provider communities.

- **Software providers are keenly focusing on providing agile, comfortable and swift software experience**, customer experience and employee experience.

This leads to the adoption of the platform, enhancing the value of interaction.

- **Software platforms are building graphical user interfaces (GUIs) and design canvas** (no-code process building canvas) to create any process with defined, domain ontology, recognized and related attributes. Business analysts no longer depend on core technology to translate the business requirements to software.

- **Site reliability engineering (SRE), governance, risk and compliance (GRC)**, and environmental, social and governance (ESG) factors are being included in the modules.

From the 42 companies assessed for this study, 16 have qualified for this quadrant, with five being Leaders and one a Rising Star

Atlassian

Atlassian has a diverse offering of workflow support solutions in application development and lifecycle management, social workplace management and business departments, software development lifecycle (SDLC), enterprise agile planning, product roadmap and service management. The company also presents work management platforms that cover a broad spectrum of portfolios, from CRM to collaboration and productivity solutions.

BMC

BMC has been one of the top five providers of service management solutions for approximately the last two decades. Functionality in IT and application support and management are its strengths. BMC Remedy is synonymous with an IT process management platform, covering almost all aspects such as discovery, operations, knowledge and data management.

Ivanti

Ivanti's hyperautomation platform, Neurons, and Cherwell's service management platform that stretches from IT to every line of business combine the personalization of user and employee experience. They also bring together the power of endpoint management, security and service management solutions, allowing enterprises to act and prevent adverse impacts on end users preemptively.

Micro Focus

Micro Focus is moving towards infusing emerging technologies in its new solutions and offerings, driving towards autonomy. The company has a strong focus on the U.S government and is

simultaneously adding new solutions to meet the marketplace needs. It has been prioritizing building the competency inorganically with M&As in the past two years, deducing a sting focus on R&D and building proprietary assets.

servicenow.

ServiceNow is commanding the space by driving the ESM context and continuously evolving through innovation, integration and invention in the present market. This can be solely achieved through a strong partnership and technology ecosystem. In 2021, it made six acquisitions and more than five strategic partnerships with technology service providers, hyperscalers, leading consulting firms and niche product firms to co-innovate diverse solutions in a joint go-to-market.

SYMPHONY SUMMITAI

Symphony SummitAI (Rising Star) is growing at pace with its out-of-the-box implementations in ITSM and functional areas (HR, finance). The ITSM solution caters to large enterprises with its broad product capabilities, integrations and support. A well mapped AI-driven ESM suite is gaining popularity and traction within large global enterprises.

Appendix

Methodology & Team

The ISG Provider Lens 2022 – Enterprise Service Management – Services & Solutions research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Enterprise Service Management Services market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

6. Use of the following key evaluation criteria:

   * Strategy & vision

   * Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * Technology advancements

Author & Editor Biographies

Lead Author

Ashwin Gaidhani
Research Partner

Ashwin Gaidhani has a comprehensive view of IT shared-managed services portfolio and digital business transformation initiatives with approximately two decades of experience. As an ISG Research Partner and subject matter expert in the field of enterprise services and digital technologies, he is presently contributing as a Lead Author with the ISG Provider Lens™ team. Ashwin comes to this work with business and technology experience revolving around service management, digital governance, emerging capabilities (artificial intelligence and intelligent automation), work design methodologies, and implementation frameworks. He is a highly qualified and experienced ITIL Expert with lifecycle experience in operations, delivery, consulting, and advisory for large corporations, including end-user, ITSP, and Technology product companies. He effectively partners with C-Level executives and tactical leaders to institutionalize digital business transformation and strategic initiatives.

Research Analyst

Arjun Das
Research Analyst

Arjun Das is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platform and Services and SAP HANA Ecosystem Services. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Arjun has helmed his current role since 2020. Prior to this role, he has worked across several syndicated market research firms and has more than 8 years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain.

IPL Product Owner

Jan Erik Aase
**Partner and Global Head –
ISG Provider Lens/ISG Research**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

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

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ISG

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MARCH 2022

REPORT: ENTERPRISE SERVICE MANAGEMENT – SERVICES & SOLUTIONS