ISG Provider Lens™

# Contact Center– Customer Experience Services

## AI & Analytics

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

movate™

**QUADRANT REPORT | OCTOBER 2022 | GLOBAL**

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**Technology helps address talent challenges by enhancing customer experience.**

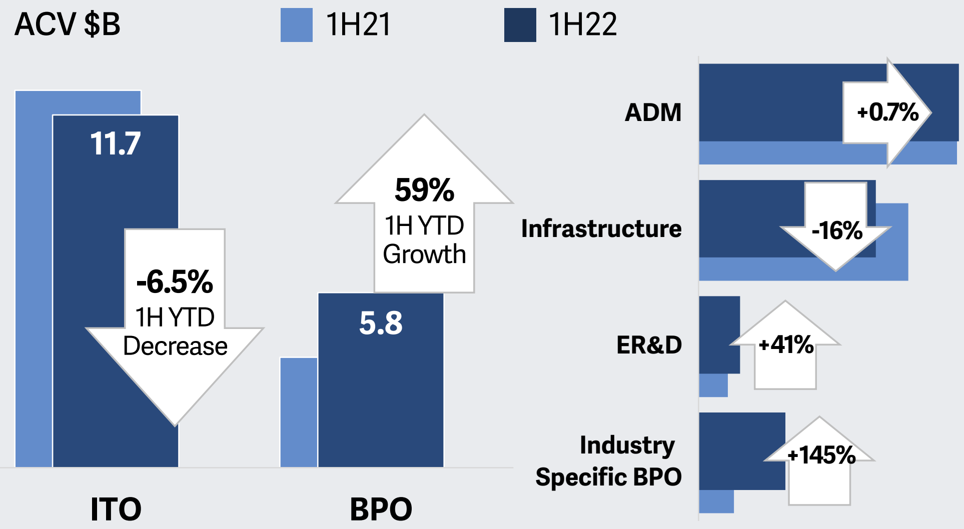
There is a strong and growing market for managed services BPO. The industry achieved one of the best first half-year levels ever, with nearly $6 billion in annual contract value (ACV). This represents a nearly 59 percent increase year-on-year (please refer to Figure 1). The lion's share of this growth was driven by the Americas and Europe, the Middle East and Africa. In addition, industry-specific BPO saw huge market traction and doubled its ACV year-on-year. Engineering research and development (ER&D) also contributed heavily to the growth of BPO managed services in the first half of 2022.

The contact center also contributed to the significant growth of managed services BPO. Post pandemic, the need for digital customer experience (CX) rose and led to a surge in activity in this space. CX is an essential focus area for all enterprises, and the growing importance is creating a stronger-than-ever market demand. Enterprises of all types are also transitioning captive operations to external services providers for transformation.

**CX trends**

There are several trends that are shaping the contact center industry. However, we have identified the top three trends that are impacting and redefining the industry and changing the way companies are operating.

**Figure 1: Global Managed Services Trends**




ACV – Annual Contract Value

# CX is a **strategic priority** for all enterprises

**Seismic shift in the delivery model**

The contact center industry has always witnessed a high churn. However, in the past eight to 12 months, the industry has experienced unprecedented attrition challenges.

According to the ISG Index, the worst is behind us, as attrition rates peaked in 2021. However, attrition still remains one of the top challenges for the industry.

Attracting and retaining talent has become more difficult now, and lack of skill sets is further accentuating this challenge. Also, the skill set requirement has dramatically changed over the years, and agents are now required to have new skill sets, with the advent of technologies. For instance, if background knowledge about the tools and their usage was a requirement few years ago, now the requirement has shifted to effective usage of these tools to drive decision-making.

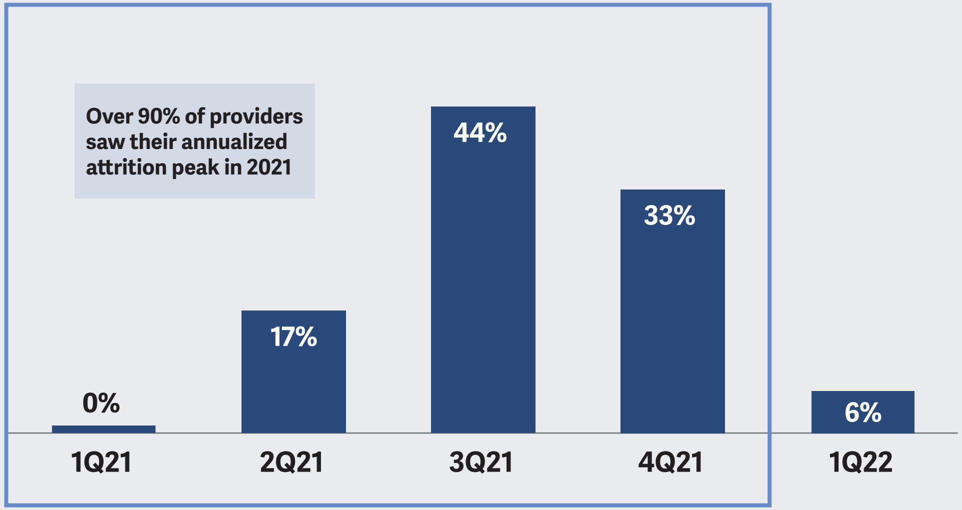
Flexible working conditions is a key driver for attracting and retaining talent. The contact center industry is innovating in this space. Providers that have introduced flexible working conditions are experiencing reduced attrition numbers, increased productivity rates and high employee satisfaction.

Service providers are taking multiple measures to enable remote or hybrid working, which are as follows:

- Providers are introducing small satellite offices called "hubs," across multiple locations. They typically have state-of-the-art infrastructure that can be leveraged by agents who live closer to these hubs. Not only are these offices enabling collaboration and engagement, but they can also be leveraged by agents if their work-from-home infrastructure is unable to support contingencies such as internet downtime.

- Currently, providers are also actively leveraging technologies such as AI and cloud platforms to drive hiring and training. Companies have introduced extensive learning platforms that are either developed in-house or in partnerships with universities to enable training, reskilling and upskilling.
- In some cases, providers are leveraging AI to drive sentiment analysis so they can check the employee pulse and tackle attrition proactively.
- Companies are also investing significantly in employee engagement platforms that can enable remote engagements. An example is gamification, which has proven to be highly successful in keeping employees engaged.
- Many providers are making significant investments in introducing tools and platforms to help employees engage virtually. Some companies are actively exploring the metaverse to create a collaborative environment.
- With remote working, boundaries are now expanded, and companies are focusing on attracting skilled talent. Several companies that we spoke to in our research have adopted a GigCX employment model. This has not only helped companies tap into talent but also enables 24-hour support and effectively address seasonal demands.
- To service clients, many companies are also investing in setting up nearshore centers in locations such as Jamaica, Peru, Honduras, South Africa and Malaysia.

**Figure 2: In What Quarter Did Providers Hit Their Attrition Peak?**




Source: ISG, 2022; Annualized analysis based on normalization of publicly reported data for a group of ITO providers

The future state of delivery is still uncertain in scenarios where significant investments are being made to find alternate delivery models. There is no single solution that can address all the challenges. Working from the physical office has its own benefits and drawbacks. However, working virtually has its own set of challenges. ISG believes that the industry is increasingly likely to adopt hybrid working conditions as it brings together the best of both worlds.

**Technological advancements that are redefining the industry**

Technology has played a crucial role in shaping the CX industry in the past couple of years. For a long time, most enterprises were heavily investing in robotic process automation (RPA). However, post pandemic, digital transformation accelerated.

Advancements in technology and adoption have grown rapidly and exponentially.

- AI has made significant inroads into the contact center industry. Whether leveraging a bot to serve a customer or improve agent experience, AI will soon become a minimum requirement in this industry.
- Enterprises are seeking and adopting a cloud-first approach. The pandemic removed all doubt that the cloud is essential to enable hybrid working. Enterprises are now aware that it is the best contingency plan in terms of business continuity.
- As remote working takes center stage, security has become a necessity. Security protocols, policies and procedures, training, effective implementation, monitoring and analyzing have become crucial. Voice biometrics, facial recognition, auto desktop lock, video proctoring and VPN are some of the technologies that help secure work-from-home environments.
- Companies have begun to identify use cases for the metaverse. We believe that with the advent of this technology, the CX industry will experience a seismic shift in engagement – whether client engagement or employee engagement.
- Analytics is essential to redefine processes. Without analytics, CX will be limited to customer service and engagement as opposed to creating a more holistic experience. Predictive analytics, sentiment analytics, speech analytics, speed to text, text analytics, intent analytics and skill routing are some of the popular techniques that help companies empower agents and enable contextual conversations.
- Another key offering that has gained significant traction in the industry is social media services. Several industry verticals are adopting social media as a channel of communication. Customer support and engagement services are being delivered effectively through social channels. Most companies are also leveraging content moderation services to protect client information. They are using AI and analytics to predict customer sentiments, moderate content and manage their product portfolio order to build their brands.

CX is a priority and essential business driver for all enterprises.

# Provider Positioning

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| | Digital Operations | AI & Analytics | Work From Home Services | Social Media CX Services |
|---|---|---|---|---|
| [24]7.ai | Product Challenger | Leader | Rising Star ★ | Market Challenger |
| Alorica | Leader | Market Challenger | Leader | Market Challenger |
| Atento | Leader | Product Challenger | Leader | Product Challenger |
| Capita | Market Challenger | Market Challenger | Market Challenger | Product Challenger |
| Cognizant | Product Challenger | Leader | Product Challenger | Leader |
| Concentrix | Leader | Product Challenger | Leader | Leader |
| Conduent | Leader | Leader | Leader | Product Challenger |
| Datamatics | Product Challenger | Product Challenger | Contender | Product Challenger |
| EXL | Product Challenger | Product Challenger | Product Challenger | Product Challenger |
| Firstsource | Market Challenger | Product Challenger | Market Challenger | Contender |

# Provider Positioning



| | Digital Operations | AI & Analytics | Work From Home Services | Social Media CX Services |
|---|---|---|---|---|
| Genpact | Rising Star ★ | Leader | Rising Star ★ | Leader |
| Hexaware | Product Challenger | Product Challenger | Product Challenger | Rising Star ★ |
| HGS | Leader | Leader | Leader | Leader |
| Infosys | Product Challenger | Product Challenger | Product Challenger | Product Challenger |
| Majorel | Market Challenger | Market Challenger | Market Challenger | Contender |
| Movate | Product Challenger | Leader | Product Challenger | Leader |
| Mphasis | Contender | Contender | Contender | Contender |
| Shapiro | Contender | Not In | Contender | Not In |
| Sitel Group® | Leader | Leader | Leader | Leader |
| Startek® | Product Challenger | Product Challenger | Leader | Leader |

# Provider Positioning

**Page 3 of 3**

| | Digital Operations | AI & Analytics | Work From Home Services | Social Media CX Services |
|---|---|---|---|---|
| Straive (SPi Global) | Contender | Product Challenger | Contender | Contender |
| Sutherland | Leader | Leader | Product Challenger | Leader |
| TCS | Product Challenger | Product Challenger | Market Challenger | Product Challenger |
| Tech Mahindra | Leader | Rising Star ★ | Product Challenger | Leader |
| Teleperformance | Leader | Leader | Leader | Leader |
| Transcom | Leader | Market Challenger | Leader | Product Challenger |
| TTEC | Leader | Leader | Leader | Market Challenger |
| Webhelp | Leader | Market Challenger | Market Challenger | Product Challenger |
| Wipro | Market Challenger | Product Challenger | Product Challenger | Market Challenger |
| WNS | Product Challenger | Leader | Product Challenger | Leader |

This study focuses on the areas ISG perceives as **most critical** in 2022 for Contact Center – Customer Experience Services.

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

Simplified Illustration Source: ISG 2022

## Definition

The ISG Provider Lens™ quadrant report on Contact Center – Customer Experience Services focuses on contact center outsourcing services and the associated aspects of enhancing customer experience (CX). Because enterprise needs have significantly changed in the last couple of years, we assess providers based on their service offerings, global and regional footprint, delivery centers and models, language capabilities, FTEs, people management and development programs, work-from-home capabilities and digital transformation elements such as consulting, AI, cloud contact center and analytics capabilities. Contact center service providers use a range of technologies and practices, such as design thinking, omnichannel support, cloud offerings, analytics and automation, to offer end-to-end, seamless CX.

Over the last couple of years, enterprises and their demands have changed considerably. Enterprises are seeking newer technologies as CX is gaining more importance. While the demands on the buyer side are increasing, the supply side is posed with newer challenges, such as staffing and retention. Furthermore, as employees are getting back to offices after the pandemic peak, there are many employees seeking flexible working conditions. Thus, providers are looking to find a balance with new hybrid working models. On the other hand, with uncertainty looming in the industry, whether it is due to the pandemic, geopolitical situations or talent shortages, innovation at every stage has become highly essential to address the current requirements. This study will focus on evaluating the new requirements of organizations, the and associated industry challenges and the measures that they are taking, both on the demand and supply sides.

This study on Contact Center – Customer Experience Services aims at understanding enterprises' requirements and providers' capabilities to meet those requirements.

## Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants: Digital Operations, AI and Analytics, Work From Home Services and Social Media CX Services.  This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant contact center – customer experience services providers
- A differentiated positioning of providers by segments
- Focus on regional market

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

## Provider Classifications

The provider position reflects the suitability of contact center customer experience services providers 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 industry requirements or the number of employees, as well as the corporate structures of customers 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 US$20 million and US$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 US$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 Challenger,  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 of 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.

**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.

★ **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.


# AI & Analytics

## Who Should Read This

This report is relevant to global enterprises across industries for evaluating the AI and analytics services of contact center providers.

In this quadrant report, ISG highlights the current market positioning of global providers of contact center AI and analytics, delivering exceptional CX and how they address key enterprise challenges globally.

With digital innovation, whether or not driven by the pandemic, AI has become an important aspect in many business operations. AI and analytics are boosting productivity, delivering new products and services, accentuating corporate values, addressing supply chain issues and fueling new start-ups.

Through RPA, speech analytics, and other AI-enabled technologies, many traditional contact center solutions are evolving at an unprecedented pace.

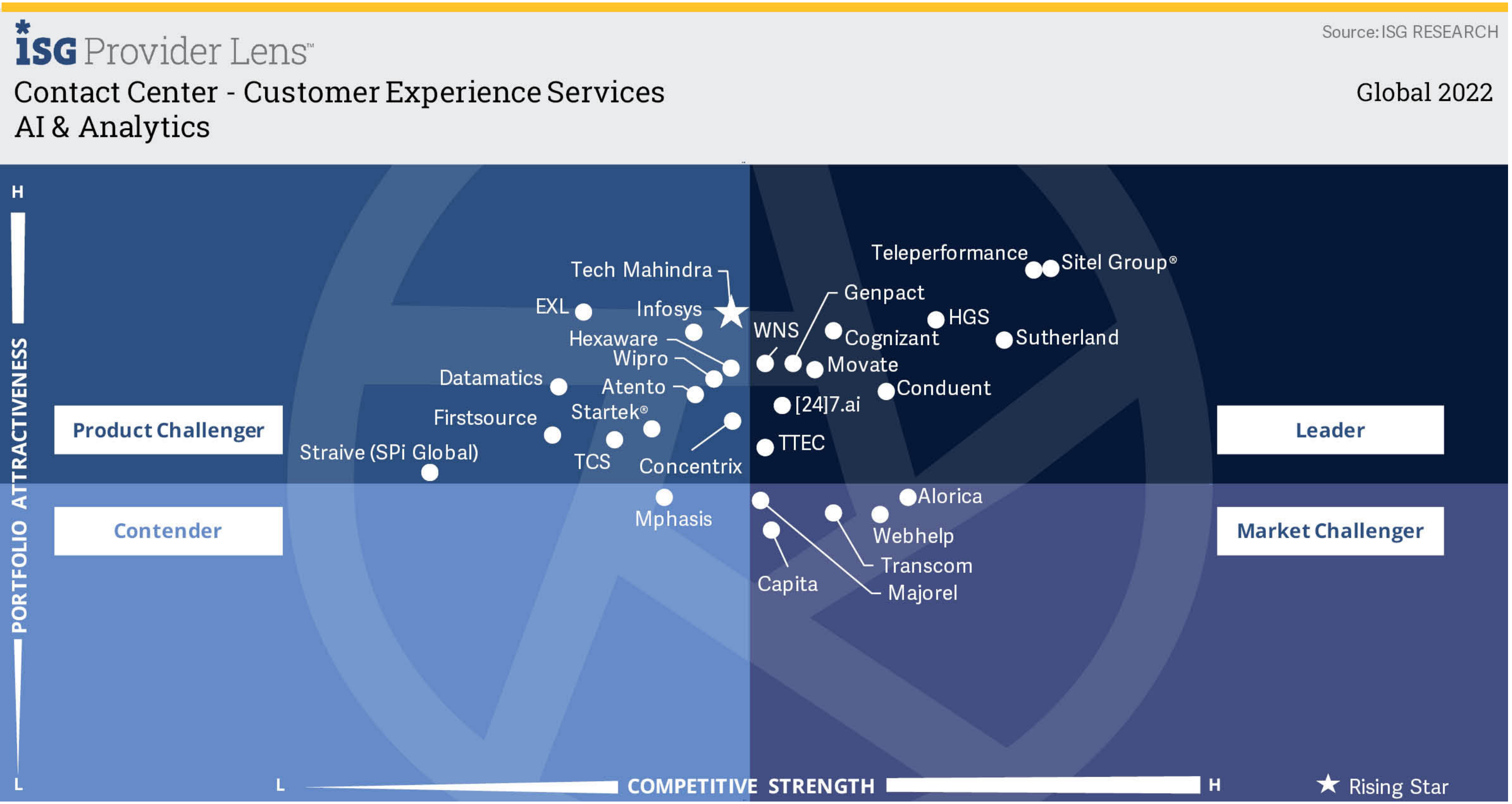
Natural language processing (NLP), an AI tool that transcribes and assesses customer conversations to draw contextual meaning, has improved the agent screen notification. However, as speech analytics evolves, many other use cases will emerge. Automating quality monitoring scorecards, giving agents real-time coaching, and predicting customer behavior are excellent examples that can rapidly enhance CX further.

**IT and technology leaders** should read this report to better understand the strengths of providers in the AI and analytics space and the areas that need improvement. The report also helps them analyze the multiple offerings of the providers and select the solutions that align with their business needs.

**Digital transformation professionals** should read this report to understand the broad range of AI and analytics solutions offered by providers and how they implement these solutions, at scale, to realize the desired outcomes.

**Vertical leaders** should read this report to understand the industry-specific solutions, backed by AI and analytics technologies, offered by the providers.

**Business strategy and industry leaders** should read this report to understand the global delivery and vertical capabilities of providers in the marketplace. This report also gives insights on the expertise, technology and innovation-led solutions of the service providers. It also differentiates providers based on how they modernize their offerings for improved CSAT scores and loyalty.




This quadrant assesses providers with AI and analytics capabilities in terms of their **solution offerings, partnerships, implementations, innovations delivered and business outcomes.**

*Namratha Dharshan*

## Definition

As transformation needs increase, more enterprises are turning toward advanced technologies to create an impact and deliver seamless CX services. AI and analytics play an integral role in digital transformation. The advancements in AI and analytics implementation, use cases and adoption are proving beneficial for both customers and agents. Agent experience is equally important as CX, and the implementation of AI and analytics in this space will help companies drive meaningful and empathetic conversations with end users and have a significant impact on business outcomes.

### Eligibility Criteria

1. Ability to maintain **AI and analytics advisory** teams
2. **Technical expertise** (certified professionals)
3. Ability to **provide AI bots**, including conversational AI and digital assistants
4. **Analytics services** such as speech analytics, text analytics, customer behavior prediction, predictive analytics and sentiment analysis
5. **Scale** of implementations
6. **Ability to help customers achieve business outcomes** such as customer satisfaction score (CSAT), net promoter score (NPS), cost savings and revenue generation
7. **Partner** ecosystem or **proprietary solutions**
8. Ability to demonstrate **referenceable case studies**

## Observations

AI and analytics have become essential tools that enable optimal CX. They can give companies the ability to identify and subsequently divide customers into segments based on their behaviors, enable a more in-depth understanding of motivations and needs, and deliver actionable insights to inform decisions that affect customer service delivery, productivity, employee satisfaction and more. AI and analytics can help organizations create and deliver targeted, personalized and remarkable experiences to their customers and reduce costs. These technologies can support agents in their daily interactions, as well as help with retention and training, elevating the overall agent experience. The leading global providers in this space bring a combination of AI bots, strong AI and analytics advisory teams and consultancies, a robust partner ecosystem paired with in-house solutions, and a proven ability to help enterprises reach their business objectives. Providers that have achieved Leader status in this quadrant come to market with outstanding solutions, demonstrated successes and a strong understanding of the current and future outlook for these technologies.

Of the 79 companies assessed for this study, 29 qualified for this quadrant. Eleven providers are Leaders and one is a Rising Star.

### [24]7.ai

AI is a core strength for **[24]7.ai**, which has once again garnered a leadership position in the CX services study. [24]7.ai offers sophisticated conversational AI solutions, a differentiator for the company.

### cognizant

With its large team of data, analytics and AI consultants, as well as its noteworthy Cognizant Neuro™ solution, **Cognizant** has earned a leadership position in the AI and analytics quadrant.

### Conduent

Meeting client demands for analytics services, offering innovative solutions and focusing on expanding existing partnerships helped **Conduent** gain a leadership position in this year's AI and analytics quadrant.

**Genpact** brings to market extensive analytics expertise and capabilities, its excellent Genpact Cora platform and performs experience-led transformations, along with augmented intelligence. These combine to make the company a Leader in this quadrant.

### hgs

**HGS** is a Leader in this quadrant, offering an array of differentiated analytics services including the introduction of HGS PULSE, a contact center analytics platform, and continued focus on innovating in the space of Alby enhancing the agent and customer experiences.

movate

**Movate** has emerged as a Leader for the third year in a row, with well-developed AI-powered offerings and analytics designed to help its customers glean real value from their data.

Sitel Group®

**Sitel Group®** has emerged as a top Leader in this quadrant for another consecutive year. The company offers extensive, sophisticated analytics and AI to clients and demonstrates customer successes through case studies.

SUTHERLAND

With consistent focus on developing and enhancing its AI and analytics capabilities, **Sutherland** is ranked as a Leader for this quadrant. Sutherland also focuses on strategic co-development partnerships to expand capabilities.

Teleperformance

A mature and prolific player in the CX arena, **Teleperformance** brings to market a wide variety of innovative and forward-thinking offerings. This strengthens the company's leadership position in this quadrant.

TTEC

With its comprehensive range of analytics solutions, sophisticated Humanify® Insights platform and a strong partner ecosystem, **TTEC** once again is a Leader in the AI and analytics quadrant.

WNS

With its robust CX practice, extensive array of partnerships in this space and newly launched data, analytics and AI practice, **WNS** has secured a leadership position in this year's AI and analytics quadrant.

Tech Mahindra

A Rising Star in the 2022 AI and analytics quadrant, **Tech Mahindra** has grown its CX practice substantially over the past two years and continues to make investments to boost its AI-based offerings.

Leader

"Movate is a disruptor in this space with its cutting-edge technology and innovation."

*Namratha Dharshan*

# Movate

## Overview

Movate (formerly known as CSS Corp) is headquartered in San Jose, California, and its key CX offerings are Movate OnDemand and Movate EDISON. It has a core CX workforce of more than 12,000 with a larger than 8,000-person gig CX workforce spread across more than 60 countries. It is a global CX and technology services provider, disrupting the industry with a unique combination of industry-leading proprietary solutions, resilient operations and innovative business engagement models.

## Strengths

**Movate Edison®:** An advanced AI-based solution, Movate Edison® now has eight CX patents ranging from predictive routing to automated AI-based and cluster-based customer service resolutions. The company also strengthens its CX AI and automation portfolio by partnering with Leaders such as Uniphore in the conversational automation space.

**Movate ValuePlus:** The Movate ValuePlus framework brings together the firm's three pillar solutions: Movate Edison®, Movate Contelli® and Active Insights. The framework aims to address the end-to-end CX value chain by collecting data from various sources and deriving insights at every stage to support business growth. These solutions join to provide journey mapping, which is highly essential to delivering the right value to clients.

**Intent analytics:** Movate delivers meaningful results with its patented intent analytics. The solutions can understand intents and subintents, then match and route them to enable empathetic conversations. Movate has demonstrated successful use cases of how it has helped enterprises transform and reap the benefits of analytics.

## Caution

Movate has introduced several proprietary solutions. The company must invest in growing its thought leadership and strengthen its solutions with industry vertical insights.

# Appendix

The ISG Provider Lens™ 2022 – Contact Center – Customer Experience Services research study analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 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 Contact Center – Customer Experience 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. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

*Author*

## Namratha Dharshan
**Director of Research and Principal Analyst**

Namratha Dharshan brings nearly 18 years of extensive research experience to lead the ISG Provider Lens™ BPO and Industry vertical program that includes more than 15 different reports and is designed to deliver research on service provider intelligence. As part of her role, she heads a team of analysts and is responsible for delivery of research reports for the Provider Lens™ program. Namratha is also a principal analyst and is responsible for authoring thought leadership papers and service provider intelligence reports in the areas of BPO, focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. Her research focuses specifically on the customer experience as it relates to digital transformation, omnichannel, analytics, AI and automation.

*Research Analyst*

## Sandya Kattimani
**Senior Research Analyst**

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, which includes market trends and insights.

*IPL Product Owner*

## Jan Erik Aase

**Partner and Global Head – ISG Provider Lens™**

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 partner 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.

## ISG Research™

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

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## ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 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 Provider Lens™

**OCTOBER 2022**

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