

# Future of Work - Services and Solutions

Managed Workplace Services - End user  
Technology Midmarket

A research report comparing provider  
strengths, challenges and competitive  
differentiators



Customized report courtesy of:



Executive Summary	03	Managed Workplace Services - End user	
Provider Positioning	07	Technology -	
Introduction		Midmarket	16 - 22
Definition	11	Who Should Read This	17
Scope of Report	14	Quadrant	18
Provider Classifications	14	Definition & Eligibility Criteria	19
		Observations	20
		Provider Profiles	22
Appendix			
Methodology & Team	24		
Author & Editor Biographies	25		
About Our Company & Research	27		

Report Author: *Mrinal Rai*

### **U.S. clients are reassessing their future of work strategies.**

After adapting to the changes brought upon by the pandemic in the last two years, enterprise clients in the U.S. are reassessing their strategies for transforming their workplaces. The Microsoft Future of Work study 2022 shows that many enterprises in the region are now embracing hybrid work models while maintaining the post-COVID norms.

Hybrid work model is now a reality; however, employees are witnessing both positive and negative effects of working away from their office premises. Although working from office can increase socializing and employee engagement, it has been observed through multiple

research studies that employees in the U.S., in general, prefer working from the location of their choice because it is more comfortable and increases self-productivity.

The preference to work from any location is also considered as one of the most important factors driving the “great resignation.” A large number of employees in the region have switched jobs starting in the middle of last year because they are seeking more flexibility and work-from-home options. In 2021, around 47 million employees in the U.S. resigned from their jobs. Some termed it as “great reshuffle.” The great resignation also resulted in massive skill shortage in the country. Hence, enterprises in the U.S. started offering flexible and collaborative working environments, along with a high focus on employee well-being, to attract and retain talent. These initiatives have led to flattening the unemployment and

# Out of the pandemic frypan, into the fire – the great resignation!



## Executive Summary

unfulfilled jobs curves, although they have still not reached their pre-June 2021 levels.

Apart from the above-mentioned factors, employees belonging to Gen Z (born in late '90s and early 2000s) are either about to enter or have already entered the workplace. There are more than 68 million Gen Zers in the U.S. This generation has grown to be tech savvy and has adapted to the virtual world and social media networking. Therefore, they did not face challenges in transitioning to a virtual and remote working model during the pandemic. They can effectively collaborate and connect with colleagues remotely because this was just like an extension to their existing social media life. However, they are striving to adjust to the restrictive nature of employment, particularly in the age of hybrid working. Also, they find it difficult to collaborate and work with employees belonging to the Gen X or Gen Y categories.

With entry of the Gen Z workforce, there is also an increasing focus on areas related to greater purpose of an organization or workplace other than making profits. This generation is quite expressive and sensitive to social issues and seeks employment in firms that provide equal representation and inclusivity. This generation is also seeking more purpose-driven, organization-wide initiatives such as sustainability, environmental, social, governance (ESG) initiatives and carbon footprint reduction. An organization exhibiting these characteristics can expect better employee retention compared to those that do not. Enterprises in the U.S. are also expected to focus more on sustainability and environmental concerns because of government initiatives such as the Paris agreement and the Biden administration's ambitious goal of carbon pollution-free power sector by 2035.

The increasing focus on employee retention, a tech-savvy workforce, sustainability, and remote and hybrid working has placed enterprise IT and workplace leaders at the center stage of transformation. Enterprise IT that was once only known for "resolving issues" is expected to play an important and key role in redefining the business and operating models of the U.S. enterprises as they tackle these challenges. Modern technologies have the potential to address many of the above-mentioned concerns, and enterprise IT and workplace leaders are exploring possibilities of leveraging them to achieve desired results.

ISG has observed decreasing demand for standalone, end-user computing or technology-only focused deals. Enterprises are increasingly including digital workplace initiatives within their overall business and digital transformation scopes. This has become

more apparent after the pandemic, as global organizations are reassessing and rethinking their business models. This does not indicate that traditional-technology-focused services are no longer pursued; . In fact, these services are now part of a broad transformation process with strong focus on employee experience and retention.

With the future of work initiatives in the U.S., we have observed the following trends:

- Enterprises are increasingly seeking assistance **in strategizing their workplace transformation plans.** Clients want to design the workplace technology experience that suites the changing employee or user persona, whether they work from office or from a remote location. In addition, clients want to design their strategy to enable and support the gig and contingent workforce.



## Executive Summary

- ISG has also observed a **re-focus on traditional-technology-focused managed services outsourcing** to enable a remote and hybrid workforce. As employees are working from locations of their choice, enterprise IT and workplace leaders are strategically investing in end-user technologies that include measuring experience with device and application performance along with adoption of automation-enabled service desk support function. Continuous monitoring and device application performance analytics can also help keep track of carbon footprint.
- The frontline workers working in essential services sector require digital enablement for productivity improvement. With great resignation and increased need to attract talent for these services, clients in the U.S. are considering technology solutions

to **enhance the experience for frontline workers** and create a sense of belonging among them.

- **Employee well-being and empathy** has been the major focus areas since the pandemic. Organizations giving importance to these aspects observe high employee retention rates. In the hybrid and remote working model, tackling issues such as digital burnouts and maintaining work-life balance have proved to be a key approach to support employee well-being and showing empathy.
- As many firms have already reopened their offices and are insisting employees to work from office for few days in a week, there is an increased need to improve the office working environment. To achieve this, companies need to invest in

technology-enabled, **smart physical workspaces that enhance employee experience.**

- With the advent of latest technologies such as the metaverse, clients are focusing on expanding and exploring on the use of technologies such as virtual realities (VR) for training programs and onboarding.

These trends have expanded the scope of traditional digital workplace technologies as they interact with diverse business functions to provide enhanced employee experience. This is explained in Figure-1 below.

Enterprises in the U.S. are focusing on multiple factors simultaneously, such as enabling hybrid work model, attracting and retaining talent by enhancing employee experience and achieving sustainability goals.

Enterprises in the U.S. are focusing on multiple factors simultaneously, such as enabling hybrid work model, attracting and retaining talent by enhancing employee experience and achieving sustainability goals.



**Figure 1: Expanding scope of digital workplace technologies and interaction with other business roles**



Source: ISG, 2022




## Provider Positioning

Page 1 of 4

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
Accenture	Leader	Product Challenger	Not In	Leader	Leader
Atos	Product Challenger	Product Challenger	Not In	Leader	Product Challenger
Bell Techlogix	Not In	Product Challenger	Product Challenger	Product Challenger	Not In
Birlasoft	Contender	Contender	Not In	Contender	Contender
Capgemini	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Coforge	Contender	Contender	Product Challenger	Contender	Not In
Cognizant	Market Challenger	Market Challenger	Not In	Market Challenger	Not In
Compucom	Contender	Leader	Leader	Product Challenger	Product Challenger
Computacenter	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Digital Workplace Group	Product Challenger	Not In	Not In	Not In	Not In



 Provider Positioning

Page 2 of 4

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
DXC Technology	Leader	Leader	Not In	Leader	Rising Star ★
GAVS	Not In	Product Challenger	Market Challenger	Market Challenger	Not In
HCL	Leader	Leader	Not In	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Leader	Not In	Leader
HPE	Product Challenger	Contender	Not In	Not In	Not In
Infosys	Leader	Leader	Product Challenger	Leader	Leader
ITC Infotech	Contender	Contender	Market Challenger	Contender	Not In
Kyndryl	Leader	Leader	Not In	Leader	Market Challenger
LTI	Product Challenger	Product Challenger	Leader	Product Challenger	Leader





## Provider Positioning

Page 3 of 4

	<b>Workplace Strategy Transformation Services</b>	<b>Managed Workplace Services - End User Technology - Large Accounts</b>	<b>Managed Workplace Services - End User Technology - Midmarket</b>	<b>Digital Service Desk and Workplace Support Services</b>	<b>Managed Employee Experience Services</b>
Microland	Contender	Contender	Contender	Contender	Product Challenger
Mindtree	Contender	Product Challenger	Not In	Product Challenger	Contender
Movate	Contender	Contender	Leader	Product Challenger	Contender
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
NTT DATA	Market Challenger	Leader	Not In	Market Challenger	Not In
Pomeroy	Not In	Market Challenger	Market Challenger	Not In	Not In
Ricoh	Not In	Not In	Product Challenger	Not In	Not In
Softtek	Not In	Contender	Not In	Not In	Not In
Stefanini	Market Challenger	Market Challenger	Not In	Market Challenger	Product Challenger



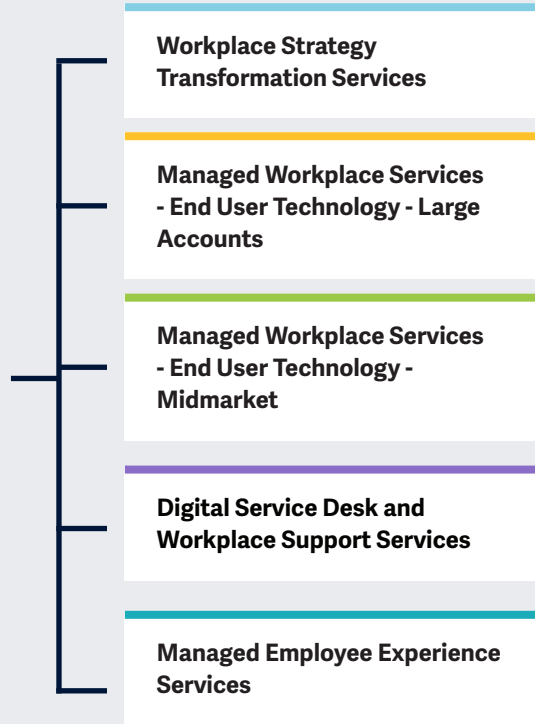
## Provider Positioning

Page 4 of 4

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
TCS	Leader	Leader	Not In	Leader	Leader
Tech Mahindra	Product Challenger	Rising Star ★	Leader	Leader	Product Challenger
TEKSystems	Not In	Not In	Contender	Not In	Not In
Unisys	Leader	Leader	Product Challenger	Leader	Leader
UST	Contender	Product Challenger	Product Challenger	Contender	Contender
Wipro	Leader	Leader	Not In	Leader	Leader
YASH Technologies	Not In	Not In	Contender	Not In	Not In
Zensar	Product Challenger	Product Challenger	Leader	Leader	Product Challenger
Zones	Contender	Not In	Not In	Market Challenger	Not In



This study focuses on what ISG perceives as the most critical issues in the U.S. in 2022 for the **Future of Work.**



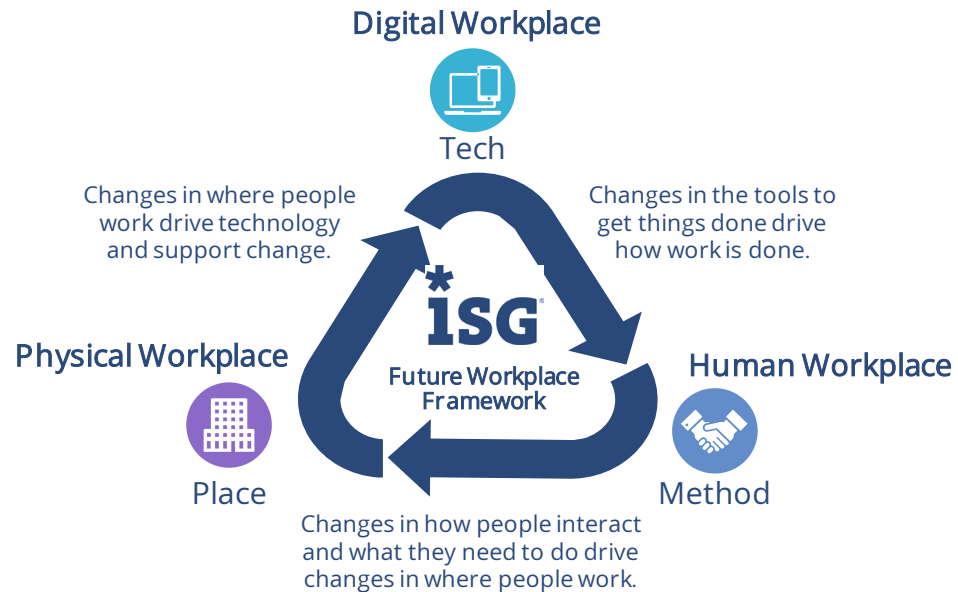
Simplified Illustration Source: ISG 2022

### Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and future of work is hybrid. The hybrid future of work, as defined by ISG, is characterized by three kinds of workplaces (Figure 2): the digital workplace, which includes the underlying technology; the physical workplace, which defines the location or place of work and could be both in-office premises and remote; and the human workplace, which describes the methods, processes and cultural aspects.



**Figure 1: ISG Future Workplace Framework**



Source: ISG, 2022



This future of work will not consider technology in silos. As workplace technologies increasingly permeate the lines of business, clients are noting the correlation between customer experience (CX) and quantified employee experience (EX).

The ongoing talent crunch and the “great resignation,” as the wave of people leaving the workforce is being called, are compelling enterprises to provide empowering, engaging, and most importantly, empathic workplace environments to retain employees. At the same time, a work environment that is engaging, technologically advanced and tightly integrated with business requirements will help attract fresh talent. A modern work environment is now neither associated with a physical location (workplace), nor with a single digital entity (workspace); it is now omnipresent, integrated and connected with multiple

“spaces” that can be accessed from any location, anytime and over any network. Upcoming and latest technology developments such as the metaverse are influencing this trend in their own ways.

The modern outlook toward work and workplace will also drive and change enterprise expectations from service providers and software solution vendors. Starting at consulting, enterprises will need expert help in defining and strategizing their workplace transformation initiatives that relate to their EX initiatives with CX goals. A combination of remote and in-office workers can enhance the robust and uninterrupted use of technologies to ensure a seamless experience for end users, while ensuring high security. Clients will also be expecting more from their service desk and workplace support service providers including a high level of automation and analytics to ensure

employee satisfaction. Enterprises have now increasingly started to consider enhanced employee experience as a prime objective and an expectation from managed service providers and are including requirements for it in the form of measurable experience level agreements (XLAs).

From the software solution vendors’ perspective, there will be increasing focus on enabling an all-encompassing unified communication collaboration setup with special focus on employee engagement and productivity. Because devices still form the first entry point and core of employee workplace technology experience, software solutions that can manage a variety of devices uniformly and with the desired security level will also be on enterprises’ radars.

The 2022 ISG Provider Lens™ Future of Work study attempts to evaluate managed service providers and vendors that cover the above-mentioned areas of services and solutions.

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

- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Focus on different markets, including global, U.S., U.K., Nordics, Germany, Switzerland, Australia, Singapore and Malaysia, Brazil and U.S. Public sector.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information



from these reports to evaluate their current vendor relationships and potential engagements.

### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants on Workplace Strategy Transformation Services, Managed Workplace Services – End User Technology, Digital Service Desk and Workplace Support Services, Managed Employee Experience Services.

### Provider Classifications

The provider position reflects the suitability of IT 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 Challenge, 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).

*(Continues on next page)*





### 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.

**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.

**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.

**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.





# Managed Workplace Services - End User Technology - Midmarket



### Who Should Read This

This report is relevant to midmarket enterprise clients across industries in the U.S. for evaluating the providers of managed workplace services – end user technology.

In this quadrant, ISG highlights the current market positioning of providers that offer managed workplace services to midmarket enterprises in the U.S. and how each provider addresses the key challenges faced in the region.

Midmarket enterprises in the U.S. continue to face challenges in terms of declining revenues, enhancing workplace productivity, reducing IT and operational costs, and scalability. These midmarket enterprises are, hence, focusing on managed service providers that can help them in addressing remote-work-related challenges and can equip them

with the right technology and processes at affordable prices to meet the current dynamic demands of their workforce.

To stay ahead in this competitive market and keep up with market transformation, midmarket enterprises in the U.S. are looking for providers that can help them in defining effective workplace strategies and managing their hybrid and remote workforces. Virtual desktop infrastructure (VDI), virtualization, device as a service (DaaS), analytics and collaboration are a few of the top priorities for midmarket enterprises in this region.



**Technology professionals**, including Infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and select managed digital workplace services.

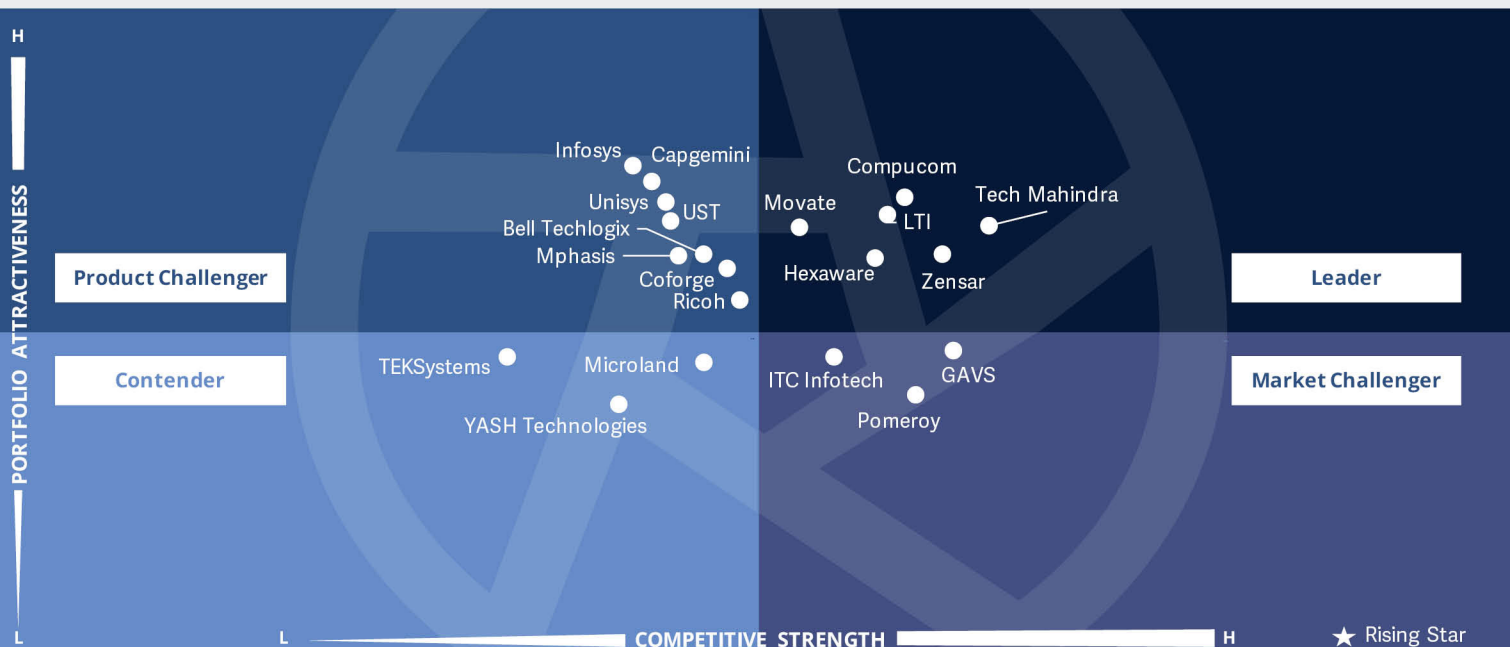


**Procurement professionals**, including sourcing, procurement and vendor management professionals, should read this report to develop a better understanding of the current landscape of managed workplace service providers in the U.S.



**Cybersecurity professionals** should read this report to see how service providers address the significant challenges of compliance and security, while keeping the employee experience seamless for remote workforces.





This quadrant assesses service providers that are well positioned to serve the **U.S. midmarket** with their **end-user technology management** services and device management services. A Leader in large accounts for these services need not be the same in this market as well.

*Mrinal Rai*



### Definition

This quadrant assesses service providers that offer managed services associated with end-user technologies that are deployed, provisioned and secured typically by enterprise IT department for end users and employees.

These services include end user enablement through services related to devices, applications, cloud workspaces and workplace security. Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

### Eligibility Criteria

1. Provide **endpoint management and security services** supporting a wide variety of solutions to assist clients with device policies related to bring-your-own-device (BYOD), mobility and expense management
2. Provide **complete device lifecycle management services**, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service for device security, plus support for unified endpoint management (UEM) and mobility program management
3. Demonstrate experience in providing **remote virtual desktop services**, both on-premises and in the cloud
4. **Manage devices in the respective** countries in the study, with at least 25 percent of the devices managed outside the provider's home region
5. Support **endpoint security services** by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero-trust approach
6. Offer services to support **modern network and unified communication** as a foundation for a digital workplace

For the midmarket and small and midsize business (SMB) quadrant in this space, providers should offer all of the above for the said market with at least 50 percent of clients from the midmarket/SMB segment. The value of the midmarket/SMB business and associated workplace services contracts deals can be different across regions and will be explicitly mentioned in the questionnaire.



## Managed Workplace Services - End User Technology - Midmarket

### Observations

The key criteria for inclusion in this quadrant was that at least 30 percent of end-user technology clients should be from the midmarket segment (5,000 or fewer end users in the U.S.)

The Contenders in this quadrant have presence in the midmarket with at least 30 percent clients for end-user technology from the category. However, their services are not mature enough for a miniaturized offering for midmarket. The Product Challengers in this quadrant have a wide service portfolio suitable for midmarket client requirements, which include predictable pricing, VDI-focused solutions, mobility management and more self-help automation. The Market Challengers in this quadrant have strong local presence and high number of clients from the midmarket segment. However, ISG did not find them a good fit for midmarket transformative requirements.

These providers must further develop their service portfolios with required capabilities to support the midmarket clients.

The Leaders in this quadrant provide highly customized and, in some cases, dedicated offering for midmarket clients, including virtual desktop or flexible pricing. The providers with required experience and transformation-focused service output in the midmarket segment are identified as Leaders.

Of more than 100 providers assessed for this study, 20 have qualified for this quadrant with six being identified as Leaders.



**Compucom** retains its leadership position in this quadrant. Its recent separation from Office Depot has provided the company significant flexibility to innovate and grow. It offers device-centric, flexible offerings that are useful for midmarket client segment.



**Movate** provides unified device management services and support for device procurement and proactive management by leveraging partnerships and automation. It has moved from the Product Challenger position last year to a Leader because of continued focus on increasing client base in the midmarket segment.

### Hexaware

**Hexaware** provides dedicated offerings for midmarket clients, including flexible pricing and modularized solutions. It registered an 18 percent increase in terms of number of midmarket clients in the U.S. and 31 percent increase in scale of operations in terms of devices and users managed.



**LTI** retains its leadership position in this quadrant with a high percentage of clients from this segment. LTI's Canvas, Follow-me-IT and end-user-experience-focused ubiquitous accessible workplace services are well suited to midmarket clients in the U.S.



## Managed Workplace Services - End User Technology - Midmarket

### Tech Mahindra

**Tech Mahindra** offers a dedicated consumption-based service offering for devices and desktops as a service that provides a predictive costing for midmarket clients. It also registered decent growth in terms of percentage of midmarket clients for its workplace services.

### Zensar

**Zensar** retains its leadership position in the midmarket segment with its device management and partnership-led services. It leverages its SaaS-based frameworks and accelerators to serve midmarket clients.





“Movate stands out with its catalog-based device provisioning and automated-led device fixes.”

*Mrinal Rai*

# Movate

## Overview

Headquartered in California, Movate (formerly known as CSS Corp) provides managed end-user technology services to clients of all sizes in the U.S. About 70 percent of its clients and 85 percent of devices it manages in this space are from the midmarket category.

## Strengths

### Unified device management:

A secured device ecosystem is Movate’s key service component in the experience-centric workplace service offering. It offers unified device management, UEM, software management, asset management, device lifecycle management and security services.

**Device provisioning:** Movate provides personal, commerce-based device provisioning, in which a user interacts with service catalog portal with backend ITSM integration. The request for new devices or peripherals is triggered to Movate’s OEM partners

via workflow automation. With its partnerships, it readies the devices for users so that they can collect them from a walk-in studio or from digilockers.

### Device experience with automation:

Movate offers automation-based device management. It leverages predictive analytics to detect real-time device fixes and solves problems either through one-click automation self-help or through logging incidences in a digital command center, where data scientists, architects and automation experts provide the fix by adding the case into automated resolution repository.

## Caution

Movate could further enhance its offering by developing plug-and-play, industry-ready vertical solutions associated with industry persona and specialized devices management. It could also add persona-specific device suggestion capabilities in its assessment and advisory services for end-user technology.





# Appendix

The ISG Provider Lens™ 2022 – Future of Work - Services and Solutions 2022 analyzes the relevant service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology

**Lead Author:**

Mrinal Rai

**Editors:**

Sajina B. and Grant Gross

**Research Analyst:**

Sonam Chawla

**Data Analyst:**

Anirban Chaudhary

**Consultant Advisor:**

Jim Kane

**Project Manager:**

Ridam Bhattacharjee

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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 Future of Work - Services and Solutions 2022 market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers and vendors on capabilities and use cases
4. Leverage ISG's internal databases, advisor knowledge and experience
5. Use of Star of Excellence CX-Data
6. Detailed analysis, evaluation of services and service documentation based on the facts and figures received from providers and other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy and 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

Author



**Mrinal Rai**  
**Principal Analyst and Senior Manager**

Mrinal Rai is the principal analyst and senior research manager at ISG and responsible for creating research reports for digital workplace, enterprise collaboration, M&A impacts and other emerging technologies initiatives. He is also the official ISG spokesperson for media relations in India. He also leads ISG's voice of customer study program, Star of Excellence. His areas of expertise is digital workplace services, modern unified communication and collaboration, both from a technology and business point of view. He is the U.S. lead quadrant and global

archetype analyst for digital workplace and social collaboration in the ISG Provider Lens™ (IPL) program. He covers key areas around the workplace and end-user computing domain such as modernizing workplace, enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture, enterprise social software, content collaboration and team collaboration. He has been with ISG for last 10 years and has more than 15 years of industry experience.

Research Analyst



**Sonam Chawla**  
**Senior Research Analyst**

Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions and Cybersecurity Solutions and Services. Sonam comes with five years of experience in the market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI.

She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights. In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting on research projects.





*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.

For more information about ISG Research subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

### \*ISG

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





**OCTOBER 2022**

---

**REPORT: FUTURE OF WORK - SERVICES AND SOLUTIONS**