Digital Workplace Services
Archetype Report

A research report aligning enterprise requirements and provider capabilities

August 2017

Customized report courtesy of:
Cognizant
About this Report

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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 was current as of May 31, 2017. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

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<table>
<thead>
<tr>
<th></th>
<th>Section Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Executive Summary</td>
</tr>
<tr>
<td>3</td>
<td>Introduction</td>
</tr>
<tr>
<td>5</td>
<td>Client Archetype Descriptions</td>
</tr>
<tr>
<td>8</td>
<td>Workplace Services Archetypes</td>
</tr>
<tr>
<td>9</td>
<td>Ad-hoc</td>
</tr>
<tr>
<td>14</td>
<td>Transformation-oriented</td>
</tr>
<tr>
<td>20</td>
<td>Cloud-enabled</td>
</tr>
<tr>
<td>26</td>
<td>Digital</td>
</tr>
<tr>
<td>32</td>
<td>Next-gen Sourcing</td>
</tr>
<tr>
<td>38</td>
<td>Service Providers Across Archetypes</td>
</tr>
<tr>
<td>40</td>
<td>Guidance</td>
</tr>
<tr>
<td>45</td>
<td>Appendix</td>
</tr>
<tr>
<td>44</td>
<td>Methodology</td>
</tr>
<tr>
<td>47</td>
<td>Additional Relevant Workplace Services Providers</td>
</tr>
</tbody>
</table>
The growth in handheld and other mobile devices and cloud computing has accelerated workplace transformation. Enterprise workforces are now mostly comprised of the millennial generation (Gen Y and Gen Z), which is self-empowered, especially when it comes to technology. A millennial user is not expected to call the IT support desk anytime he or she encounters a problem with a device or application. These end users usually like to solve problems themselves. The growing numbers of self-empowered millennial employees and end devices have led enterprises to look at options like allowing employees to bring their own devices (BYOD) to work, or allowing them to choose from an approved set of corporate devices (known as choose your own device, or CYOD). ISG has observed growing trends in mobility and BYOD adoption among many enterprises.

End-user computing (EUC) traditionally has been considered a siloed, disjointed IT function. However, with increased support for BYOD and increased focus on improving the user experience, enterprises are re-examining how they can empower employees to increase productivity via technology. Many organizations believe they can achieve positive ROI from such enablement. As a result, we see business offices other than the CIO getting involved in projects related to workplace transformation. For example, the HR department may help develop policies to enhance the user experience, which has benefits for morale and for employee on-boarding and off-boarding. Marketing, sales and other customer-facing departments may get involved to help enable field workers to connect to the workplace irrespective of device and location.
ISG has observed increased involvement of non-IT departments in transformation initiatives. Some organizations may call it workplace transformation, others call it digital strategy.

End-user workplace enablement has opened the door for more transformation initiatives. The enterprise IT support function, which until now was limited to the thankless job of taking calls from frustrated end users, also is transforming. Digital technologies have enabled the use of data, analytics, automation and cognitive computing to enhance IT support systems. Enterprises are looking for ways to eliminate the need to call the service desk for the most common issues. Some of the ways enterprises are transforming their support systems include providing self-help systems, creating a multi-channel approach for accessing the help desk, automating the most common support tasks and applying predictive analytics to prevent incidents from happening.

The increasing use of collaboration techniques is an important component of today’s workplace. Enterprise social collaboration, which until quite recently was limited to the corporate intranet, is now being relied on to support business transformation. The popularity and success of trends like DevOps and agile application development have accentuated the importance of collaborative engagement. An important step in transforming the workplace is to make sure strong collaboration capabilities are in place. Beyond having proper file sharing and sync features, a collaborative workplace also should support team collaboration, microblogging, knowledge-sharing and integration with business processes. ISG has observed a growing trend in which social collaboration elements are being included in workplace transformation initiatives.

In sync with the aforementioned trends, the current workplace often is called a “digital workplace” because it leverages digital technologies to enhance the end-user experience, which in turn is tied to productivity enhancement and business goals. The digital workplace is well connected, device- and location-agnostic, automation- and analytics-focused and aimed at enhancing the end-user experience.

There is no standard definition of digital workplace. However, it is always closely associated with the end-user experience and end-user behavior not only in the workplace, but also on the periphery. Different organizations have different meanings of the digital workplace as part of their digital transformation journeys. In this report, we identify five such client archetypes, all of which want to transform their workplace but to achieve different objectives.
This ISG Provider Lens™ report summarizes the relative capabilities of 25 workplace services providers and their abilities to address the requirements of five typical, frequently encountered categories of enterprise buyers (“archetypes”). Each archetype represents a unique set of business and technological needs and challenges.

Our research found no shortage of providers with capabilities adequate to satisfy the workplace transformation requirements of most user enterprises. However, it is rare to find one workplace services provider than can address all workplace transformation needs across a majority of user archetypes. This is due in large part to two core realities regarding the archetypes:

1. The characteristics of each archetype are moving targets because, while the core requirements rarely change, the relative importance of different requirements can vary based on business and/or technological environment changes.
2. Most enterprises, especially larger firms, tend to include multiple archetypes. As each archetype’s requirements evolve and adapt based on business and technological changes, so too does the presence and value of each archetype within the enterprise.

Therefore, enterprise IT leaders, service owners, procurement managers and others involved in a workplace transformation initiative have an ongoing series of choices when it comes to workplace services provider selection. They will need to strike a balance between optimal business value and relative cost of the provider engagement, integration and management. Market changes, new business models, fluctuating economic factors and other variables will continually add to and subtract from user needs.

The assumption that an organization fits solely within a single archetype will limit the value received over time from workplace transformation services. For providers, slotting customers into a single archetype and failing to anticipate that their needs will change can prevent effective value from being delivered, leading to customer frustration and dissatisfaction.

About the Report
This report uses research and analysis from ISG’s long-running work with enterprise user clients and IT services providers to identify and examine key changes in, approaches for and buyers of workplace services. We map the user-side requirements to provider-side offerings and capabilities.
Not every user enterprise has the same requirements for workplace transformation. In this report, we use five “buyer archetypes” – detailed in the following sections – to identify and assess buy-side requirements for business value relative to provider-side offerings and capabilities. The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their services requirements, and from working with providers to understand how those buyer requirements influence the development of suitable solutions and go-to-market strategies.

This report assesses the capabilities of 25 providers. Some services providers that are typically included in our work are not included in this report because they were unable to or declined to participate. They may be included in future versions of this report, based on merit and on the services providers’ willingness to provide current and relevant materials. Readers should not make any inferences based on a services provider’s absence from this report.

How to Use This Report

The intent of this report is to provide advice founded on ISG’s experienced-based, proprietary assessment of services providers’ relative suitability to the needs of the typical workplace services customer. This advice is then applied across each of the five archetypes as profiled. No recommendation or endorsement is indicated, suggested or implied. Clients must make the decision to engage with any provider based not only on their specific, current workplace needs, but also other factors such as cost, culture and timing.

This report is organized as follows:

- **Client Archetype Descriptions.** This section identifies and describes each of the five most common user-side archetypes that we have identified in our ongoing research and analysis.
- **Assessments by Archetype.** These sections first detail each of the five client archetypes, along with the types of service offerings that each typically requires to realize the most business value. Each archetype section includes our assessment of the relevant capabilities and positioning of the services providers surveyed and interviewed. It covers the relative suitability of the providers for each archetype based on the information they have provided us. These assessments are developed using the data, analysis and comparative methodology described in the methodology section.
- **Methodology.** In this section, we outline and explain how we developed and applied the data, analysis and insights provided in this report.

**Please note:** This report presents services providers’ known capabilities in the context of user enterprises’ typical project needs (which are categorized as specific archetypes). This report is not meant to rank providers or to assert that there is one top provider with capabilities that can meet the requirements of all clients that identify themselves as a particular archetype.
CLIENT ARCHETYPE DESCRIPTIONS

The client archetypes used in this report (and in our ongoing advisory and consulting engagements) represent the various types of clients ISG has observed as we classify them according to their relative outsourcing maturity and objectives. Each client archetype encapsulates the typical characteristics of a specific type of buyer that is considering outsourcing one or more processes or functions. Using archetypes enables us to develop sets of characteristics and needs that can be applied uniformly and repeatedly across multiple environments, industries, provider types and elements within one service line.

The archetypes are not meant to be comprehensive examinations of all potential or likely client situations and requirements. They are meant to provide a simple, relevant and repeatable set of user-side requirements against which we can assess a similarly simple, relevant set of provider capabilities.

The archetypes included in our report are based on the most current marketplace knowledge regarding prevalent buy-side goals, resources, initiatives and requirements. Archetype characteristics are also developed (and refined over time) based on our advisory and consulting work with enterprise clients and IT service providers and on our global business IT market research and advisory programs.

THE AD-HOC ARCHETYPE
These clients usually have a legacy-heavy enterprise IT function that has multiple silos and is disjointed from the business. For these organizations, enterprise IT is usually a cost center, not a value generator. These clients undertake the journey of workplace transformation because of an ad-hoc requirement, such as an acquisition, merger, divesture or an initiative to enter a new geography or adopt a completely new technology. A digital workplace would represent a great new resource for such organizations, but these organizations often are not well prepared to leverage digital workplace technology. Therefore, these clients need proper advisory and consulting services for workplace transformation.

THE TRANSFORMATION-ORIENTED ARCHETYPE
These clients adopt digital workplace initiatives to improve their service delivery and operational efficiency. Their IT organizations may have a silo structure and be disjointed. For these clients, automation-focused IT service delivery is of paramount importance.
THE CLOUD EMBRACER CLIENT

These clients want to adopt cloud based technologies for workplace delivery on any device anytime. For delivery of legacy applications on modern devices, these clients would look for VDI on cloud solutions. Cloud based workplace, unified communication and workplace productivity tools will be key for these clients.

THE NEXT GEN SOURCING CLIENT

These clients have deep experience in sourcing their workplace services. These clients will not have IT as a disjointed function but rather a function which enables the business differentiation. These clients will take best of the above four archetypes and will look for a digital workplace solution which would aim at business enablement and achieving business objectives.

THE CLOUD-ENABLED ARCHETYPE

These clients want to adopt cloud-based technologies for workplace delivery on any device anytime. To deliver legacy applications on modern devices, these clients look for virtual desktop infrastructure (VDI) on cloud solutions. Tools that enable cloud-based work, unified communication and workplace productivity will be key for these clients.

THE DIGITAL ARCHETYPE

These clients look beyond BYOD and anytime, anywhere access. They require help for their field workers to use digital technologies, which are usually deployed for customer-facing functions. Key requirements and competencies for these clients include the use of advanced analytics, automation and business process mobilization and an enterprise mobility practice.

THE NEXT-GEN SOURCING ARCHETYPE

These clients have deep experience in sourcing their workplace services. They do not have a disjointed IT operation but rather one that enables business differentiation. These clients will look for a digital workplace solution that is oriented to achieving business objectives and enabling business growth.
Archetype 1: Ad-hoc
- Legacy
- High Complexity of Environment
- High IT Integration With Business
- IT function as a true business differentiator tied with ROI
- Siloed, disjointed IT function. Largely seen at a cost center

Archetype 2: Transformation-Oriented
- Workplace Trend
- High Complexity of Environment
- Low IT Integration With Business
- High IT Integration With Business
- IT function as a true business differentiator tied with ROI
- Siloed, disjointed IT function. Largely seen at a cost center

Archetype 3: Cloud-Enabled
- Low Complexity of Environment
- High IT Integration With Business
- IT function as a true business differentiator tied with ROI
- Cloud and mobile-based workplace with more focus on apps and data (tied with RoI) than on end users or devices/platforms

Archetype 4: Digital
- Low Complexity of Environment
- High IT Integration With Business
- IT function as a true business differentiator tied with ROI
- Cloud and mobile-based workplace with more focus on apps and data (tied with RoI) than on end users or devices/platforms

Archetype 5: Next-Gen Sourcing
- High Complexity of Environment
- Low IT Integration With Business
- Low IT Integration With Business
- IT function as a true business differentiator tied with ROI
- Cloud and mobile-based workplace with more focus on apps and data (tied with RoI) than on end users or devices/platforms

**Workplace Archetypes in Context**

Archetype 1
- Legacy
- High Complexity of Environment
- High IT Integration With Business
- IT function as a true business differentiator tied with ROI
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Archetype 2
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Archetype 4
- Digital
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- High IT Integration With Business
- IT function as a true business differentiator tied with ROI
- Cloud and mobile-based workplace with more focus on apps and data (tied with RoI) than on end users or devices/platforms

Archetype 5
- Next-Gen Sourcing
- High Complexity of Environment
- Low IT Integration With Business
- Low IT Integration With Business
- IT function as a true business differentiator tied with ROI
- Cloud and mobile-based workplace with more focus on apps and data (tied with RoI) than on end users or devices/platforms

**Client Archetype Descriptions**

A1 Y/Y growth in handheld devices sold, 4.9 billion* unique mobile users globally. Millennial generation forms the majority of workforce, 34-40%* in U.S. alone

A2 Traditional end-user computing contracts decreasing every year, only 8-10%* of the total ITO deals; analytics-based automation provides productivity and cost-saving gains in workplace services as high as 70%**

A3 Cloud-based Workplace initiatives part of larger digital strategy engagement, related to cloud and mobility with non-CIO/IT function participating in around 61%* of these contracts. VDI is a key component in 62%* of workplace transformation contracts and Desktop-as-a-Service forms 25%* of VDI contracts

A4 Social Collaboration is area of focus for around 20%* of workplace transformation contracts

A5 Contracts with aim to achieve digital workplace increasing every year*

Source: *ISG Research **ISG Automation Index 2017
Ad-hoc Archetype clients are those that undertake workplace transformation initiatives because of a specific development. Examples of Ad-hoc Archetype requirements that may trigger workplace transformation initiatives include the obsolescence of legacy systems, a foray into a new geography and acquisitions or divestures that spur large-scale IT consolidation. A deep urge or directive from the CXO level to go digital without realizing the true potential, effort and need is also categorized as an ad-hoc requirement. Ad-hoc clients may be in industries that are very sensitive to compliance and regulatory issues or have heavy dependency on legacy systems.

The most common trait of an Ad-hoc Archetype client is IT systems that are disjointed silos and an IT organization that is seen as a support function and cost center. These clients often tend to source workplace transformation services without realizing the full potential that could extend beyond the boundaries of traditional IT support.
Other typical characteristics of the Ad-hoc Archetype client include:

- The need to consolidate and manage their enterprise IT and workplace environment, often on an urgent basis following an activity.
- The view of IT as a cost center and the need for ways to reduce cost per ticket or to contain device costs through a consumption/usage model.
- IT support that is metrics-oriented and operational tasks that are driven by traditional KPIs.
- A service desk that may be inefficient because of failed integration among heterogeneous suppliers.
- A lack of proactiveness and a hesitation to adopt mobile technology and BYOD. Mobility support is often provided only for VIPs.
- End users may be allowed to use their own devices. If any mobile management support is provided, it will likely be focused on controlling rights and enabling remote wipe.

Ad-hoc Archetype clients look for the following services and capabilities when it comes to workplace transformation:

- Migration to the transformed workplace without disrupting the legacy environment.
- Services providers with deep experience and understanding in the client's industry.
- Essential and traditional EUC services for managing the growing number of devices.
- Tighter security control, governance and compliance.

Workplace transformation for an Ad-hoc Archetype client will require a services provider to offer at least the following:

- Vision, focus and experience in helping clients with either a large legacy setup or clients that are in initial stages of a workplace transformation journey.
- Excellent metric-based workplace support services that can be determined by peer comparison on standard service desk parameters (KPIs), with strong focus on the most common ones.
- Sufficient operational scale, which can be determined by peer comparison on the number of devices managed, full-time equivalents (FTEs) for workplace services or EUC services, languages supported and geographic coverage.
- Basic mobility management, including basic mobile device management (MDM), VIP support and install, move, add and change (IMAC) services.
- Ability to support multiple providers of service, compliance, governance and security solutions or services.
Ad-hoc Archetype Client Imperatives

- Manage increasing number of end-user devices
- High performance and low cost for IT support and service desk services
- Workplace transformation initiatives for ad-hoc requirements
- IT consolidation after M&A activity
- Compliance to industry-specific regulations and security requirements
- Enable mobility for VIP support only

Ad-hoc Archetype

Provider Capabilities Importance

Fig 1

Increasing Future Importance

Decreasing Future Importance

Experience and vision for Ad-hoc archetype
Scale of devices and users managed
Basic mobile device management
Compliance and governance
High traditional KPIs for service desk

Size based on relative current importance in the archetype profile
Of the 25 providers included in our research, we found six that stand out above the others for serving the Ad-hoc Archetype client based on our assessment of their capabilities as described in the Methodology section in the Appendix. The six, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 2, and the providers are profiled on the next pages.

*Note: The service providers listed are arranged in alphabetical order. No ranking is implied.*

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<tr>
<th>Provider</th>
<th>Focus on Ad-hoc Archetype Clients</th>
<th>Metric-based Workplace Services</th>
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OTHER NOTEWORTHY PLAYERS — AD-HOC ARCHETYPE

Some other providers scored high in one or more areas that are important for an Ad-hoc Archetype client. However, they were not categorized as leaders for this archetype because they did not rate highly in enough categories.

Noteworthy providers (services providers with a high score in one or more parameters) for Ad-Hoc Archetype clients are:

- Focus on Ad-hoc Archetype Clients:
  - Cognizant
  - Zensar Technologies

- Metric-based Workplace Services:
  - Dimension Data
  - IBM
  - Mphasis
  - TCS
  - Wipro

- Scale of Operations:
  - Cognizant
  - CompuCom
  - Genpact
  - IBM
  - NTT DATA
  - Stefanini
  - TCS
  - Wipro

- Mobility Management:
  - Capgemini
  - IBM
  - KPI
  - TCS
  - Tech Mahindra

- Compliance, Governance, Security and SIAM:
  - Capgemini
  - Cognizant
  - IBM
  - KPI
  - NTT DATA
  - Tech Mahindra
  - Wipro
The Transformation-oriented Archetype client is focused on improving its workplace with the double aim of saving costs and improving efficiency. In most cases, though a Transformation-oriented Archetype treats enterprise IT as a siloed and disjointed function, it has a desire and readiness to transform and embrace digital and cloud disruption, often with a clear roadmap.

With growing adoption of automation and analytics in IT service delivery, IT organizations in a Transformation-oriented Archetype would like to transform the way end users are serviced. Increased use of automation and analytics will help achieve two objectives any transforming IT organization would have: reducing cost and raising user satisfaction. Automation and analytics can help reduce the cost of service provision because most low-level support tickets (Level 1 tasks) could be handled by an automated system, reducing the need for humans. The second benefit is increased end-user satisfaction. Analytics-driven support can help achieve a much better satisfaction rating than a traditional one. When it comes to mobility, a Transformation-oriented Archetype client would like to apply policy setting and compliance to mobile device management (MDM), including the abilities to push app updates and remotely wipe devices.

The definition of digital workplace for a Transformation-oriented Archetype is to have an efficient, automated IT function that gives end users options in an omnichannel model to reach out for support, and an automated system that can help solve problems and enhance the end users’ experience. A Transformation-oriented Archetype client will look at many ways to achieve the desired results. The solution may require moving from on-site support to an offshore model, assessing the current IT scenario, reducing the number of tickets and implementing self-help and automation-based workplace support services. These clients would want to adopt a “shift left” strategy to reduce the instances of Level 1 tickets and eliminate Level 0 tickets through self-help and predictive analytics.
The key characteristics that identify the Transformation-oriented Archetype are:

- Desire for operational excellence through standardization
- Lack of automation and self-help in IT support services
- High incidents of ticket volume and associated cost
- Dissatisfaction at the end-user level
- Disjointed IT function; IT mostly seen as a cost center

The main characteristics of a workplace transformation for Transformation-oriented Archetype clients are:

- Automation-based workplace support services to provide intelligent pre-informed end-user support
- High end-user satisfaction for service desk and IT support
- Support for basic mobility services like MDM, push services and remote wipe
- Vision to adopt digital workplace

To achieve their vision of an efficient and future-ready workplace, a Transformation-oriented Archetype would expect a services provider to have:

- Capabilities to assess the existing IT environment along with the consulting and expert advice around improvement of provision with a focus on understanding transformation phase requirements, such as change management, security and support services
- A vision and high priority for clients who are mid-way in the digital transformation journey and experience in helping clients achieve the vision of an efficient service desk and IT support service
- EUC capabilities with a sharp focus on improving related KPIs and on-premises desktop virtualization to support legacy applications on multiple devices and scale operations
- Automation and analytics in workplace support services, which include self-service, automation analytics in ITSM and service desk
- Mobility management services, including integration of back-end legacy applications, mobile management for Apple, Android and other mobile devices with existing enterprise capabilities
- A commitment to the workplace of the future, which includes a vision for the digital workplace, a dedicated practice for transformation services, legacy application deployment via VDI and services related to social collaboration, such as file sharing, groupware, social community and others.
Transformation-oriented Archetype Client Imperatives

- Assessment of the current environment and identify areas of improvement
- Security and change management
- High performance and quality with reduced cost in workplace management
- Decrease in number of tickets and improved end-user satisfaction
- Increasing number of end-user devices
- Integration of mobility with legacy applications
- Transition and migration to new and improved workplace environment
Of the 25 providers included in our research, we found twelve that stand out above the others for serving the Transformation-oriented Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The twelve, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 4, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.
Cognizant gives very high priority to clients that are in the process of transformation and are modernizing workplace applications and systems. The company is providing automation and AI-based services to help enhance support service productivity and simplicity. Cognizant has experience in transforming the workplace support services for clients with inefficient support functions and non-automated systems. Cognizant has partnerships with RPA, password management and AI providers. Cognizant’s Symphony Works platform has self-service features including an endpoint-alert agent, knowledge management via bot support, knowledge search, RPA/scripts, a self-help kiosk and peer-to-peer support.
OTHER NOTEWORTHY PLAYERS — TRANSFORMATION-ORIENTED ARCHETYPE

Some other providers scored high in parameters related to one or more aspects of the Transformation-oriented Archetype. However, they were not categorized as leaders in this archetype. It may be because of lack of focus or experience with this client archetype.

Noteworthy providers (services providers with high score in one or more parameters) for Transformation-oriented Archetypes are:

- IT Requirement and Assessment
  - Hexaware
  - NTT DATA
  - Tech Mahindra
  - Zensar Technologies

- Vision and Focus
  - Hexaware
  - KPIT Technologies
  - NTT DATA
  - Tech Mahindra
  - Zensar Technologies

- Technology Capabilities, Including Scale
  - Genpact
  - NTT DATA

- Enterprise Mobile Integration
  - Dimension Data
  - KPIT Technologies

- Workplace Support Services Automation
  - Hexaware
  - Tech Mahindra
  - Zensar Technologies

- Focus on Transition to Digital Workplace
  - Capgemini
  - Dimension Data
  - KPIT Technologies
  - Zensar Technologies
A Cloud-enabled Archetype client is one that believes in a true consumption-based and as-a-service model. These clients believe in and work toward enabling their end users with access to applications and data irrespective of physical location and devices. They understand the potential of BYOD and cloud-based solutions and have the risk tolerance to adopt them. These clients believe in achieving true differentiation and market leadership by leveraging the as-a-service model. So, for a Cloud-enabled Archetype client, adopting transformative cloud technology is not motivated just by cost savings, but by leveraging the technology for competitive advantage.

Cloud-enabled Archetype clients define digital workplace as an enabling environment where end users can access their work-related data and applications from any device and any location. They focus on specific line-of-business applications and not just IT support.
### The key characteristics of a Cloud-enabled Archetype client are:

- A highly dispersed and mobile workforce with real-time needs to access information from any location, or they have multiple small locations with complex workplace services
- Lack of a huge backlog and dependency on historic legacy application and data, and are open to take the cloud journey
- Desire to increase BYOD adoption among their end users
- Support for BYOD and bring your own service (BYOS), including cloud-based virtual desktop solutions that give the workforce global access and a common interface and that protect corporate resources
- First-time outsourcing or limited or zero legacy infrastructure

### To work toward achieving its vision, a Cloud-enabled Archetype client has multiple priorities, including:

- Partners with a vision for developing a cloud-based environment and adopting cloud solutions such as Windows 10, Office 365 and Online Sharepoint
- A very high level of user experience for end users
- The ability to move data and applications in the cloud and provision personal devices so end users can access their data and applications any time
- Partners that can provide access to data and applications on mobile devices via Desktop-as-a-Service (DaaS) or VDI on cloud solutions
- Partners that interact not only at the CIO level but also at the business unit level or with shadow IT personnel.

### Services providers for the Cloud-enabled Archetype client need to have a strong partner ecosystem plus capabilities in the following areas:

- Vision for and focus on clients whose outlook is to adopt and deploy cloud-based solutions
- Strong experience with Cloud-enabled Archetype clients and the ability to successfully interact with non-CIO functions
- Capabilities around cloud-based initiatives, such as migration to Office 365, Skype for Business and Windows 10 in addition to strong DaaS services
- Innovative workplace services, like innovation-focused service delivery, collaboration-friendly services, innovative security measures like biometric, Two factor authentication and the ability to bring innovation
- A digital workplace orientation with a dedicated brand for digital workplace capabilities, workplace services that include IoT devices, mobile app store, single sign-on and identity and access management.
Cloud-enabled Archetype

Client Imperatives

- Cloud readiness assessment
- Management of Shadow IT requirements
- Application and workload migration to cloud
- End-to-end cloud solution for workplace productivity
- Critical applications that stay in house or on a private cloud with access from anywhere on any device
- Integration of cloud-based collaboration solutions

Cloud-enabled Archetype

Provider Capabilities Importance

- Focus on cloud-enabled clients and shadow IT
- Migration to cloud-based workplace solutions
- Innovative and collaboration focused services
- Desktop virtualization on cloud
- Digital workplace with high end-user satisfaction

Size based on relative current importance in the archetype profile

Increasing Future Importance
Decreasing Future Importance
Of the 25 providers included in our research, we found nine that stand out above the others for serving the Cloud-enabled Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The nine, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 8, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.
Cognizant has undertaken initiatives to develop and enhance its skills in cloud-based solutions. The company is focused on continuous and extensive training for application containerization tools like Docker in addition to cloud-based solutions from Google, AWS, Microsoft Azure, Cloud Foundry, VMware and Oracle. Cognizant also offers a cloud-based virtualized desktop service called FlexD. This service is offered on-premises in a hybrid or public cloud configuration. This solution was developed with Cognizant's Cloud360 offering and Microsoft solution components. Cognizant has experience delivering cloud-based VDI solutions for clients in the BFSI and healthcare verticals. Cognizant offers strategy, assessment, consulting and build-then-run services for its cloud workplace solutions. Cognizant's DaaS offering also has a self-service automation element, supports desktop and application provisioning and can offer 99.9 percent SLA adherence. Cognizant also can reduce storage requirements by an 8:1 ratio. Cognizant's offerings have helped clients achieve anytime, anywhere, any device access and have supported widespread BYOD deployments.
Some other providers scored high in one or more areas that are important for a Cloud-enabled Archetype client. However, they were not categorized as leaders for this archetype because they did not rate highly in enough categories.

Noteworthy providers (services providers with a high score in one or more parameters) for Cloud-enabled Archetype clients are:

<table>
<thead>
<tr>
<th>Vision for and Focus on Cloud-enabled Client</th>
<th>Cloud-based Initiatives</th>
<th>Innovation Services</th>
<th>Orientation to Digital Workplace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fujitsu</td>
<td>Dimension Data</td>
<td>HCL Technologies</td>
<td>HCL Technologies</td>
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<td>Infinite Computer Solutions</td>
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<td>Zensar Technologies</td>
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</tbody>
</table>
A Digital Archetype client has a “cloud first” or “mobile first” strategy and wants to achieve business differentiation by leveraging digital technologies and tools. These clients look beyond BYOD and anytime, anywhere, any device access. The Digital Archetype client would use data, analytics, enterprise mobility and cloud solutions to enable the field user carrying IT and non-IT devices or to directly enable the interaction with the end customer.

The Digital client can be a CIO or a non-IT business unit, also called shadow IT. A Digital Archetype client will look to mobilize its line-of-business (LoB) applications or at least make them mobile-ready. A Digital Archetype client will have an enterprise mobile strategy or will be looking to develop one. In addition to features like mobile device management and single sign-on, a Digital Archetype client would also look for enabling access to business applications via handheld devices carried by field users. Clients that use data analytics tools to enable customer interactions via different devices and platforms also fall into the Digital Archetype category.

The definition of digital workplace for a Digital Archetype client is a highly collaborative, empowering, automated and smart workplace, rich with data and analytics. For a Digital Archetype client, enterprise IT is not a disjointed function, but a key ROI-generating business function.
A Digital Archetype client typically has the following characteristics:

- A cloud-first, mobile-first or nearly 100 percent BYOD enablement approach
- A heavy ROI dependency on client-facing applications and interactions, with end-user experience being of paramount importance
- Self-empowered, millennial end-users or field workers who interact directly with clients
- Rapid application deployment and a prevalent DevOps culture that contributes to more collaborative support
- The workplace is often called “Digital Workspace,” indicating non-dependency on a physical location.

To help achieve the goal of transforming the workplace, a Digital Archetype client will have the following priorities:

- Desire for a consumer-like end-user experience
- Extensive use of data analytics to support and enable field users and end customers
- Smart Internet-of-Things (IoT) devices that are part of the workplace come with support services
- Enterprise social networking and collaboration
- Advanced use of automation, such as bots, intelligent conversation agents or virtual assistants.

A services provider partner is deemed a best fit to serve a Digital Archetype client if, at a minimum, it provides the following:

- A resonating vision for digital workplace with experience with clients that have cloud-first and mobile-first strategies. The more interaction the service provider has in the client organization outside the IT office, the better position it will be in to understand the business impact of workplace transformation.
- Capabilities for consulting, implementing and integrating mobility in business processes. Providers should offer more than basic MDM and security features and be able to provide a consumer-like experience to end users.
- Key initiatives that aim at enabling the digital end-user experience. This may include capabilities related to managing smart wearable devices and VDI on cloud.
- A strong focus on enterprise social collaboration plus partnership with leading vendors. Focus and capabilities also should extend to services for enterprise-networking suites, social business transformation consulting and initiatives like gamification.
Digital Archetype

Client Imperatives

- Field workers with non-IT devices are able to connect with digital workplace
- Complete BYOD or mobile-first approach
- Mobilized business processes/business processes are becoming mobile-ready
- Digital workplace tied with ROI and business differentiation
- Dynamic workplace transformation for agile and flexible business requirements
- Consumer-like end-user experience

Digital Archetype Provider Capabilities Importance

Size based on relative current importance in the archetype profile
Of the 25 providers included in our research, we found seven that stand out above the others for serving the Digital Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The seven, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 11, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.
Cognizant is one of the few service providers whose transformative infrastructure services also include DevOps specialization. Cognizant’s new Constantly Ready Infrastructure Framework includes elements of agile application delivery and DevOps capabilities with infrastructure services. The application-infrastructure synergies in this approach help IT infrastructure management and application development teams to work in sync. Cognizant has experience helping customers define and implement digital strategies to enhance end-user satisfaction. The solutions they have developed for field users that directly interact with customers have provided a tangible ROI. At least 20 percent of Cognizant’s clients can be categorized as the Digital Archetype.
Other noteworthy providers (services providers with high scores in one or more parameters) for Digital Archetype clients include:

<table>
<thead>
<tr>
<th>Digital-First Client Focus</th>
<th>Enabling Mobility in Business Processes</th>
<th>Digital Workplace Aimed at End-User Experience</th>
<th>Collaboration Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infinite Computer Solutions</td>
<td>KPI Technologies</td>
<td>Fujitsu</td>
<td>HCL Technologies</td>
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<tr>
<td>HCL Technologies</td>
<td>NTT Data</td>
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<td>Wipro</td>
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</tbody>
</table>
There is yet another client archetype that may not have adopted a cloud-first or mobile-first approach. Their workplace digital transformation journey is still in progress, and they do not view enterprise IT only as a cost center. These clients, referred to as the Next-Gen Sourcing Archetype, have not structured their IT functions in silos. For a Next-Gen Sourcing Archetype client, the enterprise IT function is deeply integrated with its business functionalities. Workplace transformation demand will come from the business side, rather than from operations, and workplace transformation is expected to have a business outcome impact, which will be much more than cost savings.

A Next-Gen Sourcing Archetype client is mature in terms of sourcing its enterprise IT-related services. These clients often use a focused operating expense business model to minimize sunk technology costs for owned devices. For these clients, workplace transformation is not intended to improve operational efficiency. They may have additional goals related to measurably enhancing employee productivity, achieving a competitive advantage or creating business differentiation.

A Next-Gen Sourcing Archetype client will view the digital workplace as the defining model of modern EUC in the cloud and mobile era. They believe the digital workplace should be simple for the end user and business-oriented for the enterprises. When a Next-Gen Sourcing Archetype client has a requirement of workplace transformation, it is not ad-hoc but results from a well-planned vision.
The key characteristics of a Next-Gen Sourcing Archetype client are as follows:

- Deep experience in sourcing services; typically not first-time outsourcers unless pursuing greenfield projects in which IT requirements originate from the business side.
- The workplace is an aggregation of the latest technologies driven by business integration, rather than technology end users.
- A focus on agility and speed in deploying new capabilities to support a rapidly changing business landscape.
- IT organizations that may have an IT service brokerage function, a focus on agility and accelerated deployment of applications that support access from any device, anywhere and anytime.

To help achieve the goal of transforming the workplace, a Next-Gen Sourcing Archetype client will have the following priorities:

- Highly flexible contractual arrangements with service providers; for example, they may request hourly, fixed, outcome-based or any other type of pricing.
- Highly automated IT support systems that make extensive use of self-service and knowledge asset features.
- Consolidated IT in a near-shore or on-site location, which may require proximity of service desk locations from the site of operations.

A Next-Gen Sourcing Archetype client may need advisory and consulting help to realize its vision. Typical characteristics, requirements and capabilities of this archetype and/or service provider include:

- Agility, flexibility and innovation in services and service pricing.
- A partner that has a vision for and experience with business-integrated IT aimed at improving ROI or business differentiation.
- A partner with agile and innovative solutions, backed by continuous improvement and organic/inorganic growth in its portfolio to be able to demonstrate how fast it can respond to market changes.
- Scale-based parameters related to EUC and service desk support services.
- A partner with a digital workplace orientation that has an industry-specific focus and a dedicated digital practice.
Next-Gen Sourcing Archetype Client Imperatives

- Workplace transformation initiatives tied with dynamic business requirements
- Increased end-user experience and high efficiency in service delivery
- Digital workplace targeted at increasing end-user productivity
- Cloud, mobility and legacy app access solutions as per business requirements
- A future-ready and automation-enabled digital workplace

Next-Gen Sourcing Archetype Provider Capabilities Importance

- Flexible and agile in solution approach and pricing
- Ability to bring innovation and agility
- Vision and experience with business-oriented IT
- Dedicated practice for next-gen digital workplace solutions

Size based on relative current importance in the archetype profile
Of the 25 providers included in our research, we found eight that stand out above the others for serving the Next-Gen Sourcing Archetype clients based on our assessment of their capabilities as described in the Methodology section in the Appendix. The eight, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 14, and the providers are profiled on the next pages.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

<table>
<thead>
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</table>

Next-Gen Sourcing Archetype Leader assessments across capability parameters

Vision for and Focus on Next-Gen Clients
Flexibility and Agility in Pricing and Contracting
Agile and Innovative Solutions
Digital Workplace Solutions for Next-Gen Clients
Cognizant has experience with Next-Gen Sourcing Archetype clients from diverse industries including BFSI, healthcare and media. At least 30 percent of its clients can be categorized as Next-Gen Sourcing clients. The company has developed the Constantly Ready Infrastructure Framework delivery model that is oriented to providing agile business solutions, which is a key requirement of the Next-Gen Sourcing client. Cognizant believes that end-user enablement via personalized services and security over digital engagement platforms must be aligned with business objectives.
Other providers scored high in some parameters related to one or more aspects important for a Next-Gen Sourcing Archetype client but did not qualify as leaders.

The noteworthy providers (services providers with high score in one or more parameters) for the Next-Gen Sourcing Archetype are presented below.

<table>
<thead>
<tr>
<th>Vision for and Focus on Next-Gen Sourcing Archetype Clients</th>
<th>Flexibility and Agility in Pricing and Contracting</th>
<th>Agile and Innovative Solutions</th>
<th>Digital Workplace Solutions for Next-Gen Sourcing Archetype Clients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fujitsu, IBM, Stefanini, TCS</td>
<td>Computacenter, Hexaware, TCS, Unisys</td>
<td>Computacenter, Unisys, UST Global</td>
<td>Computacenter, Fujitsu, IBM, KPIT</td>
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</tbody>
</table>
### SERVICE PROVIDERS ACROSS ARCHETYPES

<table>
<thead>
<tr>
<th></th>
<th>Ad-hoc Archetype</th>
<th>Transformation-oriented Archetype</th>
<th>Cloud-enabled Archetype</th>
<th>Digital Archetype</th>
<th>Next-Gen Sourcing Archetype</th>
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<td>⭐</td>
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</tbody>
</table>

- ⭐ Indicates Leaders
- ✓ Indicates Noteworthy Players (number of check marks indicate degree of alignment with the capability requirements of each client archetype)
<table>
<thead>
<tr>
<th>Service Providers Across Archetypes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infinite Computer Solutions</td>
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<td>ITC Infotech</td>
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<td>Zensar</td>
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</table>

* Indicates Leaders

* Indicates Noteworthy Players (number of check marks indicate degree of alignment with the capability requirements of each client archetype)
GUIDANCE

This report highlights five different client archetypes for workplace transformation. All five are based on one key theme: How well your enterprise IT is tied to your business. The report distinguishes buyer behavior based on how buyers view IT and where they would place their back-end IT infrastructure when it comes to digital transformation. For example, the Ad-hoc Archetype client and Transformation-oriented Archetype client consider enterprise IT a cost-eating function and think the only way it can bring value to the business is by improving its operational efficiency and reducing cost. The Cloud-enabled and the Digital Archetype clients, on the other hand, treat enterprise IT as an ROI generator. For those clients, the digital workplace is linked to business differentiation. The Next-Gen Sourcing Archetype client incorporates best practices from all other archetypes. They would transform their workplaces to improve efficiency and enable business.

Since all the archetypes follow a “crawl, walk, run” pattern, it is expected that the Ad-hoc Archetype client may lose its prominence in the next three to five years. Mergers, acquisitions and divestures may continue to happen at a high rate, but the limitations and challenges of legacy system integration may diminish as more enterprises adopt modern technology. The Transformation-oriented Archetype may experience the same trends, but those companies will transform into other archetypes. If a Transformation-oriented Archetype organization chooses to adopt more cloud solutions and a complete BYOD approach, they may transition into a Cloud-enabled or Digital Archetype client. If, however, a Transformation-oriented company becomes more mature in managing its disparate business units and integrates them with IT, it would become a mature Next-Gen Sourcing Archetype client.

In the next few years, we may see different types of client archetypes emerging: one with an asset-light, cloud-dependent approach and another with a well-integrated business IT setup.
Enterprise Leadership Actions

It's about users and not devices. It is time for enterprises to stop taking a one-size-fits-all approach to EUC. It is important to note that the workplace is not just devices, and devices are not just end users. It is particularly important for clients falling into the Ad-hoc Archetype category to change their thinking. Fortunately, many organizations have started looking at implementing the end-user persona approach, which matches devices and services to the end user's role and needs.

A digital workplace offers much more than cost savings. Enterprise leaders should make an effort to understand the impact and opportunities a transformed digital workplace can offer. A digital workplace is more than an automated IT support service. A truly digital and collaborative workplace can help achieve many objectives other than cost savings. The Digital Archetype client and Next-Gen Sourcing Archetype clients are perfect examples.

Adopting a digital workplace doesn't mean everything has to change. Implementing a digital transformation concept for your workplace involves proper planning and assessment. The assessment not only requires analyzing the current end-user environment, but also assessing your business needs and requirements. In most cases, while employing an enterprise-wide transformation may be counterproductive, enabling certain business units with mobility and cloud-based solutions can prove to be effective. It is important to understand your disparate business needs. There is ample opportunity to pursue digital initiatives, but they should be used in the right place. For example, to become a Digital Archetype client, an enterprise may be inclined to use a next-generation collaboration tool across the organization, even though the application development team may be the only group in the organization that really needs collaboration via technology.

Take a practical, phased approach to transformation. Take a phased approach to digital workplace adoption. Technology and processes that work well in your current operations don’t need to change just for the sake of moving to digital. A digital transformation should work well if it is applied in a phased manner. The first adopters of digital workplace in an organization should become change agents. They can propagate the value of the new systems and ease the change management challenge.
**Provider Leadership Actions**

*A digital workplace is more than automated service desk support.* The same criteria this report uses to distinguish enterprise buyer types also is applicable to service providers. It is important to understand that traditional EUC services cannot be renamed digital workplace offerings simply by adding automation components to workplace support services. As highlighted in the report, the traditional workplace is very different from a digital workplace. Therefore, measures that serve the existing client workplace through use of advanced automation and analytics may not make the offering a digital offering. No enterprise-wide digital initiatives can be accomplished by one department single-handedly; similarly, digital transformation cannot be offered or accomplished by a service provider team offering only the infrastructure management solution. Delivering a digital workplace will require close integration with other teams that enable digital solutions, such as application services, digital consulting, business integration services and business process related services.

**Change management is the key.** Establishing a digital workplace is much more than putting in place enabling technology. Since the digital workplace is born out of changing end-user behavior, the service provider’s transformation initiative must take human behavior into consideration. Change management and integration are vital components of workplace transformation initiatives. It is important to include change management elements in the offering to help end users adopt to the transformed workplace.

**Stay current and stay competitive.** Just as the consumer world is changing rapidly in terms of device proliferation and social media, the workplace also is changing rapidly. End users want their devices and their workplace to support the latest capabilities, and they want them now. To stay competitive and current, service providers need to make sure they develop and incorporate technical capabilities to support almost all the major trends affecting consumer demands on the periphery of the digital workplace. Current trends indicate enterprises are becoming more cautious about their application access and deployment and less focused on device management. The growing importance of enterprise mobility management over mobile device management is an example. In the coming years, service providers may de-emphasize the pride they take in the number of devices and users they manage and shift more focus on capabilities related to secure application access and performance.
Methodology

As noted above, this report uses five archetypes of buy-side client requirements to assess the relative suitability of 25 workplace services providers. Data regarding the providers’ capabilities and positioning was provided to ISG via briefings, surveys, ISG advisor interviews and client references as appropriate.

The following service providers were considered in this report: Atos, Capgemini, Cognizant, CompuCom, Computacenter, Dimension Data, DXC, Fujitsu, Genpact, HCL, Hexaware, IBM, ITC Infotech, Infinite Computer Solutions, KPIT, Mphasis, NIIT, NTT DATA, Stefanini, Tech Mahindra, TCS, Unisys, UST Global, Wipro and Zensar.

Service providers shared data about different dimensions of workplace services. These dimensions cover their technological competency, preferred engagement models, scope of work performed, service capability, functional expertise and industry and regional presence.

Overview of Methodology

1. Categorize and assess provider data
2. Weight Importance of capability requirement
3. Determine provider position in quadrant
4. Create cumulative score
5. Categorize providers in archetypes
Methodology Details

1 Categorize and assess provider data.
The data provided by service providers was categorized and assessed according to the workplace services requirements described for each of the five client archetypes. If the provider descriptions and data were not worded or structured as precisely as our archetype requirements, our workplace analysts relied on their expertise and experience to classify the provider capabilities.

2 Weight importance of capability requirement.
Based on our advisor and analysts’ insights and expertise, each archetype capability requirement was weighted based on its relative importance to that archetype’s typical requirements. Weightings for each archetype’s requirements add up to a total of 100 percent. Specific weightings are not disclosed in this report. The relative importance of each capability requirement is depicted in illustrations at the beginning of each archetype section using differently sized hexagon icons.

3 Determine provider position in quadrant.
Once we assessed the provider’s relative ability for each of the archetype requirements, we then positioned that provider in a relevant quartile (e.g., top 25 percent, second 25 percent, and so on). Those in the top quartile were awarded a numerical “capability score” of 4/4; the second quartile earned a score of 3/4, the third quartile earned a score of 2/4, and the fourth quartile earned a score of 1/4.

4 Create cumulative score.
We then multiplied the provider capability scores from Step 3 by the weightings developed for each client archetype requirement in Step 2. We totaled the results for each provider to develop a cumulative score. These cumulative scores are not disclosed in this report.

5 Categorize providers in archetypes.
We used the cumulative scores to identify the providers most well-suited for each archetype’s requirements. These providers are listed alphabetically and are briefly profiled in each archetype section. Where relevant, additional providers with noteworthy capabilities also are mentioned (for example, providers that may have scored well on a specific requirement but not across all the requirements for that archetype).

Please note: This report presents service providers’ known capabilities in the context of user enterprises’ typical project needs. This report is not meant to rank providers or to assert that there is one top provider with abilities that meet the requirements of all clients that identify themselves with a particular archetype.
### Provider Capability Scores as Harvey Balls

<table>
<thead>
<tr>
<th>Score</th>
<th>Harvey Ball representation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score 4 out of 4</td>
<td>🌟</td>
</tr>
<tr>
<td>Score 3 out of 4</td>
<td>🌟🌟</td>
</tr>
<tr>
<td>Score 2 out of 4</td>
<td>🌟🌟🌟</td>
</tr>
<tr>
<td>Score 1 out of 4</td>
<td>🌟🌟🌟🌟</td>
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</tbody>
</table>

The cumulative score for each of the selected service providers against each archetype requirement is represented using Harvey Balls. For example: if a provider is assessed with a score of 4 out of 4, then a full Harvey Ball is used to represent its capability against that requirement. Similarly, if a provider is assessed a score of 1 out of 4, then a one-quarter Harvey Ball is used, and so on.
Additional Relevant Workplace Service Providers

The capabilities of 25 providers were assessed in this report. Some service providers that are typically included in our work are not included in this report. Some of the companies that were not included were not able to participate and others declined. Providers that do not offer a full portfolio of workplace services have not been included in the study. They may be included in future versions of this report, based on merit and on the service providers’ willingness to provide current and relevant materials. Readers should not make any inferences about a service provider’s absence from this report.

### Other Relevant Service Providers

<table>
<thead>
<tr>
<th>Other Relevant Service Providers</th>
<th>Headquartered Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture</td>
<td>Ireland</td>
</tr>
<tr>
<td>Bell Techlogix</td>
<td>US</td>
</tr>
<tr>
<td>CGI</td>
<td>Canada</td>
</tr>
<tr>
<td>Diebold Nixdorf</td>
<td>Germany</td>
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<td>EPAM Systems</td>
<td>US</td>
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<tr>
<td>Getronics</td>
<td>Netherlands</td>
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<td>IndependenceIT</td>
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<td>Infosys</td>
<td>India</td>
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<tr>
<td>LTI</td>
<td>India</td>
</tr>
<tr>
<td>Long View Systems Corp.</td>
<td>Canada</td>
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<tr>
<td>Microsoft</td>
<td>US</td>
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<tr>
<td>Mindtree</td>
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<td>OneNeck IT</td>
<td>US</td>
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<tr>
<td>Pariveda Solutions</td>
<td>US</td>
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<tr>
<td>Persistent Systems</td>
<td>India</td>
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<td>Pomeroy</td>
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<td>SAIC</td>
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<td>Finland</td>
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<td>T-Systems</td>
<td>Germany</td>
</tr>
<tr>
<td>VirtusaPolaris</td>
<td>US</td>
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</tbody>
</table>
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Director

Jan Erik Aase is a director and principal analyst for ISG. He has more than thirty-five years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens reports, including both the buyer-centric archetype reports and the US-based quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens team.

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