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Future of Work – Services and Solutions

Managed Digital Workplace Services – Large Accounts

U.S. 2021 Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

October 2021

Customized report courtesy of:

DXC TECHNOLOGY

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 ISG believes to be current as of August 2021, 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.

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EXECUTIVE SUMMARY

U.S. Organizations Prepare for the Hybrid Working World

After successfully ensuring business continuity last year amid the outbreak of COVID-19 pandemic, U.S. firms are now focused on preparing their future of work model for hybrid working. Approximately 70 percent of Americans were working remotely in April 2020, according to a survey by Gallup, a number much higher than in 2016. Now, after a year in pandemic, many enterprises and some SMBs are planning to call employees back to the office. However, there is already a growing trend toward the adoption of hybrid mode of working, wherein some workers can permanently work from the location of their choice, while others can work from the office. This trend is gaining traction because of reliance on workplace technologies that have proved their mettle during the challenging times last year. Remote workers had relied on tools and devices that helped them stay productive, connected and collaborative in the last year. As the pace of vaccinations has increased and living with the pandemic has become the new normal, U.S. firms need to adopt similar technologies to provide seamless experience for employees whether working from the office or from home.

With the hybrid work model, the U.S. firms are not expecting the entire workforce to work from home but are aiming for reduced office occupancy. The average office occupancy in major U.S. metro cities had fallen from 95 to 100 percent in March 2020 to 20 to 30 percent

in August 2021 according to a study by the facility management company Kastle Systems. However, only 19 percent of workforce has returned to office. According to Statista, ensuring physical social distancing and availability of tools to use during the COVID outbreak such as PPE kits remain a top priority for the U.S. firms. Statista also reveals that the investments in virtual collaboration tools are a top priority for 72 percent of U.S. firms, followed by IT infrastructure for secured virtual connectivity.

With these developments, U.S. firms are considering stronger partnerships with their service providers to help them prepare for the new hybrid mode of working. This involves support in framing their future workplace strategy for transformation and managing the diverse technology ecosystem with respect to workplace support, device management and security, while ensuring seamless experience for employees whether they work in-office or remotely. Many U.S. firms were already focusing on enhancing their employee experience within the workplace even before the pandemic. Because of the pandemic, this aspect has become crucial to ensure that they are developing workplaces that attract, retain and upskill their talent. This report compares many service providers offering these services for the U.S. clients around four key areas, which are summarized below.

Workplace Strategy and Transformation Services

- Clients were seeking help from their service provider partners for reimaging their workplace strategy even before the pandemic. With the pandemic, the need to support remote work transition, user enablement, cultural and performance change management, future workforce and an adaptable workplace is increasing.

- Between 20 and 50 percent of existing U.S. clients have shown enhanced engagement in their consulting and strategic-level discussions for workplace transformation with their managed service provider.

- Many service providers have increased the percentage of their consulting workforce to provide this service. In the U.S., service providers have increased their local consultants by an average of 25 percent.

- Many service providers have successfully transitioned capabilities of their U.S.-based innovation and design thinking workshop centers to a virtual setup to support clients in remote mode.

- The U.S. clients are now having serious discussions about the experience level agreements (XLAs) and how to best strategize them as per business outcome expectations.

Managed Digital Workplace Services

- The scope of managed services for the U.S. clients has widened. Clients are not just looking at efficient service desk operations but rather at enhanced usage of AI and automation for predictive support. Clients are also seeking device provisioning and lifecycle management services.

- CIOs, operations, procurement and technical leads still direct the buying decisions for managed services in the U.S.

- Portals surpass phones as the most preferred channel to raise support incidents according to an annual survey by HappySignals. The highest level of satisfaction continue to come from in-person walk-ins, followed by phone communication with service desk agents.

- Although, on average, 50 percent of the U.S. clients are still managing on-premises virtual desktop infrastructure (VDI), 35 percent are now migrating or already migrated toward a public cloud device-as-a-service model.

- Many providers are developing capabilities to secure and enhance physical on-premises office capabilities to improve and foster collaboration.

- Managed digital workplace services are still being sought separately in the U.S. and not as part of the overall digital transformation or end-to-end IT infrastructure services.

- For large U.S. clients, service providers are providing virtual tech-bars, kiosks and remote support, while mid-market clients are considering DaaS capabilities where pre-packaged devices are shipped to their home locations.

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Managed Employee Experience Services

- Only 15 to 30 percent of U.S. clients sign managed service contracts with XLAs that center around specific digital experience of end users.

- For U.S.-based end users, the main driving factors for working remotely or from home are safety and work-life balance. Service providers that focus on improving user digital dexterity, reskilling and productivity are considered as experience enhancers.

- Automated ticket resolution and predictive analytics are now table stakes and commoditized offerings. To provide real managed employee experience services, providers demonstrate correlation between employees with high digital experience and business performance.

- Culturally, U.S. end users report an average level of experience and happiness with a score of 79 out of 100 with workplace technologies, according to HappySignals.

Global outlook applicable for U.S.: Overall, the global managed service providers are at the crucial juncture of defining the future strategy. This space was previously dominated by large-scale IT infrastructure managed service providers that would offer technical end-user computing services. With time, these providers evolved their services to provide automated issue resolution and IT vending machine and kiosk services. With the introduction of mobility, service providers enhanced their capabilities by supporting mobile device and enterprise mobility management initiatives. With these newly acquired capabilities, they started to characterize themselves as "digital workplace service providers." As these

services increasingly started to become end-user-focused, providers started to provide experience level measurements and develop their XLA strategy.

The pandemic has accelerated the shift toward thinking beyond traditional end-user computing elements and considering workplace and work-related technologies as key business enabler that can make or break employee experience. A high-level employee experience is a key requirement to ensure a happy and satisfied customer. As enterprises are increasingly considering technologies and expert help in designing their employee experience strategy, service providers are transforming themselves from traditional technology implementation and managed service providers to cross-industry experts providing strategy, consulting and transformation services. Providers' consulting service portfolios that usually focus on as-is state assessment closely tied with their own implementation services are now increasingly defined by their strategy transformation services to prepare both client workplace and workforce for future of work.

As workplace technologies become increasingly business centric, these permeate the business functions, and line-of-business heads (LoBs) get involved in decision-making related to the work technologies that employees use. The rise in modern low-code/no-code development, democratization of IT and emphasis on digital dexterity and reskilling has led to laser focus on managed services that can enhance and improve the experience of end users and prepare them for changing ways of working.

Many service providers that were traditionally not strong in the IT infrastructure managed services space but were considerably stronger in terms of understanding business nuances and focused on applications and strategy transformation services are now increasingly getting involved in providing these digital workplace or future of work services. It has become a challenge for traditional EUC or modern digital workplace service providers, as they have to invest heavily to differentiate with their consulting and transformation abilities. Managed services that include desktop engineering, predictive analytics and automated service desk are now becoming table stakes. In addition, support for the Microsoft 365 environment is becoming commonplace. Providers with diverse strengths are now competing in the future of work services market with strategy transformation services at the core, supported by managed workplace services and an overarching focus on managing employee experience. This has led to the development of a competitive landscape comprising of four different set of providers as explained in Figure 1.

Developments in user experience measurement approaches include, but are not limited to, only applications and device usage. It also includes elements of employee learning, talent management and leveraging automation and AI for human+ workforce that is challenging for both traditional workplace service providers and application-focused providers. Hence, the competition to be a leader in the employee engagement and experience space is intensifying, and the only one to benefit from this competition is the enterprise client.

Fig 1

Global Future of Work Managed Service Provider Competitive Landscape
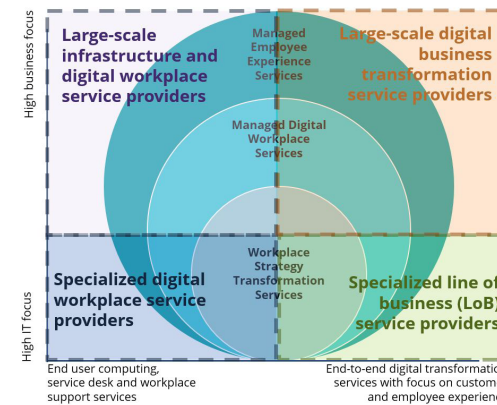
- Digital workplace services no longer stay in siloes. Changing business models and pandemic induced effects are cascading to these services as they become more business value focused

- Diverse set of managed service providers compete in the new Future of Work services market leveraging their specialization and scale.

- Three key set of services: workplace strategy transformation, managed digital workplace services and managed employee experience are offered by every managed service provider. However, the degree of focus, dedicated vision and coverage depth differs.

Source: ISG

Introduction

Simplified illustration

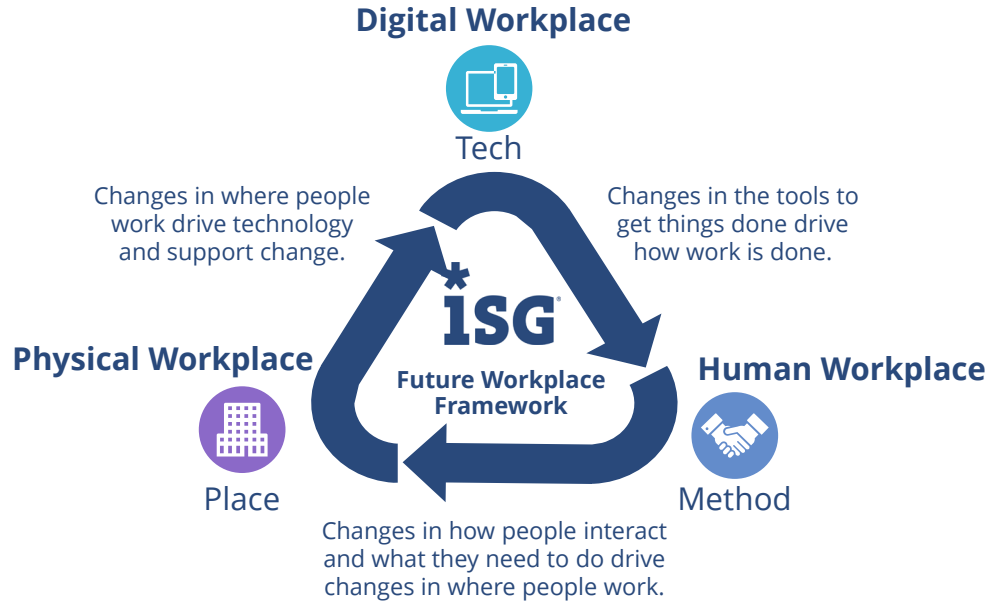| |
|---|
| **Future of Work - Services and Solutions - U.S. 2021** |
| Workplace Strategy Transformation Services |
| Managed Digital Workplace Services – Large Accounts |
| Managed Digital Workplace Services – Midmarket |
| Managed Employee Experience Services |

Source: ISG 2021

Definition

The COVID-19 pandemic has drastically changed the way people work. The shift to a remote-working model was expected in the coming years, but the crisis has accelerated its adoption at a significant pace. Enterprises that have changed their business culture and technological adoption due to the ongoing situation have learned to iterate, adapt and overcome. This has led to new ways of increasing both productivity and engagement for employees. While ISG had equated the term "future of work" with "digital workplace," the pandemic has led to an understanding that the future of work is more than just technology and support functions performed by enterprise IT functions. ISG's new Future Workplace Framework comprises three workplace ecosystems, namely Digital Workplace, Physical Workplace and Human Workplace, as described in the following illustration:

Definition (cont.)

Fig 2

The heart and soul of the Future Workplace Great Collaboration and Experience

Digital Workplace

Tech

Changes in where people work drive technology and support change.

Changes in the tools to get things done drive how work is done.

iSG Future Workplace Framework

Physical Workplace

Place

Human Workplace

Method

Changes in how people interact and what they need to do drive changes in where people work.

Source: ISG

Definition (cont.)

ISG believes that the future ways of working will involve not only enabling digital technologies for employees irrespective of their location but will also cover aspects of human empathy and will drive culture. Smart physical workplaces that ensure employee safety and well-being via mechanisms of tracking and checking the pandemic spread across workforces will also be an important aspect. This desired state of future workplace will differ and have specific nuances for different geographic regions, but the requirements will generally revolve around a few key themes. In each region, client expectations will involve establishing relationships with service providers that offer future workplace strategy transformation services such as cultural enablement and office-vs.-remote workforce planning. Clients will also partner with service providers that can manage and support the entire workplace technology ecosystem for remote employees, while also managing and measuring the experience of both in-office and remote workers. At a global level, the pandemic has led enterprises to invest in workplace technologies that can secure user identity, data and devices, provide unified collaboration and communication irrespective of location, and enhance digital dexterity and productivity. ISG expects this to continue in the coming years.

Scope of the Report

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 U.S., Global, Germany, U.K., Nordics, Australia and Brazil.

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

Provider Classifications

The provider position reflects the suitability of 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 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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

Leader

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has 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).

Rising Star

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

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.

Future of Work – Services and Solutions - Quadrant Provider Listing 1 of 3

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
Accenture	● Leader	● Leader	○ Not in	● Market Challenger
ActioNet	○ Not in	○ Not in	○ Not in	○ Not in
Atos	● Product Challenger	● Leader	○ Not in	● Leader
Bell Techlogix	○ Not in	● Product Challenger	● Rising Star	○ Not in
Birlasoft	○ Not in	● Contender	○ Not in	● Contender
Capgemini	● Leader	● Product Challenger	○ Not in	● Product Challenger
Coforge	○ Not in	● Contender	● Contender	○ Not in
Cognizant	● Contender	● Leader	○ Not in	○ Not in
Compucom	● Market Challenger	● Product Challenger	● Leader	● Product Challenger
Computacenter	○ Not in	● Contender	○ Not in	● Product Challenger
CSS Corp	○ Not in	● Product Challenger	● Product Challenger	● Product Challenger

Future of Work – Services and Solutions - Quadrant Provider Listing 2 of 3

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
DXC	Leader	Leader	Not in	Product Challenger
GAVS	Not in	Contender	Contender	Not in
HCL	Leader	Leader	Not in	Leader
Hexaware	Product Challenger	Product Challenger	Leader	Leader
IBM	Not in	Leader	Not in	Not in
Infosys	Leader	Product Challenger	Not in	Leader
Insight	Not in	Market Challenger	Market Challenger	Not in
ITC Infotech	Not in	Contender	Not in	Not in
LTI	Product Challenger	Product Challenger	Leader	Product Challenger
Microland	Contender	Contender	Not in	Product Challenger
Mphasis	Not in	Product Challenger	Not in	Not in

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Future of Work – Services and Solutions - Quadrant Provider Listing 3 of 3

	Workplace Strategy Transformation Services	Managed Digital Workplace Services - Large Accounts	Managed Digital Workplace Services - Midmarket	Managed Employee Experience Services
NTT DATA	● Leader	● Leader	○ Not in	○ Not in
Pomeroy	○ Not in	● Market Challenger	● Market Challenger	○ Not in
Stefanini	● Market Challenger	● Product Challenger	○ Not in	○ Contender
TCS	● Leader	● Leader	○ Not in	● Leader
Tech Mahindra	○ Not in	● Rising Star	○ Not in	● Product Challenger
TEKSystems	○ Not in	● Market Challenger	○ Not in	○ Not in
Unisys	● Leader	● Leader	○ Not in	● Leader
UST	○ Contender	○ Contender	● Product Challenger	○ Contender
Wipro	● Leader	● Leader	○ Not in	● Leader
YASH Technologies	○ Not in	● Product Challenger	● Product Challenger	○ Not in
Zensar	● Product Challenger	● Product Challenger	● Leader	● Product Challenger

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Future of Work – Services and Solutions Quadrants

ENTERPRISE CONTEXT

Managed Digital Workplace Services – Large Accounts

This report is relevant to large enterprises across industries in the U.S., for evaluating providers of managed digital workplace services.

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

With the easing of COVID-19-related restrictions, several enterprises in the U.S. have started planning a return to office for employees, with safety and security as the topmost priority. Large enterprise with a considerable number of employees are finding it a challenge to ensure a safe return to office and growth post pandemic. Thus, enterprises are looking for hybrid work models and more collaborative approaches, while focusing on maintaining the highest security for employees working on-site as well as remotely.

Large enterprises in the U.S. are focusing on minimizing their operating expenses (OPEX) and investing in innovative solutions, which is creating demand for managed digital workplace services. Workspace management solutions, field support and on-site IT support, chatbots, virtual assistants, digital lockers, IT kiosks, meeting room booking solutions, cognitive virtual assistants and formulation of a unified communications and collaboration (UCC) strategy are some of the major demands of enterprise clients.

Service providers in this region are combining the power of intelligent automation, AI, machine learning and analytics to help enterprises reduce workplace-related complexities.

Infrastructure, IT and workplace technology leaders should read this report to understand the relative positioning and capabilities of IT support services providers that can help them in effective planning and vendor selection. The report also shows how the technical and integration capabilities of a service provider can be compared with its competitors in the market.

Digital transformation professionals should read this report to understand how providers of managed digital workplace services fit with their digital transformation initiatives, and how they can be compared with one another.

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

Security and HR leaders should read this report to see how service providers address the significant challenges of compliance and security, while keeping employee experience seamless for the ones working remotely. HR leaders should read this report to know about leading providers that assist in developing strategies for future workforce and talent management.

Admin and field services managers should read this report to understand how service providers implement and expand the workplace services to better manage field service operations.
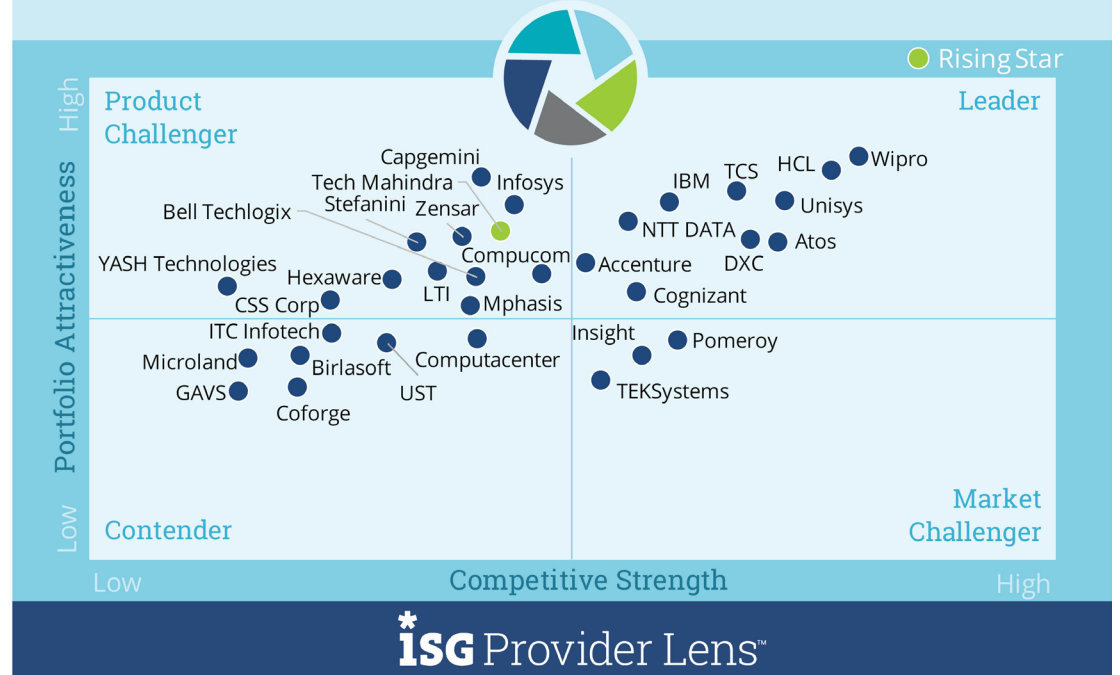
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MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Definition

This quadrant assesses service providers that offer end-to-end managed services, including workplace support, desktop engineering, managed mobility services and virtualized workspaces. Providers assessed in this space offer complete end-user computing (EUC) services that form the core of the digital workplace. Their services provide the ability to work from anywhere/anytime, device support, including automated proactive technical support and cloud platforms to provision always-on systems. They leverage artificial intelligence (AI)/ cognitive technologies for end-user facing tasks and help achieve significant cost savings.

Future of Work — Services and Solutions
Managed Digital Workplace Services - Large Accounts

2021
U.S.

Rising Star

Product Challenger

Leader

High

Portfolio Attractiveness

Low

Capgemini
Tech Mahindra   Infosys
Bell Techlogix   Stefanini   Zensar
YASH Technologies
Hexaware   Compucom
CSS Corp   LTI
ITC Infotech   Mphasis
Microland   Birlasoft   Computacenter
GAVS   UST
Coforge

IBM   TCS   HCL   Wipro
Unisys
NTT DATA   Atos
Accenture   DXC
Cognizant

Insight   Pomeroy
TEKSystems

Contender

Low   Competitive Strength   High

Market Challenger

Source: ISG Research 2021

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MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Eligibility Criteria

- Ability to provide managed service desk and workplace support services through staff augmentation, remote support and automated virtual agents.

- Offer on-site field support and in-person technical assistance.

- Set up and support self-help kiosks, tech-bars, IT vending machines and digital lockers

- Offer managed services for collaboration and communication over diverse platforms

- Provide device support, predictive analytics and proactive monitoring services

- Demonstrate experience in providing remote virtual desktop services, both on-premises and on cloud

- Offer managed mobility services in the respective countries with at least 25 percent of the devices managed outside the home region

- Offering complete device lifecycle managed services is a plus, covering device sourcing and logistics, DaaS for device security, support for unified endpoint management (UEM) and mobility program management

- Provide implementation and support for enterprise mobility, support for bring-your-own-device (BYOD), mobility expense and asset management.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Observations

The Managed Digital Workplace Services quadrant this year includes the Managed Workplace and Mobility Services for which ISG had separate quadrants last year. Providers offering the combined portfolio are positioned in this quadrant. Providing Microsoft 365 and Microsoft Teams enablement is now a commonplace service, and leveraging AI and automation to eliminate low-level incidents such as password resets is also not a major differentiator.

The Contenders in this quadrant offer strong managed services portfolio around the Microsoft technology ecosystem, although they must develop capabilities for further automation and integration and showcase more market presence with client stories and revenue.

The Product Challengers in this quadrant have stronger portfolios, leveraging automation, AI, machine learning, and augmented and virtual reality. They also develop frameworks and platforms for managed services and offer device lifecycle management services. They need to pursue the U.S. market more aggressively by acquiring more clients and increasing local presence.

The Market Challengers provide strong traditional workplace support and service desk services and are well-established in the market with huge client based. They need to further develop their capabilities.

Leaders in this quadrant provide differentiated workplace services powered by contextual AI technologies and further integration with business functions. They also have strong and growing client based in the U.S.

- **Accenture**, with its experience measurement framework and mobility services, is increasing its presence in the U.S. managed services space.

- **Atos** is steadily increasing its market share in the U.S. market with its strong managed services, focusing on a data-driven approach.

- **Cognizant** leverages its WorkNEXT™ solution portfolio and partnerships to compete strongly with other leaders.

- **DXC** uses its strong automation and the U.S. market strength, along with its Uptime offering, to compete.

MANAGED DIGITAL WORKPLACE SERVICES – LARGE ACCOUNTS

Observations (cont.)

- **HCL's** Fluid Workplace addresses the current and future needs of a managed future working model, leveraging an optimum combination of its IP and solutions.

- **IBM** benefits from its brand name and offers strong workplace support services and device analytics powered by Watson.

- **NTT DATA's** Dynamic Workplace offering leverages automation analytics and its automation and AI solution, Nucleus.

- **TCS**, with its Cognix™ for Workspace solution, leads the market and has a strong focus on experience level measurement.

- **Unisys** benefits from its strong local presence and enhanced portfolio, and emerges as a strong leader in the market.

- **Wipro** leads the market with its LiVE workspace, VirtuaDesk and other IP-led solutions and has a strong presence in the U.S.

- **Tech Mahindra** (Rising Star), with its strong growth, WorkNXT portfolio, TeXLA and other frameworks, emerges as a Rising Star in this quadrant.
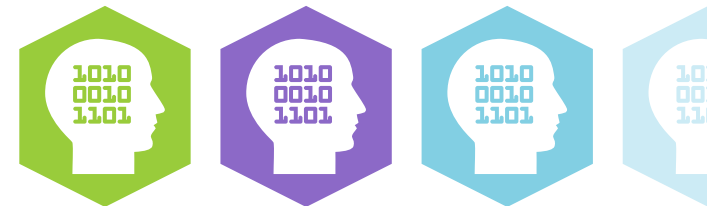
DXC TECHNOLOGY

Overview

Headquartered in Virginia, DXC Technology provides modern workplace services to more than 1,000 clients in 67 countries. The company globally manages 7.2 million end users, 6 million devices, including PCs, laptops and desktops, 1.3 million virtual desktops and 1.2 million smartphones. Its modern workplace services cover intelligent collaboration, workplace support and device and asset management capabilities.

Strengths

Strong support and device management services: DXC offers service desk services from Tulsa, Oklahoma and Plano, Texas, and supports all major languages. Its digital support services include support through tech bars, kiosks, IT vending machines and digital lockers. It offers digital-first integrated care. The company can help resolve 12 percent of incidents automatically and enables users to resolve 17 percent of the same through self-help. DXC also offers device management and device-as-a-service capabilities by leveraging its strong partnerships with key unified endpoint management, enterprise mobility management and OEM vendors. It also offers asset management services, helping enterprises discover IT assets, standardize and optimize asset data, manage assets through experience monitoring solutions, and provides cost savings.

Strong Microsoft partnership: DXC has a strong partnership with Microsoft and leverages its solutions in its Intelligent Collaboration services. DXC integrates disparate collaboration solutions affecting user experience, and then contextually personalizes them for end users. The majority of its capabilities are around Microsoft Teams, but it can also extend to other vendors such as Cisco and Slack.

DXC UPtime and improved approach: DXC recently launched an employee platform version of its entire managed services portfolio, namely DXC UPtime. The portfolio covers analytics, user portal and other key services that aim to measure user experience. It leverages analytics to cover operational, telemetry and experience data to provide informed insights for enterprise IT managers and line-of-business heads.

Caution

DXC has witnessed a dip in its scale of workplace managed services, with a decrease in the numbers of users and devices managed. This is attributed to consistent uncertainty about company's objective to retain its portfolio. Although DXC has now made it clear that it will retain, grow and transform its portfolio, it will take some time until clients start considering this new and improved approach.

2021 ISG Provider Lens™ Leader

DXC is a well-established brand in the U.S. for managed workplace services and offers strong and experienced capabilities, along with robust partnership with Microsoft.

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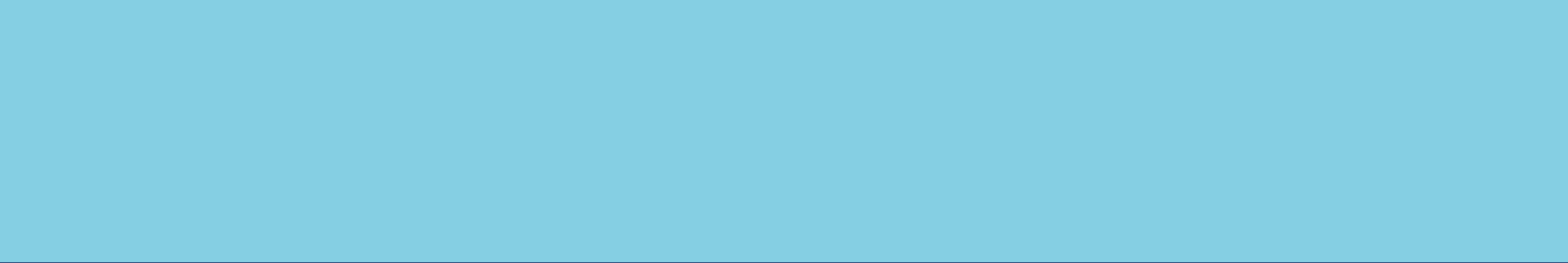
Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 Future of Work – Services and Solutions, U.S." analyzes the relevant software vendors/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.

The study was divided into the following steps:

1. Definition of 2021 Future of Work – Services and Solutions, U.S. market

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

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

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

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

6. Use of the following key evaluation criteria:
    − Strategy & vision
    − Innovation
    − Brand awareness and presence in the market
    − Sales and partner landscape
    − Breadth and depth of portfolio of services offered
    − Technology advancements
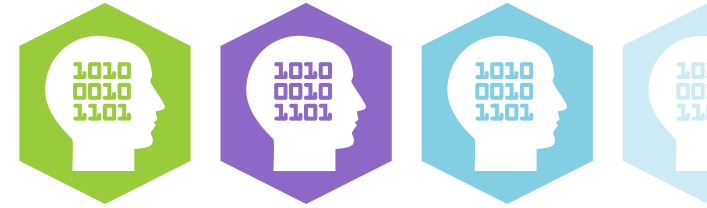
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