

NEAT EVALUATION FOR INFOSYS:

# Advanced Digital Workplace Services

Market Segment: Overall

## Introduction

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This is a custom report for Infosys presenting the findings of the NelsonHall NEAT vendor evaluation for *Advanced Digital Workplace Services* in the *Overall* market segment. It contains the NEAT graph of vendor performance, a summary vendor analysis of Infosys for advanced digital workplace services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering advanced digital workplace services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall, and with specific capability in build services, run services, and around Microsoft products.

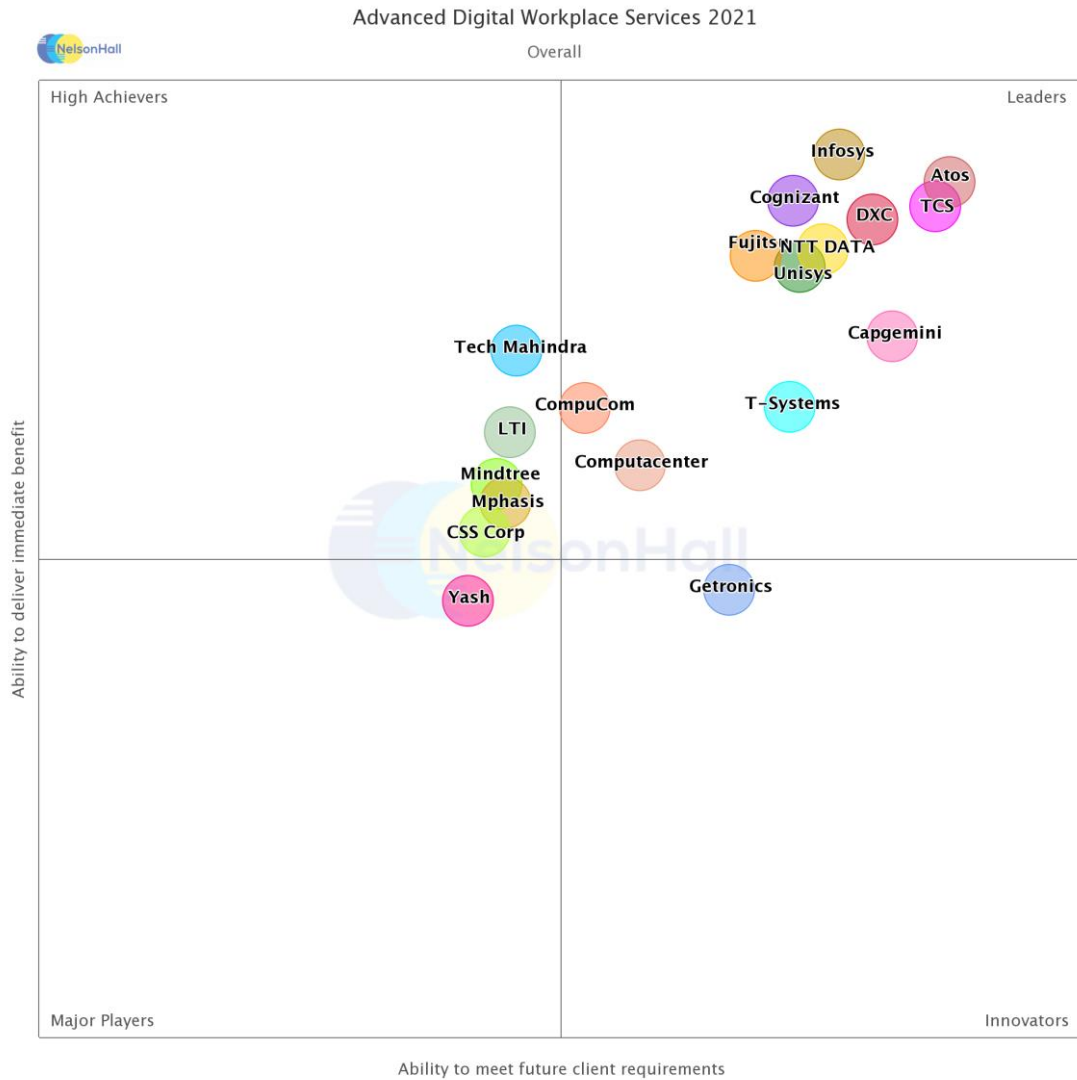
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Atos, Capgemini, Cognizant, CompuCom, Computacenter, CSS Corp, DXC Technology, Fujitsu, Getronics, Infosys, LTI, Mindtree, Mphasis, NTT DATA, TCS, Tech Mahindra, T-Systems, Unisys, and Yash Technologies.

Further explanation of the NEAT methodology is included at the end of the report.



## NEAT Evaluation: Advanced Digital Workplace Services (Overall)



NelsonHall has identified Infosys as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects Infosys’ overall ability to meet future client requirements as well as delivering immediate benefits to its digital workplace services clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *Advanced Digital Workplace Services* NEAT tool (*Overall*) [here](#).



## Vendor Analysis Summary for Infosys

### Overview

Infosys focuses on three pillars to drive employee experience across the workplace and reimagine the future of work. These include:

- *Work*: providing modular interaction including tasks and activities, tools and specialization, and gig work and assignments
- *Workforce*: collaboration including social and communities, human+machine, and diverse
- *Workplace*: phygital ecosystem (physical+digital), self-service and reliance, and wellbeing and safety.

Infosys seeks to utilize emerging technologies to enable a hybrid environment for its clients' employees through people and process change (micro-changes, anytime anywhere experience), data-driven business (connected data, sentience, and AI at core), and native automation (self-service, extreme automation, and digital-first), with different personas and industry context utilizing AI/ML, user experience.

Collaboration, office productivity, security, VDI, devices, and network are the core elements of future work. Infosys has a clear focus on culture and behavior influence as the core objectives of the future of work for digital workplace services, including employee wellbeing, experience, productivity, efficiency, agile work anywhere, attracting and retaining employees, and business continuity and resilience. This is enabled through WaaS and digitally connected workspaces. Infosys seeks to take its digital workplace transformation to a Sentient Live Enterprise to reimagine employee experience. Here, it focuses on five key areas including:

- *Remote First*: providing a unified and simplified experience to enable end-users to perform day-to-day activities and operations anytime, anywhere
- *Collaborative*: improving the process of collaborations across all users and things in the enterprise ecosystem and bringing collaboration in key business processes
- *Sentient*: driving value exchange in each interaction by enabling intelligent connections, context, and the ability to sense, process, and respond in real-time
- *Hyper Productive*: providing a single-pane view to operate across tools and enterprise applications in a collaborative manner
- *Optimized Processes*: reimagining the physical workplace activities and operations in a digital-first approach and powering them through the live enterprise workplace.

Over the last 12-18 months, Infosys has been helping clients to respond to the pandemic, enabling resiliency and remote working. It now sees consumerization of the workplace, including work from anywhere, gig economy, providing bite-sized learning on the go, and marketplace (Infosys Polycloud). It also sees organizational needs, including enhanced employee productivity, attracting and retaining talent, and new ways of working. Infosys aims to be the digital orchestrator across these areas to bridge the chasm between the two.

Infosys aims to enable enterprises to be truly digital workplaces that are experience-led, persona-based, aligned to industry workstyles, digitizing business processes and knowledge management, and enabling collaborative hybrid workplaces that continuously learn and evolve to deliver secure mobility of experience – anytime, anywhere, and on any device. It is now focused on delivering employee experience services powered by digital workplace services. A



recent example includes a large win with an automotive client where Infosys provides a set of employee experience services powered by digital workplace services through a hyper-personalized platform.

Infosys' vision translates into a multi-faceted offering suite with a human-centric experience at the top of everything it delivers. This includes experiences across the user's journey in the 'day in the life' of an employee; plus, providing a hyper-personalized experience including AI, chatbots, and understanding users' needs. It also includes continuous learning, digital adoption, and employee wellbeing and health. Other key components of the offering suite include:

- *Digital Collaboration*: ensuring this is driving organizational outcomes through sentient team collaboration and information access, intelligent employee apps, bots, digitized processes, and workflows
- *Hybrid Workplace*: anytime, anywhere hybrid workplace, workplace mobility, modern device lifecycle management, and zero-touch operations
- *Connected Workspaces*: includes phygital, smart workspaces, IoT and taking smart workspaces beyond devices through AR/VR, and immersive powered workplace capabilities, and sustainability and carbon-neutral.

Infosys utilizes its capabilities, including ClientMe (internally known as InfyMe), where it has built up several use cases and frameworks supporting employee experience. This also includes ClientMe providing on-the-go productivity, and Wingspan, its cloud-based training platform. It also focuses on hyper-personalization through its experience configurator, workplace analytics, and employee wellness. Key offerings include:

- *Human Experience (HX)*: branding and campaigns (physical, digital, phygital), CX/UX, content creation, prototypes, editorial, interaction design, video broadcast, and motion graphics
- *Studio-as-a-Service*: design studios for ideation, innovation and co-creation, human-led people, process and technology reimagination, EX transformation, marketing activation, and research programs.

Infosys delivered the Live Enterprise ClientMe employee experience platform for workplace transformation services for employees via hyper-personalized services across desktop, mobile, and support for a global automotive company. It also collaborated to re-imagine the employee hire to retire journey with an international oil major and built solutions to attract/retain talent, improve EX, and drive employees' personal development.

Infosys claims to deliver 30% productivity improvements, 50% faster time to market, and 90% automated self-service fulfillment for clients through its human-centric experience capabilities.

Infosys has ~14k FTEs globally across workplace services, with 24 global service desks supporting 30 languages globally. It has ~320 clients in total across workplace services, with an estimated split by geography as follows: North America 55%, Europe 35%, APAC 10%. Target sectors for digital workplace services are logistics & transport, services & utilities, telecom, oil & gas, retail, FSI, manufacturing, life sciences, education, and government.



## Financials

Infosys' CY 2021 revenues were ~\$15.6bn. NelsonHall estimates that ~6% of this is associated with digital workplace services (~\$940m). NelsonHall's estimate for the geographical breakdown of Infosys' digital workplace services revenues is:

- North America: 44% (~\$414m)
- EMEA: 37% (~\$348m)
- Rest of World: 19% (~\$178m).

NelsonHall estimates the vertical industry breakdown of Infosys' digital workplace services revenues to be:

- Manufacturing: 22% (~\$207m)
- Financial services: 18% (~\$169m)
- Retail: 16% (~\$150m)
- EURS: 15% (~\$141m)
- Communication: 14% (~\$132m)
- High-Tech: 9% (~\$85m)
- Life sciences: 2% (~\$19m)
- Other: 4% (~\$37m).

## Strengths

- Significant IP (Infosys Workplace Suite, Infosys Intelligent Workplace Platform, Polycloud Platform, Wingspan, InfyMe, and ESM Café) and strategic investment in digital workplace and cloud as a key focus area
- Infosys Cobalt Cloud Community and dedicated resources to curate workplace assets
- Expanding DevSecOps and SRE-led approach to operations
- Cobalt Labs at its global digital centers to enable clients to prototype and co-create new cloud-first solutions across digital workplace rapidly; agile workspaces, innovation hubs, and living labs
- Cloud assets (16k) and 225 industry cloud-first solution blueprints
- Automation factory approach for large deal transformation, enabling rapid innovation and development of use cases
- Comprehensive partner ecosystem in support of digital workplace and automation framework; and expanding innovation network in support of startups to drive next-gen capabilities
- Partnerships with academic institutions to seed skilled workforce
- Significant investment in the training of personnel, including Wingspan, Infosys Career Mosaic framework.



## Challenges

- Significant reliance on the North American market
- Continuing to increase onshore presence in EMEA
- Ramping cloud certifications and SREs, which is part of the investment roadmap
- Increasing adoption of XLAs in support of business outcomes
- Scaling consulting & advisory capabilities.

## Strategic Direction

Infosys is looking to expand its digital workplace services capabilities through the following initiatives:

### Investments in IP and accelerators

- Cloud-centric workplace, smart spaces, connected workplace, and secure workplace
- Industry context and persona-based workspaces
- Focus on Human-centric Experience Design, Employee Experience platforms including Infosys ClientME and Microsoft Viva, investments in building industry solutions and use-cases using immersive technologies like AR/XR, IoT, and 5G edge technologies. Also, development of XLAs, and enhancements to ESM Café to measure UX on ServiceNow
- Mass personalization, employee wellness solutions
- Continued investment in support of Infosys Cobalt Cloud Community and dedicated resources curating assets from the cloud community; and expanding cloud assets and industry cloud-first solution blueprints, increasing digital workplace management capabilities into Infosys Workplace Suite
- Investing in edge cloud and IoT management platform capability, and AR/VR services
- Low-code/no-code platforms, employee apps, and digital experience
- Investing in DevSecOps capabilities in support of cloud-native apps (microservices and serverless); and investments in site reliability engineering (SRE) capabilities and observability.

### Digital reskilling initiatives

Infosys is investing in digital skills training to enhance automation capabilities, with initiatives including:

- Expanding partnerships with individual universities to curate curricula for Infosys employees in areas such as ML, autonomous technologies, blockchain, design thinking (the latter, e.g., at Rhode Island School of Design, Stanford University, and Purdue University)
- Investing in training programs focusing on competencies, including UX, cloud, big data, digital offerings, and core technology and computer science skills; and utilizing Wingspan in support of cloud-specific and digital workplace training initiatives
- Infosys aims to develop SRE automation skill-sets supporting workplace services
- Investing in platforms designed for future of work involving gig workforce.



### **Partner-enabled offerings**

- Partner solutions as-a-service – services, software and infrastructure including managed services with Google, Citrix, VMware, HP, Dell, and partnerships with start-ups.

### **Investment in Expand Localization initiative in support of cognitive and AI services**

- Enhancing consulting, advisory, and design thinking capabilities through utilization of WONGDOODY and Brilliant Basics acquisitions to support Workplace transformation initiatives and adoption services
- Expanding digital studios, Cobalt labs, and innovation hubs globally (to provide localized support), investing in digital skills, and partnerships with academia to better enable clients' IT infrastructure and cloud transformation roadmaps and initiatives. This includes Infosys' innovation network to develop partnerships with next-gen technology companies and start-ups
- Adapting talent strategy to the future of work, including hiring beyond STEM, utilizing personalized 24/7 AI-powered learning assistant, Infosys career Mosaic framework.



## Outlook

Infosys is focused on employee experience and reimagining the future of work across three key pillars of work, workforce, and workplace. It seeks to take its digital workplace transformation to a Sentient Live Enterprise and delivering employee experience powered by digital workplace services. This also includes utilizing InfyMe use cases and frameworks to support employee experience, and ClientMe using Wingspan, its cloud-based training platform. Infosys focuses on organization change management (OCM) through its technology consulting and will need to continue to ramp its advisory and consulting resources to support this. Infosys is also developing XLAs across the digital workplace and will need to increase adoption to support business outcomes for clients further.

Infosys focuses on data-driven business, native automation, personas, and industry context utilizing AI and ML; also, culture and behavior influence, employee well-being, agile work anywhere, and attracting and retaining employees. Infosys' workplace suite enables managed services to become more efficient through automation and utilizing tools and accelerators for migration. It is also investing in wider talent and skills to support through the utilization of its Wingspan platform.

Hybrid Workplace focuses on borderless working, Evergreen IT, self-help and self-heal, zero-trust design, and persona-based services. Infosys is also investing in automation at the front-end, with ESM Café leveraging ServiceNow's native capabilities to provide an AI solution for the service desk and workplace and further drive UX.

We expect Infosys to expand its ecosystem partnerships in support of its smart spaces concept (recent example includes partnering with Microsoft as Smarten Spaces), and in additional ISVs and digital start-ups in support of the digital workplace, in particular in support of self-heal, auto-remediation and end-user experience monitoring and analytics. Infosys will also gain further traction across its Intelligent Workplace Platform, enabling the physical workplace to become digital and support a safe return to work and ongoing management of hybrid working environments.

Infosys has created nine virtual Cobalt labs to support its cloud-first approach and enable rapid prototyping of cloud-first solutions and co-innovation with clients. We expect Infosys will continue to ramp these, post-Covid-19, across its global development centers. In addition, it is increasing Living Labs and innovation centers in support of digital workplace services and in its partnerships with academia to drive co-innovation. Finally, we expect Infosys to make further bolt-on acquisitions supporting cognitive, AI, and automation services and develop joint GTM capabilities in partnership with hyperscalers supporting digital workplace services.





## Advanced Digital Workplace Services Market Summary

### Buy-Side Dynamics

The key decision factors in selecting a vendor to deliver digital workplace services are:

- Providing proactive & predictive support services (self-healing, remote monitoring, automation, AIOps, cognitive service desk and proactive and predictive analytics)
- Self-serve capabilities (portal-based access to knowledge articles, smart chat, AI powered self-help and self-serve including virtual agents and mobile support applications)
- On-site and virtual support services (Tech Cafes, smart lockers, IT vending machines, remote video support)
- Focusing on wellbeing, and driving digital adoption through organizational change management (OCM)
- AR/VR and immersive technologies for remote support and field services
- Smart meeting rooms and smart offices including voice and gesture controls, and safety management in support of the phy-gital workplace
- Accelerating adoption of Device as a Service, Workspace as a Service, VDI, and cloud productivity platforms M365, Cisco WebEx, Citrix Collaboration, Amazon Workspaces, and VMware Workspace ONE
- Increasing focus on XLAs and sentiment analysis to further enhance employee experience, and driving a human-centric approach across DWS
- Increasing proactive experience centers and a real-time data insights-driven approach across the workplace
- Expanding AI virtual agent to HR (onboarding and offboarding)
- Deploying Microsoft Viva for employee wellbeing
- Driving personas by industry and personalized experience services
- Developing new skillsets including machine coaches, business value specialists, automation and AI architects, CX leads, service resiliency engineers, cloud architects, and cloud DevOps orchestrators
- Increasing low-code/no-code (Power Platform) skills
- Expediting resources building automation use cases and system capability by industry, and dedicated automation and AI leads by client account
- Ability to support clients' ESG initiatives and drive carbon-neutral agendas
- Providing agile and DevOps frameworks and methodologies across the workplace environment
- Provision of design thinking-led consulting engagements, supplemented with dedicated innovation centers for co-innovation and co-creation across the digital workplace
- Enabling safe return to the office and supporting a hybrid working environment
- Ability to enact AI-Ops and an AI-led service desk environment



- Providing a fault-free IT infrastructure environment in support of remote workers
- Increasing productivity of cloud environments to expedite new cloud services
- Flexibility in approach and cultural alignment of the vendor across the client organization
- Ability to provide industry-specific expertise across digital workplace services.

## Market Size & Growth

The global digital workplace services market is estimated by NelsonHall as ~\$43,312m in 2021. It is expected to grow at 3.1% CAGR to reach ~\$48,856m by 2025.

## Success Factors

The key success factors for digital workplace services vendors include:

- *Modern Management*: provide Evergreen services to enable clients to keep up to date with latest features and release updates on Windows 10 and M365, and Evergreen CoE to drive adoption of new features. Also, providing support for Windows 365, Windows 11 and Apple DaaS. Increasing modern management toolsets including Microsoft Autopilot, Intune, and VMware Workspace ONE. Providing support for clients' ESG and carbon-neutral agendas through DaaS and Evergreen services
- *Consulting & Advisory Services*: increase onshore consulting and advisory services, supported by digital workplace SMEs, providing a design thinking and collaborative approach to define clients' hybrid digital workplace transformation roadmap, and virtual labs to showcase multiple use cases in support of a hybrid workplace
- *Increasing Skill-Sets*: ramp digital reskilling and new skill sets including automation architects, site reliability engineers (SRE), machine coaches, business value specialists, experience leads, hyperscaler full-stack SMEs, and AI/ML specialists
- *Intelligent Collaboration*: expanding intelligent collaboration capabilities to smart meeting rooms and utilizing AI and automation to enhance meetings. Increasing user adoption and transformation through Microsoft Teams and bringing LOB applications into teams (e.g., ServiceNow, Workday), and developing IP in the Teams app store
- *Increasing Automation and AI*: using AI-Ops to trigger automation and enable automated remediation. Expanding AI-Ops to No-Ops cloud managed services and developing more complex use cases in support of a hybrid workplace environment. Enabling agile and zero-touch service desk and digital support through self-healing, self-service, and AI-chat, including the expansion of AI virtual agent use cases. Providing one-click resolution of common issues, and IVR-led automation capabilities (AI-enabled voice for automation). In addition, enacting event and incident automation to diagnose and remediate (self-heal) incidents through AI, cognitive bots, and proactive and predictive analytics
- *XLAs and Employee Experience*: increase focus on XLAs and sentiment analysis including wellbeing and HR (Microsoft Viva), to further enhance employee experience, and driving a human-centric approach across digital workplace. Developing proactive experience centers to monitor real-time data insights and XLA dashboard performance
- *Focus on Innovation*: expand AR/VR and immersive capabilities to support remote field support, in particular across Microsoft HoloLens and Mesh services. Combining digital kiosk solutions with digital experience and ability to interact with digital agent at locker or video conferences and collaborate with a live agent. Increase innovation hubs to drive an



experience-led approach and support co-innovation with clients on smart hybrid work environments

- *Low-Code/No-Code Development Capability*: utilize citizen development principles to reduce ongoing IT costs and increase the value of adopting low-code platforms (Microsoft Power Platform). Vendors need to ensure they have defined a robust and encompassing capability to support this transformation. This capability should span training the individuals, building foundational tools and processes, and defining governance structures
- *Deeper Personalization*: driving a hyper-personalized approach at the start of client engagements to better understand clients' business and customize services accordingly. Also, defining personas by industry and personalized experience services across the workplace and wider enterprise ecosystem
- *Smart Working Environment*: increase safe workplace capabilities including workplace signage for social distancing, gesture and voice control and biometric entry with building entry. Provide integration with third-party platforms including ServiceNow Safe Workplace Suite, and utilizing M365 to provide IoT and AI-enabled employee safety applications. Also, provision of management dashboards providing real-time monitoring and reporting capabilities. In addition, smart meeting rooms and wayfinding solutions for next-generation collaboration and parity of experience regardless of location.

## Challenges

The key challenges for digital workplace services vendors include:

- Clients want vendors to focus more on enabling the transformation to a hybrid workplace environment. The once typically constrained and traditional workplace services-focused RFP framework is now necessitating vendors to demonstrate both a proactive and transformative approach, and to bring collaborative 'blue-sky' thinking into the process. This is driven through a modular approach, IP, methodologies, modern toolsets, innovation hubs and ecosystem partnerships to achieve the client's desired outcomes
- Clients are placing greater focus on the experience and wellbeing of end-users across the workplace. They are increasingly looking to drive the adoption of digital tools, assets, and processes. Also, to increase the experience monitoring capabilities of end-users both from a device and HR (wellbeing) perspective, including remote onboarding. Through organizational change management, understanding how users react to change and identifying learning patterns. In addition, clients are further challenging vendors to deliver tailored workplace solutions targeting industry objectives to further drive adoption
- Clients are increasingly focused on defining and developing XLAs in parallel with SLAs as they seek to improve employee experience across the enterprise. Both vendors and clients need to ensure XLAs are well defined and structured, with a focus on developing XLA dashboard measurement across a number of areas including automation and virtual agent effectiveness. Also, measuring end-user sentiments across device, application, network, and home office. Vendors should also broaden the scope of XLAs across the wider enterprise, (e.g., onboarding and wellbeing in HR) to further improve employee experience across 'hire-to-retire'
- Clients are looking to adopt modern management capabilities and move to a hybrid workplace environment to facilitate a flexible, safe, work-from-anywhere culture. The office is now seen as a destination for collaboration. Clients are looking for the skillsets to facilitate this transition and drive employee experience and support the hybrid workplace of the future. Vendors need to ramp digital re-skilling initiatives to enable more



productivity for clients and a greater focus on purpose, wellbeing, experience, and sustainability as primary drivers for enterprises.

## Outlook

The future direction for digital workplace services will include:

- Greater focus on human-centric experience design and employee experience platforms including utilization of Microsoft Viva. Also, targeting installed M365 client bases with Viva to improve productivity and UX
- Investing in decarbonization measurement and reducing onsite support, and developing green apps to educate and provide end-users with visibility of their carbon footprints
- Development of proactive mass healing (L2/3) with service desk resolving data corrections or data validation errors and site reliability engineers (SRE) approving solutions offered by self-healing systems. Also, investing in platforms designed for the future of work, including the gig workforce and remote talent
- More focus on the development of industry-specific personas to create solutions and use cases to fit specific industry requirements for hybrid digital workplace services. Also, standardization of XLAs in support of digital workplace and customizing XLAs by persona, client verticals, and client-specific requirements
- Investing in MarTech and contextualizing the workplace for users, and targeting ads to an end-user in an enterprise for training and adoption services, and continuing focus on OCM to drive digital adoption
- Vendors will increase joint GTM and business plan approaches with strategic ecosystem partners (i.e., Microsoft, AWS, Google, Citrix, VMware), in particular across M365, Unified Device Management, DaaS, and Cloud Workspace
- Vendors will increase AI-Ops and ML capabilities to enable enterprises to utilize AI as a collaboration tool to augment workforces and further enhance UX. Also, supporting the transition to a future No-Ops model
- Greater focus on Teams including Teams Calling, Power Platform, Windows 365 (Cloud PC), Win 11 and Apple DaaS; and repurposing offices to become collaboration hubs
- Vendors will increase capabilities across AR/XR, IoT, 5E edge technologies and mixed reality IoT integration with virtual twin. Also, focusing on frontline workers as a service (FWaaS) capabilities across the workplace.



## NEAT Methodology for Advanced Digital Workplace Services

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NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet client future requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet client future requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

**‘Ability to deliver immediate benefit’: Assessment criteria**

| Assessment Category | Assessment Criteria   |
|---------------------|---|
| Offerings           | <ul style="list-style-type: none"> <li>VDI services and capabilities</li> <li>Modern management and Evergreen services capabilities</li> <li>XLA-based engagement capability</li> <li>Intelligent collaboration and M365 capabilities</li> <li>Digital support services and AI-enabled capabilities</li> <li>AR/VR, smart spaces and IoT-enabled capabilities</li> <li>Workplace security services</li> </ul>   |
| Delivery            | <ul style="list-style-type: none"> <li>DWS North America delivery capabilities</li> <li>DWS EMEA delivery capabilities</li> <li>DWS APAC delivery capabilities</li> <li>DWS LATAM delivery capabilities</li> <li>Dedicated resources for build capabilities and consulting-led approach</li> <li>Dedicated resources for run capabilities including DTCs, CoEs; and reskilling programs</li> <li>Ability to provide proactive and predictive self-serve and self-heal capabilities</li> <li>Ability to support next-generation AI-led workplace services</li> <li>Ability to utilize analytics to improve end-user insights and overall employee experience</li> <li>Extent of digital startups and ecosystem partner GTM for digital workplace services</li> </ul> |
| Presence            | <ul style="list-style-type: none"> <li>Scale of Ops - Overall</li> <li>Scale of Ops – N. America</li> <li>Scale of Ops - EMEA</li> <li>Scale of Ops - APAC</li> <li>Scale of Ops - LATAM</li> <li>Number of clients overall for digital workplace services</li> </ul>   |
| Benefits Achieved   | <ul style="list-style-type: none"> <li>Level of cost savings achieved</li> <li>Improved speed problem resolution</li> <li>Reduced number of service tickets</li> <li>Increased end-user/business satisfaction</li> <li>Pricing approach</li> </ul>  |



*Exhibit 2*

**‘Ability to meet client future requirements’: Assessment criteria**

| Assessment Category                       | Assessment Criteria   |
|---|---|
| Overall Future Commitment to Advanced DWS | Financial rating<br>Commitment to next generation digital workplace services<br>Commitment to innovation in digital workplace services  |
| Investments in Advanced DWS               | Investment in IP and platforms, including cognitive and AI in support of DWS<br>Investment in support of virtualization<br>Investment in support of modern management (inc. Evergreen)<br>Investment in support of XLA-based approach to workplace<br>Investment in support of intelligent collaboration<br>Investment in support of AI-enabled services, and data-driven proactive approach to DWS<br>Investment in support of AR/VR, immersive services, and smart spaces |
| Ability to Partner and Evolve Services    | Key partner<br>Ability to evolve services   |

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.



[research.nelson-hall.com](http://research.nelson-hall.com)

**Sales Inquiries**

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:  
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