iSG Provider Lens™

ServiceNow Ecosystem Partners

A research report comparing provider strengths, challenges, and competitive differentiators

QUADRANT REPORT | APRIL 2022 | U.S.

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Executive Summary

Report Author: Dr. Tapati Bandopadhyay

ServiceNow has emerged as the most preferred workflow management platform.

The connected enterprise space has been expanding since the cloud adoption drive, especially in the U.S. Software providers are building business specific and industry verticalized solution. Enterprises are driven by a broad set of services in every portfolio and domain, generating data that eventually transforms into knowledge. These services create and store business information produced by many teams and stakeholders involved at every touchpoint. The software industry has seen a transformation from installed on-premises applications to cloud (SaaS) models. This has multiplied the benefits in every aspect, including in deployment,

functionalities and integration with advanced components. The cloud-first strategy is being adopted by software providers and enterprises alike, and is converging as an integrated service management strategy.

U.S market is dynamic and welcoming for new and developed solutions leading the way to transform enterprise processes. Industries like Insurance, Banking & finance, Retail and healthcare are the top consumers as these are strongly driven by transactions. These range from the technology, organizational support to business process which are going through reengineering and upgradation in every aspect.

In this scenario, workflow has been transformed to simplify activities, inputs and outcome dynamics. In addition, software vendors are transitioning into a preferred marketplace arrangement for the open-source community and partner

ServiceNow is building products for every **persona, industry and portfolio.**

Executive Summary

ecosystem to utilize and offer technology agnostic, industry specific accelerators.

New-age software platforms offer prebuilt process packages, Agile designing and multiple deployment options through custom connectors and accelerators.

ServiceNow is one such platform with a robust ecosystem that scales with many service integrators, service providers, technology providers and advisory communities. It is one of the fastest-growing platforms that provides workflow management solutions across various verticals and horizontals. The standard approach is to replicate technology processes, but there is a growing requirement for a single unified platform for the diverse functions of an enterprise. This is for the following vital reasons:

- Business applications for every function may enhance system interconnectivity but also create integration complexities.

- With increased application touchpoints, data security has simultaneously gained prominence because of increased vulnerability.

- Service levels and performance management has become a complex activity, affecting benefits realization.

- Incremental technology operations cost, including support, maintenance and license, now constitutes a large expense share.

As a result, enterprises are keen on exploring options to reduce management complexities of multiple software platforms as such issues often impede digital business transformation initiatives.

The core focus of the ServiceNow platform is to simplify workflow by focusing on functional nuances and business logic. ServiceNow strategically leverages customer personas, products

and platforms across functional areas. The ServiceNow platform enhances business, technology and cross-functional processes.

The focus on building products for every persona, industry and portfolio drives the expansion of ServiceNow in every sector. The technology portfolio covers critical aspects of service management driven by ITIL 4 and has translated into specialized offerings. Various features such as the convenience of virtual agents, focus on productive intelligence, use of machine learning and availability of workforce and workflow optimization toolkits have positioned it as a solid and comprehensive platform. It also covers critical security operations; governance, risk and compliance; DevOps; and portfolio management.

ServiceNow has a discrete strategy focusing on U.S enterprise clients and service providers. A series of acquisitions

made by ServiceNow depicts the approach to building a diverse portfolio of accelerators and solutions inclining towards unique requirements. The acquired product companies possess functionalities around automation platforms, observability systems and testing solutions. The infusion of these novel functionalities enhances workflow efficiency, effectiveness, and economics.

Provider communities have understood the capabilities of ServiceNow — interoperability, compatibility and customization — and are rapidly building expertise on the platform in terms of consulting, implementation and integration, and managed services. ServiceNow also offers products including accelerators global service integrators to reduce the time to value and enhance end-user experience.

ServiceNow is one of the most widely adopted platforms for a few

Executive Summary

critical reasons: first, it is considered a comprehensive platform with AI, analytics, security, automation, and low-code/no-code characteristics to build business processes at pace and scale; second, ServiceNow has tiered partnerships and discrete roles with providers. For example, the ServiceNow Impact partnership program strives to expand market penetration and value actualization for customers. The partners help enterprises gain momentum with the digital transformation of their businesses. ServiceNow's technological and strategic partnerships are about leveraging exclusive proprietary offerings and industry knowledge to upscale realtime process execution capabilities.

The U.S has always been the largest market for ServiceNow and has been flourishing at a pace. 50% workforce is based out of the U.S and around 94% of the overall revenue accounts for North

America. Consulting and professional services firms are getting into partnership with ServiceNow to fulfill the customer demands and build a new pipeline for their unique requirements. This is an exciting ecosystem with technological developments using Artificial Intelligence, Machine Learning, and new-age application models through strategic partnership, innovation programs and co-build initiatives with industry-leading providers and consulting firms.

ServiceNow's goal is to build enterprises of the future with mature products and a comprehensive platform, standardizing processes and enabling a transition to digital workers, with a focus on business-critical tasks. The platform, therefore, will play a pivotal role in building future enterprises that are sustainable, resilient and agile.

> ServiceNow is the fastest-growing platform providing workflow management solutions.

Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Accenture	Leader	Leader	Leader
Advance Solutions	Product Challenger	Contender	Product Challenger
Aspire Systems	Product Challenger	Contender	Product Challenger
Atos	Product Challenger	Product Challenger	Not In
Capgemini	Leader	Leader	Leader
Cask	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC	Market Challenger	Market Challenger	Market Challenger
EY	Market Challenger	Market Challenger	Market Challenger

Provider Positioning

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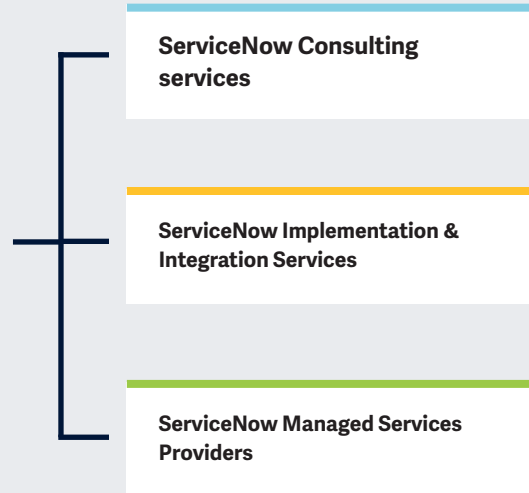|	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Genpact	Leader	Leader	Leader
GlideFast	Product Challenger	Product Challenger	Product Challenger
HGC	Contender	Contender	Contender
HCL	Leader	Leader	Leader
Hexaware	Rising Star ★	Leader	Rising Star ★
IBM	Market Challenger	Not In	Not In
Infosys	Leader	Leader	Leader
INRY	Product Challenger	Contender	Contender
KPMG	Leader	Market Challenger	Market Challenger
LTI	Leader	Leader	Leader

Provider Positioning

Page 3 of 3

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Maryville Consulting Group	Contender	Not In	Not In
Mindtree	Product Challenger	Rising Star ★	Rising Star ★
NewRocket (Highmetric)	Not In	Not In	Contender
Plat4mation	Contender	Not In	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Rising Star ★	Market Challenger	Market Challenger
Trianz	Leader	Rising Star ★	Leader
Wipro	Leader	Leader	Leader
YASH	Product Challenger	Product Challenger	Product Challenger

This study focuses on what ISG perceives as most critical for 2022 for **ServiceNow Ecosystem Partners** market.

ServiceNow Consulting services

ServiceNow Implementation & Integration Services

ServiceNow Managed Services Providers

Simplified Illustration Source: ISG 2022

Definition

The ServiceNow Ecosystem Partners 2022 study examines the extensive, global and complex partner network of one of the leading workflow management software solutions. The broad acceptance of ServiceNow's offerings among the user community has led to exponential growth for the company. Enterprises seek professional services to fully utilise its broad functionalities — from process redesign through software implementation and integration to application management and training. Various offerings and certification levels indicate the focus of partner companies, ranging from full-scale lifecycle support to laser-focussed services for specific tasks.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants on ServiceNow consulting services, ServiceNow implementation and integration services and ServiceNow managed service providers.

This 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 regional market

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

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

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

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

ServiceNow Consulting Services

Who Should Read This

This report is relevant to all enterprises across industries in the U.S. for evaluating the providers of ServiceNow consulting services.

In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow consulting services to enterprises in the U.S. and how each provider addresses the key challenges faced in the region. The report also provides a comprehensive overview of the competitive landscape of the market.

Enterprise clients, especially in mature markets such as the U.S., are evaluating the ServiceNow consulting services offered by various service providers based on their end-to-end delivery capabilities. As a part of this, enterprises expect a long-term roadmap and blueprint for process transformation and functionalities offered by ServiceNow to be aligned

with their requirements. Enterprises also seek proven execution abilities of service providers in the U.S. to enable enterprise business services and workflows on top of the ServiceNow platform ecosystem, beyond ITSM, IT operations management (ITOM) and IT asset management (ITAM).

C-level executives: Executive leaders, including CEOs and CIOs, focusing on driving business outcomes and organizational objectives through ServiceNow solutions should read this report to understand the trends and developments in ServiceNow offerings.

Digital transformation leaders: Digital transformation leaders that spearhead initiatives to build a resilient and future-proof organization should read this report to know how services providers design ServiceNow solutions and map respective technologies.
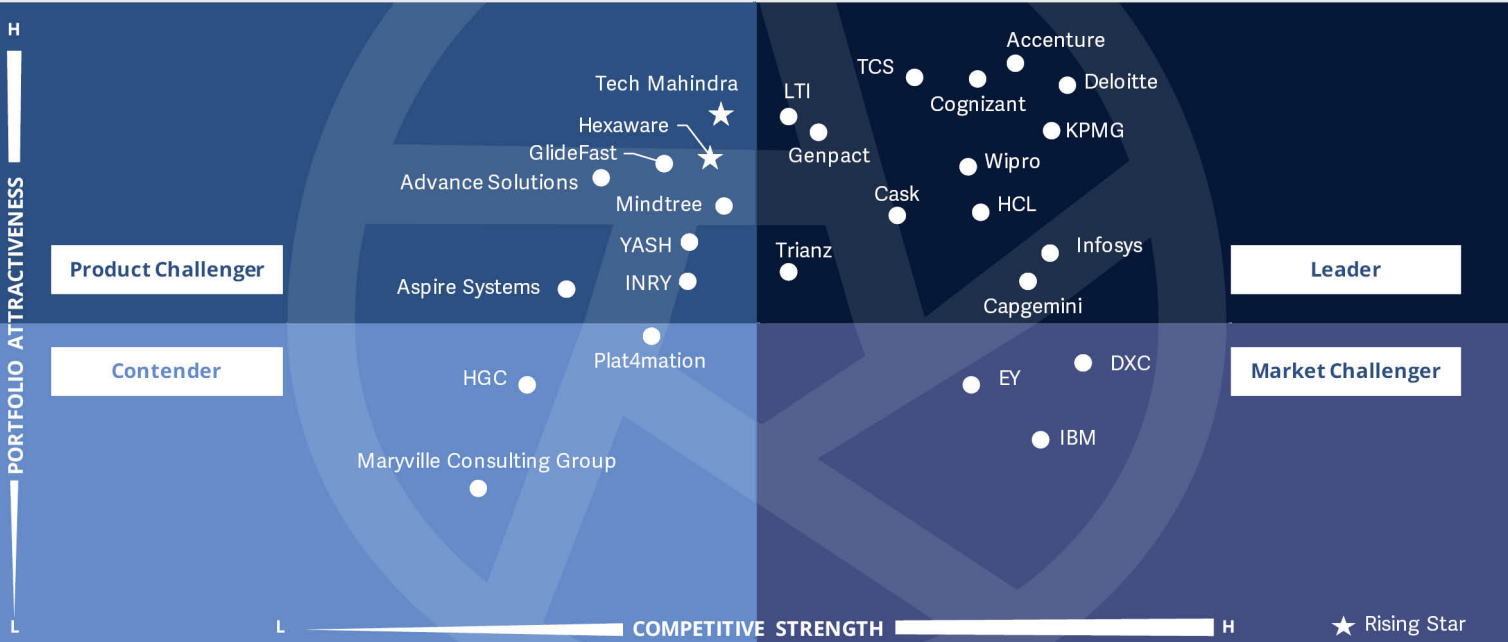
Consulting leaders: Management, technology and domain consulting leaders should read this report to learn about the industry-specific solutions provided by ServiceNow and providers' prowess in successfully conducting consulting assignments for diverse industry verticals.

ISG Provider Lens™

ServiceNow Ecosystem Partners
ServiceNow Consulting Services

Source: ISG RESEARCH

U.S. 2022

PORTFOLIO ATTRACTIVENESS

H

Tech Mahindra ★
Hexaware —
GlideFast —— ★
Advance Solutions
Mindtree

Product Challenger

YASH
Aspire Systems
INRY

Contender

Plat4mation

HGC

Maryville Consulting Group

LTI

TCS

Cognizant

Accenture

Deloitte

KPMG

Genpact

Cask

Trianz

Wipro

HCL

Infosys

Capgemini

Leader

EY

DXC

Market Challenger

IBM

L

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COMPETITIVE STRENGTH

H

★ Rising Star

This quadrant emphasizes on the **ability and in-depth expertise** of the provider firm to consult enterprises on mapping ServiceNow capabilities. Consulting service providers **evaluate business requirements** and map corresponding products, services and packages.

Dr. Tapati Bandopadhyay

ServiceNow Consulting Services

Definition

This quadrant assesses providers of consulting services that help clients with the use of workflow management services. While reference models and assessments are key to understanding a client's maturity and prevailing challenges, a broad understanding of the current technical capabilities and plans help differentiate the ServiceNow partners. Helping clients understand what efforts toward transformation have to be made to optimize the investments made on ServiceNow and deliver a robust migration path distinguishes consultants from one another.

Eligibility Criteria

1. **Use of reference models, templates and frameworks**: Best practices in opportunity identification and assessments for new ServiceNow competencies. Availability of frameworks, tools for ServiceNow investment planning and roadmaps, ROI and business case development, value realization metrics and benchmarks (by industries and functions).

2. **Experience in broad workflow and service management**: Designing client roadmaps with long-term strategic plans to use ServiceNow

as an integrated "platform of platforms" for all major corporate business operations, IT services and integration with GRC and security policies.

3. **Capabilities to predict long-term technological developments**: Tools and methodologies to gather market intelligence. Part of tech community and knowledge forums to seek insight on advancements.

4. **Knowledge about ServiceNow capabilities and other tools**: Knowledge about workflows functional and business processes within enterprise services supported by ServiceNow, ITSM

and IT operations management and areas such as customer service management, human resources, finance and accounting, facility management and security.

5. **Possesses relevant certifications**: ServiceNow certifications, ITIL 4 expertise, COBIT, DevOps and enterprise service management (ESM)-related accredited experience.

6. **Experience with organizational change principles and practice**: Planning, delivering and supporting organizational change with proven case studies and client storyboards from various industries, as relevant.

ServiceNow Consulting Services

Observations

Service providers and advisory firms have understood the importance of building comprehensive knowledge related to ServiceNow offerings. Their consulting practices are built around enterprise portfolios and aimed at transforming businesses and processes.

For business process transformation, consulting provider firms are developing proprietary frameworks and templates that are industry specific, and include advanced technologies and cross-functional services. Acquisitions have been rampant in the IT market; niche firms that are aligned to specific industries and technologies have been acquired to expand teams and gain domain expertise inorganically.

Evolving methodologies are used by service providers for evaluating current processes and calibrating an approach to review and recommend changes, based on the compatibility and customization features offered by the ServiceNow platform. Strategy design and the use of custom templates to capture attributable data are prevalent trends. In addition, providers focus on developing proprietary offerings in congruence with the ServiceNow platform to accelerate knowledge capturing processes. Complementing technologies such as AI and automation are also being used extensively.

ServiceNow is increasingly collaborating with established service providers, through partnerships and strategic alliances to build industry specific solutions to optimize processes. Such engagements also involve substantial collaboration on the commercials and knowledge sharing.

From the 65 companies assessed for this study, 28 have qualified for this quadrant with 13 being Leaders and two as Rising Stars.

accenture

Accenture's ServiceNow consulting offerings are embedded into its domain consulting talent, focused execution and outcome-based delivery models. Its "one strategy one" execution model, coupled with the unique and pervasive strengths of the ServiceNow platform, helps in re-platforming its enterprise clients.

Capgemini

Capgemini Capgemini's consulting capabilities cover operating model and design, workflow transformation recommendations and an application modernization roadmap.

Cask

Cask demonstrates a strong knowledge of ServiceNow in terms of the latest releases, features and use of newer modules such as AIOps and predictive analytics in functional areas beyond IT. Its focus on technology-business hybrid talent is the critical success factor for clients requiring consulting services.

Cognizant

Cognizant takes a holistic approach toward ServiceNow consulting services. Through the acquisition of Linium, the company offers dedicated knowledge and competencies on ServiceNow.

Deloitte

Deloitte has consistently been an award-winning ServiceNow partner, providing consulting services to help clients achieve continuous innovation and value

from disruptive digital technologies. Its strong governance and risk management practice make it easier for clients to execute large complex transformation projects effectively on the ServiceNow platform.

Genpact is a workflow transformation leader in this space. Its ServiceNow consulting offerings enable end-to-end digital transformation of clients' business workflows.

HCL's ServiceNow consulting offerings stretch beyond standard IT and service management into ServiceNow platform applications and new modules that leverage other functional and business workflow transformations that are integrated and outcome focused.

Infosys takes an outcome-focused, measurable and service-levels aware view of ServiceNow managed services across IT, business services and operating environments of client enterprises.

KPMG

KPMG's strengths in risk and compliance in business and financial management processes and workflows for clients help enterprises leverage ServiceNow optimally in a holistic approach across governance, risk, compliance and sustainability.

LTI has been witnessing significant growth of its ServiceNow practice in the recent years, especially in mature markets such as the U.S. Its vertical-focused consulting offerings for ServiceNow operationalizes industry-specific business workflows.

TCS

TCS takes a highly differentiated, innovation-focused intellectual-property-driven approach, powered by Crystallus™, for clients seeking a strategic journey with ServiceNow.

Trianz

Trianz leverages the functional and domain consulting skills of its ServiceNow practice teams to deliver a verticalized, knowledge-powered, automation-first approach that enables clients' value realization from ServiceNow.

Wipro has smartly integrated its long-standing IT service management practice partnership with ServiceNow into its digital consulting offerings. It empowers clients to make the best of both IT and business views of ServiceNow.

Hexaware (Rising Star) is been focused on helping clients leverage ServiceNow by applying a 360-degree view across business functions and IT services. It is one of the award-winning strategic consulting partners of ServiceNow and ensures high customer satisfaction.

Tech Mahindra (Rising Star) is one of the unique ServiceNow consulting partners that offers specialized vertical and domain-focused value. It has strong expertise and experience in deep-technology leveraged domains such as telecom.

Infosys

Leader

"Infosys' ServiceNow consulting provides a unique intellectual property (IP)-based towards digital transformation."

Dr. Tapati Bandopadhyay

Overview

Infosys is headquartered in Bengaluru, India, and operates in 50 countries. It has over 270,000 employees in approximately 234 global offices. In FY21, the company generated $13.5 billion (+10.7 percent YoY) in revenue, with financial services as its largest segment. Infosys provides consulting for 13 industries with six service offerings that cover CIO advisory and digital and emerging services for consulting. It has offices in more than 20 locations in the U.S.

Strengths

Proven industry expertise in ServiceNow consulting: Infosys' ServiceNow consulting capabilities in the ESM space encompasses connected, integrated and cross-channel engagement platforms; multicloud orchestrators; data ecosystems; AI-first enterprise ops; digitalized workflows; and experience-as-a-package services.

Persona-based service offering: Infosys' ServiceNow consulting provides unique end-to-end competencies across IT and enterprise business processes and services through its design capabilities and user experience(UX)-focused persona-based approach. Infosys' ServiceNow solution offers four different personas of the same individual users for service requests, reporting errors, support and finding a solution.

ESM Café – a unique value proposition: Infosys' differentiators empower clients to leverage ServiceNow for accelerating the expansion of value between IT and non-IT. Infosys also leverages innovations such as the ESM Café and enables low-code/no-code and industry specific solutions with intellectual property embedded into large deals.

Caution

Infosys' ServiceNow consulting services focus on easy-to-leverage intellectual property and help accelerate client digital transformations, but are more suited for end-to-end large client initiatives rather than point solutions, service enablement and small engagements.

ServiceNow Implementation and Integration Service

ServiceNow Implementation and Integration Services

Who Should Read This

This report is relevant to all enterprises across industries in the U.S. for evaluating the providers of ServiceNow implementation and integration services.

In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow implementation and integration services to enterprises in the U.S. and how each provider addresses the key challenges faced in the region.

Enterprises in the U.S. are keen on strategically leveraging the ServiceNow platform ecosystem and innovations for their digital business transformation and are focusing on outco me-assured implementations. For achieving this, enterprises require implementation experts, proven implementation methodologies and strategies, and flexible implementation models.

Most large mature enterprises in the U.S. are early technology adopters and own complex legacy technology stacks and business service landscapes. Hence, they require seamless integration to ensure smooth service delivery and consistent user experience. Service providers that can meet these requirements can be of significant help to enterprises.

C-level executives: Executive leaders, including CDOs and CTOs, should read this report to identify the right system integration partner for meeting the technical requirements for ServiceNow implementation in line with the objectives of their enterprises. This study will also help them understand the ServiceNow implementation and integration landscape and providers' capabilities that are aligned to their long-term technology roadmap.

Engineers and architects: Engineering heads and architects responsible for ServiceNow implementations in enterprises can use this report to understand the developments in ServiceNow solutions so that they can invest in and build intellectual property and accelerators for respective activities, cloud platforms and industries.

Technology leaders: This study provides insights into the latest technology trends and patterns aligned with ServiceNow features, functionalities and components. Hence it helps technology leaders in understanding the configuration and integration of ServiceNow solutions.

ISG Provider Lens™

ServiceNow Ecosystem Partners
ServiceNow Implementation and Integration Services

Source: ISG RESEARCH

U.S. 2022

H

PORTFOLIO ATTRACTIVENESS

GlideFast
Mindtree

TCS
Accenture
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Wipro
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Leader

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Advance Solutions
Aspire Systems

DXC
Tech Mahindra
KPMG

Market Challenger

HGC
INRY

EY

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L
COMPETITIVE STRENGTH
H

★ Rising Star

This quadrant assesses the competencies of provider. **implementing and integrating** the ServiceNow platform in **diverse environments and technology set-ups,** including connecting inhouse systems with ServiceNow for optimum performance and continuous service availability.

Dr. Tapati Bandopadhyay

ServiceNow Implementation and Integration Services

Definition

This quadrant assesses providers specializing in implementing ServiceNow. As ServiceNow's solutions do not run in isolation in most companies, knowledge of integration with different software tools is an essential differentiating factor among partners. The experience of service providers ensures that installation and integration are seamless. At the same time, they should also focus on the maintenance of the installed solution.

Eligibility Criteria

1. **Use of predefined solutions, accelerators and templates:** Experience in agile project management (PMP certifications, SaFE and Scrum), continuous integration/continuous development and DevOps best practices and toolchains, containerization platforms, application performance monitoring and platform-specific ops management tools.

2. **Experience with emerging technologies:** E2E management of machine learning techniques, natural language processing (NLP) and AI capabilities, paired with cognitive computing to enable digital service management (DSM), virtual agents and self-service.

3. **Knowledge about ServiceNow usage and value in specific client scenarios:** Enterprise-shared services/ BPO, cloud and multi-cloud integration; knowledge of development and deployment and operations of industry specific solutions (for example, healthcare, telecom) on the ServiceNow platform.

4. **Speed of adoption and value realization:** Deploy new features, modules and enhancements on the ServiceNow platform in a cost-effective and efficient manner.

5. **Ability to offer maintenance support:** Support in installations, upgrades and new feature/module release management, migration, patch management, lifecycle management of ServiceNow instances, and maintenance experience in post ServiceNow release migration

6. **Size and capabilities of local and global delivery teams:** This includes relevant ServiceNow technologies expertise such as API development, JSON and Python.

7. **Experience in system, data and process integration:** Integration with the hub and spoke model (starter, standard, professional and enterprise levels).

8. **Customer satisfaction measurement:** Ability to gather voice of customer, service satisfaction index, ServiceNow score and net promoter score (NPS).

Observations

ServiceNow is emerging as the preferred platform across enterprises to support workflow management. However, post-implementation, support and maintenance become complex when global organizations use it across geographies. As new releases and platform upgrades are complex tasks, providers have to prepare a standardized and unified process with modernized components using automation.

Service providers are consolidating technologies and developing new integration strategies for internal and external systems. For example, ServiceNow has a well-crafted approach wherein service integrators and enterprises can build a platform atop ServiceNow for personalized consumption. Market differentiators, proprietary templates, system accelerators, platform connectors

and adjoining system components are becoming a part of go-to-market strategies.

Modernizing legacy application architecture and digitalizing the current and new application landscape is becoming a priority. Providers are building technology packs that include accelerators covering domain-related activities to support and maintain business readiness in accordance with ServiceNow. The platform can build and integrate the technology components of processes and workflows to improve execution and accelerate outcomes.

Focus on research and proprietary offerings is increasing in due to the growing popularity of ServiceNow among enterprise clients. Building, aligning, operationalizing and monetizing proprietary assets is a differentiator and value generator. This encourages the stakeholders in the ServiceNow

ecosystem, which includes ServiceNow teams, integration partners and software partners, to collaborate and co-innovate on novel solutions.

From the 65 companies assessed for this study, 25 have qualified for this quadrant with 12 being Leaders and two as Rising Stars.

accenture

Accenture's offers industry specific ServiceNow implementation and integration services that are end to end in terms of coverage of clients' complex legacy and digital applications landscape. Its offerings are best suited for large enterprise clients.

Capgemini

Capgemini Capgemini's ServiceNow implementation and optimization services are enabled with a considerable line-up of accelerators and frameworks, enhanced with time and over implementations.

Cask

Cask has a strong ServiceNow-focused technology and workflow transformation team with certifications plus experience in delivering mid to large projects. It is a leading ServiceNow partner for clients in the U.S. due to its collaborative and integrative implementation approach.

Cognizant

Cognizant's ServiceNow implementation offerings utilize its deep technology management and IT service management (ITSM) know-how, combined with the specific tools and modules

implementation skills from the acquired company, Linium's teams. These are among the most comprehensive and balanced offerings for mature markets.

Deloitte

Deloitte's ServiceNow implementation offerings aptly combine its process redesign and implementation expertise, along with key strengths in governance and risk management. The company is best suited for complex legacy landscapes.

Genpact's ServiceNow implementation offerings leverage its workflow re-execution experience, providing clients with an integrative platform of platforms to achieve process and service excellence.

HCL's ServiceNow implementation and integration services are built atop its proprietary offerings such as DRYiCE™. Backed by strong services management implementation experience, the company takes an outcome-assured and service-oriented view of clients' strategic platform initiatives.

Hexaware leverages its best practice framework, H2O, to facilitate ServiceNow implementation journeys with relevant accelerators and pre-built knowledge and service bundles. It offers industry leading rapid and agile ServiceNow implementations for clients across verticals.

Infosys' Cobalt framework provides standard, tried and tested transformation templates along with best practices to ensure client success in strategic ServiceNow implementations.

LTI's ServiceNow implementation strategy also utilizes other relevant platforms such as Mosaic and Fosfor. The practice is uniquely differentiated with a design thinking and persona-based approach to help clients achieve faster adoption, at scale

TCS

TCS offers highly comprehensive ServiceNow implementation services powered by proprietary offerings. With the apt usage of CrystallusTM modules, accelerators and pre-curated service and process knowledge bundles, the company accelerates ServiceNow implementations in a predictable manner.

Wipro's ability to cross-leverage its digital ecosystem partners for ServiceNow implementation is a strong differentiator thanks to the diversity of talent available in the ecosystem. The skills range from design thinking applications to AI and cybersecurity integrations.

Mindtree

Mindtree (Rising Star) is a strong ServiceNow implementation partner because of its knowledge-sharing culture and domain focus. Its deep and unique expertise in some of the service-focused domains such as travel and hospitality make it a unique partner for ServiceNow.

ServiceNow Implementation and Integration Services

Trianz

Trianz (Rising Star) has ServiceNow practice teams that focus on combining technology tools expertise with functional and process know-how. It offers unique innovation-driven ServiceNow implementation services that enable improvement in process agility.

Infosys

Leader

"Infosys cross leverages the Cobalt framework to ensure success in every ServiceNow implementations"

Dr. Tapati Bandopadhyay

Overview

Infosys is headquartered in Bengaluru, India and operates in 50 countries. It has more than 270,000 employees across 234 global offices. In FY21, the company generated $13.5 billion (+10.7 percent YoY) in revenue, with financial services as its largest segment. Infosys has proven experience in application modernization and business and enterprise process transformation. It has offices in more than 20 locations in the U.S.

Strengths

360 degrees ServiceNow implementations expertise: Infosys cross leverages the platform's innovative ecosystem with its Cobalt framework of competencies. This includes the cloud innovation ecosystem on Cobalt, orchestrators facilitating movements to the cloud and blueprinting for new solutions and experience.

Innovative tools to accelerate Implementation: Infosys' integrative approach balances client requirements for modernizing the core as well as for building a cloud-first approach. These include the legacy requirement arising from data center consolidation,

applications ERP modernization, legacy tech transformation to APIs and data modernization for analytics.

Simplified interface for usage convenience: Infosys' ServiceNow practice enables end-to-end transformations in client landscapes across different verticals, ranging from financial services to semiconductor manufacturing and hi-tech industries. It delivers targeted outcomes, ranging from environment simplification to tools rationalization and enhanced user experience (UX). These outcomes are delivered with a proven industry track record — a few weeks rather than months and quarters — because of its experienced, domain-savvy talent pool.

Caution

Infosys leverages the Cobalt framework in sync with ServiceNow implementation practices. While enabling critical client capabilities through this approach, it increases the risk and likelihood of lock-ins for clients due to the tight integration between approaches and frameworks in implementation.

ServiceNow Managed Services Providers

Who Should Read This

This report is relevant to all enterprises across industries in the U.S. for evaluating providers of ServiceNow managed services.

In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow managed services to enterprises in the U.S. and how each provider addresses the key challenges faced in the region. The report also provides a comprehensive overview of the competitive landscape of the market.

In the U.S., enterprise clients find two aspects of ServiceNow managed services as critical success factors. The first aspect is regarding the quality, availability and agility of the workforce that provide managed services. Conducting programs such as monthly/quarterly service reviews and change management reviews can help increase the efficiency and build trust between managed service providers and enterprise clients.

Second aspect is the relevancy of ServiceNow skills, in terms of version upgrades and support, provided by the managed service team. For the providers of a large platform such as ServiceNow, new version releases are frequent, and enterprises need to ensure that they run on the latest versions.

C-level executives: Executive leaders, including COOs and CIOs, should read this report to understand the capability of the providers of ServiceNow managed services in managing and supporting ServiceNow maintenance aspects across portfolios. Choosing the right partner will help improve operating margins and business growth.
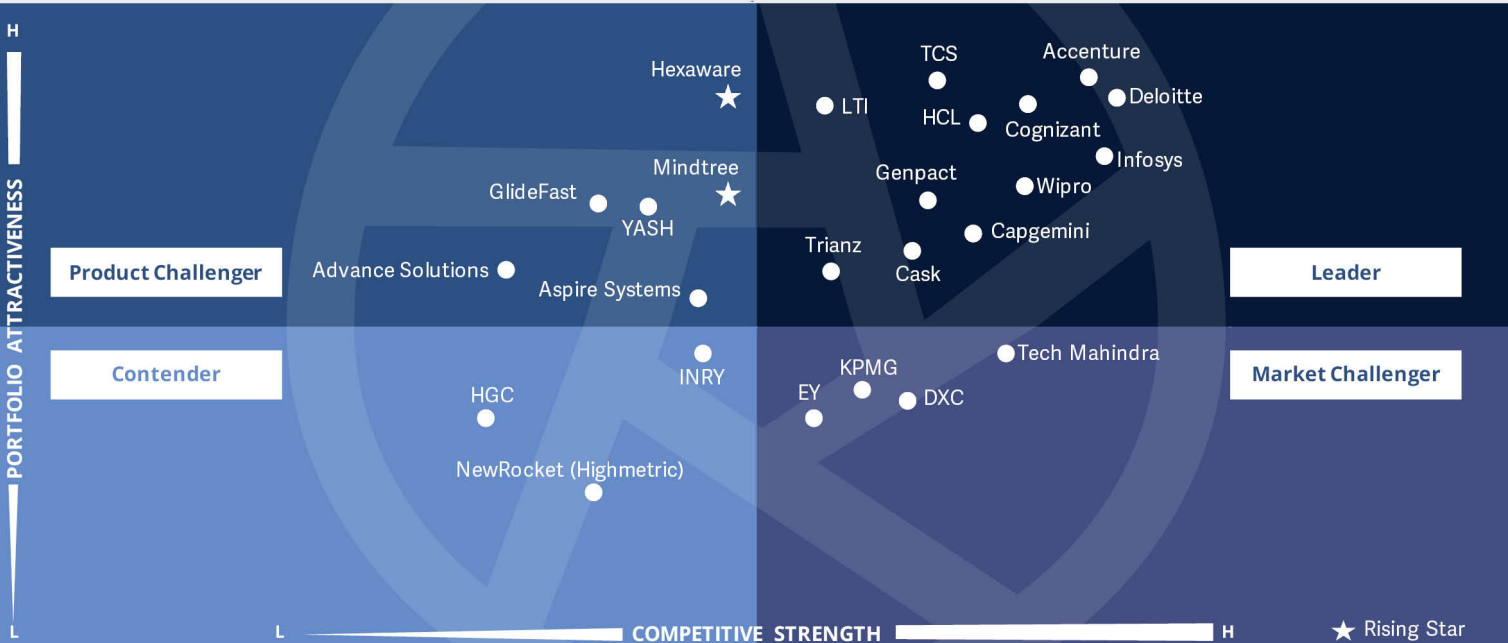
Delivery leaders: Program and service delivery leaders that manage large accounts in the U.S. and are responsible for customer experience and the net promoter score (NPS) should read this report to understand how ServiceNow managed service providers retain their credibility and service qualities.

Service line leaders: Service line and functional leaders that lead technology, corporate and organizational functions through portfolio management, employee services and application and technology support groups should read this report to rationalize the fitment of ServiceNow resources and workflows across all services.

ISG Provider Lens™
Source: ISG RESEARCH

ServiceNow Ecosystem Partners
ServiceNow Managed Services Providers

U.S. 2022

PORTFOLIO ATTRACTIVENESS

Product Challenger

Contender

Hexaware ★

Mindtree ★

GlideFast
YASH

Advance Solutions

Aspire Systems

HGC

INRY

NewRocket (Highmetric)

TCS   Accenture
LTI   Deloitte
      HCL   Cognizant
                    Infosys
Genpact
          Wipro
Trianz   Capgemini
        Cask

Leader

Tech Mahindra

KPMG
EY   DXC

Market Challenger

L   COMPETITIVE STRENGTH   H   ★ Rising Star

This quadrant assesses the ability of a service **prover to manage, maintain and support** the ServiceNow platform. The capability to **customize and personalize** the platform with the right set of resources is a critical factor.

Dr. Tapati Bandopadhyay

ServiceNow Managed Services Providers

Definition

This quadrant assesses providers for their capability to offer managed services for maintenance and support functions, including monitoring, remote support and centralized management of the Now Platform, workflows and the applications that run on this platform. When analyzing the providers in this quadrant, maintenance, data quality management, data security, and compliance-related aspects are considered. Due to the complexity of workflows that need to be supported, providers have to deliver services in global reach and cross-organizational usage. In addition, the service providers have to support a highly sophisticated and integrated application landscape and prove how they operate or integrate with a multi-vendor environment.

Eligibility Criteria

1. **Experience with support**: This includes ServiceNow's Now Platform, workflows, third-party applications, integrators and accelerators, newly released features/ modules and upgrades.

2. **Delivery capabilities**: with proximity to clients.

3. **Existing technology partnerships** with key software providers and breadth of application management service (AMS)-related portfolio.

4. **Service integration and management (SIAM) and delivery models**: Manage platform and have experience to use ServiceNow in broader frameworks such as AIOps, MLOps, ITOps, etc.

5. **Maturity of delivery and contract models**: Ability to manage multiple vendors and dependencies between toolchains and support SLAs.

6. **Broad customer base and local use cases and references.**

7. **Intelligent, adoptive and evolutive maintenance**: This is in sync with upgrades, functionality enhancements from ServiceNow and tech ecosystems, from Service providers and service integrators, in-house engineering teams and external partners and specialist tool providers.

8. **Ability to manage decentralized deployment inside the organization**: Adoption of low-code, - no-code and citizen developer techniques, training for identification and delivery and user knowledge updates on new releases, versions, features and modules

Observations

The evolving technology landscape and innovative solutions redefine enterprise processes and workflows. A mature and experienced workforce with high competency levels in technical areas helps sustain and manage the ServiceNow platform, which is comprehensive and increasingly accommodates evolving business requirements. Simultaneously, upskilling is essential for building an open professional talent pool.

Customizability of technology, business and organizational processes in tandem with cultural, professional and customer-driven changes is a growing trend. Many attributes need to be incorporated into processes, in keeping with the new work culture, along with a unique set of skills across various programming languages, applications platforms and systems.

Industry-specific services build confidence in providers handling and managing business processes. These projects prove to be a good source for building business acumen and a verticalized knowledge base. Business contextual knowledge is valuable and referenceable for other similar processes.

Managed services delivery model sustenance is growing as a key focus area with ServiceNow resource availability limitations. The providers have resorted to In-house training programs and community platform experiences are gaining popularity. Resources can be leveraged under the professional services engagement for short to moderate-term standard sets of work packages that do not fall in the confidentiality space. This initiative is backed by ServiceNow helping in building a mature resource pool and

conducting continuous incremental training programs to meet market demand.

From the 65 companies assessed for this study, 25 have qualified for this quadrant with 12 being Leaders and 2 as Rising Stars.

accenture

Accenture's managed services for ServiceNow take an end-to-end lifecycle-based view that generate strong client confidence. Its offerings are differentiated in terms of an ownership of outcomes, gainshare and service quality.

Capgemini

Capgemini Capgemini supports the entire managed services lifecycle, covering application support, custom enhancements and a set of critical competencies.

Cask

Cask's ServiceNow managed service offerings focus on domains and on driving outcomes. Its strong resource pool ensures consistency and reliability of ServiceNow assets in clients' runtime environment, ensuring secure, risk-managed operational scenario.

Cognizant

Cognizant offers one of the most holistic and balanced managed services portfolios, on the ServiceNow platform, in mature markets. Its long-standing tech and tools knowledge together with its ServiceNow related modules and process knowledge is well leveraged in its managed service offerings.

ServiceNow Managed Services Providers

Deloitte

Deloitte's ServiceNow managed service offerings are in sync with complex and expansive client scenarios and their unique requirements. Business and operational risk management and security and regulatory compliance assurance are the two critical success factors for its offerings.

Genpact's ServiceNow managed service offerings not only ensure smooth running of integrated workflows on the ServiceNow platform, but also take a metrics-driven, measurable route to client success, enabling them to achieve continuous process and service improvements.

HCL takes an outcome-focused, measurable and service-levels aware view of ServiceNow managed services across IT, business services and operating environments of client enterprises.

Infosys takes an outcome-focused, measurable and service-levels aware view of ServiceNow managed services across IT, business services and operating environments of client enterprises.

LTI offers unique, domain-aware and functionally savvy managed services for the ServiceNow platform with modules that are in demand among fast-growing enterprises in mature markets such as the U.S.

TCS

TCS takes a unique view to ServiceNow managed services, focusing on client productivity and outcome management. It takes a knowledge-powered, measurable, performance-oriented view of ServiceNow implemented instances in client landscapes.

Trianz

Trianz offers full-spectrum ServiceNow capabilities and managed services for mature client scenarios, stretching from version controls and upgrades of individual features to modules, entire assets, application landscape and lifecycle stages.

Wipro extends its managed service capabilities for ServiceNow to competence in adjacent tools and tech stacks. This approach helps clients manage not only the ServiceNow instances optimally and effectively, but also manage the entire integrated landscape.

Hexaware offers knowledge-driven ServiceNow managed services leveraging their long-term partnership. It also takes an operational risk-aware, performance-focused, cost-optimized view of ServiceNow instances running in diverse client technical service scenarios.

ServiceNow Managed Services Providers

Mindtree

Mindtree provides cross-skilled ServiceNow practitioners and developers for its managed services. Combined with a collaborative learning culture, this talent-integrative approach makes Mindtree a unique partner for clients that are focused on achieving continuous success with ServiceNow applications.

Infosys

Leader

"Infosys takes an outcome-focused view to ServiceNow managed services, going beyond IT to business services."

Dr. Tapati Bandopadhyay

Overview

Infosys is headquartered in Bengaluru, India and operates in 50 countries. It has more than 279,000 employees across 234 global offices. In FY21, the company generated $13.5 billion (+10.7 percent YoY) in revenue, with financial services as its largest segment. Infosys offers an entire range of services under application managed services, offering integration, functionality, configuration and training. It has offices in more than 20 locations in the U.S.

Strengths

Outcome-based flexible commercial and delivery models: Infosys has delivered outcome-driven flexible commercial models for ServiceNow managed service engagements that are in sync with the dynamic demands in mature markets such as the U.S. The outcome-based models focus on the achievement of service objectives in runtime. The unit-based models are the equivalents of pay-per-use in case of services delivered. The intellectual property-based models factor in the client value realized through the use of relevant solutions. The company also offers traditional cost models such as T&M and fixed price.

Improvement and modernization at the core of service offerings: The outcome-based operating models for ServiceNow's managed services include service improvement objectives achievable per milestone, improvements in self-service usage and adoption, maintenance of assets for automation of workflows, and asset data accuracy, among others.

Security and cloud service offerings bolstering risk mitigation: Given that Infosys' ServiceNow practice is positioned within the larger cloud and security ecosystem, the managed services leverage these adjacent capabilities to ensure value realization for clients in a risk-mitigated and compliant manner.

Caution

Infosys' ServiceNow managed service offerings can be complex in terms of managing the platform as well as the integrated frameworks delivered through in-house innovations for small client teams.

Appendix

The ISG Provider Lens 2022 – ServiceNow Ecosystem Partners research study 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.

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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 March 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of ServiceNow Ecosystem Partners market

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

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

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

5. Use of Star of Excellence CX-Data

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

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author

Dr. Tapati Bandopadhyay
Lead Analyst

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 25+ years. She has been a global practice leader and executive-level advisor & consultant, in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects, for the US market. Prior to working at ISG as a Lead Analyst and Research Partner, Dr. Tapati served in senior positions as Vice President, General Manager and Senior Director Research, at HFS, Wipro, Gartner, respectively.

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally. For more information about ISG Provider Lens research, please visit this webpage.

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ISG

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REPORT: SERVICENOW ECOSYSTEM PARTNERS