Key Differentiators in Large Enterprise Managed Digital Workplace Services

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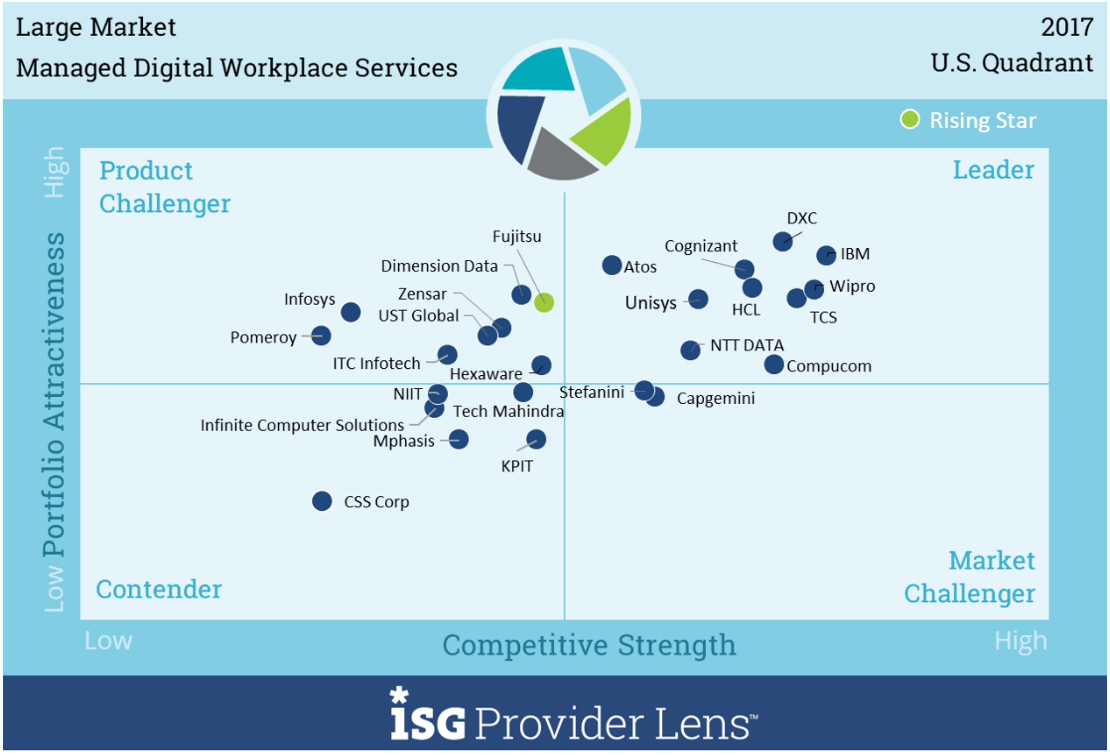
As highlighted in the report, these services can reduce Level 0 and 1 incident tickets through predictive analytics and can eliminate Level 1 and 2 tickets via automation. Many service providers featured in our report offer managed digital workplace services that produce an average 30 percent reduction in operational cost and ticket volume. Analytics and automation in IT support services, plus increasing self-help utilization, enhance the end user experience and help enterprise IT achieve the "shift-left" approach.

Large enterprises in the U.S. are also increasingly looking to consolidate their geographically spread service desks into few more manageable ones. Service desk consolidation results in the need for nearshore and onshore support services. Service providers that have strong local presence and offer onsite IT-kiosk services lead this market.

Figure 1 depicts the report's relative positioning of digital workplace managed services providers as leaders, product challengers, market challengers or contenders. The full report illustrates and explains the competitive strengths, differentiators and domain experience of all the service providers that are positioned as leaders and rising stars.

Figure 1: Leading Providers for Managed Digital Workplace Services, U.S. Market 2017



Source: ISG Research 2017

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Key highlights from the report include:

- DXC, IBM and Wipro were identified as leaders in this segment. They each have huge operational scale and strong presence in the North America. IBM and Wipro offer highly automated solutions for workplace support services. DXC is focused on digital workplace and has a strong partner base in the domain.
- Cognizant is increasing its market presence with new wins and its future-oriented Constantly Ready Infrastructure services model.
- TCS and HCL have been strong market players in North America. TCS, with its Ignio platform, and HCL, with its DRYiCE™ platform, provide agile and automated solutions for workplace management.
- NTT DATA also is a leader in this space because of its scale of operations and strong regional presence from its Dell Services acquisition.
- Unisys is a strong player in managed workplace services. Its onsite support and Tech Café are already popular services in the region.

- CompuCom has a strong presence in the U.S. and North America. Traditionally, it has been a key player in end-user computing. With recent acquisitions, it has developed automation capabilities specific to service desk services.

USING THIS INSIGHT

ISG Provider Lens Quadrant reports are intended to provide fact-based, qualified insights regarding services providers' suitability for a defined sets of enterprise client's IT service needs. These assessments are developed using data, analysis, and comparative methodology as described in each report. No recommendation or endorsement is indicated, suggested or implied. Clients must make the decision to engage with any provider based not only on their specific, current ADM needs, but also other factors such as cost, culture and timing.

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