

# Future of Work - Services and Solutions

## Digital Service Desk and Workplace Support Services

A research report comparing provider strengths, challenges and competitive differentiators



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### **U.S. clients are reassessing their future of work strategies.**

After adapting to the changes brought upon by the pandemic in the last two years, enterprise clients in the U.S. are reassessing their strategies for transforming their workplaces. The Microsoft Future of Work study 2022 shows that many enterprises in the region are now embracing hybrid work models while maintaining the post-COVID norms.

Hybrid work model is now a reality; however, employees are witnessing both positive and negative effects of working away from their office premises. Although working from office can increase socializing and employee engagement, it has been observed through multiple

research studies that employees in the U.S., in general, prefer working from the location of their choice because it is more comfortable and increases self-productivity.

The preference to work from any location is also considered as one of the most important factors driving the “great resignation.” A large number of employees in the region have switched jobs starting in the middle of last year because they are seeking more flexibility and work-from-home options. In 2021, around 47 million employees in the U.S. resigned from their jobs. Some termed it as “great reshuffle.” The great resignation also resulted in massive skill shortage in the country. Hence, enterprises in the U.S. started offering flexible and collaborative working environments, along with a high focus on employee well-being, to attract and retain talent. These initiatives have led to flattening the unemployment and

# Out of the pandemic frypan, into the fire – the great resignation!



## Executive Summary

unfulfilled jobs curves, although they have still not reached their pre-June 2021 levels.

Apart from the above-mentioned factors, employees belonging to Gen Z (born in late '90s and early 2000s) are either about to enter or have already entered the workplace. There are more than 68 million Gen Zers in the U.S. This generation has grown to be tech savvy and has adapted to the virtual world and social media networking. Therefore, they did not face challenges in transitioning to a virtual and remote working model during the pandemic. They can effectively collaborate and connect with colleagues remotely because this was just like an extension to their existing social media life. However, they are striving to adjust to the restrictive nature of employment, particularly in the age of hybrid working. Also, they find it difficult to collaborate and work with employees belonging to the Gen X or Gen Y categories.

With entry of the Gen Z workforce, there is also an increasing focus on areas related to greater purpose of an organization or workplace other than making profits. This generation is quite expressive and sensitive to social issues and seeks employment in firms that provide equal representation and inclusivity. This generation is also seeking more purpose-driven, organization-wide initiatives such as sustainability, environmental, social, governance (ESG) initiatives and carbon footprint reduction. An organization exhibiting these characteristics can expect better employee retention compared to those that do not. Enterprises in the U.S. are also expected to focus more on sustainability and environmental concerns because of government initiatives such as the Paris agreement and the Biden administration's ambitious goal of carbon pollution-free power sector by 2035.

The increasing focus on employee retention, a tech-savvy workforce, sustainability, and remote and hybrid working has placed enterprise IT and workplace leaders at the center stage of transformation. Enterprise IT that was once only known for "resolving issues" is expected to play an important and key role in redefining the business and operating models of the U.S. enterprises as they tackle these challenges. Modern technologies have the potential to address many of the above-mentioned concerns, and enterprise IT and workplace leaders are exploring possibilities of leveraging them to achieve desired results.

ISG has observed decreasing demand for standalone, end-user computing or technology-only focused deals. Enterprises are increasingly including digital workplace initiatives within their overall business and digital transformation scopes. This has become

more apparent after the pandemic, as global organizations are reassessing and rethinking their business models. This does not indicate that traditional-technology-focused services are no longer pursued; . In fact, these services are now part of a broad transformation process with strong focus on employee experience and retention.

With the future of work initiatives in the U.S., we have observed the following trends:

- Enterprises are increasingly seeking assistance **in strategizing their workplace transformation plans.** Clients want to design the workplace technology experience that suites the changing employee or user persona, whether they work from office or from a remote location. In addition, clients want to design their strategy to enable and support the gig and contingent workforce.



## Executive Summary

- ISG has also observed a **re-focus on traditional-technology-focused managed services outsourcing** to enable a remote and hybrid workforce. As employees are working from locations of their choice, enterprise IT and workplace leaders are strategically investing in end-user technologies that include measuring experience with device and application performance along with adoption of automation-enabled service desk support function. Continuous monitoring and device application performance analytics can also help keep track of carbon footprint.
- The frontline workers working in essential services sector require digital enablement for productivity improvement. With great resignation and increased need to attract talent for these services, clients in the U.S. are considering technology solutions

to **enhance the experience for frontline workers** and create a sense of belonging among them.

- **Employee well-being and empathy** has been the major focus areas since the pandemic. Organizations giving importance to these aspects observe high employee retention rates. In the hybrid and remote working model, tackling issues such as digital burnouts and maintaining work-life balance have proved to be a key approach to support employee well-being and showing empathy.
- As many firms have already reopened their offices and are insisting employees to work from office for few days in a week, there is an increased need to improve the office working environment. To achieve this, companies need to invest in

technology-enabled, **smart physical workspaces that enhance employee experience.**

- With the advent of latest technologies such as the metaverse, clients are focusing on expanding and exploring on the use of technologies such as virtual realities (VR) for training programs and onboarding.

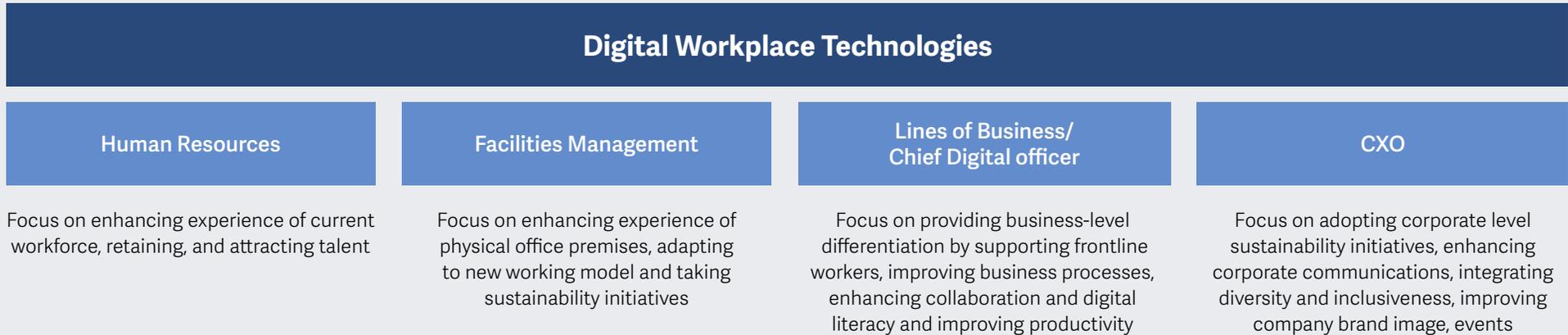
These trends have expanded the scope of traditional digital workplace technologies as they interact with diverse business functions to provide enhanced employee experience. This is explained in Figure-1 below.

Enterprises in the U.S. are focusing on multiple factors simultaneously, such as enabling hybrid work model, attracting and retaining talent by enhancing employee experience and achieving sustainability goals.

Enterprises in the U.S. are focusing on multiple factors simultaneously, such as enabling hybrid work model, attracting and retaining talent by enhancing employee experience and achieving sustainability goals.



**Figure 1: Expanding scope of digital workplace technologies and interaction with other business roles**



Source: ISG, 2022



## Provider Positioning

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	<b>Workplace Strategy Transformation Services</b>	<b>Managed Workplace Services - End User Technology - Large Accounts</b>	<b>Managed Workplace Services - End User Technology - Midmarket</b>	<b>Digital Service Desk and Workplace Support Services</b>	<b>Managed Employee Experience Services</b>
Accenture	Leader	Product Challenger	Not In	Leader	Leader
Atos	Product Challenger	Product Challenger	Not In	Leader	Product Challenger
Bell Techlogix	Not In	Product Challenger	Product Challenger	Product Challenger	Not In
Birlasoft	Contender	Contender	Not In	Contender	Contender
Capgemini	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Coforge	Contender	Contender	Product Challenger	Contender	Not In
Cognizant	Market Challenger	Market Challenger	Not In	Market Challenger	Not In
Compucom	Contender	Leader	Leader	Product Challenger	Product Challenger
Computacenter	Product Challenger	Product Challenger	Not In	Product Challenger	Product Challenger
Digital Workplace Group	Product Challenger	Not In	Not In	Not In	Not In



 Provider Positioning

	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
DXC Technology	Leader	Leader	Not In	Leader	Rising Star ★
GAVS	Not In	Product Challenger	Market Challenger	Market Challenger	Not In
HCL	Leader	Leader	Not In	Leader	Leader
Hexaware	Product Challenger	Product Challenger	Leader	Not In	Leader
HPE	Product Challenger	Contender	Not In	Not In	Not In
Infosys	Leader	Leader	Product Challenger	Leader	Leader
ITC Infotech	Contender	Contender	Market Challenger	Contender	Not In
Kyndryl	Leader	Leader	Not In	Leader	Market Challenger
LTI	Product Challenger	Product Challenger	Leader	Product Challenger	Leader



 Provider Positioning

	<b>Workplace Strategy Transformation Services</b>	<b>Managed Workplace Services - End User Technology - Large Accounts</b>	<b>Managed Workplace Services - End User Technology - Midmarket</b>	<b>Digital Service Desk and Workplace Support Services</b>	<b>Managed Employee Experience Services</b>
Microland	Contender	Contender	Contender	Contender	Product Challenger
Mindtree	Contender	Product Challenger	Not In	Product Challenger	Contender
Movate	Contender	Contender	Leader	Product Challenger	Contender
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
NTT DATA	Market Challenger	Leader	Not In	Market Challenger	Not In
Pomeroy	Not In	Market Challenger	Market Challenger	Not In	Not In
Ricoh	Not In	Not In	Product Challenger	Not In	Not In
Softtek	Not In	Contender	Not In	Not In	Not In
Stefanini	Market Challenger	Market Challenger	Not In	Market Challenger	Product Challenger



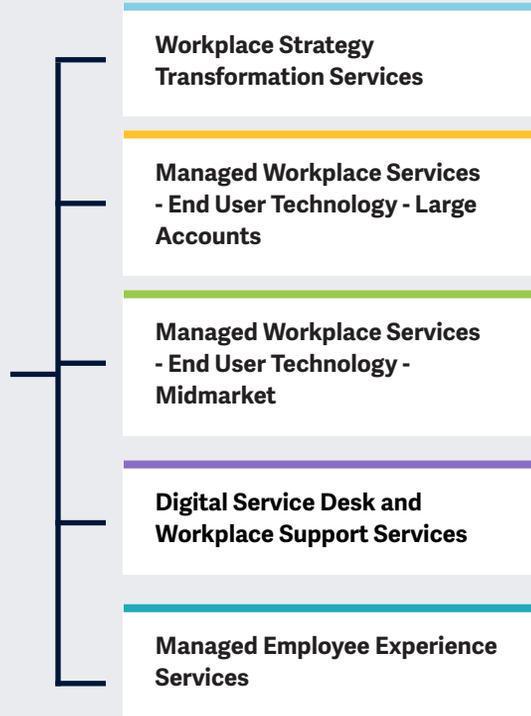
## Provider Positioning

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	Workplace Strategy Transformation Services	Managed Workplace Services - End User Technology - Large Accounts	Managed Workplace Services - End User Technology - Midmarket	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services
TCS	Leader	Leader	Not In	Leader	Leader
Tech Mahindra	Product Challenger	Rising Star ★	Leader	Leader	Product Challenger
TEKSystems	Not In	Not In	Contender	Not In	Not In
Unisys	Leader	Leader	Product Challenger	Leader	Leader
UST	Contender	Product Challenger	Product Challenger	Contender	Contender
Wipro	Leader	Leader	Not In	Leader	Leader
YASH Technologies	Not In	Not In	Contender	Not In	Not In
Zensar	Product Challenger	Product Challenger	Leader	Leader	Product Challenger
Zones	Contender	Not In	Not In	Market Challenger	Not In



This study focuses on what ISG perceives as the most critical issues in the U.S. in 2022 for the **Future of Work.**



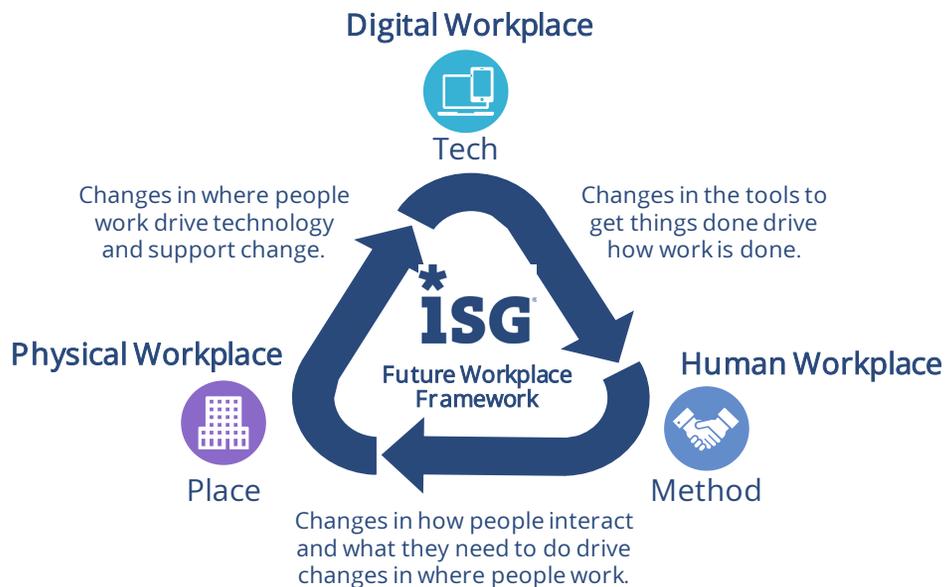
Simplified Illustration Source: ISG 2022

### Definition

As global enterprises look ahead after two turbulent years of the pandemic, it is certain that the old ways of working are not coming back, and future of work is hybrid. The hybrid future of work, as defined by ISG, is characterized by three kinds of workplaces (Figure 2): the digital workplace, which includes the underlying technology; the physical workplace, which defines the location or place of work and could be both in-office premises and remote; and the human workplace, which describes the methods, processes and cultural aspects.



**Figure 1: ISG Future Workplace Framework**



Source: ISG, 2022



This future of work will not consider technology in silos. As workplace technologies increasingly permeate the lines of business, clients are noting the correlation between customer experience (CX) and quantified employee experience (EX).

The ongoing talent crunch and the “great resignation,” as the wave of people leaving the workforce is being called, are compelling enterprises to provide empowering, engaging, and most importantly, empathic workplace environments to retain employees. At the same time, a work environment that is engaging, technologically advanced and tightly integrated with business requirements will help attract fresh talent. A modern work environment is now neither associated with a physical location (workplace), nor with a single digital entity (workspace); it is now omnipresent, integrated and connected with multiple

“spaces” that can be accessed from any location, anytime and over any network. Upcoming and latest technology developments such as the metaverse are influencing this trend in their own ways.

The modern outlook toward work and workplace will also drive and change enterprise expectations from service providers and software solution vendors. Starting at consulting, enterprises will need expert help in defining and strategizing their workplace transformation initiatives that relate to their EX initiatives with CX goals. A combination of remote and in-office workers can enhance the robust and uninterrupted use of technologies to ensure a seamless experience for end users, while ensuring high security. Clients will also be expecting more from their service desk and workplace support service providers including a high level of automation and analytics to ensure

employee satisfaction. Enterprises have now increasingly started to consider enhanced employee experience as a prime objective and an expectation from managed service providers and are including requirements for it in the form of measurable experience level agreements (XLAs).

From the software solution vendors’ perspective, there will be increasing focus on enabling an all-encompassing unified communication collaboration setup with special focus on employee engagement and productivity. Because devices still form the first entry point and core of employee workplace technology experience, software solutions that can manage a variety of devices uniformly and with the desired security level will also be on enterprises’ radars.

The 2022 ISG Provider Lens™ Future of Work study attempts to evaluate managed service providers and vendors that cover the above-mentioned areas of services and solutions.

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers;
- A differentiated positioning of providers by segments;
- Focus on different markets, including global, U.S., U.K., Nordics, Germany, Switzerland, Australia, Singapore and Malaysia, Brazil and U.S. Public sector.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information



from these reports to evaluate their current vendor relationships and potential engagements.

### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants on Workplace Strategy Transformation Services, Managed Workplace Services – End User Technology, Digital Service Desk and Workplace Support Services, Managed Employee Experience Services.

### 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 Challenge, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have 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).

*(Continues on next page)*



## 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.

**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.

**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.

**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.

★ **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.





# Digital Service Desk and Workplace Support Services

## Digital Service Desk and Workplace Support Services

### Who Should Read This

This report is relevant to the enterprises across industries in the U.S. for evaluating the providers of digital service desk and workplace support services.

In this quadrant, ISG highlights the current market positioning of digital service desk and workplace support service providers in the U.S. and how each provider addresses the key challenges faced in the region.

Enterprises in the U.S. are constantly focusing on redefining their IT support and service desk services to offer seamless user experiences and are leveraging automation to drive efficiency and reduce costs. Enterprises here have started realizing that integrating virtual agents, automation and analytics can help them drive efficient transformation. Thus, enterprises in the U.S. are looking for providers with strong service delivery as

well as regional language capabilities and that can modernize their support services and increase the first-level resolution rate.

Enterprises in the region also prefer providers that offer experience-focused services, which can help them in delivering personalized experiences to their employees. These enterprises are demanding a data-driven approach to proactively resolve issues even before an employee is impacted.



**Technology professionals**, including infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of providers that can help them in modernizing service desk and workplace support services.



**Digital professionals**, including facility managers, should read this report to understand how digital service desk and workplace support service providers fit their digital transformation initiatives and how they are compared with one another.

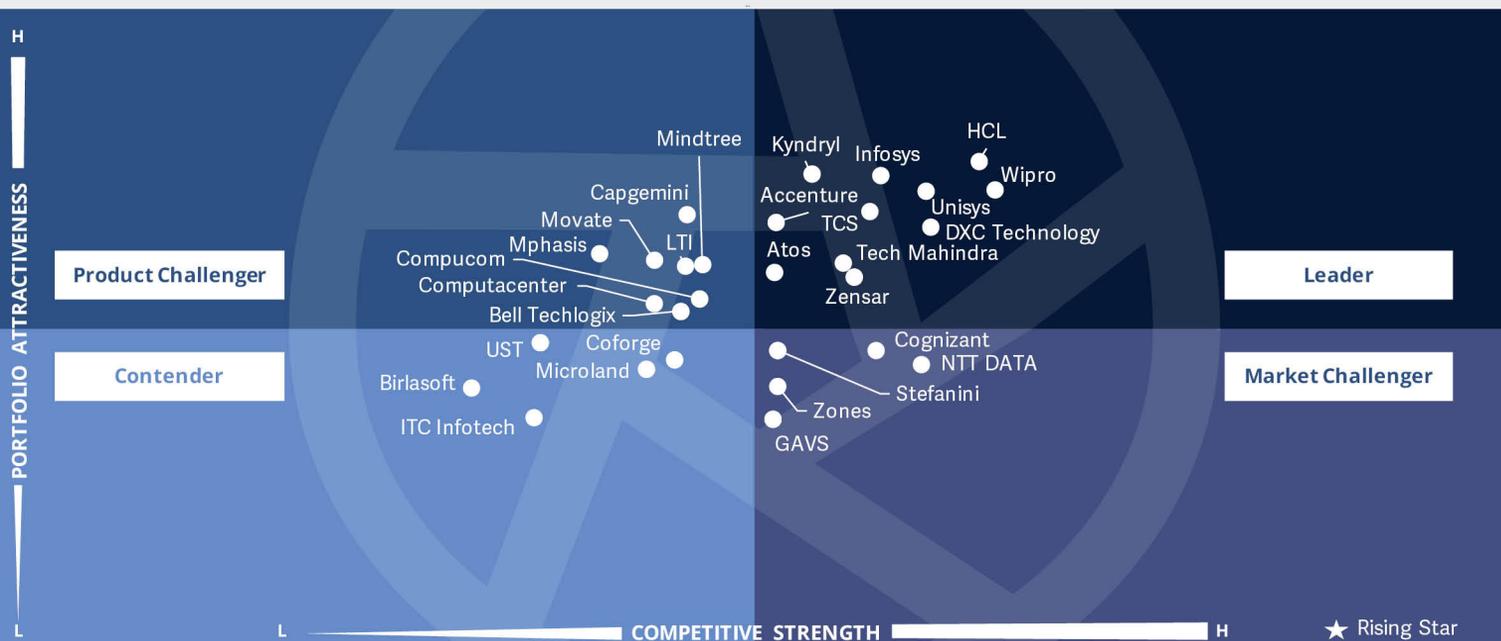


**Field service professionals** should read this report to understand how service providers implement and expand the uses of workplace services to better manage field service operations.



**Procurement professionals**, including sourcing, procurement and vendor management professionals should read this report to develop a better understanding of the current landscape of digital service desk and workplace support service providers in the U.S.





This quadrant assesses managed service providers that offer not just **new age service desk and support functions** but also provide employee **experience enhancement** leveraging **automation and analytics** with these services.

Mrinal Rai



### Definition

This quadrant assesses service providers that offer modernized support services, including workplace support, service desk services, onsite/field support, tech bars and cafés, digilockers, Uber-style field support and automation-enabled omnichannel support for chat and voice. Their services enable work from anywhere at anytime and include device support that encompasses automated proactive technical support and cloud platforms to provision always-on systems. The providers leverage local onsite field support and digitally transformed services through AI and other cognitive technologies for user-facing tasks and help achieve significant cost savings.

### Eligibility Criteria

1. Ability to provide managed **service desk and workplace support services** through a hybrid workforce, including virtual agents
2. Offer **remote and onsite field support** plus in-person technical assistance, leveraging augmented reality or virtual reality (AR/VR)
3. Capability to set up and support **self-help kiosks, tech bars, IT vending machines and digilockers**
4. Data-driven **enriched analytics** to support self-service, automatically resolve tickets and generate actionable **insights** among users
5. Provide **automated and contextualized support for end users**, based on their roles and work
6. Ability to **quantify workplace support function performance** beyond traditional service metrics



## Digital Service Desk and Workplace Support Services

### Observations

The Contenders in this quadrant provide traditional service desk services powered by basic automation. Most providers in this quadrant offer an intelligent virtual agent, compiling insights from telemetry and sentiment analysis on employee interaction. However, these providers could not offer additional support functionality and leverage the latest technologies for experience-enhancing service desk support services. The Product Challengers in this space provide high-level automation, increased self-help and cognitive intelligence services. Some of these providers also provide field and onsite support. Some of them leverage AR for remote assistance. The Market Challengers in this quadrant have strengthened their position with their legacy service desk and automation services and have strong brand

positioning in the U.S. They may need to consider workplace support much beyond agents and virtual agent support.

The Leaders in this quadrant offer intelligent service desk and support functionality. They can analyze and incorporate their support insights to define and measure the overall employee experience. These providers can manage large number of deals in the U.S. and have strong market presence and brand image.

Of more than 100 providers assessed for this study, 32 have qualified for this quadrant with 11 being identified as Leaders.

### **accenture**

**Accenture** provides automation and AI-enabled workplace support services with a broad portfolio. Its deskside of the future services provides omnichannel support for users leveraging automation

and predictive analytics. It also offers experience-enhancing self-help services such as digital lockers and remote technology support.

### **Atos**

**Atos** leads with its strong workplace support and care services powered by analytics and automation. It provides omnichannel support, enhanced productivity and experience. However, there is a growing concern regarding its possible spin off that could lead to uncertainty in its workplace services outlook.

### **DXC Technology**

**DXC Technology** provides service desk and intelligent support, leveraging multiple channels and applying proactive intelligence on devices and applications. It

leverages its UpTime platform to analyzes UX data derived from incidence resolution and user satisfaction.

### **HCL**

**HCL** provides automation and AI-based contextualized omnichannel support for end users through multiple proprietary tools and solution accelerators. It identifies new and emerging use cases relevant for U.S. clients with respect to digital service desk and field support.

### **Infosys**

**Infosys** registered strong growth with its service desk and support services. It has developed industry-focused support capabilities, leveraging AR. Its continued focus on training programs is extended to service desk agents as well.



## Digital Service Desk and Workplace Support Services

### Kyndryl

**Kyndryl** leverages the strong technical heritage of IBM but provides comprehensive service desk and support services powered by analytics and automation that are no longer exclusively part of IBM Watson. It also provides an intelligent contact center solution that allows clients' own CX support agents to leverage its technology to enhance employee experience.



**TCS** leverages its ignio and automation capabilities to provide cognitive intelligent support. It also helps its clients mature toward a highly experience-focused delivery model for service desk offerings. Its support services are deeply tied with its focus on employee experience services.



With its large client base and strong automation and experience-centric focus, **Tech Mahindra** provides comprehensive service desk and support services. It also provides continuous training programs to its employees, leveraging the swarm technique.

### UNISYS

**Unisys** is a strong Leader in this space. It leverages automation, analytics, AR-based support, tech café and onsite support services. It has a large base of operations in the U.S. and leverages its local presence to support clients.



**Wipro** provides automation and service desk and support services focused on improving agent performance. It leverages an intelligent virtual agent for enhancing employee experience through support. It also provides innovative field support services leveraging the collective knowledge of agents and technologies such as virtual reality.

### Zensar

**Zensar** has a strong presence in the managed workplace services market. It offers a wide range of digital support services leveraging automation, proprietary tools, accelerators and virtual reality technology.





“Accenture offers experience-focused support services powered by automation, and analytics.”

*Mrinal Rai*

# Accenture

## Overview

Headquartered in Dublin, Ireland, Accenture offers digital service desk and workplace support services through its deskside support of the future services as part of its large managed workplace services portfolio. Its support services focus on assisting service desk agents and enabling automated ticket deflection, user self help, employee walk-up and remote support.

## Strengths

### Shift left through automation and AI:

Accenture provides enhanced user satisfaction and automated incident resolution through multiple channels. It helps handle user tickets via self-service, chat and a phone interface. While level 0 tickets are auto resolved through proactive monitoring, level 1 tickets are resolved through assisted automation and intelligent support. It reports resolving around 2.8 million incidents using automation. Tickets with higher complexities are resolved using persona-based insights and contextualization.

### Smart lockers and remote support:

Accenture provides Smart lockers for

touchless support services in office premises, wherein users can swap devices and peripherals. It also offers remote support using technologies such as Intel vPro and allows remote technology support agents to run diagnostics while users wait in queue for deskside support.

### Experience-focused analytics:

Accenture also runs analytics on delivered support services to analyze their impact on employee experience. With incident reassignment analysis, root cause analysis, time taken to restore productivity, support channel performance and user preferences, it creates dashboards that help IT administrators make informed decisions.

## Caution

Accenture managed services are best fit for clients that have reached certain level of maturity and a clear vision for digital workplace transformation. Although employee experience is a key objective of every enterprise IT organization, clients starting from service desk or field support transformation may find Accenture’s support services portfolio underwhelming compared to other Leaders in this space.





“Atos’ support services are powered by analytics, automation and cognitive intelligence.”

*Mrinal Rai*

# Atos

## Overview

Headquartered in Paris, Atos provides digital service desk and support services as part of its intelligent care center within its engaged employee experience services. It has its service desk locations in Mason; Celebration; Flint, Michigan; Fargo, North Dakota; and Clovis in the U.S.

## Strengths

**Atos OneContact:** OneContact allows end users to access their workplace support from any device and any location. It provides users with options to choose from multiple support channels.

**Atos Virtual Assistant and admin support:** Atos Virtual Assistant is a cognitive intelligent interface that provides quick resolution of employee issues and enables human intervention powered by analytics and intelligence. Atos provides journey analytics that helps administrators in faster identification of challenges, event analysis and service quality

improvement.

**Informed experience approach:** Atos has been one of the pioneers of the XLA approach and leverages extensive analytics capabilities to provide an informed, data-driven service portfolio. Its proactive experience services analyze UX based on many parameters, which are then fed to its digital care center services such as service desk, virtual assistants, and physical and virtual tech bars.

## Caution

With recent uncertainty of Atos’ possible split and spinning off some businesses, there is a growing concern among its workplace clients regarding its outlook and direction. The competition in experience-driven workplace support services space is intense, and Atos must strongly showcase its differentiation to compete with other Leaders in this space.





“DXC Technology offers multichannel support services, with automation and analytics measuring X data.”

*Mrinal Rai*

# DXC Technology

## Overview

Headquartered in Virginia, DXC Technology provides digital service desk and workplace support services in its managed workplace services portfolio. It has 50 global service desk centers with 81,000 service desk agents and 6400 support tech staff that manage 40 million clients. It leverages automation and AI for ticket deflection. It provides service desk services from Tulsa, Oklahoma, and Plano, Texas, and supports English and Spanish languages.

## Strengths

**Digital support services:** DXC Technology's digital support service offering includes service desk and site support services. It provides these services to around 76 clients in the U.S. It offers omnichannel digital service desk leveraging automation, AI and machine learning to solve user issues via both virtual and human agents. DXC Technology also offers field technician services and provides user self-help options such as integrated vending and locker systems or walk-in centers.

**Automation-enabled support:** DXC Technology partners with Amazon for AWS Connect and Alexa support. It also partners with Espressive and

IBM Watson for conversational AI, Automation Anywhere and UiPath for RPA scripts, and Microsoft for Cortana-enabled support. With automation, it can resolve up to 24 percent of incidents, and around 15 percent through knowledge articles.

**Analytics and center of excellence:** DXC Technology analyzes experience level “X” data by examining user satisfaction with IT support and leveraging sentiment and ticket resolution analysis. It manages its service desk delivery via a virtual center of excellence that connects with different client account teams to drive best practices, innovation and analytics-based voice of customer (VoC) analysis.

## Caution

DXC Technology's growth in its number of clients in the U.S. for service desk services is low compared to other Leaders in this quadrant. Of its existing clients, 95 percent are engaged in traditional service level agreements and only 5 percent in an XLA model focused on automated ticket resolution.



# HCL



“HCL offers a strong portfolio for omnichannel support aimed at business and experience transformation.”

*Mrinal Rai*

## Overview

Headquartered in Noida, India, HCL provides service desk and workplace support services as part of its Fluid Workplace services. It provides service desk capabilities from various cities such as Cary, North Carolina; Dallas; Jackson, Mississippi; Seattle; New York; Hartford; Hamilton, Ontario; Mexico City and Guadalajara and supports English, Spanish and French languages.

## Strengths

**Digital support:** HCL offers several digital support capabilities such as bot-driven omnichannel customer contact center engagement and integrated service desk with dedicated solutions for individual business apps and industries. Its cognitive virtual assistant, Lucy, supports all business use cases, including multilingual meeting support. It also supports real-time translation of chat and voice. It supports virtual kiosks for video conferencing and Virtual Intellizone for remote IT query resolution.

**Automated resolution:** HCL leverages WorkBlaze for proactive resolution, OptiBot for user self-help and iAutomate for process reengineering. Leveraging automation, its service desk agents can resolve incidents with a 90 percent first-level resolution rate, and it can help auto-resolve 40 percent of incidents, and 16 percent through user self-help.

**AR/VR-based support:** Through OnSight, HCL offers immersive support to remote users through live video sharing, doodling, FAQs and conferencing capabilities.

## Caution

HCL’s support services are more aligned with enhancing experience and transformation and could be overwhelming for clients with lowest maturity level of transformation, for example, those just introducing chat-based support.





“Automation and AR-based support for frontline workers and agent training are Infosys differentiators.”

*Mrinal Rai*

# Infosys

## Overview

Headquartered in Bengaluru, India, Infosys provides service desk and workplace support services as part of its wide digital workplace services. It offers its service desk services from Atlanta, Phoenix, Puerto Rico and supports English, Portuguese and Spanish. In addition, it provides automation-enabled support services using the latest and emerging technologies. Infosys recorded a 58 percent growth in its service desk and support services business in the U.S. last year.

## Strengths

**Transformed service desk:** Infosys focuses on eliminating incidents before they happen using predictive analytics and user self-service. It provides cognitive intelligence-based omnichannel incidence resolution with minimum human intervention. Leveraging automation, Infosys can achieve up to 20 percent automated incident resolution, and 25 percent resolution through self-help.

**Frontline support:** Infosys leverages AR and VR technologies to support frontline employees with connected digital experiences. It is already providing this level of support for

its clients in the energy and utilities sectors.

**Infosys Cortex:** Infosys developed its own customer service tool called Cortex for sourcing, training and managing performance of support agents. Cortex is an AI-based platform that simulates live incidence contacts for training and enabling ticket diagnostics. It also leverages in-house developed Digitran for digital transition and creation of automated SOPs, training videos, workflows and simulation.

## Caution

Although Infosys has a strong growth and promising service desk services portfolio, it should showcase differentiation with its existing clients engaged with traditional service engagement models. According to ISG’s voice of customer survey, some clients have expressed dissatisfaction with Infosys’ ability to leverage emerging technologies and proactively engage with them for workplace services.





“Kyndryl offers strong services with ability to combine CX with EX through intelligent contact center.”

*Mrinal Rai*

# Kyndryl

## Overview

Headquartered in New York, Kyndryl was recently spun off from IBM and provides digital service desk and support services as part of its digital workplace services. It supports its clients from desk services located in Buffalo, New York, and Boulder City, Nevada.

## Strengths

**Modern service desk services:** Kyndryl provides support services leveraging automation and AI. It provides omnichannel support powered by automation library, cognitive virtual agent and self-healing. After spinning off from IBM, Kyndryl now has an advantage of partnering with non-IBM automation solution vendors.

**Cloud contact center:** Kyndryl realizes the benefits of leveraging its support technologies to enable their clients adopt its cloud contact center platform powered by Five9 and other workplace partner technology solutions. It provides clients with options to use

their own agents for support functions powered by Kyndryl technology services. It leverages its technology to drive both CX and EX.

**Workflow orchestration and experience:** Kyndryl provides services that can reduce context switching and orchestrate workflow to enhance employee experience. It assists end users to access multiple enterprise applications through a single interface leveraging APIs and secured connectivity.

## Caution

It may take some time for legacy IBM clients to make the best use of Kyndryl's service desk services and intelligent contact center services for managing customer experience. Clients engaging with Kyndryl must start considering it as a new firm offering intelligent support that can combine CX with EX.



# TCS



“TCS’ modular approach helps clients transition from the legacy setup to a matured support model.”

*Mrinal Rai*

## Overview

Headquartered in Mumbai, India, TCS provides digital service desk and workplace support services as part of its Cognix for Workspace modular offering. Apart from its global locations, TCS has a service desk in Cincinnati. It also provides field services, genius and tech bars and leverages its partners for onsite support and IT kiosk services in the U.S.

## Strengths

**Zero-touch support:** Through Cognix, TCS provides proactive monitoring and auto-healing, and through its Machine First Delivery Model™ (MFD™), it offers cognitive automation and remote and field support.

**Focus on client maturity:** TCS’ eXperience Elevation Center (XEC) team augments Cognix for Workspace services by offering operational insights into escalated incidents, agent performance measurement, digital employee experience support and shift left services. It also measures efficiency index that is influenced by service speed and resiliency. TCS analyzes

service desk maturity of clients by segmenting the maturity into eight levels, starting from clients considering the function as a cost center to a machine-guided, personalized interaction powered by virtual human agent.

**Shared service platform:** TCS Cognix offers a shared service platform to provide insights into a support function dashboard that provides information such as incidents raised and knowledge articles used. Cognix aims at silent IT operations through auto healing, virtual agents, digital lockers and vending machines.

## Caution

TCS support services are now integrated into its experience-centric services. Clients working with TCS for service desk and support services should consider innovative approaches suggested by the company to assess service maturity instead of focusing on the number of tickets resolved through automation.





“Tech Mahindra offers a highly innovative approach for service desk services, focusing on digital resolution and experience.”

*Mrinal Rai*

# Tech Mahindra

## Overview

Headquartered in Pune, India, Tech Mahindra provides digital service desk and digital support services as part of its FLEX workplace services. It has 1,390 experts and seven service desk locations in the U.S., supporting four languages. It manages more than 20 million annual contacts, leveraging automation and experience-centric services.

## Strengths

**Digital support:** Tech Mahindra leverages multiple technologies, tools and platforms to provide pre-emptive support such as auto-healing and proactive resolution. It also supports assistive resolution through user self-help. It can resolve up to 36 percent of incidents automatically and using self-help.

**Low/no-code and swarm support:**

Tech Mahindra assists service desk agents to create custom bots, leveraging low/no code platforms. It has a center of excellence for bot frameworks, wherein it provides consulting, coding and content

creation for bots in a shared service model. It also applies a swarm approach for providing quick turnaround for issues faced by globally dispersed technicians.

**Digital field services:** Tech Mahindra provides field services that enhance employee experiences. It offers digilockers for swapping or loaning devices and accessories, as well as video conferencing and Intel-vPro-enabled remote support, IT vending machines and procurement, leveraging Amazon business to deliver IT assets. It also has trained engineers and operated tech bars for support.

## Caution

Tech Mahindra can further enhance its experience level agreement approach by improving support and device-level KPIs with business-level outcomes. It can also enhance its field support service by including VR technology and, therefore, creating a competitive edge over other Leaders in this space.





“Unisys features intelligent workplace services by leveraging strong partnerships and automation”

*Mrinal Rai*

# Unisys

## Overview

Unisys is headquartered in Pennsylvania and operates in 24 countries. With more than 2,600 field technicians in North America, Unisys also offers proactive monitoring of the workplace to eliminate the need for help in resolving issues. It continues to expand its presence in the U.S. Unisys has service desk locations in Augusta, Georgia, and Salt Lake City.

## Strengths

### **Strong service delivery capabilities:**

Unisys has more than 13 service desk locations and four field services locations. It also has nine workplace engineering and consulting centers. Unisys offers services across the globe with strong regional language capabilities. It manages 19 million service desk contacts and supports 19 spoken languages and 81 additional languages via translation. Unisys has automatically fixed 116,000 issues.

### **Intelligent workplace services:**

Unisys offers digital support services across devices and applications. Its digital service desk is empowered by

automation solutions such as Amelia and contact center vendor, NICE. IT also provides partner-led augmented-reality-based support and onsite services. Leveraging automation, it can resolve up to 26 percent incidents, and 17 percent through user self-help.

**High client retention:** Unisys continues to be a client-focused company and has an NPS of 72. It has 90 percent renewal rate, which indicates high customer loyalty. Although there are short-term contracts and financial pressure, Unisys has retained most of its clients. The average tenure of Unisys’ top 10 clients is about 30 years.

## Caution

Unisys still has a large number of client engagements with its fixed-based pricing model. The company must emphasize outcome-based or XLA-based pricing to gain more growth opportunities. Unisys can achieve this by jointly exploring applicable XLAs with clients.





“Wipro offers service desk and innovative field support services to its clients.”

Mrinal Rai

# Wipro

## Overview

Wipro is headquartered in Bengaluru, India, and operates in 66 countries. It has more than 243,000 employees across 130 global offices. In FY22, the company generated \$10.4 billion in revenue, with IT services as its largest segment. Wipro's LIVE Workspace includes myUniHub, an integrated user enablement platform that offers users a self-help knowledgebase, and Liva, an intelligent virtual assistant, that offers a self-service directory with bot-based automation to resolve issues.

## Strengths

**LIVE Workspace OneDesk:** Wipro's OneDesk provides the overall analysis of support functions. It assists service desk agents and supervisors with quick insights using an agent performance dashboard, KPI scorecards, support center performance metrics and associated support function performance metrics, and other employee experience parameters. Wipro has also won prestigious Managed Service Provider award from Service Desk Institute (SDI).

**Workplace support capabilities:** Wipro offers ExperienceNXT, an analytics-driven platform for driving XLA-led outcomes and enhancing experiences. It offers

Virtual Walk-in powered by TruRemote created with Intel for delivering near-zero field resolution of IT issues. Wipro has overall first-level resolution rate of 85 percent, and around 45 percent of incidents are auto resolved through automation. It is also innovating remote filed services by leveraging collective knowledge of support agents and uberization of hands and feet support.

**Innovation in field services:** Wipro offers innovative field services with uberization feature support, allowing users to track the field technician. It also leverages technologies such as Intel vPro for remote support. It also leverages swarming and virtual technologies to empower collective knowledge of support agents.

## Caution

Wipro's approach toward transformation-led client engagements has led the firm to provide innovative solutions in the workplace support and, particularly, field support services. Clients engaging with Wipro for digital service desk services should ascertain applicability of these transformative approaches for legacy support services.





“Zensar provides digital support services powered with automation, proprietary tools and accelerators.”

Mrinal Rai

# Zensar

## Overview

Headquartered in Pune, India, Zensar operates in 17 countries and has more than 1,700 digital workplace associates. Its Smart Desk is a personalized, proactive and intuitive service offered to enterprises in the U.S. Zensar’s Smart Desk solution includes enterprise smart desk, smart field support, an intelligent solution café, smart vending machines and lockers and workplace engineering services. Zensar has about seven service desk locations across the U.S. and supports multiple languages onsite.

## Strengths

### Compelling portfolio of services:

Zensar offers workplace services that are sensitive to user personas for creating personalized workplace support experience for users. Its next-generation services make digital workplace experience more engaging and offer benefits such as faster resolution rate, reduced MTTR, improved productivity and more.

**Digital support:** Zensar provides business-aligned service desk services leveraging experience-as-a-service UX, workplace monitoring and analytics, and AR/VR. Leveraging automation, it can resolve 32 percent of incidences,

and 22 percent using self-help.

### Expanding proprietary tools and accelerators:

From proprietary products to accelerators, the Zensar’s workplace supporting portfolio is robust.

It offers accelerators for smart assistance, AR/VR technologies, smart lockers and vending machines, which further enhance the workplace offerings. It also helps clients move from SLA to XLA.

## Caution

Zensar mainly focuses on a fixed-price pricing model. However, with productivity being a key aspect of digital workplace, Zensar should now emphasize more on outcome-based and XLA-based pricing models.





# Appendix

The ISG Provider Lens™ 2022 – Future of Work - Services and Solutions 2022 analyzes the relevant 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 September 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 Future of Work - Services and Solutions 2022 market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers and vendors on capabilities and use cases
4. Leverage ISG's internal databases, advisor knowledge and experience
5. Use of Star of Excellence CX-Data
6. Detailed analysis, evaluation of services and service documentation based on the facts and figures received from providers and other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy and vision
  - \* Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* Technology advancements



## Author & Editor Biographies

Author



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Mrinal Rai is the principal analyst and senior research manager at ISG and responsible for creating research reports for digital workplace, enterprise collaboration, M&A impacts and other emerging technologies initiatives. He is also the official ISG spokesperson for media relations in India. He also leads ISG's voice of customer study program, Star of Excellence. His areas of expertise is digital workplace services, modern unified communication and collaboration, both from a technology and business point of view. He is the U.S. lead quadrant and global

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Research Analyst



**Sonam Chawla**  
**Senior Research Analyst**

Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions and Cybersecurity Solutions and Services. Sonam comes with five years of experience in the market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI.

She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights. In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting on research projects.





*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

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 partner 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](#).

### \*ISG Research™

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### \*ISG

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