ServiceNow Ecosystem Partners

ServiceNow Managed Services Providers

An analysis of the ServiceNow ecosystem, including providers' portfolio attractiveness and competitive strengths

Customized report courtesy of:

kyndryl

QUADRANT REPORT | **APRIL 2024** | **U.S.**

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Executive Summary

Report Author: Tapati Bandopadhyay

ServiceNow fuels and drives digital transformation, elevating enterprise success and user experience

In 2023, ServiceNow strengthened its partnership ecosystem by establishing strategic alliances with industry-leading service providers to deliver customized solutions to specific client needs. Collaborations with companies such as Accenture, Deloitte, Capgemini, TCS and IBM underscore its commitment to empowering organizations through innovative services and expertise. ServiceNow also expanded its service offerings, introducing specialized solutions for critical industries such as healthcare, finance and retail to address sector-specific challenges and drive digital transformation. These industry-specific and function-specific workflow solution bundles solidified ServiceNow's position as a leading provider of digital workflow solutions, empowering U.S. businesses to streamline operations, improve efficiency and deliver exceptional experiences to the customers and employees of client enterprises. Recently, there has been an increased focus on strategic IT-OT-BT integrations, with initiatives from ecosystem partners and their client enterprises using ServiceNow to monitor environmental, social and governance (ESG) and governance, risk and compliance (GRC), as per the emerging regional market needs.

This year's focus centers on technology advancements through the ServiceNow Build on Now and Build with Now initiatives. There is also an emphasis on leveraging generative AI (GenAI) applications to support AI and ML use cases and applications, a predominant feature of the portfolio of new offerings. The Global Elite and Elite Service Provider partners of ServiceNow in the U.S. market have designed these enterprise-grade process and workflow automation solutions to be highly scalable and customizable, allowing enterprises to customize these solutions to meet their requirements. Whether organizations must process millions of transactional workflows daily or

Strategic delivery partnerships enrich ServiceNow's sector-specific offerings.

require advanced customization capabilities, service providers are focused on developing teams that can scale to meet unique and industry-specific client needs.

ServiceNow advancements and developments in the past 12 months

In 2023, ServiceNow introduced numerous features and capabilities designed to enhance the partner ecosystem's ability to better serve its clients. Its focus was on workflow engineering and integrating IT, OT and BT, with integrative modules poised to revolutionize digital workflows across various U.S. industries. The Vancouver release marked a significant milestone in ServiceNow's journey toward empowering organizations with enhanced automation, intelligence and flexibility. A standout feature of the Vancouver release was the Now Assist GenAI platform, which leverages advanced ML algorithms to automate repetitive tasks, provide intelligent recommendations and streamline decision-making processes. Additionally, ServiceNow introduced Build on Now and Build with Now offerings, empowering organizations to customize

and extend the platform according to their unique requirements. These offerings enable businesses to seamlessly develop custom applications, integrations and workflows, fostering innovation and agility.

ServiceNow further strengthened its partnership ecosystem by collaborating with leading technology providers and service partners on services and workflow innovations. These collaborations include building industry-specific solutions and pre-trained function-specific knowledge and workflow modules on the Now Platform. These strategic alliances enable ServiceNow to deliver comprehensive solutions tailored to specific industry needs, driving digital transformation and accelerating business growth. Through these initiatives, ServiceNow reaffirmed its commitment to empowering organizations in the U.S. to thrive in an increasingly complex and competitive digital landscape.

Its Document Intelligence solution and Document Understanding module, typically at the core of any business workflow and functions automation solution stack, are on

top of Now. Document Intelligence utilizes advanced ML algorithms to extract critical information from unstructured documents such as contracts, invoices and legal documents. The Document Understanding module streamlines document processing workflows by automatically identifying and removing relevant data points, reducing the need for manual intervention and minimizing the risk of errors. This feature enables organizations to accelerate document processing times, improve data accuracy and enhance compliance with regulatory requirements. This solution includes a Document Classification module, leveraging AI-powered classification algorithms to categorize documents automatically based on their content and context. By analyzing the text and structure of documents, the Document Classification module can identify patterns, keywords and metadata to accurately classify documents into predefined categories.

As the partner ecosystem showcased several customer case studies in the U.S. market this year, these features and modules prove particularly valuable for large ServiceNow client organizations dealing with large volumes of

documents across diverse business functions, such as finance, human resource and legal. Streamlining document processing and knowledge engineering, such as automatically classifying documents, enables organizations to seamlessly execute document retrieval, improve search capabilities and optimize document storage and organization. The knowledge extraction module, using AI-powered data extraction algorithms, enables organizations to extract specific data fields from documents, such as names, dates and amounts. This capability benefits organizations that must capture structured data from unstructured documents, including invoices and purchase orders. These features and functionalities are now widely adopted for solutions such as Order-to-Cash and Procure-to-Pay modules, which have become mainstream integrated workflow applications on top of ServiceNow as an enterprise platform. By automating the knowledge extraction and integration process, the partner ecosystem of ServiceNow organizations accelerates data entry tasks, reduces manual errors and improves data quality.

Unlocking enterprise efficiency: Integrating GenAI with ServiceNow for strategic insights and workflow optimization

By integrating additional GenAI functionalities into these modules, organizations can gain valuable insights into their document repositories. This integration enables them to search and identify complex and hidden trends, patterns, dependencies and anomalies within workflows. The insights module uncovers hidden insights that inform strategic decision-making and process optimization by analyzing metadata, usage patterns and content. Service providers utilize these patterns and metadata to help clients optimize their enterprise functions.

Thereby, client organizations seamlessly incorporate these capabilities into their existing workflows, applications and business processes by leveraging the power of the ServiceNow platform in an integrated manner alongside AI and ML, deep learning and predictive analytics modules. This practice enables organizations to maximize the platform's potential across their entire enterprise, spanning customer service and IT operations, finance and legal departments. NLP and NLU technologies empower these modules to automate integrated business processes and tasks, enhance decision-making processes and improve overall operational efficiency. With seamless integration with the ServiceNow platform and advanced customization capabilities, ServiceNow's solutions are poised to transform how organizations handle workflows, leveraging enterprise service and process knowledge repositories.

The latest release of ServiceNow's Now Assist platform, expanded in Vancouver, marks a significant advancement in service management solutions. With its innovative features and streamlined user interface, Now Assist promises to revolutionize how organizations handle their service operations. This release introduces cutting-edge capabilities such as AI-powered virtual agents, advanced analytics and enhanced automation, empowering businesses to deliver exceptional service experiences while optimizing efficiency and cost-effectiveness. The Now Assist platform's integration with ServiceNow's broader ecosystem further enhances its value proposition, enabling seamless collaboration across departments and workflows. Its intuitive design and robust functionality make it a game-changer for businesses looking to elevate their service delivery capabilities. As ServiceNow continues to expand its presence in the U.S. market, clients are poised to benefit significantly from adopting Now Assist. Leveraging its capabilities can drive innovation, improve customer satisfaction and achieve operational excellence. Now Assist's potential to streamline processes, reduce response times and enhance overall service quality represents a compelling solution for U.S.-based ServiceNow clients seeking to stay ahead in today's competitive landscape. As organizations increasingly prioritize digital transformation and customer-centricity, Now Assist emerges as a strategic tool for driving success and staying ahead of the curve. Some forward-looking partners in the U.S. market are collaborating and working with ServiceNow. Firstly, they aim to build the talent pipeline equipped to drive GenAI application initiatives on Now Assist, and secondly, they advise on and implement industry and function-specific enhanced modules tailored for Now Assist.

> Enterprises benefit from ServiceNow's strategic alliances, accessing AI-driven, industry-customized workflows to enhance agility, efficiency and productivity in IT and non-IT digital operations.

Provider Positioning

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Accenture	Leader	Leader	Leader
Aspire Systems	Product Challenger	Contender	Product Challenger
Capgemini	Leader	Leader	Leader
Cask	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
EPI-USE	Not In	Contender	Contender
Eviden (an Atos Business)	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Evoke Technologies	Contender	Not In	Not In
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Market Challenger	Not In	Not In
Genpact	Product Challenger	Product Challenger	Product Challenger
GlideFast	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
HGC Technologies	Contender	Not In	Not In
IBM	Leader	Not In	Not In
Infosys	Leader	Leader	Leader

Provider Positioning

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
INRY	Product Challenger	Product Challenger	Product Challenger
Jade Global	Rising Star ★	Rising Star ★	Product Challenger
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Product Challenger	Rising Star ★
LTIMindtree	Leader	Leader	Leader
NTT DATA	Leader	Not In	Market Challenger
ProV	Not In	Contender	Contender
RapDev	Not In	Product Challenger	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Rising Star ★	Leader	Leader

Provider Positioning

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	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Trianz	Product Challenger	Product Challenger	Product Challenger
Unisys	Not In	Product Challenger	Product Challenger
UST	Product Challenger	Not In	Product Challenger
Wipro	Leader	Leader	Leader
YASH Technologies	Not In	Product Challenger	Product Challenger

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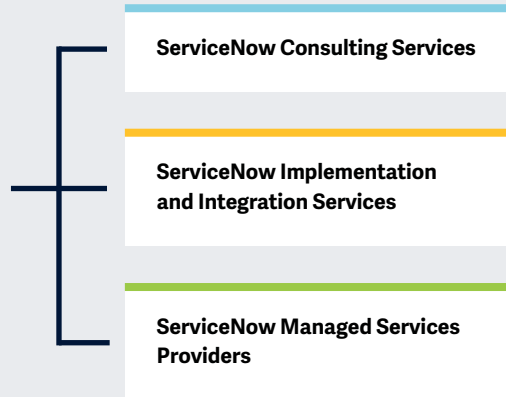# Key focus areas for **ServiceNow Ecosystem Partners**.

Simplified Illustration Source: ISG 2024

ServiceNow Consulting Services

ServiceNow Implementation and Integration Services

ServiceNow Managed Services Providers

Definition

ServiceNow continues to experience substantial growth, recording revenue of $2,150 million in the second quarter of 2023, a 23 percent YoY increase. This growth demonstrates ServiceNow's ability to meet customer requirements.

ServiceNow adoption and workflow engineering trajectory indicate a future where enterprise clients consistently optimize efficiency by embedding technology components. Service providers are pivotal in crafting these tailored, intelligent workflow solutions that propel businesses forward in the competitive digital economy. Service providers are responding positively to these shifts by adopting ServiceNow capabilities to develop bespoke solutions catering to the needs of vertical industries. A growing trend toward industry-specific workflows is evident through strategic acquisitions and partnerships to enhance domain expertise. Growing demand from enterprise clients is driving service providers to explore GenAI and ML capabilities, adding predictive and prescriptive analytics into workflows to facilitate smarter and more

proactive operations. ServiceNow's Now Platform introduces GenAI features, such as Case Summarization and Text-to-Code, integrated into all workflow offerings. These capabilities leverage ServiceNow's proprietary large language models (LLMs) and are purpose-built for the ServiceNow platform, reducing repetitive work and significantly improving productivity.

ServiceNow recently announced the Vancouver release, with a heightened focus on GenAI, broadening the customer engagement opportunities for the vendor with a growing customer set.

Strategic consolidation of partner programs indicates platform maturity and the evolution of service offerings, competence and innovation, all focused on delivering connected value. The technology and industry inclusion in workflow engineering aligns with market demand.

ServiceNow is transitioning from being a preferred ITSM process management tool to an enterprise-wide portfolio operations tool that drives a comprehensive customer-business-creator experience and value.

Key ServiceNow announcements in the past 12 months included a deepened relationship with NVIDIA and a revamped and realigned partner engagement model. This partner relaunch has enabled ServiceNow to improve partner-centric activities by realigning incentives and program details to maximize mutual benefits. ServiceNow partners have responded positively to the new program, gaining clarity on tiers and incentives, which is the most important factor.

The ISG Provider Lens™ ServiceNow Ecosystem 2024 study analyzes services and offerings from ServiceNow partners in the U.S., Brazil, Europe and Australia, focusing on select segments. Enterprises seek accredited and reliable professional services (in multiple segments that ISG analyzes individually) to fully utilize ServiceNow's expanding functionalities, ranging from process redesign and software implementation and integration to increased application management and

training requirements. Partner companies' focus is indicated by their various offerings and certification levels, which can cover full-scale lifecycle support and specific services for distinct tasks.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: ServiceNow Consulting Services, ServiceNow Implementation and Integration Services, and ServiceNow Managed Services 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 (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 $20 million and $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 $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 Challenger, 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).

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 Managed Services Providers

ServiceNow Managed Services Providers

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating companies that provide ServiceNow managed services. In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow managed services to U.S. enterprises and how each provider addresses regional market challenges. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape in the U.S.

Managed service providers (MSPs) play a major role in facilitating digital transformation initiatives within enterprises using ServiceNow, presenting significant opportunities for enhancing competitiveness in an evolving business landscape. Enterprises seek MSPs that can provide a skilled and adaptable workforce with technical expertise and a deep understanding of their specific needs and objectives.

Given ServiceNow's ongoing evolution through the introduction of new features and functionalities, it is imperative for service providers to stay updated. To achieve this objective, providers must invest in continuous training and certification programs to ensure their teams possess the necessary skills and knowledge to deliver enhanced support services.

Strategy professionals should read this report to understand service providers' capabilities to manage and support the maintenance of ServiceNow solutions across portfolios.

Service delivery professionals should read this report to understand how ServiceNow managed service providers retain their credibility and service quality.
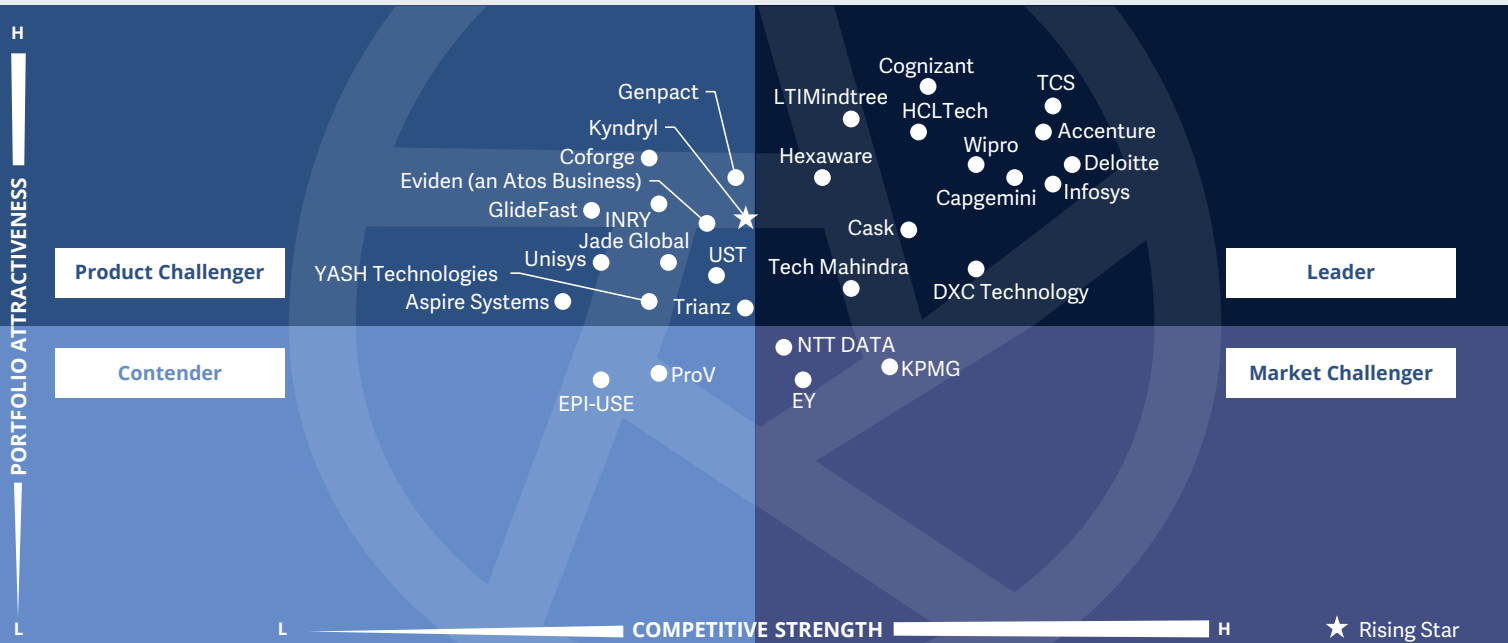
Service line and functional professionals should read this report to rationalize the fitment of ServiceNow resources and workflows across services.

ISG Provider Lens™

ServiceNow Ecosystem Partners
ServiceNow Managed Services Providers

U.S. 2024

PORTFOLIO ATTRACTIVENESS

H

Cognizant
LTIMindtree
TCS
Genpact
HCLTech
Kyndryl
Wipro
Accenture
Coforge
Hexaware
Deloitte
Eviden (an Atos Business)
Capgemini
Infosys
GlideFast
INRY
Cask
Jade Global
UST
YASH Technologies
Unisys
Tech Mahindra
Product Challenger
Leader
Aspire Systems
Trianz
DXC Technology
Contender
NTT DATA
KPMG
Market Challenger
ProV
EY
EPI-USE

L

L   **COMPETITIVE STRENGTH**   H   ★ Rising Star

This quadrant assesses service providers' capabilities to **manage the ServiceNow environment post deployment,** including customized solutions. Enterprise clients are increasingly prioritizing **optimized cloud operations and FinOps for enhanced efficiency and financial management**.

Tapati Bandopadhyay

ServiceNow Managed Services Providers

Definition

This quadrant assesses providers based on their ability to offer managed services for maintenance and support functions, including monitoring, remote support and centralized management of the Now platform, workflows and associated applications.

With the growing popularity of the DevOps method, managed service providers are expected to comply with a new set of requirements. These providers need to be prepared for the platform's continuous evolution, which can challenge the status quo of the existing solution and manage two new releases in a short period.

Considering the complexity of workflows that require support, providers must deliver services globally and across different organizational domains. They must manage a highly sophisticated and integrated application landscape, demonstrating how they operate within or integrate with a multivendor environment.

When analyzing providers in this quadrant, factors such as maintenance effectiveness, data quality management, data security and compliance are taken into account. Managing multicultural aspects, especially in nearshore/offshore delivery cases, is as important as offering different deployment options, considering potential data privacy and residency concerns. Offering different pricing options due to the new economic situation in many countries is also significant.

As ServiceNow increasingly becomes the unified enterprise platform, effectively managing its lifecycle and services assets built and operated on top of it poses a critical challenge along its long-term maturity curve. Evaluating the platform costs and license management versus the value and ROI realization of the strategic platform assets is also essential, considering CloudOps and FinOps capabilities on the platform. Managing the risks associated with critical features and workflows on the platform is another essential capability required for effective RiskOps.

Eligibility Criteria

1. **Experience with support:** Involves extensive experience with ServiceNow's Now platform, workflows, third-party applications, integrators and accelerators, newly released features/ modules and upgrades

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

3. **Technology partnerships:** Partnerships with key software providers and a comprehensive application management service (AMS)- related portfolio

4. **Service integration and management (SIAM) and delivery models:** Expertise in managing ServiceNow in broader applications under CloudOps, such as AIOps, MLOps, FinOps, RiskOps and ITOps

5. **Delivery and contract models maturity:** Ability to manage multiple vendors and dependencies between toolchains while adhering to support SLAs

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

7. **Intelligent, adaptive and progressive maintenance:** In sync with upgrades and **functionality enhancements from ServiceNow** and technology ecosystems and with service integrators, in-house engineering teams, external partners and specialized tool providers

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

ServiceNow Managed Services Providers

Observations

Enterprise clients actively seek strategies to consolidate, standardize, enhance and optimize their global service delivery. ServiceNow stands out as a unified platform capable of integrating multiple systems, data sources and partners, offering visibility, governance and automation in service delivery. Furthermore, ServiceNow empowers enterprises to leverage AI and ML capabilities to augment service quality, efficiency and innovation.

Evolving service delivery narratives: There is a noticeable paradigm shift in how ServiceNow is perceived in business transformation journeys among service providers and enterprise clients. Moving beyond the traditional *implement-manage-maintain* approach, the focus has shifted toward *amplify-innovate-personalize*. This transition signifies a move toward exploring new, highly customized and personalized solutions on and with ServiceNow. It repositions the platform as a pivotal digital engineer for managing internal and external workflows.

Growing importance of FinOps: In the quest to optimize licensing expenditures, FinOps solutions are becoming increasingly crucial. Service providers now offer tailored FinOps strategies to optimize ServiceNow licensing costs and maximize return on investment for platform implementations. These strategies leverage detailed insights into ServiceNow's usage and billing metrics, aligning investment with actual requirements for efficient license management and cost optimization. Service Providers are also integrating licenses from various systems and software, including ERP, CSM and workflow management platforms, to develop comprehensive enterprise-level value propositions.

Emergence of new managed services streams: The shift toward digital business transformation fosters customization and personalization, necessitating the development of new applications and solutions. Residing on the Now Platform, these applications incorporate automation and AI components, demanding enhanced support and maintenance. Consequently, service providers are expanding their offerings to include post-deployment support engagements, focusing on AI models, automation and data management.

From the 35 companies assessed for this study, 30 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture's ServiceNow managed services transform workplace experiences, creating a future-ready management system with ServiceNow's Workplace Service Delivery solution. This transformation enhances customer and agent satisfaction while reducing costs through integrated services, proprietary intellectual property and accelerators.

Capgemini

Capgemini leverages its business case centers, people analytics labs and experience management office to establish interactive dashboarding and reporting capabilities and track experience KPIs. These solutions enable clients to demonstrate true value realization through their ServiceNow implementations.

Cask

Cask continues to expand Cask Reserve, its ServiceNow managed services capability and Tech Direct, a dedicated expert team of consultants. Such initiatives enable clients to leverage Cask's ServiceNow technical capabilities to improve ServiceNow results continually.

cognizant

Cognizant's ServiceNow managed services focus on transforming infrastructure and workplace management with the Now Platform. Its AI-led Neuro® Suite for IT operations enables full monitoring and automated detection and resolution of operation incidents.

Deloitte.

Deloitte integrates ServiceNow managed services with Now Assist GenAI capabilities, offering end-to-end operational services. This integration blends domain expertise with advanced AI for superior service management, enhancing service delivery and operational excellence for clients.

ServiceNow Managed Services Providers

DXC TECHNOLOGY

DXC Technology combines deep application insights and global resources to drive ServiceNow-managed services. Its Platform X enriches ITSM, ITOM, CSM, HR and ESG solutions, enabling clients to harness ServiceNow's full potential for mission-critical systems.

HCLTech

HCLTech offers accelerators bundled with ServiceNow Managed Services to improve end-to-end stakeholder experience. Its *built-on* products, such as iMigrate, Go Mapping and MarketVista, enable enterprises to accelerate, automate and optimize workflows across functions.

HEXAWARE

Hexaware is expanding its managed services in 2024 to include comprehensive ServiceNow platform support, establishing centers of excellence and innovation and specialized services such as ITSM and software assessment service as a service. The firm focuses on industry-specific solutions, such as CAPA for healthcare and Hex Assure for optimized service delivery.

Infosys

Infosys leverages its extensive partner ecosystem to integrate advanced AR, AI and data analytics into its ServiceNow managed services. It offers cutting-edge solutions in predictive AIOps, enterprise monitoring and asset management through its specialized services and innovation hubs.

LTIMindtree

LTIMindtree enhances its managed services with the Mosaic and Leni accelerators, scaling ServiceNow engagements efficiently. Their deep analytics expertise and specialized CoE, governed by industry SMEs, ensure comprehensive, high-quality ServiceNow solutions that drive significant value and operational excellence for clients.

tcs TATA CONSULTANCY SERVICES

Through Crystallus™ accelerator and its Machine First Delivery Model, **TCS'** ServiceNow managed services offer rapid deployment and automation across ITSM, ITOM and ITBM suites. Its industry-specific customer service management and field service management solutions optimize service delivery and automation.

TECH mahindra

Tech Mahindra's ServiceNow managed services leverage its TechM amplifAI engine to build custom AI and ML solutions and bots for enhanced operational efficiency. The company has evolved from a Market Challenger in 2023 to a Leader in 2024.

wipro

Wipro's ServiceNow managed services enhance productivity and experiences with accelerators such as the ServiceNow FirstWatch. Its approach transforms security and enterprise-wide IT and non-IT workflows, ensuring a unified and efficient operational landscape.

Kyndryl

Kyndryl (Rising Star) differentiates its managed services practice by offering unique solutions built in partnership with ServiceNow. Its leading-edge solutions help clients maintain business continuity and constantly adapt to new threats and regulatory standards.

Kyndryl

"Kyndryl brings expertise and tools to guide ServiceNow clients on the path to value in a proven and assured manner, enhancing service quality and security aspects."

Tapati Bandopadhyay

Overview

Kyndryl is headquartered in New York, U.S. It has more than 80,000 employees and operations across 100 countries. In FY23 the company generated $17.0 billion in revenue, with Principal Markets as its largest segment. Kyndryl enhances ServiceNow deployments by focusing on strategic planning, governance, process optimization and change management. This is supported by a global CoE and robust delivery processes, ensuring alignment with organizational goals and compliance standards. The company maintains delivery and customer innovation centers across all continents.

Strengths

Comprehensive set of tools: Kyndryl's ServiceNow implementation and subsequent managed services in the U.S. market offer a comprehensive suite of tools and offerings designed to drive digital transformation and operational excellence. Leveraging extensive experience and expertise in ServiceNow, Kyndryl assists organizations in deploying and optimizing ServiceNow solutions to meet their specific business needs and objectives.

Focus on innovation and high customer satisfaction: With a focus on innovation and customer satisfaction, Kyndryl empowers clients to unlock the full potential of ServiceNow for driving business growth and agility in today's competitive market landscape.

Seamless deployment: Kyndryl's implementation services encompass strategic planning, solution design, configuration, customization and integration, ensuring seamless and aligned with industry best practices. The company also provides managed services for ongoing support, maintenance and enhancement of ServiceNow environments, enabling clients to maximize efficiency, minimize downtime and improve the overall user experience.

Caution

Kyndryl should consider developing practice notes customized for target U.S. market clients, using its tools, proven knowledge and expertise. This approach aims to drive best practice awareness programs specifically for their target segments.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **ServiceNow Ecosystem Partners** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Legal/Compliance

▼ **Least satisfied**
Other Line of Business

Region

▲ **Most satisfied**
Middle East

▼ **Least satisfied**
Africa

Industry

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Chemicals

Industry Average CX Score

78.2

▲ Highest CX: 96.5
▼ Lowest CX: 43.5

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 406

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	50.3%
Nearshore	20.5%
Offshore	29.2%

Appendix

Methodology & Team

The ISG Provider Lens 2024 – ServiceNow Ecosystem Partners 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.

Study Sponsor:
Aman Munglani

Lead Author:
Dr. Tapati Bandopadhyay

Editors:
Dona George and Ritu Sharma

Research Analyst:
Arjun Das

Data Analyst:
Anuj Sharma

Project Manager:
Swathi Amin

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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 2024, 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 & Editor Biographies

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 27+ 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.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Research Analyst

Arjun Das
Research Specialist

Arjun Das is a research specialist at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platform and Services and SAP HANA Ecosystem Services. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Arjun has helmed his current role since 2020. Prior to this role, he has worked across

several syndicated market research firms and has more than 8 years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain.

Author & Editor Biographies

Study Sponsor

Aman Munglani
Director and Principal Analyst

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.

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 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.

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For more information about ISG Provider Lens™ research, please visit this webpage.

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

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