iSG Provider Lens™

Workday Ecosystem

Consulting and Strategy Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

pwc

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Executive Summary

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Workday continues to deliver and innovate platform solutions for a seamless experience

Platform and software modernization are revolutionizing the digital product industry. The focus is shifting from relevance to delivering a comprehensive experience at various stages of engagement for all personas interacting with the platform. The introduction and maturity of advanced models, such as large language models (LLMs) and algorithms, are expanding the possibilities for interactive and intelligent solutions that address complex challenges.

One of the most valuable capabilities in this regard is human capital management (HCM), which is a structured set of services across an organization. Technology integrations and solutions are continuously being adopted to meet the changing needs of all stakeholders, from developers to users.

The increasing integration of markets, technologies and cultures worldwide has created new opportunities and challenges for organizations. Globalization demands an HCM platform to manage a diverse and dispersed workforce that can operate effectively in different contexts and cultures. It must also cope with competition for talent, regulatory and legal differences, and ethical and social issues arising from operating in multiple countries.

The U.S. is a competitive market with vast opportunities. It is known for its ability to adopt innovative solutions and adapt them to meet the transforming industry needs. One of the main characteristics of the U.S. market is its openness to disruption. Software platforms are continuously evolving to match the maturity of the business processes, system interoperability and user convenience. Developing technology capabilities, constantly refining processes and elevating customer experience expectations impel a coercive force on the platform vendors to stay relevant by enhancing their offerings to gain a competitive advantage.

Workday constantly updates and improves its features and capabilities to benefit customers from the latest innovations and best practices. It has a strong customer community and partner ecosystem that offers support and

Workday drives Enterprise impact by refining HCM workflows and delivering Workforce experience

guidance. Workday focuses on security and reliability using a SaaS delivery model that ensures high availability, performance and data protection. It also leverages in-memory technology and cloud computing to provide real-time insights and analytics to help companies make better decisions.

Notable new features include:

- **Workday Assistant** – This AI-powered chatbot provides employees with answers to HR-related questions, such as how to change their benefits or request time off. Workday Assistant leverages NLP and ML algorithms to understand user queries and provide accurate responses.

- **Skills Cloud** – This new feature enables organizations to map their skills inventory and identify skills gaps. Skills Cloud provides a comprehensive view of an organization's skills landscape, allowing HR professionals to identify areas for improvement and create targeted training and development programs.

- **Workday Journeys** – This feature provides a personalized onboarding experience for new hires. It enables organizations to

create customized onboarding plans for each employee, guiding them through the process and ensuring a seamless transition into the organization.

Workday focuses on creating a solid technical and functional documentation library to build in-depth knowledge about the platform and transform a resource into an autodidact. **Workday Adoption Toolkit** offers tools and resources that help customers drive user adoption and engagement with Workday. The Toolkit includes guides, templates, checklists, webinars and other materials covering change management, communication, training and support. Customers can use the Toolkit to plan and execute their adoption strategy and measure their results.

Workday focuses on incorporating a wider set of processes and capabilities. Thus, apprehension about technical complexity hovers as the platform expands and adds new offerings. Developing intelligent capabilities hosted on the top three hyperscalers has magnified the scope for the Workday platform to develop strategic go-to-market opportunities and improve

solution quality. Such a benefit will help enterprise clients host their workloads across cloud providers.

Workday has chosen the Google Cloud Platform for its public sector deployment, and a few modules are on Azure. It is an exciting start to new blue ocean opportunities for integrating novel solutions. This partnership is expected to drive Workday's solution maturity and increase penetration among existing customers through unique leverage and pricing structures to run the HCM platform in the cloud.

Evolving Workday Service Segments & Practices in the U.S. Market

Consulting and Strategy Services

Consulting and advisory competencies are among Workday Services partners' predefined standard offerings. In the past 12 months, we have seen a dramatic change in the transformation consulting space. Organizational change management (OCM), business technology fitment, technical architecture and process transformation converge to deliver a sustainable solution.

Enterprise clients realize the benefit of a swift transition of services led by a strong consulting practice. Consulting service goes beyond assessing, service mapping and recommending a solution. It entails improved experience delivery, operational consulting and technical expertise to redesign the technical architecture to accommodate microservices, container orchestration and cloud-native application development to impart platform resiliency. Governance, risk and compliance (GRC) and security consulting increasingly dominate the discussions because the HCM platform holds sensitive organizational information. A provider's consulting capabilities around the Workday platform and the HCM domain are crucial in transitioning enterprise clients from the incumbent HCM platform to Workday.

Implementation and Integration Services

The Workday implementation process is improving technically and operationally. Increasing the development of accelerators and other IP to complete the implementation process is deeply rooted in the Workday technical services practice. Partnerships

with testing platforms like TOTAL TaaS™ with prebuilt automated testing solutions for all primary Workday modules have accelerated deployment. Personalization and customization are critical asks by enterprise clients due to their increasing familiarity with the Workday Extend offering that helps build an application on top of the Workday platform. This enables enterprise functions to integrate and connect various internal and external systems, resolving information flow challenges. The service partners focus on serving the entire Phase 1 and Phase X implementations as a continuum. Workday's platform is in the next phase of maturity, where after implementing the core HCM platform, the natural course of scale is implementing other financial, analytics, talent management and payroll. Agile methodologies have also gained prominence in Workday implementation trends. Workday service partners are adopting these project management practices, enabling faster adaptation to changes, improved communication among team members and better documentation and process efficiency.

Workday Managed Services

Workday customers need ongoing support to maintain and optimize their systems and address issues that arise during normal operations. Post-deployment support quality heavily depends on resources, certifications and maintenance experience to ensure the smooth functioning of the platform. Application management services (AMS) deal with platform break-fix, design and development services. Change and release management are continuous activities that need administered execution, as these should not disrupt the platform. These are complex but routine activities that ensure the latest updates and features are incorporated into the Workday platform.

Using managed services in the Workday ecosystem previously was less popular due to ambiguity in the Workday partner ecosystem. Partners were contentious about the inclusions in this space due to limited-service offerings in the Workday AMS space. The ISG Workday team formed the blueprint with a futuristic view and anticipated

transformation in this space. This partner ecosystem study is confident about Workday managed services, especially with the experience from studying the platform market. In this case, we have seen capabilities expand through the customization of APIs and application interfaces extended by the platform community.

In conclusion, platform and software modernization is transforming the digital product industry by shifting the focus from relevance to delivering a comprehensive experience for all personas interacting with the platform. Human capital management plays a crucial role in this transformation by providing a structured set of services across an organization. Workday, a leading HCM platform provider, continuously incorporates technology integrations and solutions to meet the changing needs of all stakeholders. The increasing integration of markets, technologies and cultures worldwide presents new opportunities and poses challenges for organizations. Workday's renewed focus on technology,

including cloud services, data management, generative AI and intelligent automation, reflects its commitment to staying relevant and competitive in the rapidly evolving market.

> Workday is set to revolutionize how businesses approach their HR and finance operations by empowering organizations to achieve unprecedented efficiency and productivity. Workday will be a game-changer for the modern workplace and human capital function with its latest technology components and innovative solutions.

Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Accenture	Leader	Leader	Leader
Alight	Leader	Leader	Leader
Avaap	Market Challenger	Contender	Product Challenger
BNB	Not In	Contender	Not In
Capgemini	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
CrossVue	Contender	Contender	Contender
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Glyde Consulting	Contender	Not In	Not In

Provider Positioning

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Guidehouse	Market Challenger	Market Challenger	Market Challenger
Hexaware	Not In	Leader	Leader
Huron	Leader	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader
Impact Advisors	Not In	Market Challenger	Market Challenger
Intecrowd	Product Challenger	Product Challenger	Contender
Invisors	Product Challenger	Rising Star ★	Rising Star ★
Kainos	Not In	Product Challenger	Leader
KPMG	Leader	Leader	Product Challenger
Mercer	Leader	Product Challenger	Leader

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Provider Positioning

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Preos	Contender	Not In	Not In
PwC	Leader	Leader	Leader
TopBloc	Product Challenger	Product Challenger	Product Challenger
UST	Contender	Not In	Contender

The Workday Ecosystem study focuses on **providers' ability to offer consulting**, implementation and managed services **for the Workday platform**.

Consulting and Strategy Services

Implementation and Integration Services

Managed Services

Simplified Illustration Source: ISG 2023
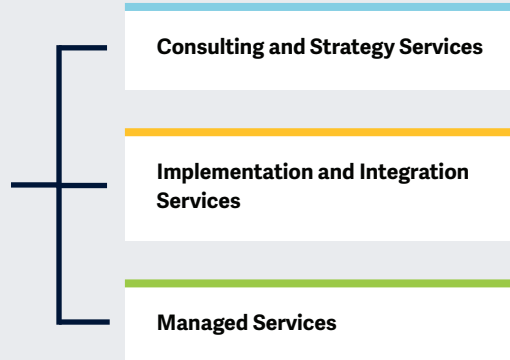
Definition

The global economy faces several uncertainties, such as high inflation, tepid growth and recessionary fears. Business services are seldom immune to these challenges, the biggest concern being soaring operating costs. More importantly, human resource costs have been at an all-time high because of global phenomena, such as the "great resignation" and quiet quitting.

Technological advancements have enabled companies to shift toward automation, AI and other transformative business processes. These, in turn, have improved human resources, a core service line for every organization. Such functions have seen a drastic transformation in the manner of conducting business. Human-centric processes keep shifting to the virtual space with the digitalization of HCM workflows. There has been a need to consolidate these essential functions to extend organizational support to employees and streamline mainstream HR functions digitally. It has necessitated integrating and focusing on modernizing processes and technological developments.

With a global presence across all major markets, Workday offers tailored solutions to streamline HR functions digitally, primarily for midsize and large companies. Workday's cloud-based solutions encapsulate a complete suite of services, such as financial management, strategic sourcing, peakon employee voice, adaptive planning, analytics and reporting. Workday integrates HR applications into an enterprise management cloud platform designed to incorporate custom requirements and personalization, extending its ability to cater to exclusive needs effortlessly.

This study evaluates the partner network's service maturity, technical competency and the depth and breadth of its understanding of the service lifecycle on the Workday platform, encompassing not only a specific product but also the modules. In addition to the evaluation mentioned above criteria, the following also applies to the service providers of all quadrants:

- Unique differentiators
- Economic stability
- Market position

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions — Consulting and Strategy Services, Implementation and Integration.

Services Managed Services

This ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market

Our study serves as the basis for important decision-making regarding 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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptionsare 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.

Consulting and Strategy Services

Consulting and Strategy Services

Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. that are evaluating providers of Workday consulting services.

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

Organizations in the U.S. are using Workday consulting services to adapt to the changing competitive landscapes and latest business models for technical and functional reasons. This has resulted in the growing demand for financial management and human capital management (HCM) support. Enterprises are concentrating on ramping up new capabilities that align with Workday focus areas such as Finance, Adaptive Planning, Peakon, and Workday Extend. Workday Extend and Workday Peakon are two new platforms that are picking up pace and are experiencing increased demand in the U.S.

Enterprises continue to focus on HCM transformation and are currently developing frameworks, solutions, or tools to address and streamline HR-related business issues and processes. Clients opt for service providers that predominantly focus on Governance risk and compliance (GRC) advisory and consulting. Software providers in the U.S. region continue to align their strategy with an emphasis on technology including cloud services, data management, generative AI, and intelligent automation. Intelligent automation in particular highlights the importance of technology in consulting services.

Business leaders focused on driving business outcomes, including CHROs, CFOs, payroll and financial leaders, should read this report to understand the trends and developments in Workday offerings.
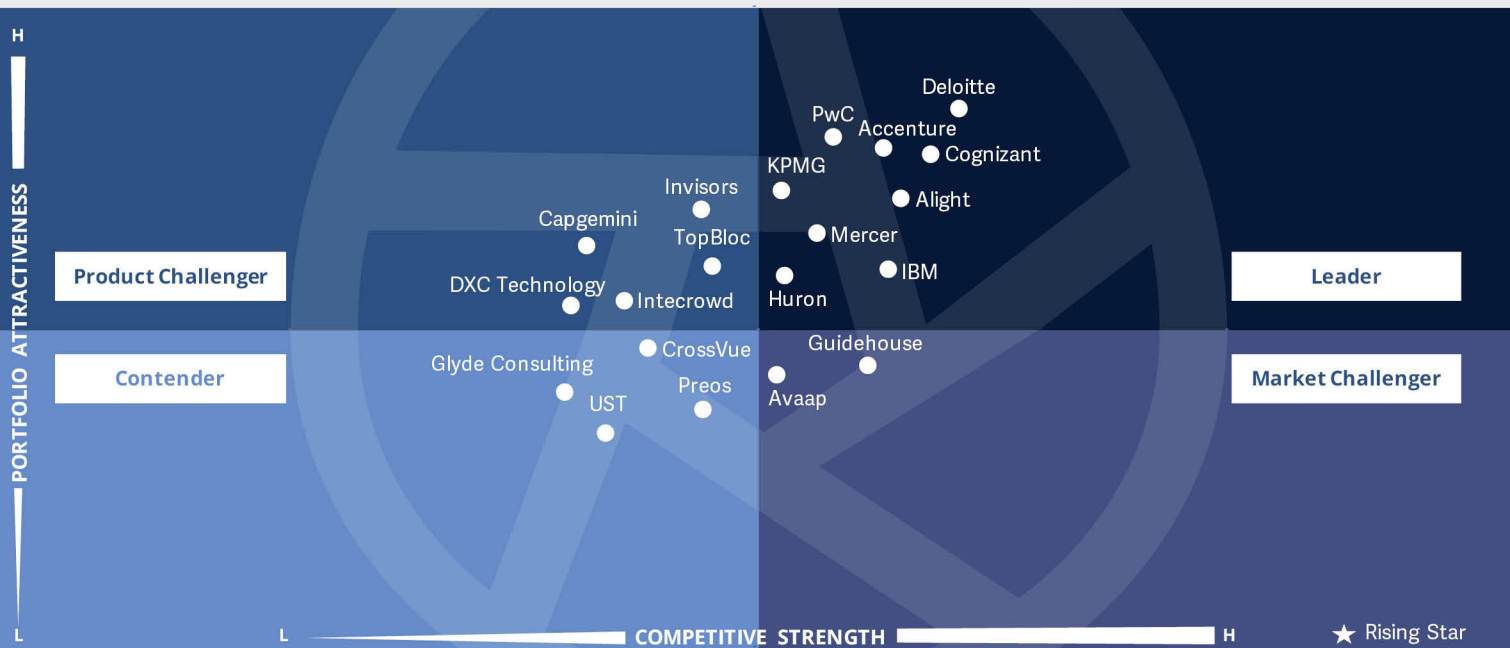
Consulting leaders, including management, technology, functional and domain consulting leaders, should read this report to learn about U.S.-specific Workday offerings.

Digital transformation leaders spearheading initiatives to build a future-proof organization should read this report to know how services providers design Workday solutions and map them to respective technologies.

ISG Provider Lens™

Workday Ecosystem
Consulting and Strategy Services

U.S. 2023

PORTFOLIO ATTRACTIVENESS (L → H)

COMPETITIVE STRENGTH (L → H)

- Product Challenger
- Contender
- Leader
- Market Challenger

Providers plotted:
- Deloitte
- PwC
- Accenture
- Cognizant
- KPMG
- Alight
- Invisors
- Mercer
- Capgemini
- TopBloc
- IBM
- DXC Technology
- Intecrowd
- Huron
- CrossVue
- Glyde Consulting
- Guidehouse
- Preos
- UST
- Avaap

★ Rising Star

This quadrant evaluates service providers that offer **Workday advisory and consulting services** for assisting enterprise clients **in optimizing processes** and onboarding the Workday platform for HCM solutions.

Ashwin Gaidhani

Consulting and Strategy Services

Definition

This quadrant evaluates the Workday consulting and strategy service providers that transform the HR services landscape to improve the service philosophies toward sustainable, effective and resilient business operations using Workday solutions, products and platforms. The Workday advisory and consulting services help enterprise clients develop a road map for HR process transformation to meet business objectives. This quadrant assesses providers' expertise in driving transformational initiatives to deliver a robust execution plan, which certified consultants then administer. It also evaluates their approach to migrating and reforming processes by analyzing business, functional and technical requirements using custom assessment kits aligned with practices prescribed by Workday. The service providers covered in this quadrant help enterprise clients of all sizes understand the changing market trends and design the best models for business, service and technology.

Eligibility Criteria

1. **Use of reference assessment models, frameworks and templates:** Use of best practices in opportunity identification and assessments for current and new Workday competencies; availability of frameworks, tools and templates for the Workday adoption roadmap.

2. **Experience in defining and evaluating human resources management system (HRMS) landscape:** Capability to design HR service transformation strategy and a long-term road map integrating functional services.

3. **Industry knowledge, domain practices and Workday portfolio:** In-depth knowledge of Workday product portfolio (HRMS, financial management, payroll, analytics, Extend and HCM services) and related functionalities, processes, workflows, tools and platforms.

4. **Digital business transformation competency:** Focus on diverse and HR-wide portfolios and expertise in industry-specific functional process and strategy consulting.

5. **Business tools and technology expertise:** Must have Workday platform certifications, accreditations (hyperscalers and third-party software) and capabilities to predict long-term technology developments and prescribe timely solutions using expertise and partnerships.

6. **Experience in organizational and technology change management:** Principles and guidance to ensure compliance with regulatory and governance frameworks.

7. **Resource competency and relevant certifications:** Workday certified (Workday Pro) resource pool with expertise in building solutions.

Consulting and Strategy Services

Observations

Workday consulting has grown considerably in the U.S., with various enterprises adopting its cloud-based solutions, including Human Capital Management (HCM), Financial Management and Adaptive Planning. Workday has become a preferred HCM platform among enterprise clients focusing on improving experience and engagement across its ecosystem, including partners, software vendors and technology service providers.

- Workday Customer Success Plan (Accelerate) is a personalized service that helps enterprise clients achieve their business goals with Workday. The focus is directed toward user connection with the platforms and related modules. Self-guided and self-paced solutions help resources understand Workday offerings and functionalities deeper. These (accelerate) plans provide guidance, best practices and recommendations to help customers optimize their Workday configuration, performance and usage.

- Workday's current focus for enterprises across the U.S. is directed toward developing Adaptive Planning and Prism Analytics. Enterprises want to develop these tools with Workday to automate processes seamlessly and efficiently.

- Workday Payroll has become a prominent focus area for many enterprises across the U.S. Automating payroll processes makes it easier for businesses to secure their data while saving time and ensuring efficiency.

- Enhancing and automating Workday services have enabled enterprises to opt for these services across the U.S. because Workday provides ongoing support, maintenance, updates and enhancements.

From the 28 companies assessed for this study, 20 have qualified for this quadrant, nine being Leaders and no Rising Star

accenture

Accenture's Workday solutions are enhanced by an appropriate framework design and its thorough understanding of the client environment and through an in-depth analysis of assets and methodologies. Its automation and data analytics ensure the right skills are available.

Alight

Alight provides services across six functional areas: people experience; time tracking; HCM; finance; planning and budgeting reporting; and analytics. It powers these services with accelerators, automated testing, AMS, optimization, reporting and analytics.

cognizant

Cognizant offers a complete lifecycle of services, including an in-house advisory services practice and proprietary tools. It also provides strategic roadmap development, governance planning, phased technology deployments, M&A support and continuous improvement cycles.

Deloitte

Deloitte offers collective learnings, best practices and accelerators to enable Workday transformations for the biggest customers across multiple industries. It helps clients to automate key processes, unify data and boost employee engagement and satisfaction.

Consulting and Strategy Services

HURON

Huron's consulting approach consists of evaluating and empowering change by end-to-end assessment, designing a scalable and tactical roadmap and crafting a business case to get buy-in from stakeholders. Its consulting services contributed most of its revenue.

IBM

IBM's full-stack observability enables it to continuously monitor Workday's application performance by leveraging its comprehensive suite of databases and APIs. Powerful dashboards and visualizations contextualize interactions, while actionable insights facilitate timely responses.

KPMG

KPMG's solutions enable C-level executives to work through the complexity of their business. KPMG's holistic approach encompasses the entire Workday lifecycle, from inception to launch and post-implementation. This helps achieve expected outcomes and improve performance.

Mercer

Mercer offers a mix and match of Workday solutions. For instance, it supplements Workday Financial Management with Workday Adaptive Planning for planning and budgeting, Workday Inventory for supply chain management and Prism Analytics for reporting and analytics.

pwc

PwC's Business-eXperience-Technology (BXT), agile methodology, end-to-end testing, data-driven design and deployment accelerators offer unparalleled client experienceIts digital risk team helps anticipate and address risks to offer maximum client reassurance.

PwC

"PwC's outstanding consulting capabilities, data tracking and analytics and the One Firm go-to-market strategy power its delivery model."

Ashwin Gaidhani

Overview

PwC is headquartered in London, U.K. and operates in 152 countries. It has more than 327,900 employees across 690 global offices. In FY22, the company generated $50.3 billion in revenue, with Advisory as its largest segment. PwC's Business-eXperience-Technology (BXT) agile methodology drives iterative, rigorous solution reviews throughout the program. PwC's digital assets include providing planning, HR execution, finance execution, payroll and payments, analysis and insights and industry verticals. Its U.S. practice is a well-established business with a loyal clientele.

Strengths

Proven across-the-board track record in consulting: PwC provides end-to-end HR implementation expertise from strategy through execution. It has extensive cross-functional knowledge of organizational requirements and deep technology, security, risk and compliance knowledge. It has extensive experience in using change management to drive adoption and engagement. PwC provides guidance and supports the client throughout the Workday onboarding process.

Robust foundational data facilitates data tracking: A controlled and accurate workflow enables clients to track, manage and control in-memory, real-time data. Clients can access a full range of financial capabilities, relevant analytics and metrics. A unified process provides controls and security for regulatory compliance. This results in increased operational visibility, accuracy, transparency and productivity, and consistency in reporting, policies and procedures.

Power of 'One' for scope economies: PwC's GTM strategy involves approaching clients as 'One Firm' that provides end-to-end services. It trains the workforce of the future and provides services for finance transformation, risk and regulatory, digital, deals and tax. Its portfolio covers all available Workday solutions.

Caution

While Workday consulting engagements are based on the client's size, scale, and business complexity, enhancing the degree of customization along with combining technology and process transformation to address clients' requirements could further boost PwC's market penetration.

Appendix

The ISG Provider Lens™ 2023 – Workday Ecosystem research study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2023, 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 Workday Ecosystem 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

Research Partner

Ashwin Gaidhani
Lead Analyst

Ashwin Gaidhani has a comprehensive view of Enterprise services portfolio and digital business transformation initiatives with over two decades of experience as an ISG Research Partner and subject matter expert in enterprise services and workflow management. He is presently contributing as a Lead Analyst and Author with the ISG Provider Lens™ for platforms, emerging, and digital technologies.

Ashwin comes to this work with in-depth business and technology experience revolving around service management, consulting, emerging capabilities (artificial intelligence and intelligent automation), and work design methodologies.

Enterprise Context and Global Overview Analyst

Swetha Tadepalli
Research Analyst

Swetha Tadepalli is a Research Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Workday Ecosystem, and Oil & Gas studies, respectively. Swetha has experience in the technology research industry. She carried out research delivery for both primary and secondary research capabilities.

She is also involved in authoring enterprise context and global summary reports with market trends and insights. She also supports the advisors with her research skills about the latest market developments in the industry.

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.

About Our Company & Research

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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ⁱSG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 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.

For more information, visit isg-one.com.

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AUGUST, 2023

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