

***ISG** Provider Lens™

ServiceNow Ecosystem Partners

U.S. 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



April 2021

About this Report

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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 April 2021, 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.

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- 1** Executive Summary
- 5** Introduction
- 15** ServiceNow Consulting Services
- 19** ServiceNow Implementation & Integration Services
- 23** ServiceNow Managed Services Providers
- 27** Methodology

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EXECUTIVE SUMMARY

ERP For CIOs

ServiceNow has established itself as the market leader, providing the greatest possible automation. Most clients want to free process execution from manual requirements through the use various technologies. They don't just seek support for individual manual tasks with an electronic workflow, but also want to integrate and harmonize their entire process landscape. While addressing this challenge, ServiceNow became a leader in this market, achieving total sales of more than US\$4.3 billion in 2020, with more than 90 percent coming from the licensing business. ISG estimates that the total market revenue generated is more than US\$12 billion. The company supports more than 6,900 customers worldwide, of which almost 1,100 have an annual contract value (ACV) of more than US\$1 million. It has more than 13,000 employees who ensure a satisfied customer base. Roughly 99 percent of all contracts are currently being renewed.

Developed as a software suite in a platform-as-a-service model, ServiceNow was originally positioned as a kind of an enterprise resource planning (ERP) suite for CIOs. In addition to a user-friendly interface and an easy-to-use workflow engine, it has several modules that worked as a case management system to support the full information technology infrastructure library (ITIL)-based process flows. While extensively using new technologies, ServiceNow continuously increased the degree of process automation. Financial evaluations and risk management were put in place to control the corporate rules via a uniform database. The rapid provision of new functionalities was driven by the targeted acquisition

of software companies that were leaders in their specialist areas or were preparing to take up leadership positions.

Today, increasing number of decision makers in enterprises are speculating whether an agile workflow platform is the better solution than a rigid ERP system when it comes to establishing automated incident processing in companies. A solution like ServiceNow is becoming increasingly attractive for those enterprises where the realization has dawned upon decision makers that digitization and process automation are conjoint.

Service management has established itself in many companies as a philosophy rather than a single, IT-limited discipline. Experienced companies have realized that the basic elements of service management such as clear requirements management, the development and provision of a catalog of services based on defined requirements, structured change management or clear performance-based compensation as well as the comprehensive management of the necessary internal and external suppliers, not only improve the efficiency of their own corporate but also the loyalty of customers. These are viewed by enterprises as a necessary criterion for competitive differentiation.

Due to the complexity and variety of requirements of comprehensive service management, a key to success for ServiceNow is the large established network of different partner companies. While there are significant differences in the requirement profiles between individual customers, industry-specific requirements should be considered.

Flexibility and expandability is a major challenge which ServiceNow addresses through the constantly growing partner ecosystem.

ServiceNow's approach is relatively simple; it involves the provision of a workflow platform that operates as a combination of a system of records and a system of engagement. While the platform can easily adapt to customer needs and expand from a functionality point, it can connect every back-end system that is required for the automation of process flows via interfaces. Due to the complexity of such tasks, partner companies are required to be able to cope with these requirements. While constantly growing, as of today, more than 1,300 companies worldwide have a formal partnership with ServiceNow and, in addition to services, also provide functional extensions that are made available as a solution in an app store. More than 470 of these apps are available for the two current versions of ServiceNow alone, Paris and Quebec. To support the broadest possible range of processes, there are currently more than 525 ready-made integration solutions for other products that are by no means only developed for the IT environment. In addition to solutions for corporate processes such as human resources or customer service, integration solutions already enable access or management of data in ERP solutions; for example, to enable corporate customers in the B2B or B2C environment to access order status or invoices via a portal. According to the motto of Fred Luddy, the founder of ServiceNow, "When I started ServiceNow in 2004, my vision was to build a cloud-based platform that would enable regular people to route work effectively through the enterprise."

ServiceNow pursues a clear strategy in the continuing development of its solution. Further developments of the platform as well as basic functionalities are developed in-house,

functional adaptations and industry-specific solutions are either provided by partners or docked to the system via integrators. Special modules for dedicated processes that affect areas which are decisive for the success of the solution are developed in-house and are offered as a supplement to the platform.

While considering the functional diversity and possible fields of application of a workflow platform such as ServiceNow, it quickly becomes clear that everything that happens in a company can be mapped in this system. Almost all tasks are regulated in processes or procedures that are by no means limited to the company. On the contrary, these processes are part of every B2B or B2C connection. This procedure is known as case management, and the flexibility to be able to map every case is a key strength of ServiceNow.

The ServiceNow Partner Ecosystem

ServiceNow distinguishes between four different types of partners, depending on the type of service offered to the customer. The partner types are:

- Service partners
- Service provider partners that offer managed services
- Technology partners that develop applications or develop integrators
- Sales Partners

In addition, companies can be certified as training partners.

Numerous certifications are possible for the individual function modules and the technical and organizational activities required here for the introduction, adaptation, and operation

of the solution. In addition to the different types of partners, companies can be certified as training partners, and there is a special certification for companies that operate in the public sector.

ServiceNow currently differentiates its partners based on the following classifications:

- Specialist
- Premier
- Elite
- Global Elite

With the exception of the “specialist” status, the grouping into various partner categories is based on the commitment of the companies to support the qualitative and quantitative success of ServiceNow. In addition to a wide variety of quality parameters such as the type and number of certifications through participation in training classes, evaluation of customer satisfaction and practical experience with the respective modules, commercial key figures such as sales and growth also come into play. The respective partner status then results from this differentiated and complex set of figures. Due to the relatively high entry barriers and precise control by ServiceNow, there are currently six companies in the premium segment of “Global Elite Partner”: Accenture, Deloitte, DXC Technology, Ernest & Young, IBM and KPMG. These companies are committed to targeting more than US\$1 billion in annual sales and, more importantly, use the solution internally.

ServiceNow reviews the efforts and achievement of goals of the partners annually and thus ensures that their respective reported status also corresponds to the current necessary knowledge and required delivery quality. Together with the quality indicator published on the ServiceNow partner site, the partner status is a good indicator of the quality of the services offered by the respective company.

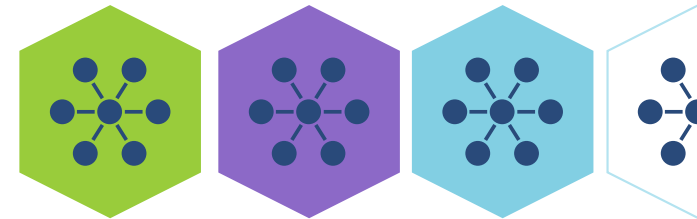
Finding The Right Partner Means Planning Comprehensively

When selecting partners, user companies should not disregard an important aspect: Due to the constantly growing functionality and the ever-increasing attractiveness of the technical solution even outside the IT organization, ServiceNow is no longer the only decisive factor for the successful implementation of such a comprehensive system. In addition to specific circumstances of an industry in which the user operates, an understanding of the integration needs and capabilities of ServiceNow with other software architectures is of growing importance, especially when planning a broader implementation. In this context, it is also important to understand the core processes, personnel and any cultural circumstances as well as the adaptability of a company to change and take all of these into account when planning the new environment.

While not only looking at the purely technical development of ServiceNow but also at its development in terms of appointments to top positions, the strategy is clear. With Bill McDermott as CEO, ServiceNow is to be established as an information hub and automation solution for all corporate processes and thus take its place among the ranks of the industry giants for enterprise applications such as SAP, Salesforce and Oracle.

Against this background, ISG has added a category of service providers to the ServiceNow partner ecosystem in this study, adding them to the “plan” area of the classical “plan-build-run” approach. Due to its capabilities, ServiceNow is to be seen as the cornerstone of a company's digitization strategy. Thus, a deep integration of these solution into the digitization strategies is necessary to not only justify the high investments, but also to be able to leverage their full potential. If this step is neglected or simply ignored, companies are threatened with the same misfortune that many have already experienced with the introduction of ERP systems. This group of consulting companies includes vendors that can accompany users in digital transformation by understanding ServiceNow as an integral part of the digital strategy and know how to profitably leverage the potential of the solution beyond the confines of IT.

In addition to these more strategic planning partners, companies that specialize in the implementation and integration of ServiceNow are evaluated, followed by providers that offer services around the operation of an implemented solution. In addition to the purely technical capabilities, the understanding of the providers in connection with the principles of service management and in the development and operation of process-oriented, industry-specific workflows is evaluated in all areas.



Introduction

Simplified illustration



Source: ISG 2021

Market Overview

The ServiceNow Ecosystem Partners 2021 study examines the extensive global, yet complex partner network for one of the leading software solutions for workflow-enabled service management. The high acceptance of ServiceNow product offerings in the user community has ensured exponential growth. In order to take full advantage of the broad functionality, from process (re-)design to software implementation, integration with application management services and training, appropriate professional services are required. Various offerings and certification levels show the focus of the different partner companies; they range from support over the entire lifecycle to very focused services for highly specific tasks.

Definition (cont.)

The ISG Provider Lens™ study offers IT decision makers:

- A presentation of the strengths and weaknesses of the relevant providers
- Differentiated positioning of suppliers on the basis of competitive strength and portfolio attractiveness
- View of multiple markets, including the U.S., Germany, and Brazil

The study thus provides an essential decision-making basis for positioning, relationship, and go-to-market considerations. ISG Advisors and enterprise clients also use information from these reports to evaluate their current and potential vendor relationships.

Scope Of The Report

The study "ISG Provider Lens ServiceNow Ecosystem Partners 2021" analyzes the services and offerings of ServiceNow partners in the USA, Brazil and Germany in selected segments. Based on the analysis results, the service providers operating in the defined segments can be assessed with regard to the strength of their portfolio and their competitiveness in the market.

This ISG Provider Lens™ study is based on the lifecycle of a ServiceNow-based workflow solution and has been divided into the following three segments:

- ServiceNow Consulting Services — necessary prior to the implementation of a system
- ServiceNow Implementation & Integration Services — required for the implementation of a solution
- ServiceNow Managed Services — guarantee the smooth operation of a solution after it has been introduced

Definition (cont.)

ServiceNow Consulting Services

This segment examines providers of consulting services that help clients prepare for the deployment of workflow-driven service management. Reference models and assessment methodologies are key in understanding clients' maturity level and their biggest challenges. However, for a better differentiation, partners must also have knowledge on current and future available technical solutions. Consultants are positioned differently when it comes to helping clients understand the transformation projects needed to leverage the investments in ServiceNow. The migration path required for this must be shown accordingly.

The main evaluation criteria for this segment are:

- Use of reference models and templates
- Experience with broader workflow and service management design
- Skills in the assessment of long-term technology developments
- Expertise regarding ServiceNow capabilities and other available tools for broader enterprise service management

- Knowledge of workflows and processes in the enterprise services supported by ServiceNow
- Certifications of standard bodies
- Experience with the principles of organizational change

ServiceNow Implementation & Integration Services

This segment analyzes providers with a strong specialization in ServiceNow implementation. In most companies, ServiceNow solutions are not operated in isolation; therefore, knowledge of the integration with different software tools is a decisive differentiator. With their experience, service providers are expected to make installation and integration as smooth as possible. At the same time, they should also ensure the maintainability of the installed solution.

The main evaluation criteria for this segment are:

- Broad technical experience with the tools offered

Definition (cont.)

- Use of predefined solutions, accelerators and templates
- Experience with emerging technologies such as machine learning (ML), natural language processing (NLP) and artificial intelligence (AI) in conjunction with cognitive computing
- Experience with system, data and process integration
- Knowledge regarding the specifics of enterprise shared services
- Approach to ensuring the ease of maintenance of the installations

ServiceNow Managed Services Providers

This quadrant examines service providers that offer managed services as part of the provision of the SaaS solution for maintenance and support tasks, including monitoring, remote support, centralized management of the Now platform and the workflows and applications running on this platform. When analyzing the various vendors in this segment, aspects such as maintenance, data quality management, data security and compliance issues are considered. Due to the complexity of

the workflows to be supported, service providers need to address factors such as global coverage and cross-organizational usage. They are challenged not only to support a highly sophisticated and integrated application landscape, but also to demonstrate how they work in a multivendor environment or ensure integration.

The main evaluation criteria for this segment are:

- Experience supporting ServiceNow's Now platform, workflows and third-party applications
- Delivery capability close to the client
- Existing technology partnerships with key software vendors
- Breadth of application management services (AMS)-related portfolio
- Service integration and management (SIAM) approach and delivery models
- Maturity of delivery and contract models
- Broad client base
- Local application examples and references

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.

Provider Classifications

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.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly fall behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Companies that receive the Rising Star award have a promising portfolio 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. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In


The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: 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 qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

ServiceNow Ecosystem Partners - Quadrant Provider Listing 1 of 2

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Abhra, Inc	● Contender	● Contender	● Contender
Accenture	● Leader	● Not in	● Not in
Atos	● Product Challenger	● Rising Star	● Rising Star
Capgemini	● Leader	● Leader	● Leader
Cask	● Leader	● Leader	● Contender
Cognizant	● Leader	● Leader	● Leader
Crossfuzze	● Contender	● Not In	● Not In
Deloitte	● Leader	● Not In	● Not In
DXC	● Leader	● Not In	● Not In
Fujitsu	● Product Challenger	● Not In	● Not In
Glidefast	● Product Challenger	● Not In	● Not In
HCL	● Leader	● Leader	● Leader
Hexaware	● Rising Star	● Leader	● Leader
Highmetric	● Not In	● Not In	● Product Challenger

ServiceNow Ecosystem Partners - Quadrant Provider Listing 1 of 2

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Infosys	● Leader	● Leader	● Leader
INRY	● Contender	● Market Challenger	● Market Challenger
Kloves Inc.	● Not In	● Contender	● Not In
KPMG	● Leader	● Not In	● Not In
Logicalis	● Not In	● Not In	● Market Challenger
LTI	● Leader	● Leader	● Leader
Maryville Consulting Group	● Contender	● Contender	● Not In
Orange Business Services	● Market Challenger	● Contender	● Contender
Plat4mation	● Product Challenger	● Not In	● Not In
Stefanini	● Not In	● Product Challenger	● Product Challenger
Tech Mahindra	● Contender	● Rising Star	● Rising Star
Trianz	● Product Challenger	● Product Challenger	● Contender
Unisys	● Contender	● Not In	● Not In
Wipro	● Product Challenger	● Leader	● Leader



ServiceNow Ecosystem Partners Quadrants

SERVICENOW CONSULTING SERVICES

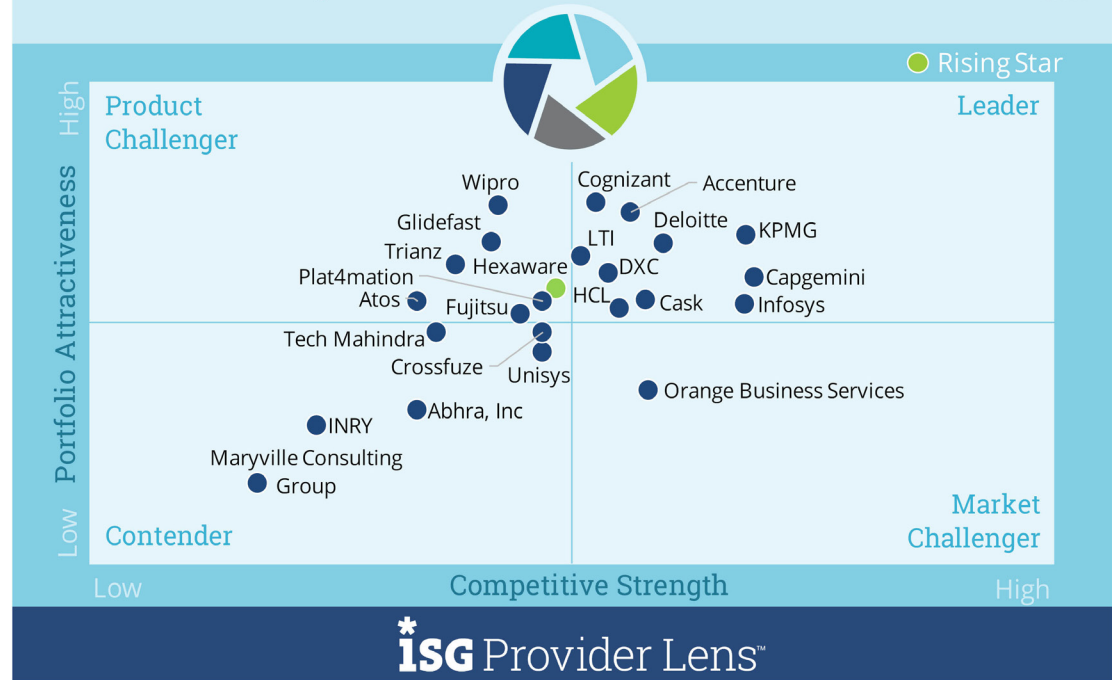
Definition

This segment examines providers of consulting services that help customers prepare for the deployment of workflow-driven service management. While reference models and assessments are key to understanding clients' maturity level and their key challenges, a comprehensive understanding of the current and future technical capabilities of partners helps to differentiate. Consultants are positioned differently when it comes to communicating to clients about the transformation efforts required to truly leverage the investments made in ServiceNow and to demonstrate a robust migration path.

The most important evaluation criteria for this segment in addition to knowledge on the performance of the ServiceNow product offering are the integration capability and the long-term development of the service spectrum.

ServiceNow Ecosystem Partners
ServiceNow Consulting Services

2021
U.S.



Source: ISG Research 2021

SERVICENOW CONSULTING SERVICES

Eligibility Criteria

- Use of reference models and templates
- Experience with broader workflow and service management design
- Possibilities for forecasting long-term technology developments
- Expertise regarding ServiceNow capabilities and other available tools for broader enterprise service management
- Knowledge of workflows and processes in the enterprise services supported by ServiceNow
- Certifications of standard bodies
- Experience with the principles of organizational change

Observations

While analyzing all available data, it becomes clear that the differences among the 40 plus companies that have been assessed for this quadrant are very small. On assessing all the service providers that finally made it into the quadrant graphic, it is fair to say that the differences are even marginal. The key differentiators that defined the positioning were a combination of transformational change experience, business process knowledge and reference models beyond the more “classical” IT solutions. All the challengers and contenders in this quadrant deliver excellent consulting services when it comes to ServiceNow-based and ITSM/ITOM-oriented solutions. Clients that look for well-prepared partners need to take those companies into account.

- **Accenture** is a leader in consulting services for ServiceNow due to its strong business process know-how paired with technology expertise. Its dedication to ServiceNow is demonstrated through the official creation of the ServiceNow Business Group.
- **Capgemini's** leadership position is based on the extensive ServiceNow knowledge gained from several hundred implementations. This enables the company to design proven ServiceNow architectures that help clients to transform.

SERVICENOW CONSULTING SERVICES

Observations (cont.)

- **Cask's** pragmatic approach and sole dedication to ServiceNow makes it a leader in this quadrant. A long list of complex case studies documents the company's ability to support strategic planning.
- **Cognizant** demonstrates its leadership position with a large pool of resources to support strategic implementation planning along the principles of "modernize", "reimagine", and "transform". This enables clients to start their digital journey.
- **Deloitte** is a leader as it understands how to utilize ServiceNow to address clients' current challenges — increasing customer demands, managing the growing complexity in their service delivery models, and working with increasingly constrained budgets.
- **DXC** understands that behind every great experience is a great workflow. With this in mind, the company is able to accelerate business operations by transforming IT with ServiceNow.
- **HCL's** leadership position is the result of its long-lasting experience with ServiceNow paired with a comprehensive partner network. This enables strong integration planning, which adds more functional power.
- **Infosys'** dedication makes it a leader. With its acquisitions, strong executive attention and support, and internally developed IT management suites based on ServiceNow, the company has a strong ability to plan for digital transformation.
- **KPMG's** strength is the combination of business process and technology know-how, backed with the experience of more than 450 ServiceNow implementations. With this store of knowledge, the company is a leader for transformational planning.
- **LTI** is a leader due to its clear transformational strategy design based on four strategic offerings to help clients to transform.
- **Hexaware**, this quadrant's Rising Star, has demonstrated strong growth and is about to reach the Leader quadrant. Its deep understanding of the current challenges results in strong integration knowledge, a clear must for a strategic planner.

RISING STAR: HEXAWARE

Overview

Hexaware supports clients through some 60 certified ServiceNow experts and has 1 of its 4 delivery centers in the U.S. as a ServiceNow CoE. The company's ServiceNow revenue has grown 10 times in the last 5 years, reaching around US\$12 million in 2020. As a ServiceNow Elite Partner, Hexaware has delivered more than 45 consulting engagements and has delivered more than 30 custom applications. Its best practice, Hyper Optimized (H2O) framework for ITSM solutions on ServiceNow, delivers the technology backbone and is the basis for heavy consolidations. It also offers a comprehensive consulting offering covering maturity assessments, process consulting and platform adoption advice as well as service transformation and governance planning.

Strengths

Structured assessment framework as a basis for consulting services: ARMOR, Hexaware's assessment framework, looks at people, processes, reporting, governance and tools that are used in an organization. ARMOR stands for Ameliorate, Reconcile, Mellow, Ontrack and Robust, indicating the consulting steps and approach. It delivers process maturity scores, gap analysis reports and recommendation roadmaps based on real-life and achievable best practices.

H2O based on ServiceNow enabling clients to plan for robust integration: H2O is Hexaware's best practice image of a service management implementation with a focus on industry best practices and standards such as ITIL®4. With configurable interfaces for quick integrations, it delivers pre-designed automation bots that allow for broad integration planning.

Strong integration approach beyond IT: H2O integrates with nearly all system and service management solutions for knowledge management, telephony integration, remote support, and IT asset management. It also provides interfaces and connectors to leading business applications such as SAP, Oracle and Coupa to deliver a comprehensive services ecosystem.

Caution

Hexaware should demonstrate its commitment to ServiceNow by automating the use of its internal processes with the platform.

Should Hexaware's Intelligent Process Automation Services (HIPAS™) realize the ServiceNow capabilities and lead to the H2O integration landscape, the company should communicate this enterprise-wide approach to become a leader in this quadrant. Use cases where HIPAS™ was leading to H2O solution blueprints will help the company in this regard.



2021 ISG Provider Lens™ Rising Star

Hexaware is ready to help clients that want to master a complex and heterogeneous environment while transforming.

SERVICENOW IMPLEMENTATION & INTEGRATION SERVICES

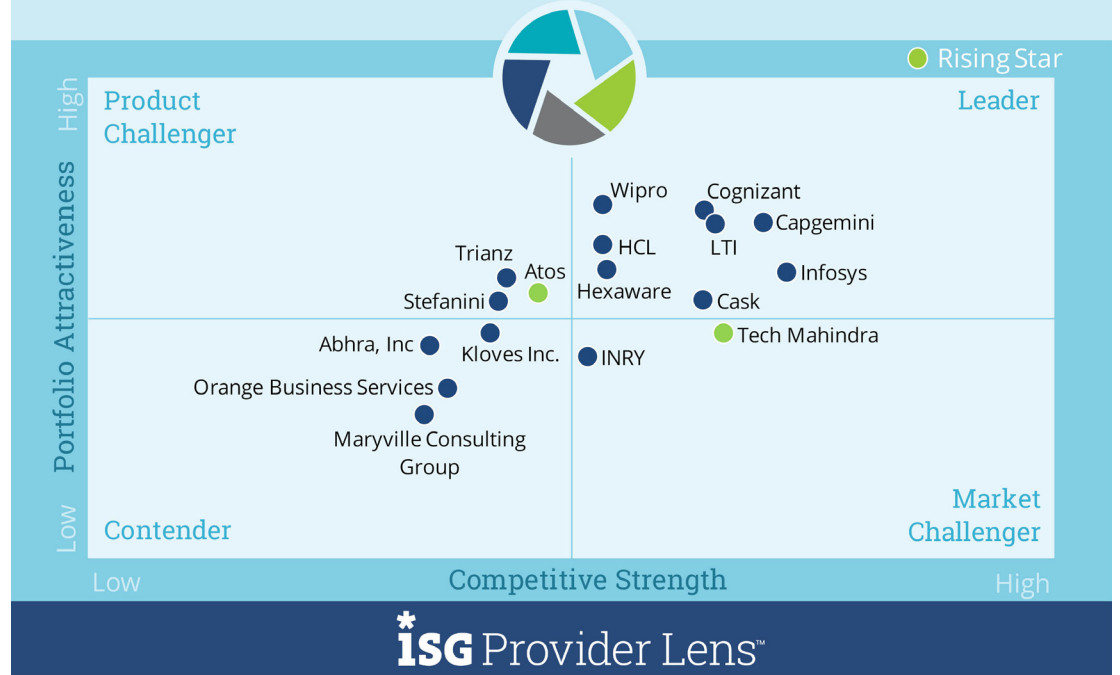
Definition

This segment analyzes providers with a strong specialization in ServiceNow implementation. In most companies, ServiceNow solutions are not operated in isolation; therefore, know-how regarding the integration with different software tools is a key differentiator. Service providers are expected to ensure that installations and integrations run as smoothly as possible owing to their experience and that the ServiceNow solutions can be operated in such a way that potential problems arising from the high number of version upgrades do not affect ongoing operations.

Another important aspect of installation is the ability to enable the future user or operator of a solution to fulfill his/her duties and tasks once the solution is up and running. The necessary knowledge transfer must be part of the implementation capabilities of the providers.

ServiceNow Ecosystem Partners
ServiceNow Implementation and Integration Services

2021
U.S.



Source: ISG Research 2021

SERVICENOW IMPLEMENTATION & INTEGRATION SERVICES

Eligibility Criteria

- Broad technical experience with the tools offered
- Use of predefined solutions, accelerators, and templates
- Experience with emerging technologies such as ML, NLP, and AI in conjunction with cognitive computing
- Experience with system, data, and process integration
- Knowledge regarding the specifics of enterprise shared services
- Approach to ensure maintainability of implementation

Observations

The many years of experience with satisfied and referenceable clients of almost all service providers analyzed in this quadrant lead to a strong performance density and only minor differences in quality. Essentially, all the providers assessed deliver excellent results in the implementation and integrations of ServiceNow. There are only some differences in experience with other management systems, which users must consider when deciding on a suitable partner.

- **Capgemini's** leadership position is based on a comprehensive offer of support capabilities for clients to integrate beyond IT. Change capabilities ensure broad acceptance of newly implemented solutions.
- **Cask** is a leader in this quadrant as the company, based on the experience from numerous successful implementations, adds valuable steps to the NOW CREATE methodology.
- **Cognizant's** leadership is based on the company's experience in implementing complex and integrated solutions, which led to the use of an agile approach when implementing ServiceNow.
- **HCL** has developed a Golden Blueprint that supports implementations with numerous templates and integration capabilities. This allows clients to perform a rapid implementation, making the company a leader in this quadrant.

SERVICENOW IMPLEMENTATION & INTEGRATION SERVICES

Observations (cont.)

- **Hexaware** supports its clients during implementations with a scalable and configurable set of features, delivering a best practice image to jump start implementations. Together with strong front and back-end integration capabilities, the complete and competent offering makes the company a leader.
- **Infosys'** leadership position is due to a combination of skills that guarantee successful installations based on an overall powerful offering for addressing all aspects around implementation and integration, enabling a fast turnaround.
- **LTI** supports clients with self-developed tools using advanced technologies to generate great returns on investment (RoI). Focused acquisitions support the continuous growth of the offering, making the company a leader in this segment.
- **Wipro** ensures its leadership position by delivering strong functional extensions of the base platform, enabling successful implementations and tightly integrated frameworks.
- **Atos**, a Rising Star in this quadrant, has demonstrated strong dedication in the ServiceNow market through the acquisition of Engage ESM. This paves the way for a leadership position in the ServiceNow market in the U.S.
- **Tech Mahindra's** capabilities in eliminating disjointed tools and connecting siloed teams through the implementation of holistic solutions make the company a Rising Star in this quadrant.

HEXAWARE

Overview

Hexaware supports clients through some 60 certified ServiceNow experts and has 1 of its 4 delivery centers in the U.S. as a ServiceNow CoE. The company's ServiceNow revenue has grown 10 times in the last 5 years, reaching around US\$12 million in 2020. As a ServiceNow Elite partner, it has delivered more than 75 implementation engagements. H2O, Hexaware's Hyper Optimized best practice framework for ITSM solutions on ServiceNow, delivers the technology backbone and the basis for heavy consolidations. Hexaware also provides a comprehensive consulting offering to help clients achieve robust ServiceNow implementations.

Strengths

H2O to accelerate the implementation of ServiceNow: This offering has a scalable and configurable set of features that deliver a best practice image to jump start implementations. With integrated process frameworks for incident management (IM), problem management (PM), change management (CM), knowledge management (KM), and configuration management data base (CMDB), clients can focus on business-oriented services.

Strong integration capabilities across the board: Delivering a comprehensive management system requires integrating ServiceNow with legacy application and other best-of-breed software. H2O offers front-end integration for other ITSM solutions (such as BMC Software) an asset management solution for software and infrastructure (or remote support systems) and back-end integration with ERP systems, AI solutions and business applications.

Broad range of custom applications allows for rapid implementations: Hexaware's pre-built custom applications across all major enterprise-wide services allow for a bespoke implementation with many functionalities off-the-(Hexaware)-shelf. Based on the Technology Partnership Program of ServiceNow, the company is developing product extensions and is focusing on custom development to ensure short implementation cycles.

Caution

Hexaware should demonstrate capabilities beyond IT automation as clients are seeking enterprise-wide service automation even for business processes.

Hexaware's integration capabilities should become a cornerstone of the go-to-market strategy for implementation services. As clients realize more often that ServiceNow can automate nearly every enterprise process, the integration especially with backend systems is becoming a differentiator.



2021 ISG Provider Lens™ Leader

Hexaware offers a broad range of ServiceNow extensions and has a strong integration platform, making it an ideal partner for heterogenous implementations.

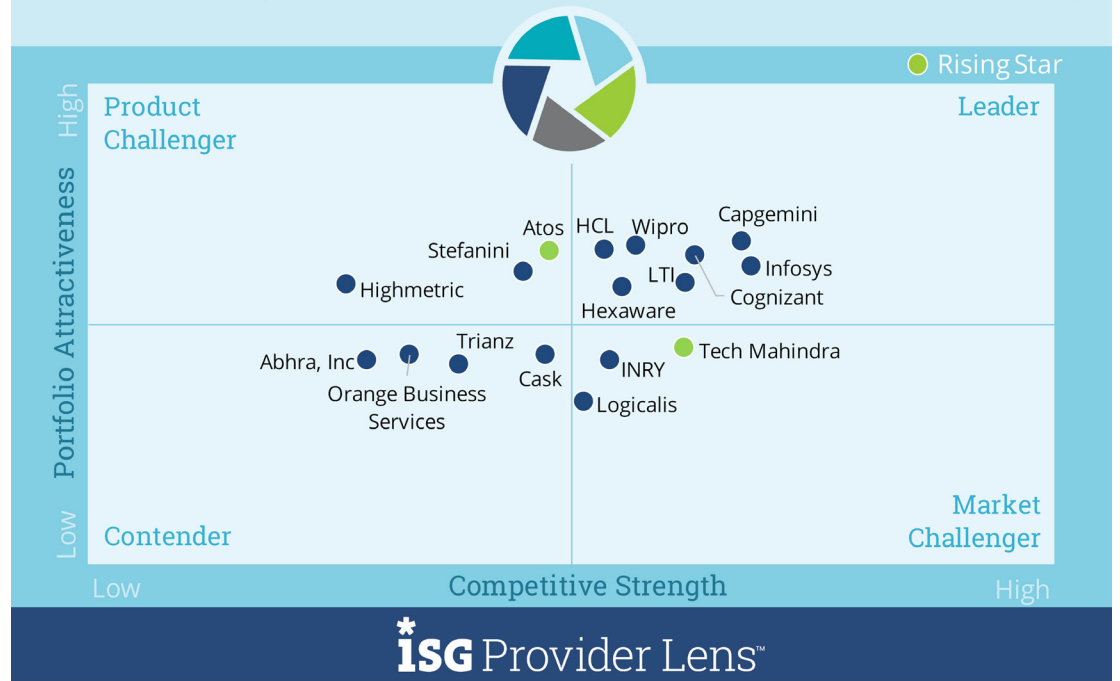
SERVICENOW MANAGED SERVICES PROVIDERS

Definition

This quadrant examines service providers that offer managed services for maintenance and support tasks, including monitoring, remote support, centralized management of the Now platform, and the workflows and applications running on it. Aspects such as maintenance, data quality management, data security and compliance issues are considered while analyzing the various providers in this segment. Due to the complexity of the workflows to be supported, service providers should address factors such as global coverage and cross-organizational usage. They are challenged not only to support a highly sophisticated and integrated application landscape, but also to demonstrate how they work in a multivendor environment or ensure integration.

ServiceNow Ecosystem Partners
ServiceNow Managed Services Providers

2021
U.S.



Source: ISG Research 2021

SERVICENOW MANAGED SERVICES PROVIDERS

Eligibility Criteria

- Experience in supporting ServiceNow's Now platform, workflows and third-party applications
- Client-facing delivery capabilities
- Existing technology partnerships with key software vendors
- Breadth of application management services (AMS)-related portfolio
- Service integration and management (SIAM) approach and delivery models
- Maturity of delivery and contract models
- Existing CLIENT base and local application examples and references

Observations

The service area around managed services for ServiceNow is clearly dominated by international IT service providers with a wealth of experience and a pronounced local presence. Since all companies, with the exception of T-Systems, base their services on the ServiceNow Cloud operated by the manufacturer, the differences in this quadrant are negligible. All offshore providers can score points above all with their many years of experience in dealing with rapidly changing technologies and growing customer demands. The resulting service offerings go far beyond classic application management and help clients to maximize the benefits of ServiceNow installations. At the same time, users of the systems are enabled to take advantage of the new ways of using enterprise services.

- **Capgemini's** comprehensive and high-quality managed services offering, paired with the approach for continuous improvement and the ability to manage highly integrated ServiceNow solutions, makes the company a leader in this quadrant.
- **Cognizant's** strengths lie in the adaptability of managed services based on its core-flex approach, paired with the extensive use of advanced technologies for delivering managed services, making it a leader in this quadrant.
- **HCL's** broad service coverage with flexible payment arrangements demonstrate the company's client dedication, making it a leader in this space.

SERVICENOW MANAGED SERVICES PROVIDERS

Observations (cont.)

- **Hexaware's** leadership comes with the broad knowledge of designing and operating highly integrated business solutions centered around ServiceNow.
- **Infosys'** leadership position is based on its dedication to deliver superior services. The GuideVision acquisition, which has led to the formation of the ServiceNow CoE within Infosys, is a prominent example.
- **LTI** has gained leadership due to its permanent efforts in improving delivery quality through automation while reducing the total cost of ownership (TCO) for clients.
- **Wipro's** extensive automation capabilities with its internally developed AI-based HOLMES™ platform underpin the application

support lifecycle while increasing delivery quality and avoiding breakdowns. These capabilities enabled the company to secure a leadership position in this quadrant.

- **Atos** is a Rising Star as the company is investing to increase its international presence for managed services delivery. By acquiring Engage ESM, it now has a ServiceNow dedicated CoE.
- **Tech Mahindra** is a Rising Star in this quadrant based on its comprehensive offering paired with a robust application modernization strategy.

HEXAWARE

Overview

Hexaware supports clients through some 60 certified ServiceNow experts and has 1 of its 4 delivery centers in the U.S. as a ServiceNow CoE. The company's ServiceNow revenue has grown 10 times in the last 5 years, reaching around US\$12 million in 2020. As a ServiceNow Elite partner, it has delivered more than 75 implementation engagements. H2O, Hexaware's Hyper Optimized best practice framework for ITSM solutions on ServiceNow, delivers the technology backbone and the basis for heavy consolidations. Hexaware also provides a comprehensive consulting offering to help clients achieve robust ServiceNow implementations.

Strengths

Broad and flexible set of engagement models servicing ServiceNow solutions: Scalable, flexible and clearly defined service components plus service-level agreements (SLAs) allow clients to absorb services in different sourcing models. The range of sourcing models starts with a staff augmentation model based on a time and material commercial model and ranges up to a full managed services model with complete ownership taken by Hexaware. Pricing for the managed services model is outcome based with a year-over-year productivity increase.

Strong automation philosophy to continuously increase delivery quality: Hexaware's approach is to "Automate and Cloudify Everything™". By leveraging a multitude of technologies, partnerships and in-house solutions, the company aims to enable enterprise-wide automation and cloudification to deliver against SLAs that are linked to business outcomes.

Broad range of service offerings allow for bespoke delivery model: Hexaware is offering a pre-packaged bundle as part of the extended ServiceNow AMS services. It includes development hours/developer per year, ServiceNow platform upgrade activity annually, annual/biannual ServiceNow roadmap workshop with Hexaware Solution architects, and annual ServiceNow technical implementation review by Hexaware Solution architects. Clients are always at the current version, and new functionality is being implemented as per their demand.

Caution

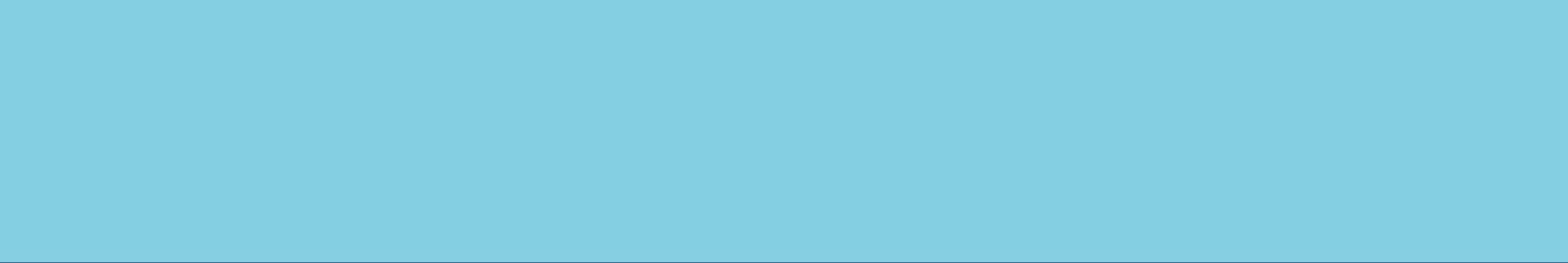
Clients are seeking enterprise-wide service automation and management even for business processes. Hexaware should thus demonstrate service delivery capabilities beyond IT in conjunction with ServiceNow.

Hexaware's integration capabilities should become a cornerstone of the go-to-market strategy for delivering managed services. As clients realize more often that ServiceNow can automate nearly every enterprise process, the integration and related management capabilities especially with backend systems are becoming a differentiator. Hexaware should assess how to expand the managed services offering beyond IT.



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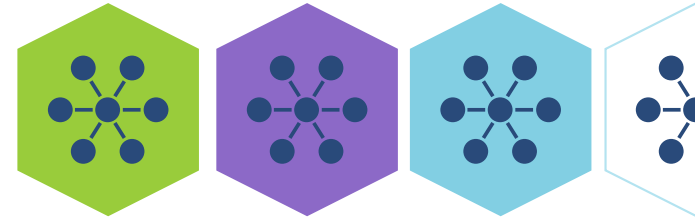
Hexaware offers a broad range of ServiceNow engagement models together with strong services beyond IT, making it an ideal partner for complex enterprise solutions.



Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2021 – ServiceNow Ecosystem Partners” 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. 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 and use cases.
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable).
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements

Author and Editor



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With more than 40 years of IT industry experience, Mr. Peichert has profound knowledge, in particular, in areas such as outsourcing, IT operations, organizational design and IT/Business alignment. In his ISG role as an independent consultant, he supports customers to help them make strategic and tactical decisions and set up and optimize organizations and processes to enable them to leverage IT and service solutions.



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Arjun Das is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem and SAP HANA Ecosystem. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops contents from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well.

Author and Editor



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Partner and Global Head – ISG Provider Lens/ISG Research

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

ISG Provider Lens™ | Quadrant Report

April 2021

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