

Digital Business – Solutions and Services

Digital Customer - Experience Services

U.S. 2021
Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



December 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 December 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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EXECUTIVE SUMMARY

Enterprises and IT Leaders in the U.S. Have now Shifted from Reactive to Proactive Phase in their Digital Transformation Initiatives

ISG rated 55 providers for the Digital Business Solutions and Service Partners 2021 report across five quadrants for the U.S. market. More vendors have participated in this year's study compared to last year, with almost 60 percent demonstrating expertise across quadrants, indicating a stronger push for digital services. The changing priorities of businesses during the COVID-19 pandemic and during the current recovery phase are a major factor that drives the overall growth of digital services in the U.S. In addition to analytics, automation, cloud and cybersecurity, other trends such as the connected ecosystem, implementation of digital solutions using low-code/no-code platforms, immersive experience technologies, digital technology-enabled sustainability services and multi-cloud environments will further fuel the growth of digital transformation in the region. Data from the ISG Index™ finds that global demand for technology and business services reached a record high in the second quarter of 2021. ISG forecasts that the global market for cloud-based services (IaaS and SaaS) will grow 21 percent in 2021 and 9 percent for traditional managed services. ISG data shows that interest in cloud solutions grew significantly in the first half of the year, with the number of Forbes® Global 2000 companies indicating an increased buying intent more

than doubling since December 2020, especially among larger companies. This signifies a strong push for digital business services that will continue to grow, as enterprises in the U.S. will now see digital service providers as core partners for achieving their digital transformation objectives.

The pandemic has accelerated digital transformation by three to five years and has created a robust demand environment for IT and service providers. Enterprise clients are looking to build IT ecosystems that are not only secure, agile and cost effective, but also capable of driving growth, innovation and an improved customer experience. In the U.S., there are still significant opportunities remaining, such as migrating and upgrading the significant legacy enterprise systems and applications as well as providing the edge computing necessary to collect and analyze operational data to improve decision making, performance and continuous innovation.

Digital transformation is one of the key trends in modern business. It refers to both the digitalization of existing processes and the development of new and digitally enabled ways of doing business. It is a broad term that encompasses many technologies and business processes. Many technology enablers such as automation, analytics, cloud and mobility will continue to dominate the trends for digital business transformation services, considering the demand for process efficiency and data-driven customer experience. But many new and evolving technologies, such as

machine learning, digital twin, 5G and IoT, are accelerating these trends and leading to exponential changes in many areas such as supply chain, customer and employee experience and sustainability.

Digital transformation became important for enabling remote working, enhancing collaboration workflows, and streamlining operations from supply chain management to customer experiences. In 2020, the objective was to quickly deliver collaboration, workflow and analytics capabilities in the cloud. This trend will continue to dominate in 2021, but will witness a new phase and approach. IT leaders will shift from a reactive attitude to more engaging strategic digital transformation initiatives. Enterprises in the U.S. will become more dependent on digital service providers for building and refining digital business models, fostering a culture that prioritizes experimentation and using technology and data to establish competitive advantages.

Some notable trends in the U.S. market are as follows.

- **Agile to remain key for reshaping business model:** The move to agile practices and DevOps is the start of the enterprise journey to establish an agile business model that supports digital transformation. Enterprises are expected to invest more in agile management tools, adopt experimentation cultures and expand agile to their data science teams. There will be a multidisciplinary agile team consisting of people from various business functions, and change management programs will be a crucial part of the agile strategy.

- **Use of low-code platforms for offering a better experience:** Low-code platforms help in rapidly developing workflow applications, customer engagement applications, line-of-business applications and integration of automation. They play a crucial role in modernizing legacy applications and moving more workloads to the cloud for a better employee and customer experience and improved collaboration.
- **Data-driven approach to continue mainstream:** Most providers are leveraging analytics and AI to analyze data and provide a new-age customer experience for digital consumers in the new future. This approach is being leveraged to understand the changes in consumer behavior and not only adjust existing digital services for customer requirements but also to capture any new market opportunities.
- **Outcome-based pricing model:** Many providers are adopting outcome-based pricing models to deliver digital services to clients. Approximately 10-15 percent of service provider contracts are based on outcome-based pricing. With more enterprises adopting digital services, there has been huge percentage growth in demand for contracts in this pricing segment. This also indicates that providers are ready to put their profit in the game.
- **Providers to continue investing in building in-house digital tools:** The combined use of tools and accelerators for digital services as well as ready-to-deploy platforms helps providers position themselves uniquely in the market. They are investing in building industry-specific tools with proven use cases, and function-specific solutions. These tools help providers create the required differentiation in the competitive digital business transformation service market.

- **MLOps is here to stay:** The machine learning operations (MLOps) approach is modeled with machine learning, DevOps and data scientists. It offers users the opportunity to reduce deployment time and monitor machine learning models for model drift in production. It also provides a management and operational framework, allowing data scientists to focus on developing and testing datasets as well as creating AI models to carry out the analysis.

To better understand how suppliers are delivering digital services to clients, ISG has developed a framework with five broad service delivery areas:

- Digital business consulting services
- Digital customer experience services
- Digital supply chain transformation services
- Sustainability and decarbonization services
- Blockchain services

Digital Business Consulting Services

Consulting service providers have now modified their pandemic-specific offerings to help clients remain sustainable and capture new opportunities that arose during the crisis. They offer services such as digital strategy design, organizational change management (OCM), collaboration tools, digital culture consulting, process automation and omnichannel experience, along with support for digitalizing the supply chain and maintaining cash flow.

To achieve this and accelerate digital transformations, providers are adopting accelerators such as DevOps and DevSecOps methodologies for agility and security, and application programming interfaces (APIs) to boost efficiency and facilitate innovation. ISG observes that more consulting players are building greater capabilities in AI, machine learning, analytics, security, IoT, design thinking and prototyping to support clients in their digital transformations. Other services include benchmarking, digital maturity assessments and strategic research around market dynamics. Supply chain design, supply chain consulting, supply chain analytics, predictive analytics and related technologies such as blockchain and IoT are in high demand among clients.

Digital Customer Experience Services

With many businesses moving to online channels, service providers have been nimble and agile while building these applications for their clients in a shorter time. Such customer experience services have helped businesses to reach their clients and sustain day-to-day operations in a digital manner. The increased adoption of digital technologies has led to a significant surge in cloud-based implementations. Many providers have deployed customer experience services built on hyperscalers. With a continued focus on customer experience services, there has been a greater emphasis on building direct-to-consumer strategies and applications around them. With many distributors facing challenges in continuing with the physical workplace environment due to public safety precautions, businesses have built direct-to-consumer applications wherein services are directly delivered to consumers through digital channels.

Digital Supply Chain Transformation Services

Supply chain modernization is a central focus across industries in the U.S. To drive growth and business innovation, supply chains must be agile enough to cope with disruptions. This was made clear over the course of global events such as pandemic, Brexit and rising political unrest, as agile supply chains served enterprises by catalyzing new business opportunities in a uber responsive and scalable manner. A rigid or slow supply chain can have the opposite effect, slowing down or even running a business' ability to deliver a strong customer experience into the ground. Advances in supply chain related systems, services and technologies, together with more efficient network orchestration and network capacity, have the potential to solve seemingly uncompromising business problems. Areas where there have been promising advances include network capacity optimization, digital twins, orchestration of data across systems, AI and machine learning, and ethical sourcing.

Sustainability And Decarbonization Services

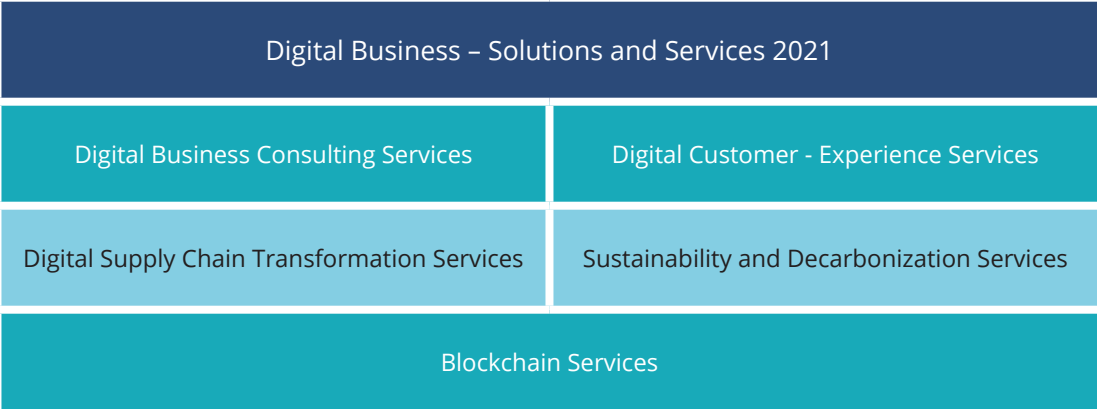
Service providers have specific offerings to help clients in this segment. These include assessing and measuring carbon emissions, identifying aspects/areas where there could be possible reduction/exclusion of carbon footprint, and using digital technologies to strategize and plan decarbonization across business units. Some enterprises are also targeting to achieve circular economy leading to zero waste and to create sustainable supply chains for specific industries.

Blockchain Services

While there is a high dependency on the underlying infrastructure requirements and the complexity of various components working together for a successful blockchain implementation, there have been certain specific areas where there is traction for blockchain. The adoption of blockchain has gradually increased this year, along with many early blockchain initiatives and use cases ranging from proofs-of-concept (PoCs) to pilot and production stages. Based on their qualifications and expertise, prominent platforms in this space are Hyperledger Fabric, Ethereum and R3 Corda. The growth of blockchain services in the U.S demonstrates enterprise readiness and is moving beyond the hype growth phase. The technology is continuing to witness cross-industry adoption, led by many new use cases and application areas for blockchain such as fraud management, counterfeit management, identity management, capital markets solutions and industry-specific use cases such as supply chain solutions for pharmaceuticals, energy management and sustainability.

Introduction

Simplified Illustration



Source: ISG 2021

Definition

The COVID-19 pandemic has accelerated adoption of digital tools and transformation services around the world and led to a surge in new digital transformation initiatives. Many of these initiatives have helped businesses survive and thrive; hence, digital transformation has become the pathway to success for businesses across all industries. The use of information technology to change the customer journey, improve business agility and deliver digital products has helped businesses across all processes, including sales, trading, production, supply chain, product design and human resource management among others, to deliver real bottom-line benefits and has enabled them to maintain the client experience during the pandemic.

Over the past year and a half, many businesses have digitized their customer experience to continue supporting their clients, specifically in industries where brick-and-mortar stores remained inaccessible due

Definition (cont.)

to the COVID-19 pandemic. While some businesses moved their customer journeys to online channels, many have leveraged innovative services such as the use of multiple emerging technologies to deliver better customer experiences by moving from generation 1 customer experience (online channels) to generation 2 customer experience (innovative services).

One of the most disrupted segments during the pandemic has been the supply chain. Its complexity emphasizes the fact that we live in a globally connected and highly interdependent world. The digitalization of the supply chain also brings in the aspect of the resilient supply chain. With the expanding technology and infrastructure footprint as a result of increased digitalization, it is imperative for organizations to embrace sustainability goals for a greener and more livable planet.

Scope of the Report

This ISG Provider Lens™ study is focused on identifying the service providers that can support clients in these capabilities. Digital-ready service providers understand the full scope of digital services to provide constant innovation for improving user experiences, accelerating business delivery and incorporating intelligent solutions. They partner with leading technology vendors and can articulate the use of cognitive computing and learning systems to digitize any enterprise client.

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

- Transparency on the strengths and areas for improvement of relevant providers
- A differentiated positioning of providers by segment
- A perspective on different markets, including the U.S., the U.K., Germany, Nordics, Brazil, Australia

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new 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 US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more 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

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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

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

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Digital Business - Solutions and Services - Quadrant Provider Listing 1 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
Accenture	● Leader	● Leader	● Leader	● Leader	● Leader
Atos	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Bain & Co.	● Product Challenger	● Not in	● Not in	● Not in	● Not in
BCG	● Leader	● Not in	● Not in	● Not in	● Product Challenger
Birlasoft	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger	● Not in
Bridgei2i	● Contender	● Contender	● Product Challenger	● Not in	● Not in
Capgemini	● Leader	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Coforge	● Not in	● Product Challenger	● Not in	● Product Challenger	● Not in
Cognizant	● Leader	● Leader	● Leader	● Leader	● Not in
CSS Corp	● Not in	● Contender	● Not in	● Not in	● Not in
Cybage	● Not in	● Product Challenger	● Product Challenger	● Not in	● Not in
Deloitte	● Leader	● Market Challenger	● Market Challenger	● Product Challenger	● Product Challenger

Digital Business - Solutions and Services - Quadrant Provider Listing 2 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
DXC	● Product Challenger	● Product Challenger	● Product Challenger	● Contender	● Not in
Ecovadis	● Not in	● Not in	● Not in	● Not in	● Contender
einfochips	● Contender	● Not in	● Contender	● Not in	● Not in
ENGIE	● Not in	● Not in	● Not in	● Not in	● Contender
EY	● Product Challenger	● Not in	● Product Challenger	● Leader	● Contender
GEP	● Not in	● Not in	● Leader	● Not in	● Not in
Group 50 Consulting	● Not in	● Not in	● Contender	● Not in	● Not in
Guidehouse	● Not in	● Not in	● Not in	● Not in	● Contender
HCL	● Leader	● Leader	● Leader	● Leader	● Leader
Hexaware	● Not in	● Leader	● Not in	● Not in	● Not in
HGS	● Not in	● Product Challenger	● Not in	● Not in	● Not in
IBM	● Leader	● Leader	● Leader	● Leader	● Leader

Digital Business - Solutions and Services - Quadrant Provider Listing 3 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
Infosys	● Product Challenger	● Leader	● Leader	● Leader	● Product Challenger
Innominds	● Not in	● Not in	● Not in	● Contender	● Not in
KPMG	● Market Challenger	● Not in	● Not in	● Not in	● Contender
LTI	● Leader	● Leader	● Rising Star	● Rising Star	● Not in
McKinsey	● Product Challenger	● Not in	● Not in	● Not in	● Leader
Mindtree	● Product Challenger	● Leader	● Product Challenger	● Product Challenger	● Contender
Mphasis	● Product Challenger	● Product Challenger	● Contender	● Contender	● Not in
NTT DATA	● Not in	● Not in	● Product Challenger	● Product Challenger	● Not in
Persistent	● Contender	● Market Challenger	● Not in	● Contender	● Not in
Publicis Sapient	● Not in	● Leader	● Not in	● Not in	● Not in
PWC	● Leader	● Not in	● Market Challenger	● Not in	● Product Challenger
Siemens	● Product Challenger	● Product Challenger	● Not in	● Not in	● Product Challenger

Digital Business - Solutions and Services - Quadrant Provider Listing 4 of 4

	Digital Business Consulting Services	Digital Customer - Experience Services	Digital Supply Chain Transformation Services	Blockchain Services	Sustainability and Decarbonization Services
SLK Software	● Contender	● Product Challenger	● Product Challenger	● Contender	● Not in
Softtek	● Not in	● Not in	● Not in	● Contender	● Not in
Stefanini	● Not in	● Product Challenger	● Not in	● Not in	● Not in
TCS	● Product Challenger	● Leader	● Leader	● Product Challenger	● Not in
Tech Mahindra	● Product Challenger	● Leader	● Product Challenger	● Leader	● Not in
Trianz	● Product Challenger	● Not in	● Not in	● Not in	● Not in
T-Systems	● Contender	● Not in	● Not in	● Product Challenger	● Product Challenger
UST	● Rising Star	● Product Challenger	● Contender	● Product Challenger	● Not in
Visionet	● Not in	● Contender	● Not in	● Not in	● Not in
Vuram	● Contender	● Contender	● Not in	● Not in	● Not in
Wipro	● Leader	● Leader	● Leader	● Leader	● Leader
Zensar	● Contender	● Rising Star	● Leader	● Product Challenger	● Not in

The slide features a dark blue background with a light blue header. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The main title is positioned on the right side of the slide.

Digital Business - Solutions and Services Quadrants

ENTERPRISE CONTEXT

Digital Customer - Experience Services

In this quadrant report, ISG evaluates providers offering customer experience (CX) solutions and services, with the ability to deliver business model innovation and enable enterprises to build competitive differentiation in today's digital economy.

In the report, ISG lays out the current positioning of customer experience (CX) service players in the U.S., with a comprehensive overview of the market's competitive landscape. ISG observes a growing need among enterprises to harness the advantages of CX to increase brand awareness, customer satisfaction rates and customer retention rates.

By adopting CX services, enterprises are expecting to increase productivity, innovation and change management capabilities to keep pace with competitors' offerings. They also expect to increase revenue, and maintain margins, quality and level of operations.

Customers are looking toward providing a frictionless experience to users. With the number of digital channels increasing, there is a need to provide seamless experience across all channels. The focus is on providing an optimal digital experience to both customers and employees.

Companies are looking at artificial intelligence as the technology to empower every industry imaginable; the result is an increasing number of industries are moving toward digital systems strengthened with AI. It is noted that AI is already playing a pivotal role in industries such as healthcare, automotive, smart devices and apps, and will penetrate further into many other segments in the near future.

The following roles can use this report to identify and evaluate different service providers:

IT leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and improve the reliability and availability of their businesses.

Digital transformation professionals should read this report to understand a provider's capability to deliver seamless omnichannel solutions, leveraging AI and analytics for superior CX. The report also gives insights into how the providers can be compared with one another.

Business strategy leaders, through this report, will gain knowledge on providers' product portfolio, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality for agents.

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Definition

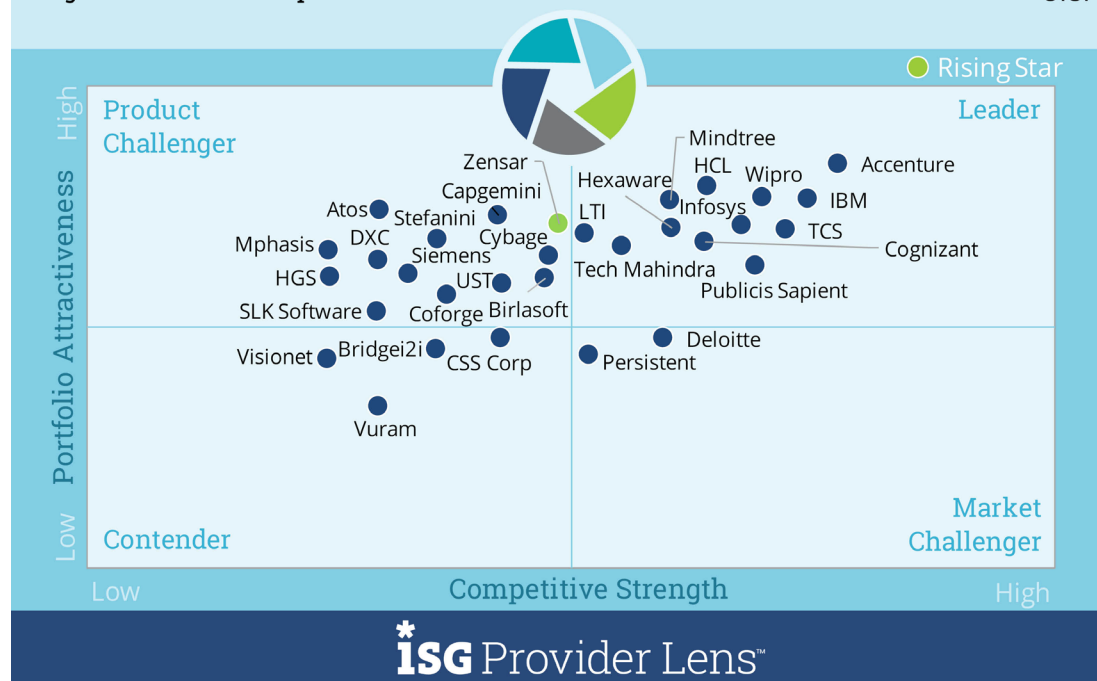
This quadrant assesses a service provider's and digital agency's ability to deliver business model innovation, enabling enterprises to build competitive differentiation in today's digital economy. Providers in this quadrant should be able to provide consulting and implementation services to improve the customer experience for their clients.

Customer experience design is transforming how companies organize marketing, sales, delivery and post-sales processes. It is a customer-centric approach and changes all of the enterprise's business processes around the customer.

Digital customer experience indicates how digital companies design differentiation for the end customer journey. This quadrant involves conceiving customer journeys to create new business models and realizing the benefits using new technology and business ecosystems. Companies in this space design how an ideal customer (or persona) interacts with a product and a brand. The design process includes technology experts, sales, marketing and clients in a collaborative process. Leading firms use analytics to extract insights from user data.

Digital Business - Solutions and Services
Digital Customer - Experience Services

2021
U.S.



Source: ISG Research 2021

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Definition (Cont.)

Cognitive computing extracts data from conversations, texts and social media. The experience is measured with simple A/B tests as well as complex sentiment analysis captured from customer interactions.

The customer experience involves real-time monitoring and measuring of various touch points that drive the customer journey and the supporting technology and business processes. The customer experience team produces a continuum change of digital businesses, delivering business model innovation and enabling enterprises to build competitive differentiation in today's digital economy.

Eligibility Criteria

- Should focus on user experience to design apps, web and product/services using advanced technologies such as AI, machine learning and IoT
- Should focus on delivering an end-to-end customer journey to provide a differentiated value proposition
- Should offer advisory, integration and managed services for innovative customer experience services
- Must showcase deep industry and customer knowledge for business transformations, changing channels, business structures and cultural shift
- Must have established CX governance framework
- Should have the capability to deliver services using innovative technologies such as augmented reality and virtual reality

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations

Projects that deliver digital customer experience services are becoming more complex, requiring providers to demonstrate expertise in diverse disciplines. These include design thinking, experience design strategy, mobility, data modernization and monetization, behavioral analytics, data science, personalization, security, and privacy among others. At the same time, the expanding partner ecosystem and increased adoption of multiple technologies that are reshaping the landscape of these services should be taken in consideration.

All leaders have robust offerings and delivery capabilities, a significant client base maturity, proven partnerships, innovation and investments in developing a portfolio of in-house intellectual property for delivering exponential business outcomes from these services. After analyzing provider responses, ISG observes the complexity of executing and delivering better digital customer experience services has increased when compared to the 2020 analysis. The market trend of demand for the 3 A's (automation, analytics and AI) continues to dominate as

a major requirement from enterprise users, and most capabilities are constantly innovated by providers. These digital frontrunners will continue to capitalize on the growing digital customer experience services market by offering hyper personalization, immersive experience through use of technologies such as augmented and virtual reality, data security and instant access to information.

Vendors offering customer experience services over the last 18 to 24 months have scaled up their acquisition strategies in the U.S., and most of the digital agencies that were acquired by IT service providers in recent years have studios and experience labs in the region to serve relevant brands. These acquisitions are building their internal competencies to strengthen their presence in clients' marketing departments. In addition, marketing agencies are strongly enhancing their digital and IT technology competencies. As most of the large U.S.-based companies are global, customer journey service providers that are prominent in this region are also relevant in others. Providers are expected to develop and deploy customer experience services for their clients in shorter timeframes and at a higher quality, helping them to capture opportunities arising across various sectors. They leverage digital platforms, tools and frameworks as part of their innovation strategy to deliver these services, with most of them offering contactless shopping with mobile-based deliveries.

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations (cont.)

As in last year's analysis, ISG again forecasts higher adoption of technologies such IoT and augmented and virtual reality to further drive customer experience initiatives. Providers in this space have demonstrated use cases where they have successfully delivered an immersive experience to clients in the U.S. The adoption of IoT-enabled customer experience initiatives has also increased. Users are now able to offer a more personalized and connected experience, while assisting customers on their journeys across digital and physical environments.

Some of the observations on the leaders in this quadrant are as follows:

- **Accenture** continues to acquire companies to further strengthen its workforce and capabilities, transforming into an experience agency that can design, build and run customer experiences for growing brands and businesses.
- **Cognizant** applies an advisory-led, AI platform-based approach that covers data modernization and AI intellectual property, demonstrating its niche expertise.
- **HCL** brings in a comprehensive portfolio of nearly 15 customer experience tools, accelerators and other intellectual property to help clients in their customer experience transformation journeys. It has both technical expertise and business consulting capabilities to help clients develop, manage and implement digital transformations, from strategy to execution.
- **Hexaware** has a strong discipline for its human-centered approach to experiences. Its experience design pillars include qualitative research and analysis, ideation, concepting and product strategy, prototyping and validation, agile design and product improvement.
- **IBM** has a network of 57 IBM iX studios that facilitate increased collaboration and ideation between developers, researchers and designers with a digital strategy team to assist clients.
- **Infosys** leverages its innovation hubs, experience centers and delivery centers in the U.S. to cater to clients in different industries. It has a strong client base in the banking and financial services and manufacturing sectors.
- **LTI** continues to invest in building sophisticated capabilities across exponential technologies such as AI, machine learning, intelligent automation, IoT and advanced analytics.

DIGITAL CUSTOMER - EXPERIENCE SERVICES

Observations (cont.)

- **Mindtree** has a dedicated experience design practice that delivers both consulting and futuristic point of views around experience design for future technology. It has developed expertise in delivering large-scale digital transformation initiatives for clients.
- **Publicis Sapient**, in collaboration with Elder Research and Tquila, formed PS AI Labs. The data science consulting labs offers capabilities such as data science to extract insights, strategic data assessment, machine learning libraries, and other AI capabilities such as natural language processing (NLP).
- **TCS** offers a range of proprietary industry-specific digital customer experience frameworks, tools, models and accelerators to help clients achieve their digital experience vision, making it one of the leaders in this quadrant.
- **Tech Mahindra's** Personalization Framework (PerCX) offers end-to-end personalization capabilities and largely covers three broad areas hyper-personalization, experience testing and AI- and machine learning-driven recommendations engines.
- **Wipro's** customer experience service leverages design thinking, disruptive insights, future vision, experience roadmap, design and continuous improvement. Its focus is on reducing human dependency with self-service tools such as chatbots and conversational AI.
- **Zensar's** (Rising Star) Digital Experience Accelerator (DEXA), built on Adobe Experience Cloud, delivers a multimodal experience to accelerate customer engagement. Its plug-and-play architecture makes adoption simple for businesses.

ACCENTURE

Overview

Accenture, part of the ISG Index Big 15 group of service providers, has 52 offices and 15 delivery centers in North America. Accenture Interactive provides design, marketing, commerce and content services, leveraging a rich skill set obtained through acquisitions. Accenture has more than 180 design studios, competence centers, innovation centers and labs worldwide, which are leveraged to develop digital solutions and services. It is continuing to acquire companies to further strengthen its workforce and capabilities, transforming into an experience agency that can design, build and run customer experiences for growing brands and businesses.

Strengths

Strong network of innovation centers: Accenture has 10 innovation centers and seven Liquid Studios in the U.S. to prepare companies for change through new technologies and ways of working by offering a human-centered approach to innovation. These innovation centers are home to a multidisciplinary team of designers, developers and technology experts that work with clients and partners to co-develop solutions and services, ignite transformational thinking, and fulfill human needs by using emerging technologies.

Focus on enhancing AI capabilities: Accenture continues to invest heavily in enhancing its AI capabilities and across its proprietary intelligence assets such as applied intelligence AIP+, Advance Customer Engagement (ACE+) and customer data analytics. Recently, it acquired Core Compete, its eighth applied intelligence-focused acquisition in the past two years, for enhancing its cloud-native AI and machine learning solutions.

Continuous scaling of customer experience offerings: In recent years, Accenture has expanded its range of digital services by acquiring and innovating a large range of competencies. It offers business consulting services such as experience and design strategy, technology consulting, design, UX, data, analytics, customer relationship management (CRM), commerce, content and programmatic advertising.

Caution

Accenture has a plethora of experience in delivering large-scale customer experience transformation requirements. It leverages a large team drawn from multiple delivery units at high hourly rates. As a result, small and midsize clients find it difficult to partner with the company in the long run.



2021 ISG Provider Lens™ Leader

With its robust network of innovation centers, design studios and technology partners, Accenture offers end-to-end digital customer experience service capabilities to support U.S.-based clients across their transformation journey.

COGNIZANT



Overview

Cognizant, part of the ISG Index Big 15, is a U.S.-based company with 42 offices and six delivery centers in the region. Cognizant Interactive offers design and marketing expertise, leveraging the acquisitions of Idea Couture, Cadient, Zone, Mirabeau, Netcentric and Mustache. Cognizant AI Customer Intelligence offers insights to support business decision making. Cognizant's consultants and domain experts assist clients in creating modern frameworks and platforms that leverage a wide range of digital technologies.



Strengths

Intelligent Data Works (IDW): The framework is a collection of AI-enabled prebuilt components, tools and methods to enable a next-generation digital data platform more quickly. It offers Responsive Data Modelling Workbench (RDW), Data Integration Workbench (DIW), Intelligent Migration Workbench (IMW), DevOps Workbench (Dow) and Data Service Workbench (DSW).

Advanced intelligence capabilities: Cognizant Automation Center Askiva is a service desk chatbot that initiates conversations with users, interprets the intent and provides possible resolutions. The solution uses natural language understanding (NLU) and natural language processing (NLP) techniques to understand the intent and facilitate knowledge search plus local and server-side actions.

Comprehensive customer journey framework: Its Customer Intelligence enablement approach starts with envisioning the customer experience across the value chain. It involves a human-centric approach with design thinking and the building of an intelligence foundation, followed by extracting insights to enrich customer experience across touchpoints. The framework also provides support for hyper personalization of all customer interactions, next best action recommendation and location-based services.

Strong portfolio of in-house CX tools: Cognizant uses an in-house tool to analyze customer transactional and behavioral data across channels, clickstream data and social and transactions data. The tool leverages AI and machine learning capabilities to generate personalized offers and campaigns to enhance customer engagement. It also has proven tools such as UX Maturity Assessment, Toybox, CoreArt, FuseKit™.



Caution

Cognizant must focus on offering a better outcome-based pricing model to its clients. All other major players in the U.S. offering digital customer experience services are aggressively using this pricing model to expand their client base and keep hold of all their major accounts in the currently difficult economy.



2021 ISG Provider Lens™ Leader

With its robust digital technology expertise, digital practices and portfolio of in-house tools and accelerators, Cognizant delivers comprehensive customer experience and digital business services to clients in U.S.

HCL

Overview

HCL Technologies (HCL) has 15 offices and 13 delivery centers in the U.S., along with in-house innovation programs supported by a global network of co-innovation labs to stay ahead of the technology curve. The U.S. accounted for the majority of its overall revenue. Its customer experience services cover the experience strategy and design practice, customer and user experience strategy, experience design and innovation, employee experience and a customer engagement platform.

Strengths

ADVantage Experience 2.0 CX solution: This is a digital marketing and experience solution with accelerators that empower organizations to meet the demands of customer experience. ADVantage Experience has an specific versions built for the financial services, retail, hi-tech, life sciences and healthcare and travel verticals. Major features include code automation, DevOps, onboarding and rollout automation as well as a pre-built library with more than 250 reusable components.

Comprehensive set of in-house tools: HCL brings in a comprehensive portfolio of nearly 15 customer experience tools, accelerators and other intellectual property to help clients in their customer experience transformation journeys. Some of the major ones include Connected CX, AI Accelerator, Customer 360, Design to DevOps, XR studios and Advantage UI-DevOps.

Dedicated focus on AI and ML: HCL's offerings in AI and machine learning are augmented through the DRYice™ product suite. DRYice™ transforms and simplifies IT and business operations for clients by leveraging AI and cloud. It offers end-to-end automation, business process optimization, service orchestration, employee experience transformation, enterprise digital marketplace and an AI-enabled cognitive virtual assistant.

Caution

HCL has diverted greater focus and investments to scale up its customer experience services and cognitive capabilities, however, it must continue to penetrate the market further by capturing more new logos across the region.



2021 ISG Provider Lens™ Leader

HCL has a clear focus on investments in new growth areas such as automated IT operations, AI-enabled employee experience and next-generation technologies. The company offers a wide range of frameworks, tools and processes across the consulting, technology solution and implementation areas of the digital business.

HEXAWARE

Overview

Hexaware is a global IT services provider delivering comprehensive digital customer experience and consulting services to enterprise clients. The company has been identified as a Leader for the second year in a row. Its value proposition is to Automate Everything™, Cloudify Everything™ and Transform Customer Experiences™ to accelerate the shift of enterprise clients into the digital era. It acquired Mobiquity to scale up its expertise in the digital transformation of customer experience. Mobiquity now serves as Hexaware's go-to-market brand for digital products and digital CX.

Strengths

Expertise in offering intelligent automation: Hexaware's Intelligent Process Automation Services (HIPAS™) leverage a whole range of AI technologies such as cognitive optical character recognition (OCR), machine learning, natural language processing, speech recognition, image analytics and robotic process automation (RPA) to deliver digital business transformation. The company has an advanced agile practice with DevOps automation, testing and quality assurance.

Experience-first approach: The Mobiquity offering has a strong discipline for its human-centered approach to experiences. Its experience design pillars include qualitative research and analysis, ideation, concepting and product strategy, prototyping and validation, agile design and product improvement. It uses customer feedback and reviews to better understand client requirements and build a digital roadmap through customer experience-specific methodologies.

Continuous focus on offering intelligent capabilities: Hexaware has expanded the use of services such as AWS Personalize. It also leverages the AI and machine learning capabilities of platforms such as Adobe Sensei to boost the marketing and customer engagement efforts of clients across the Adobe Experience Cloud suite. This further provides an analysis of behavioral and transactional data to improve the business performance of digital products.

Caution

Hexaware should speed up its R&D project investments and activities. In comparison, all other major players are continuing to invest heavily into developing more niche technology capabilities to remain ahead in the highly competitive customer experience services market in the U.S.



2021 ISG Provider Lens™ Leader

Hexaware has a flexible, automation-oriented approach towards offering industry-specific digital solutions, making it one of the most preferred providers to work with in U.S. The company has strong, loyal client base for its experience services and offers end-to-end customer experience capabilities through its Mobiquity offering. With a focus on automation and operational efficiency, it delivers superior customer experiences to clients.

IBM



Overview

IBM iX is the company's design studio for digital strategy, customer experience and digital platforms, offering a full range of capabilities that cover business consulting and strategy, design thinking and customer experience-specific technology. It is the digital transformation arm of IBM Global Business Services that leads services for front-office transformation. The firm acquired Spanugo, WDG Automation and Vivant to enhance its capabilities in this space. In the U.S., IBM has a strong client base in banking, financial services and insurance sector, followed by the telecom and manufacturing verticals.



Strengths

Comprehensive set of customer experience offerings: IBM iX is considered a leader for its technical architecture, AI and analytics, digital commerce, technology integration and data architecture and migration services. It offers a wide range of skills, including business consulting, experience and strategy design, design thinking and customer-experience-specific technology, along with business consulting, industry-specific services and AI/cognitive modelling.

AI and analytics tools: IBM offers wide range of customer experience tools and accelerators. One of the most powerful and comprehensive tools is IBM Watson Customer Experience Analytics that captures, manages and analyzes customer data to provide information on the digital customer journey and experience across the customer life cycle. It enables digital analytics solutions and reporting, journey analytics, and session search and replay to resolve application problems.

Proficiency in AI-led automation: IBM leverages automation in various facets of IT operations. Its dynamic automation feature leverages AI and machine learning capabilities to identify known issues and implement automated resolution to reduce the overall time to resolve and improve the operational efficiency, resulting in a better customer experience.



Caution

IBM has a large product suite and multiple delivery teams. These may pose difficulties for clients to navigate.

The company should offer a new, differentiating approach to its comprehensive and complex transformation offerings in customer experience services for improving its overall revenue performance.



2021 ISG Provider Lens™ Leader

The IBM iX customer experience offering has the most advanced technology capabilities and largest base of full-time employees (FTEs) in the U.S. to support clients across all industries. It also offers business functions to provide highly innovative services around customer experience.

INFOSYS

Overview

Infosys, part of the ISG Index Big 15, generated revenues of \$4.8 billion from its digital services in North America in 2020. It has more than 11,000 digital customer experiences professional in the U.S and leverages innovation hubs, experience centers and local delivery centers to cater to clients across industries. Infosys has a strong presence in the banking and financial services and manufacturing sectors, with additional experience in the hi-tech and telecom verticals.

Strengths

Cloud powered experience platform: Infosys' Cobalt solution helps clients rapidly launch their solutions in the market and create new business models. It provides access to a catalog of over 14,000 assets and more than 200 industry-specific cloud solution blueprints. It also helps businesses redesign the enterprise from the core, and build new cloud-first capabilities to create seamless experiences in public, private and hybrid clouds across PaaS, SaaS and IaaS landscapes.

Unique innovation process and approach: Infosys Living Labs, its "innovation as a service" offering, works with clients to accelerate and de-risk the innovation process strategically and sustainably by bringing together emerging technologies and design capabilities and focusing on business context. Living Labs creates real and virtual spaces where clients can ideate by using design thinking methodologies based on emerging technologies and experiments.

Depth of customer experience offerings: Infosys' digital marketing services cover customer experience management, analytics, campaign management, marketing operations, customer relationship management (CRM) and loyalty management. The company combines its proprietary tools, accelerators and frameworks such as Digital Factory, Campaign Automation, Connected Customer Framework and Migration together with acquisitions to increase its marketing and customer experience capacity.

Caution

Infosys could further improve its client relationships by recommending the latest technologies, trends, best practices and best-in-class frameworks. This will also help the company to showcase its capability and capacity, largely to the small and mid-sized segment, where it needs more focus to further expand its market share.



2021 ISG Provider Lens™ Leader

Infosys offers end-to-end digital transformation services along with a strong partner ecosystem and innovation capabilities. It is continuing to grow its AI-based customer data analytics platform and customer experience services.

LTI



Overview

LTI has approximately 1,500 digital experts in 13 offices and four delivery centers in the U.S. Its digital services revenues exceeded \$800 million in fiscal year 2021, of which more than 73 percent were contributed by its U.S. operations. With nearly 60 percent of its digital services clients based in the region, the company is continuing to witness significant growth. LTI is continuing to invest and build sophisticated capabilities across exponential technologies such as AI, machine learning, intelligent automation, IoT and advanced analytics.



Strengths

Experience design solutions: LTI facilitates and conducts deep and contextual user-sensing, human touch and focused ideation to craft compelling and meaningful experiences through a design thinking strategy to enhance the experience across products, processes and services. These are further enhanced through 360-degree immersive experience design, digital commerce, and UX and research.

Vast range of in-house tools: LTI has many applicable tools, platforms and clustered services in all areas across its customer experience service. Some of them are the Mosaic suite of products, Leni, FASTLANE, iDz, Dice, Next-Gen Workplace, MBIF and SIA. One of the most powerful among them is Mosaic, a converged platform for data engineering, advanced analytics and knowledge-led automation.

Strategic expansion strategy: In 2019, LTI acquired Lymbyc, a specialist in AI, machine learning and analytics, which adds to LTI's Mosaic platform offering. Other acquisitions include Powerup Technologies, a born-in-cloud company with cloud consulting capabilities, and Ruletronics, a pure-play Pega consulting and implementation company. It followed by further strengthening its partnership and alliances ecosystem with companies such as AWS, SAP, Pegasystems and MuleSoft.

Advance analytics capabilities: LTI Leni is an augmented analytics solution that provides actionable insights with contextual business narratives in a simple Q&A format, empowering decision makers with powerful autonomous intelligence. It offers recommendations on insights and stories relevant to the user.



Caution

Given the continuing growth trajectory, LTI should increase its resource availability and volume immediately in the U.S. Other major players are aggressively expanding their certified digital platforms to address the growing demand for digital transformation across industries.



2021 ISG Provider Lens™ Leader

LTI is constantly scaling its capabilities across digital technologies. It has been actively developing many tools, platforms and solutions in the customer experience space, backed by a strong industry focused advisory team. The company has many innovative success stories of implementations and deployments for U.S.-based clients.

MINDTREE



Overview

Mindtree is a global IT services provider with dual headquarters in Bengaluru, India, and Warren, New Jersey. It reported revenues of \$660 million from digital services with a team of 12,000 digital experts, more than 190 clients, and 43 offices in 18 countries. The company offers robust digital customer experience services by applying its domain knowledge and accelerators to bring new initiatives to market faster. Mindtree has strong capabilities in design, the marketing technology stack, intelligence, edge and emerging technologies.



Strengths

Robust platform portfolio: IT offers several proprietary platforms to help clients in their digital transformation journeys. In the early stages of an engagement, it uses the Creative Process Accelerator (CRX) for ideation, brainstorming concepts, discussions about contracts, and pre-production and production activities. The company also uses a digital maturity framework to assess and benchmark the omnichannel journeys of clients against best practices and the intended competition.

Dedicated design practice: Mindtree has a dedicated experience design practice covering both consulting and futuristic points of view around experience design for future technologies. Its product design capability involves the creation of a minimum viable product (MVP), leading to product development and deployment.

Customer-centric framework: Mindtree's persona framework is a predefined framework for journey building across all industries, allowing clients to rapidly customize their journey, bring nuance to their specific requirements and speed up multiple areas of engagement. The contextual inquiry framework informs user-centered design via five key models, namely flow, sequence, artifact, cultural and physical.

Employee experience and collaboration: Mindtree has an end-to-end approach towards the transformation of the digital backbone to the workforce and workplace experience. It offers employee experience consulting, workforce solutions, hyper automation, self-service using virtual assistants, personalized micro training and learning, and field worker solutions covering use cases such as remote sales, remote field service and remote monitoring of equipment using IoT.



Caution

Mindtree's digital services revenues primarily come from the business services and banking and financial services sectors. The company should diversify its client portfolio to other industries such as healthcare and energy.



2021 ISG Provider Lens™ Leader

Mindtree has strong customer experience service capabilities and brings in technology breadth and depth to deliver data-driven experiences powered by AI and automation. It is one of the most trusted digital service providers in the U.S., with good reference and use cases.

PUBLICIS SAPIENT



Overview

Publicis Sapient has a 12,000-strong workforce dedicated to customer experience and runs operations in 24 locations across the U.S. It is the digital business transformation arm of Publicis Groupe, a French advertising and public relations company with €9.8 billion in revenues and 80,000 employees in 100 countries. In 2019, it acquired Epsilon, a U.S.-based data-driven marketing agency, to strengthen the group's position in digital marketing. Publicis Sapient offers services such as strategy and consulting, customer experience and design, technology and engineering, enterprise platforms, data and AI, and innovation and digital product management.



Strengths

Proven set of digital intellectual property: Publicis Sapient goes to market with a strong portfolio of in-house accelerators such as Synapse, which connects business and technology users. Its knowledge-as-a-service (KaaS) offering uses AI and machine learning to generate insights from unstructured data. The company also offers Digital Transformation Index, Mobile Experience Barometer, Rapid Commerce and Marcel.

AI and emerging technology lab: Publicis Sapient formed PS AI lab in collaboration with Elder Research and Tquila. This data science consulting lab offers capabilities such as data science to extract insights, strategic data assessment, machine learning libraries and other AI capabilities such as NLP. It partners with major platforms such as AWS, Microsoft Azure and Google Cloud Platform. It also has emerging experience labs, Kepler Lab and CDP Virtual Lab as part of its innovation network.

Expansion strategy: After acquiring Epsilon, Publicis Sapient strengthened its digital marketing and data analytics capabilities and improved its offerings in the digital marketing space. In early 2020 it acquired Third Horizon, to strengthen its global digital strategy and consulting capabilities.



Caution

Publicis Sapient should scale up its efforts in increasing awareness about its IT services, AI and advanced analytics capabilities. A dedicated team for thought leadership and other marketing collateral will help better position the company in the overall IT services market.



2021 ISG Provider Lens™ Leader

Publicis Sapient has a strong presence in the U.S. with a highly professional workforce and partner ecosystem. The company also has an innovative customer experience-led approach and design thinking and technology consulting services to deliver world-class solutions in an agile environment.

TCS



Overview

TCS generated revenues of \$11.4 billion in North America in FY21. The company has approximately 13,000 FTEs globally for delivering customer experience services to clients. It has 24 offices and 14 delivery centers in the U.S. TCS leverages automation, AI and machine learning for delivering digital business transformation services. TCS Interactive's services portfolio includes design, content, digital marketing, digital commerce and digital channels.



Strengths

Strong asset portfolio: TCS's range of proprietary, industry-specific digital frameworks, tools and accelerators helps clients achieve their digital experience vision. Other services include business and technology consulting, maturity assessment, cloud architecture and design, implementation and migration support, compliance and security management.

Intelligent automation and AI framework: The Machine First™ Delivery Model (MFDM) puts AI and automation at the heart of the enterprise, making technology stacks self-healing and operations and supply chains more resilient. It focuses on business outcomes such as improved customer experience, increased speed to market, straight-through processing, new business models and personalized services.

Industry partnerships and alliances: TCS has strategic partnerships with leading customer experience management platform providers such as IBM, SAP, Salesforce, Oracle and other digital ecosystem enablers. This allows it to develop industry-leading technology solutions, backed by an adequate support framework.

Innovation Hub: TCS COIN™ brings together a network of experts from the startup, research, academic and corporate worlds to work on collaborative innovations for TCS's Fortune 1,000 customers. It has four components, namely TCS COIN™ Accelerator, TCS COIN™ Reference Architecture, TCS COIN™ Certified Start-up Partner Program and TCS COIN™ Integration Team.



Caution

Although TCS serves a wide range of clients and successfully address their most complex digital transformation needs, it is perceived as a large, traditional IT service provider. It should change this image by increasing its marketing efforts around next-generation digital transformational capabilities.



2021 ISG Provider Lens™ Leader

TCS has a large-scale digital customer experience transformation services practice, along with a robust portfolio of tools and accelerators. It also offers design and implementation expertise, covering every aspect of planning and deploying digital customer experience services.

TECH MAHINDRA



Overview

Tech Mahindra generated revenues of approximately \$2.6 billion in 2021 in the digital space, with 58,000 digital professionals catering to clients globally. In the U.S., it has 40 locations and five major delivery centers. It acquired Mad*Pow, a U.S.-based agency that specializes in focused experience design, as well as BORN Group and Zen3 Infosolutions. Tech Mahindra's customer experience practice offers omnichannel expertise across sales, service, marketing and commerce, customer insights, technology enablers and operations to help clients transform and embrace digital disruption.



Strengths

Comprehensive portfolio of customer experience services: Tech Mahindra offers human-centric design and adoption services that cover human UX consulting, experience strategy, behavior change design, business process innovation, digital design solutions and experience innovation. Technology transformation services include a customer data platform, A/B testing, marketing analytics, chatbots, next-best action, cross-sell/upsell and intelligent automation for the customer journey. Operation transformation services cover process automation, governance and personalization.

Customer experience frameworks coupled with advanced capabilities: The Personalization Framework (PerCX) offers end-to-end personalization capabilities, including advisory, implementation, optimization and operations. The solution covers the three broad areas of hyper-personalization, experience testing and AI/machine learning-driven recommendations engines. It also offers CareXa, a customer management framework that incorporates end-to-end solutions. Tech Mahindra's Blue Marble Microservices platform enables clients to bring a quicker technology alignment for a better experience.

Digital experience management suite: Comviva's Suite is a portfolio of digital marketing solutions that enable enterprises to manage the customer life cycle holistically. The portfolio leverages big data-driven mobile analytics to uncover customer insights in real time. These are applied to ensure better revenues and enhance the customer experience.



Caution

Most of Tech Mahindra's digital services revenue in the U.S. comes from the telecom and media industries. The company should diversify its client portfolio and extend its footprint to other industries such as the retail, federal and other public sector, and energy domains.



2021 ISG Provider Lens™ Leader

Tech Mahindra strategically uses its frameworks, AI, analytics tools and innovation labs to offer more comprehensive digital customer experience services to clients in the U.S.

WIPRO



Overview

Wipro has 40 offices along with four large-scale delivery centers in the U.S. It reported \$4.9 billion in revenues from the region in 2020. Its digital consulting capabilities include design-led transformation; asset-based transformation; business reimagining, talent and change; CIO advisory and strategic technology consultancy. The company leverages the Designit division to think about, design and implement next-generation customer experiences. Its customer experience and business acceleration services are focused on cloud advisory and strategy as well as cloud optimization, supported by cloud brokerage and managed service offerings.



Strengths

Next-generation customer experience platform: Wipro's Digital Customer Experience Management (DCxM) platform adopts a modular experience-as-a-service approach that provides customer insights across the customer journey to deliver a rich experience across industry-specific channels. It is equipped with automation, machine learning, big data analytics, NLP and predictive analytics to offer this data.

Proven capabilities and outcomes: Wipro's customer experience services leverage design thinking, disruptive insights, future vision, experience roadmap, design and continuous improvement. The focus is on reducing human dependency with self-service tools such as chatbots and conversational AI. It also brings in sentiment and predictive analytics, unified user interface and next-best action functionality for a more engaging experience. Benefits include improvements in Net Promoter Score (NPS) by 20 points and first-time fix rate by 10 percent, as well as reduced ticket volumes.

Expertise in AI and analytics: Wipro HOLMES™ is a one-stop applied AI and automation platform that helps enterprises to build and deploy intelligent solutions for their digital and automation journeys easily and quickly. It offers frameworks such as Cognitive Search, Cognitive Image Processing, Deep Text Extraction and Intelligent Process Automation through its ecosystem partners. Its Automation Marketplace enables easy and efficient consumption of these services across the hyperautomation journey.



Caution

Wipro's digital services revenue is largely driven by the healthcare, banking, financial services and consumer verticals. Enterprises from other sectors that are seeking specific industry expertise should seek client references to evaluate the firm's capabilities in those specific verticals.



2021 ISG Provider Lens™ Leader

Wipro's investments in next-generation technologies and digital tools, coupled with its human-centric design-led customer journey conceptualization, customer experience and technology architecture, have helped strengthen the firm's leadership in this space.

RISING STAR: ZENSAR



Overview

Zensar has more than 10,000 associates in 25 offices (with 11 in the U.S.), delivering \$567 million in revenues, including \$425 million from the U.S. It employs 500 digital experts in the U.S. Zensar Digital Customer Experience services are provided through Zensar's Studios that embody experience, engineering and engagement. The services combine Zensar's internal capabilities with those of the acquisitions of Foolproof, Keystone and Indigo Slate. Zensar Studios combines three of the main strategic growth opportunities Zensar has identified, including experience, engineering, and data and analytics. Key capabilities include interactive experience strategy and design services, digital channel delivery services, digital optimization, and customer experience platforms and frameworks.



Strengths

Breadth of offerings: Zensar has an end-to-end offering that integrates delivery capabilities. The services offered are research, experience strategy, creative, digital channels, digital marketing, enterprise experience, post-sales experience, employee engagement, CRM services and platforms and frameworks to deliver digital customer experience services. It also augments its end-to-end offerings with many proprietary CX solutions.

Infinity CRO: Zensar's Infinity CRO matrix takes a holistic customer-centric approach to optimization. Zensar's approach helps clients to understand people and blend that with the wealth of data from tools and best practices to create market-leading experiences that contribute commercially from the get-go.

Multimodal experience platform: Zensar's Digital Experience Accelerator (DEXA) platform helps reduce churn and drives customer engagement for clients, resulting in more conversions. It allows customers to communicate with brands using multiple modes, either on a channel of their choice or via multiple channels simultaneously.

Ruptive human experience platform: Zensar's Ruptive is a leading human experience innovation platform. It was designed to ignite the creation of dynamic personas, unmistakably hard-to-forget experiences, and a culture of innovation from the outside in.



Caution

Zensar should expand its footprint, adding more clients across industries in the U.S. To become a leader, the company should add more digital professionals. It must also focus on other major industries such as telecom and media, followed by energy verticals, to increase its share.



2021 ISG Provider Lens™ Rising Star

Zensar offers a differentiated portfolio, leveraging as-a-service options for accelerated implementation and agility. It offers innovative and specialized customer experience services, supported by relevant and advanced technological accelerators.

The image features a dark blue background with a light blue horizontal band at the top. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The word "Methodology" is written in a white, serif font on the right side of the image.

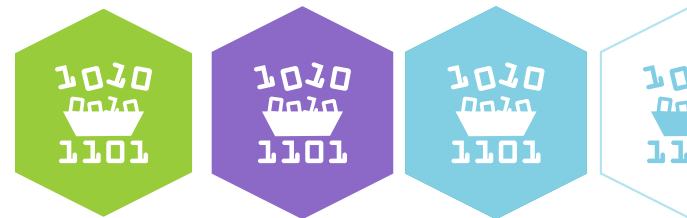
Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2021 Digital Business – Solutions and Services, U.S.” analyzes the relevant software vendors/service providers in the Brazilian 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 2021 Digital Business – Solutions and Services U.S. 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & 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



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Tarun has nearly decade of extensive research experience across ICT domain including report writing, drafting though leadership, analyzing IT spending, consulting clients on latest trend and business use cases. Additionally, he has been responsible for delivering end-to-end research projects, working along with internal stakeholders in delivering various consulting projects.



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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

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