

Future of Work (Workplace) - Solutions

A research report comparing provider strengths,
challenges and competitive differentiators



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Executive Summary	03
Provider Positioning	07
Introduction	
Definition	13
Scope of Report	15
Provider Classifications	16
Appendix	
Methodology & Team	39
Author & Editor Biographies	40
About Our Company & Research	42

Digital Employee Experience (DEX) Solutions	17 – 21
Who Should Read This Section	18
Quadrant	19
Definition & Eligibility Criteria	20
Observations	21

Unified Endpoint Management (UEM) for SMBs	22 – 27
Who Should Read This Section	23
Quadrant	24
Definition & Eligibility Criteria	25
Observations	26
Provider Profile	27

Unified Communications and Collaboration as a Service (UCCaaS)	28 – 32
Who Should Read This Section	29
Quadrant	30
Definition & Eligibility Criteria	31
Observations	32

Productivity and Collaboration Solutions for SMBs	33 – 37
Who Should Read This Section	34
Quadrant	35
Definition & Eligibility Criteria	36
Observations	37

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Cost optimization needs and generative AI impact the future of work solutions market

Global enterprises fear a possible economic slowdown but are also curious about the possibilities of the latest generative AI technology. These fears and enthusiasms impact the approach to workplace technology investment decisions for large organizations and SMBs. The workplace technology landscape has multiple areas that impact the employee experience and the organization's outlook. This report dives deep into two important areas: front-end technologies that are employee facing and are the entry point for digital workplace and back-end technologies that IT administrators leverage to ensure uninterrupted, secured and cost-effective management of IT estate that delivers the workplace to employees. Both areas focus on employee experience enhancement in two different aspects and have different sets of technologies that interest a large organization versus an SMB.

DEX: Must-have for optimized end-user computing estate management for large organizations

Digital employee experience (DEX) technologies have become popular in the past few years as the focus on employee experience started gaining traction. For IT administrators, the first and foremost step for enhancing employee experience is providing uninterrupted workplace technology performance. According to the latest survey by ISG of global workplace leaders, employee productivity is one of the most important considerations for workplace technology buying decisions. Uninterrupted technology performance is necessary for enhancing the productivity of an end user or an employee. Uninterrupted technology access means less or no IT issues related to device and application performance, translating into efficient IT administration and management. Multiple studies suggest that most IT issues the end users raise can and should be resolved automatically. DEX technologies not only help IT administrators resolve those issues automatically but also assist the IT service

Doing more with less
approach and
generative AI
disrupts the workplace
solutions market.



desk in resolving the remaining issues with greater efficiency and visibility.

Many technology monitoring and observability solutions can provide real-time insights into the performance of different IT assets a large organization may own. Modern DEX solutions mostly focus on the end-user technologies, primarily the devices, endpoints and applications. Leading DEX solutions can also extend this coverage to network and operating system (OS) performance. These solutions can observe and monitor the performance of different end-user computing technology components and provide automated resolution of the most common IT issues. Many DEX solutions also support collecting user feedback information by creating and sending employee surveys asking to rate the experience with the workplace technology. The feedback from employees and intelligence from monitoring and observability of devices and applications can help assign a quantifiable measure of employee experience. Many managed digital workplace outsourcing service providers leverage this DEX score as an important

input for the XLAs they sign with their clients. DEX solutions also provide root cause analysis (RCA) for IT issues that can assist IT service desk agents in responding to employee queries and issues appropriately.

ISG's experience with clients indicates that enterprises that prioritize value realization with DEX technologies go beyond tool implementation. It also requires fostering a culture or leveraging these deep insights to improve EX and not just reduce service desk tickets. DEX works well in the hands of curious and empowered teams, which are not immediately in the line of fire for support calls but are tasked with underlying trends in small batches of users/devices to provide broad solutions to contain the impact before an issue escalates to a large extent.

With a growing concern of possible economic slowdown, IT organizations of large enterprises are focusing on *doing more with less* and optimizing spend. DEX solutions are an important component of this strategy as these can quantify the EX and help reduce the need

for less-skilled human service desk agents for issues that could be resolved automatically.

The advent of generative AI is seen as an opportunity for DEX solutions. Since these large language models (LLMs) can generate summarized and analyzed views out of large information, these can be used to enhance the efficiency of the IT admins using insights from DEX solutions that talk to diverse endpoints and end-user technology touchpoints. Leading DEX technology providers are already integrating this technology into their solutions.

SMBs invest in unified endpoint management solutions to have a single pane of glass visibility

The SMBs have a different set of requirements from a device management perspective. These clients mostly allow their employees to use their own devices, or they deploy mobile device management (MDM) solutions to manage the devices they provide their employees. As the number of devices their employees use and the diversity in platforms increases, they are looking at a wider unified endpoint

management (UEM) solution to have a single pane of glass for managing them. Security is the most important driving factor for opting for a device management solution. The UEM solutions can help SMBs improve their security posture by enabling them to deploy and enforce security policies on their diverse devices and endpoints. Deploying device and endpoint management solutions can protect SMBs from data breaches and security threats. The UEM solutions also help the IT staff of SMB organizations that are usually understaffed by providing complete asset visibility in their environment. This does not include only the devices and endpoints but also the different application licensing information. These solutions can keep track of the usage of this licensing, providing opportunities to optimize their usage and contain costs. SMB clients that support device issues leverage endpoint management solutions that provide remote login support allowing IT admins to conduct remote troubleshooting sessions. For many SMB clients, frontline workers form an important part of their business operations,



and these frontline workers are increasingly leveraging smart and IoT technology-enabled devices. The UEM solutions provide a single pane of glass management for devices of all types and are used by SMBs to support their frontline worker operations.

With the growing concern of possible economic downturn, IT buyers from the SMB segment are cautious with spending and want to optimize their investments. UEM providers offer complete visibility and asset management of their IT estate. Leading providers also provide DEX capabilities for quantifying end-user experience scores. SMB admins also look for solutions supporting diverse operating systems and device platforms. The UEM providers are responding by supporting diverse device setups and ecosystems such as Android, Apple, Samsung Knox, Linux and Windows.

The introduction of generative AI opens new possibilities in the endpoint management solution landscape. Leading UEM providers offer generative AI-based solutions that can recommend user device policies based on persona and security requirement.

UCCaaS has immense possibilities with generative AI

Unified communications and collaboration (UCC) as a service (UCCaaS) is the front-end employee-facing workplace technology that enables employee connection with the rest of the organization. Clients that have high investments in private branch exchange (PBX) or public switched telephone network (PSTN) systems are moving toward voice over Internet Protocol (VoIP). Many clients with on-premises UCC setups are transitioning toward cloud-based systems. According to the latest ISG survey with global workplace IT leaders, UCC is the second-most important technology for the next 12 months. The non-IT business leaders also understand the importance of UCCaaS technology. There is already a growing interest in combining the same technology stack to empower customer experience. UCaaS and contact center as a service (CCaaS) technologies converge, highlighting the relationship between EX and CX.

With the growing concern of a possible economic downturn, UCCaaS vendors do not

see the massive growth they witnessed during the pandemic and witnessed a decline in stock prices. Providers facing growth challenges seek exit strategies, resulting in mergers and acquisitions in this space. The latter half of 2022 witnessed major acquisitions in this space, mostly where UCCaaS vendors wanted to expand in the CCaaS space.

The advent of generative AI has resulted in massive adoption in this space. As this technology has a huge scope of implementation and guaranteed success with contact center and meeting conferencing space, UCCaaS providers are in a race to develop offerings around it. Leading providers are developing solutions targeted at horizontal business functions to make them smarter with AI usage.

Productivity and collaboration solutions for SMBs is a colorful competitive space

While UCaaS or UCC are mostly seen as more applicable for a large enterprise than an SMB because of investments in telephony and PBX, there are a host of technology providers that

the SMBs are leveraging to foster enhanced productivity and collaboration within their environment. These providers are not necessarily the regular unified communications and collaboration providers in the UCCaaS space. These providers belong to different technology spaces but provide capabilities to serve the SMB market for their productivity and collaboration needs. Because of the nature of work in the SMB space, these providers from diverse areas, such as task management, collaborative work and office productivity, can provide the required features to support the future of work.

With growing concerns around a possible economic slowdown, the already price-conscious SMB clients are spending cautiously on investing in a technology provider solution for productivity and collaboration and trying to make use of the existing project management solutions and their interoperability with other solutions to address these requirements.




Executive Summary

The advent of generative AI has been tremendously helpful for technology providers in this space, and each provider has embraced this new technology to improve and enhance the functionality of their solutions. With increasingly improving productivity collaboration solutions in this space, SMBs may not have to invest in costlier UCC or office productivity applications.

Requirements of SMBs versus enterprises differ for EX-enabling technologies such as DEX or UEM and EX-enhancing technologies such as UCCaaS and productivity collaboration. However, these technology categories are affected by the same cost concerns and the latest AI technology disruptions.




 Provider Positioning

Page 1 of 6


	Digital Employee Experience (DEX) Solutions	Unified Endpoint Management (UEM) for SMBs	Unified Communication Collaboration as a Service (UCCaaS)	Productivity and Collaboration Solutions for SMBs
1E	Leader	Not In	Not In	Not In
42Gears	Not In	Leader	Not In	Not In
8X8	Not In	Not In	Leader	Not In
Absolute Software	Contender	Not In	Not In	Not In
Airtable	Not In	Not In	Not In	Contender
Alcatel-Lucent	Not In	Not In	Contender	Not In
Asana	Not In	Not In	Not In	Market Challenger
Atlassian	Not In	Not In	Not In	Leader
Baramundi	Not In	Product Challenger	Not In	Not In
Blackberry	Not In	Product Challenger	Not In	Not In



 Provider Positioning


	Digital Employee Experience (DEX) Solutions	Unified Endpoint Management (UEM) for SMBs	Unified Communication Collaboration as a Service (UCCaaS)	Productivity and Collaboration Solutions for SMBs
BlueJeans by Verizon	Not In	Not In	Product Challenger	Not In
Canva	Not In	Not In	Not In	Contender
Catchpoint	Market Challenger	Not In	Not In	Not In
Cisco	Not In	Not In	Leader	Product Challenger
ControlUp	Rising Star ★	Not In	Not In	Not In
Dialpad	Not In	Not In	Product Challenger	Not In
Dropbox	Not In	Not In	Not In	Market Challenger
Dynatrace	Market Challenger	Not In	Not In	Not In
Flock	Not In	Not In	Not In	Contender
Google	Not In	Market Challenger	Leader	Leader



 Provider Positioning


	Digital Employee Experience (DEX) Solutions	Unified Endpoint Management (UEM) for SMBs	Unified Communication Collaboration as a Service (UCCaaS)	Productivity and Collaboration Solutions for SMBs
GoTo	Not In	Product Challenger	Product Challenger	Not In
HCL Software	Contender	Contender	Not In	Not In
Hexnode	Not In	Leader	Not In	Not In
HP	Contender	Not In	Not In	Not In
IBM	Not In	Leader	Not In	Not In
Ivanti	Product Challenger	Product Challenger	Not In	Not In
Jamf	Not In	Market Challenger	Not In	Not In
Kaspersky	Not In	Contender	Not In	Not In
Kissflow	Not In	Not In	Not In	Contender
Lakeside Software	Leader	Not In	Not In	Not In



 Provider Positioning


	Digital Employee Experience (DEX) Solutions	Unified Endpoint Management (UEM) for SMBs	Unified Communication Collaboration as a Service (UCCaaS)	Productivity and Collaboration Solutions for SMBs
ManageEngine	Product Challenger	Leader	Not In	Not In
Matrix42	Not In	Product Challenger	Not In	Not In
Micro Focus	Not In	Market Challenger	Not In	Not In
Microsoft	Product Challenger	Product Challenger	Leader	Product Challenger
Miro	Not In	Not In	Not In	Market Challenger
Mitel	Not In	Not In	Market Challenger	Not In
Monday	Not In	Not In	Not In	Market Challenger
Nanoheal	Product Challenger	Not In	Not In	Not In
Nextthink	Leader	Not In	Not In	Not In
Nextiva	Not In	Not In	Contender	Not In



 Provider Positioning

	Digital Employee Experience (DEX) Solutions	Unified Endpoint Management (UEM) for SMBs	Unified Communication Collaboration as a Service (UCCaaS)	Productivity and Collaboration Solutions for SMBs
Quest KACE	Not In	Market Challenger	Not In	Not In
RingCentral	Not In	Not In	Leader	Not In
Riverbed	Leader	Not In	Not In	Not In
Sangoma	Not In	Not In	Contender	Not In
Scalefusion	Not In	Leader	Not In	Not In
Slack	Not In	Not In	Not In	Product Challenger
Snow Software	Not In	Contender	Not In	Not In
Sophos	Not In	Market Challenger	Not In	Not In
SOTI	Not In	Contender	Not In	Not In
Tanium	Product Challenger	Not In	Not In	Not In

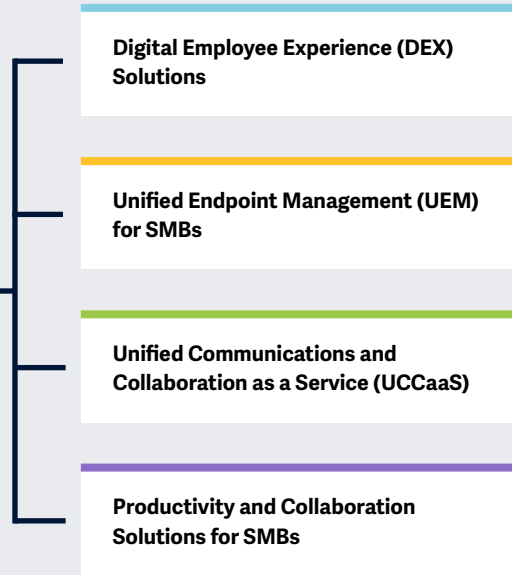


 Provider Positioning

	Digital Employee Experience (DEX) Solutions	Unified Endpoint Management (UEM) for SMBs	Unified Communication Collaboration as a Service (UCCaaS)	Productivity and Collaboration Solutions for SMBs
ThousandEyes	Market Challenger	Not In	Not In	Not In
UberAgent	Contender	Not In	Not In	Not In
VMware	Product Challenger	Product Challenger	Not In	Not In
Vonage	Not In	Not In	Market Challenger	Not In
Windstream	Not In	Not In	Contender	Not In
Zoho	Not In	Not In	Rising Star ★	Leader
Zoom	Not In	Not In	Leader	Product Challenger



This study evaluates technology service providers and vendors offering solutions that influence and impact the employee experience.



Simplified Illustration; Source: ISG 2023

Definition

From the future of work perspective, 2023 is the year of stabilizing. After the disruptions and challenges of the post-pandemic world and the Great Resignation that followed, global businesses started adjusting to the new realities and acknowledging the importance of employee experience. Employee experience transformation is the top agenda item of every business leader, along with adapting to changing customer demand and evolving technology and becoming more conscientious and environmentally focused.

The key components of the future of work enable hybrid working for most of the global workforce. Technologies that support anywhere working are only one of the components in this landscape. Other components include access to the applications, collaboration solutions and uninterrupted technology access to ensure productivity. Proactive maintenance, support

and technology that understands users' context and enhances experience are essential parts of this ecosystem. This is shown in the figure below.

The future of work solutions landscape consists of multiple categories of technology service providers or solution vendors. These solutions can be categorized into two main categories: EX-enabling technologies that enable and manage the underlying technology backbone and EX-enhancing technologies that directly interact with employees and impact their productivity and collaboration. These can be further segmented into two subcategories based on the requirements of large enterprises and midmarket or SMBs. The areas covered in this research are shown in the figure below.



Figure 1: EX impacting technology landscape areas

	EX-Enabling Technologies	EX-Enhancing Technologies
For Enterprises of all sizes	Measuring and quantifying technology experience	Unified and cloud-based approach for communication and collaboration
For SMB clients	Consolidated management of user endpoints	Productivity and Collaboration to enhance experience

Another accompanying research study will cover the associated services aspect of this study.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: Digital Employee Experience (DEX) Solutions, Unified Endpoint Management (UEM) for SMBs, Unified Communications and Collaboration as a Service (UCCaaS) and Productivity and Collaboration Solutions for SMBs.

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

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

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

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





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

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





Digital Employee Experience (DEX) Solutions

Digital Employee Experience (DEX) Solutions

Who Should Read This Section

This report is relevant to enterprises across industries in different geographies for evaluating digital employee experience (DEX) solutions vendors.

In this quadrant, ISG highlights the current market positioning of DEX solutions vendors to enterprises worldwide and how each solutions vendor addresses the critical challenges faced.

Most enterprises globally have shifted to hybrid and remote working models where they face challenges in getting end-to-end visibility of business-critical applications and relevant insights including device and app performance, user behaviors, and network-related issues. To address such challenges, these enterprises want to engage with solution providers that offer a user-friendly interface with security and DEX on the same console to assist enterprise IT support functions and service desks.

Enterprises globally are moving from traditional monitoring tools to DEX, as these traditional monitoring and other tools fail to identify the root cause of the IT issue. Hence, enterprises seek solution providers leveraging analytics tools, automation and AI and ML to reduce complexity and track and improve device performance while enhancing EX and threat detection.

ISG has observed that ServiceNow has been the most preferred ITSM solution globally by enterprises to streamline processes, improve service delivery and enhance their service desk operations. Solution vendors with an extensive DEX vendor ecosystem are preferred by enterprises globally.



Chief human resources officers (CHRO)

leaders should read this report to know which vendors are leading in DEX solutions that can help them effectively plan and enhance EX with technology.



Technology professionals, including workplace technology leaders, should read this report to understand DEX solution vendors' relative positioning and capabilities.



Digital professionals should read this report to understand how the solution vendors of DEX fit their digital transformation initiatives and how they are compared with one another.

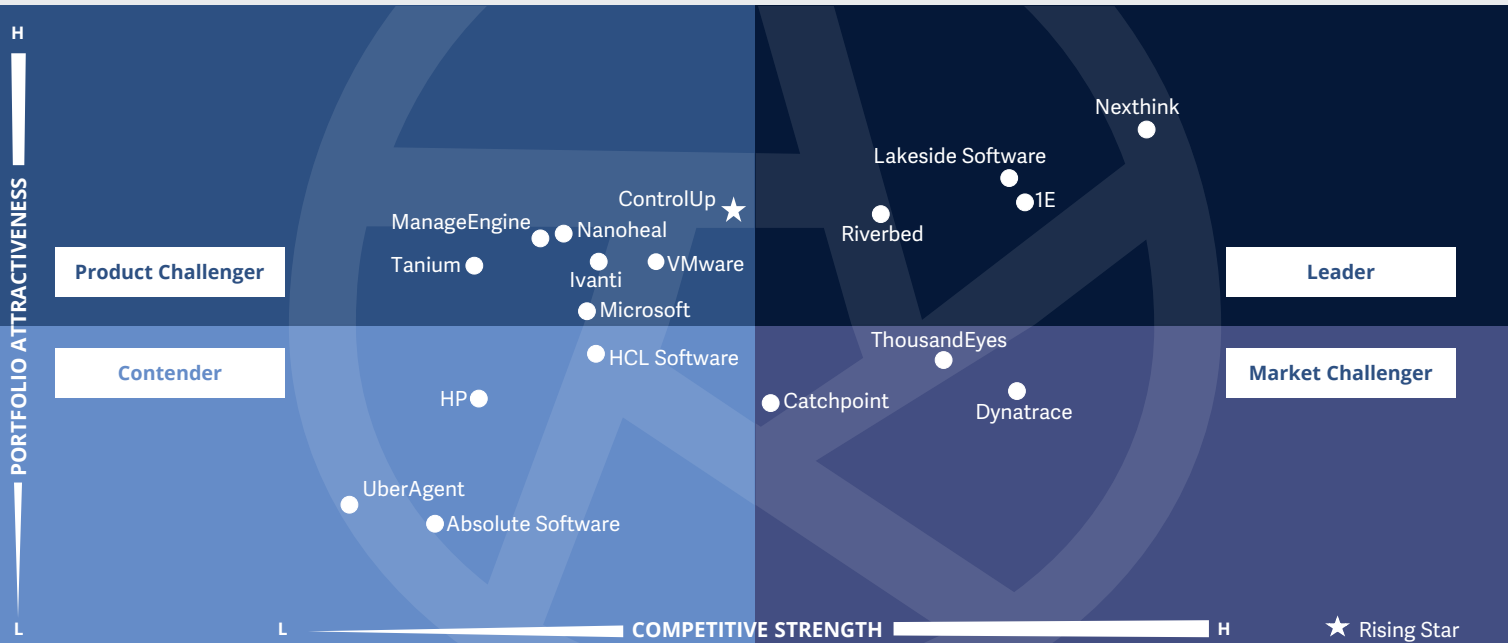


Line-of-business (LOB) leaders should read this report to better understand the current landscape of DEX solutions vendors.



Future of Work (Workplace) - Solutions
Digital Employee Experience (DEX) Solutions

Global 2023



This quadrant assesses software solutions that **observe, assess** monitor, auto-fix and **measure digital workplace technology-led experience**, while also **identifying and remediating issues** to support IT administrators.

Mrinal Rai



Digital Employee Experience (DEX) Solutions

Definition

This quadrant assesses global technology providers that provide a DEX capability. Also known as end-user experience management (EUEM) solutions, DEX solutions aim to measure, analyze, benchmark, manage and enhance the employee experience with technology. These solutions analyze information by collecting data from endpoints used by employees, such as devices, network points and applications. DEX solutions typically deploy an endpoint agent that collects this information, and IT teams can combine this with direct user feedback. Data collected through a DEX solution provides insights enabling the enterprise digital workplace or IT organization to take actions to improve the overall employee experience with the technology. These solutions also offer automated and assisted issue remediation.

DEX solutions have become popular among large enterprise clients, especially in the post-pandemic world because of an increasing number of hybrid and remote workers. As employees work from locations of their choice and use various devices and endpoints to

access their workplace, enterprise IT needs tools to ensure device security, technology performance and enhanced EX.

DEX solutions also assist enterprise IT support function and service desk to support user issues with comprehensive information in real time. This helps support agents resolve those issues with speed and efficiency. By proactively and automatically resolving issues, these solutions help clients achieve a high level of employee productivity with uninterrupted technology performance.

Eligibility Criteria

1. Software solution that offers **DEX separately** or as part of an existing IT management solution
2. Solution that continuously **monitors endpoints**, such as **devices, applications, network touchpoints**, and so forth, leveraging an **endpoint agent**.
3. Solution providing **telemetry-based insights** into technology estate impacting employee experience with the entire workplace technology ecosystem
4. Solution that offers **automated resolution and remediation** for issues that cannot be automatically resolved
5. Solution also **supports user self-help** to resolve issues at their end
6. **Global presence** with clients in all major geographies



Digital Employee Experience (DEX) Solutions

Observations

This is the first time ISG is comparing vendors in the DEX space, although it has been helping enterprise clients to address challenges with technology-led experience measurement. This market is a conglomeration of vendors from diverse areas. While key technology providers focusing on DEX are still leading this market, many providers in adjacent technology spaces fiercely compete. Other technology providers offer broad functionality, and DEX is a small subset of their product portfolio.

From the 55 companies assessed for this study, 18 have qualified for this quadrant, with four being Leaders and one a Rising Star.

The Leaders in this quadrant are traditionally focused on end-user experience monitoring and have an established client base. These providers offer solutions that focus on physical endpoints and devices and provide observability, issue identification and remediation. They also offer capabilities to design end-user surveys to assess user sentiment associated with the technology. The Product Challengers in the market excel in one of the key areas, such as

end-user computing technology monitoring, issue remediation and scripting or broader IT asset management capabilities. The Market Challenger technology providers provide strong experience management capabilities for adjacent technology areas such as networks or application monitoring. The Contenders in this space either manage endpoints from their technology ecosystem or have an underdeveloped DEX solution model.

Key differentiators for the Leaders and the Rising Star are briefly explained below.

From the 55 companies assessed for this study, 18 qualified for this quadrant, with four being Leaders and one a Rising Star.

1E

1E leads the market with its strong platform that can support complex environments for large enterprise clients. It provides comprehensive DEX management capabilities with proactive management of end-user computing issues.

Lakeside Software

Lakeside Software, with its SysTrack platform, leads the market with its strong focus on improving support function leveraging a robust DEX library. It also has one of the strongest service provider partner base among all Leaders in this quadrant.

Nextthink

Nextthink provides a powerful platform that can provide visibility, management, and automated resolution for endpoints, applications, networks, OS and infrastructure issues. It leads with a strong partner base, market presence and continued innovation.

Riverbed

Riverbed's Aternity Alluvio is part of its Unified Observability portfolio that focuses on comprehensive experience covering devices, applications and network performance. It provides industry vertical benchmarking and assesses the cost impact of technology change.

ControlUp

ControlUp (Rising Star) focuses on analyzing, correlating, remediating and automating issues for DEX management. It can manage physical endpoints, VDI environment, SaaS and web applications and UCC tools.





Unified Endpoint Management (UEM) for SMBs

Unified Endpoint Management (UEM) for SMBs

Who Should Read This Section

This report is relevant to SMBs across industries in different geographies for evaluating the unified endpoint management (UEM) vendors.

In this quadrant, ISG highlights the current market positioning of the UEM solution vendors to enterprises worldwide and how each provider addresses the key challenges faced.

In this hybrid working era, where employees can use multiple devices and endpoints, SMBs globally face challenges in supporting end users with a secured computing device. Secure management of servers, smartphones, tablets, point-of-sale (POS) machines and other IoT devices has been a top priority for enterprises. These enterprises are thus focusing on solution providers offering comprehensive UEM and security solutions that can help them securely manage servers across popular operating systems such as Windows, macOS, Linux, Chrome, Android and iOS, all from a single pane of glass.

These enterprises want to engage with solution providers offering a comprehensive suite of cutting-edge capabilities to troubleshoot issues promptly while enhancing productivity and security to safeguard devices against threats and thefts. Protecting corporate data and ensuring mobility management are other priorities for enterprises globally.

ISG has observed that solution providers with strong partnership capabilities, which support multiple platforms like Android, iOS and macOS, and excellent integration abilities like Okta, Azure Active Directory and Google Workspace are in high demand globally.



Technology professionals, including infrastructure, IT and workplace technology leaders, should read this report to understand the relative positioning and capabilities of UEM solution providers.



Procurement professionals, including sourcing, procurement and vendor management professionals, should read this report to better understand the current landscape of UEM vendors.



Cybersecurity professionals should read this report to see how service providers address the significant compliance and security challenges while maintaining seamless EX.

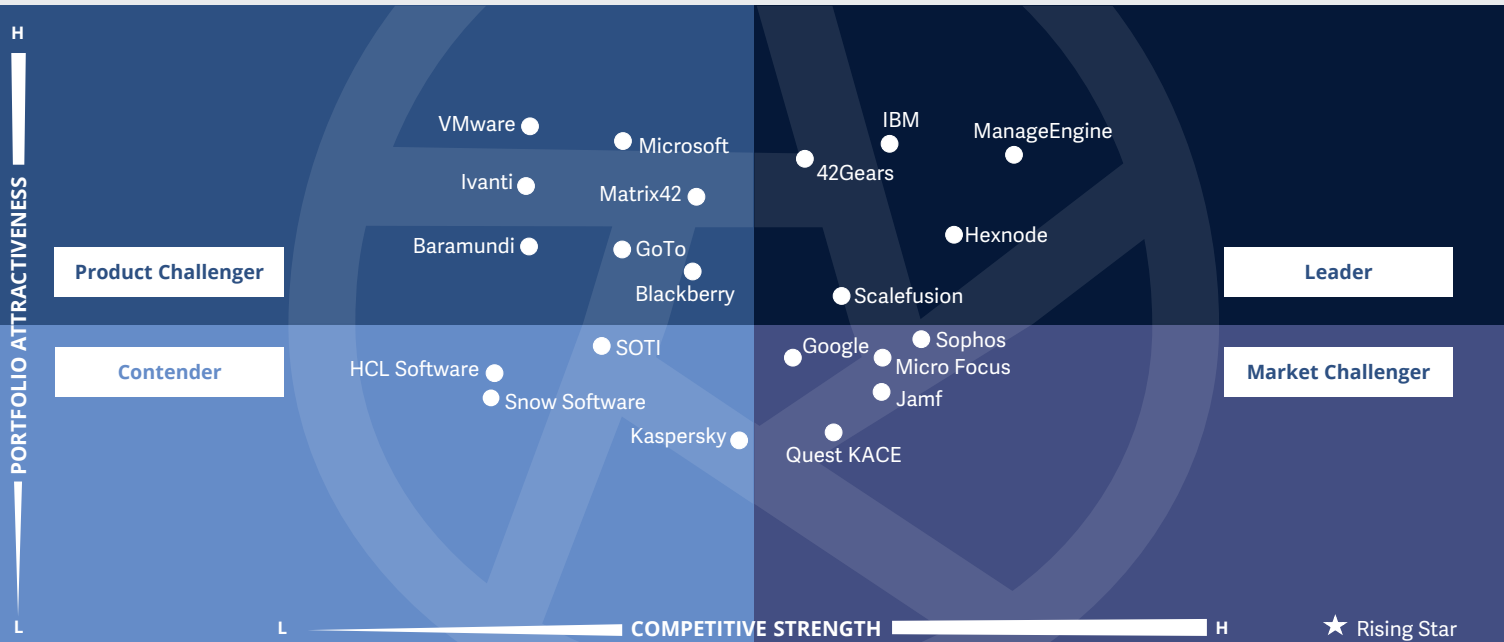


Digital professionals should read this report to understand how the solution vendors of UEM fit their digital transformation initiatives and how they are compared with one another.



Future of Work (Workplace) - Solutions
Unified Endpoint Management (UEM) for SMBs

Global 2023



This quadrant assesses **global technology providers** that provide **devices and endpoint management solutions** for **SMBs**, focusing on **cost optimization** and **managing diverse device platforms**.

Mrinal Rai



Unified Endpoint Management (UEM) for SMBs

Definition

This quadrant only assesses global technology providers that provide a unified endpoint management (UEM) software product.

These solutions help enterprises manage smartphones, tablets, laptops, PCs and smart devices. A UEM solution should primarily provide complete enterprise mobility management (EMM), covering mobile application management (MAM), mobile device management (MDM) and mobile content management (MCM), and take a unified approach to manage devices through a single console. It should support both on-premises and cloud deployments, remotely manage and configure devices and provide application and device analytics. It should also offer mobile security, endpoint security, identity and access management and PC/desktop integration management.

The SMB clients are often understaffed compared with a large enterprise client IT department and are price sensitive. While leveraging separate tools such as MDM or enterprise mobility management (EMM) is still prevalent among SMB clients, there is

an increasing interest in adopting a single all-encompassing endpoint management solution. These clients look for tools that can easily integrate with their existing technology ecosystem. A full-blown UEM solution catering to large enterprise clients may have many additional functionalities, such as DEX, which may not be the focus area for an SMB client. These clients also look for solutions that require the minimal need for professional services and hence look for vendors that offer those capabilities as an add-on.

Eligibility Criteria

1. Ability to offer an **independent software solution for UEM** with diverse capabilities such as MDM, enterprise mobility management (EMM), MCM, mobile application management (MAM), secure user access and profile management
2. Manage devices in **diverse OS environments**
3. Provide **integration with enterprise security** and user policies through **identity access features and endpoint security**
4. Provide native support for modern **endpoint security and remediation (EDR)** and **zero-trust** capabilities
5. **Global presence with a strong focus on the SMB** or the midmarket segment



Unified Endpoint Management (UEM) for SMBs

Observations

This is the first time ISG is making a technology provider comparison for UEM in the SMB market. ISG has done overall UEM quadrant in the past three years, which were not focused on any particular client segment large account of SMBs. This year ISG has drilled down for the SMB needs. The SMB market has unique requirements where IT admins are looking for technology provider solutions to manage a diverse set of operating systems and device platforms. While Windows is the primary OS platform for large enterprises, SMB environment mostly consists of platforms such as Android, Apple iPad and iPhone, Linux and others. The providers that can manage a diverse set of platforms and OSes are positioned in this quadrant. Providers that fulfill this requirement are positioned as contenders. In contrast, those that offer a much broader UEM solution that covers diverse areas, such as IT asset management and end-user computing environment management, are positioned as product challengers.

For many of these providers, UEM is one part of a broader offering; hence, their pricing is not very attractive for SMB clients. The providers positioned as market challengers in this quadrant have a strong presence in the SMB market; however, they either can manage a few device platforms, or ISG could not get enough information about their key differentiator in the UEM functionality. The Leaders in this quadrant have a strong product feature set managing diverse device platforms and providing security and easier policy deployment. These providers have a proven track in the SMB space. Some providers also leverage generative AI technology in their features, while others are maturing to a wider DEX functionality.

From the 55 companies assessed for this study, 21 have qualified for this quadrant, with five being Leaders.

42Gears

42Gears is a well-established brand in the midmarket MDM space. It can manage diverse operating systems and support nontraditional computing devices supporting frontline workers. It leads the market with its strong and continuously evolving feature set.

hexnode

Hexnode offers strong capabilities in managing diverse kinds of OSes and supports use cases of multiple industries in the SMB space. It has a solid client base from this segment and a very strong competitive advantage, making it a Leader.



IBM's Security MaaS360 is a well-established product in the UEM space and serves clients in both large and midmarket. Its core differentiation lies in Watson-enabled analytics, intelligence, security and ease of use.



ManageEngine leads the market with its strong focus on the SMB market. Its Endpoint Central solution provides comprehensive device management, analytics and end-user experience monitoring solutions.

Scalefusion

Scalefusion provides strong MDM functionality for diverse OS platforms. It also provides a dedicated solution set for key challenges faced by SMB clients. Its Sage AI functionality leverages AI and OpenAI technologies to assist IT admins.





“Strong experience, product portfolio and experience enhancement have placed ManageEngine as a Leader in this quadrant.”

Mrinal Rai

ManageEngine

Overview

Headquartered in India, Zoho provides UEM and security through its ManageEngine Endpoint Central solution (ManageEngine is Zoho's enterprise IT management software division). It manages approximately 20 million endpoints, supporting 130,000 IT professionals across 190 countries. ManageEngine supports iOS, Apple tvOS, macOS, Windows, Android, point of sale (POS), mixed reality and industrial devices, along with wearables, ATMs and browsers. It is deployed both in-house and over the cloud. More than 90 percent of ManageEngine clients are from the SMB segment.

Strengths

Coverage and recent updates: Endpoint Central supports zero-touch provisioning and Windows and Apple device onboarding. Recent important updates include the introduction of checkpoint mobile threat detection (MTD) and zero-day OS support for iPadOS, android, iOS, macOS and Windows. Leveraging Zoho Flow integration, Endpoint Central can connect with more than 800 enterprise applications designing workflows.

Move toward DEX: ManageEngine works toward an autonomous digital workplace that inputs endpoint security, endpoint management, and endpoint analytics and generates IT automation and end-user experience management as output. It has expanded its offering to provide a comprehensive DEX solution capability

leveraging its UEM offering and additional functionality. ManageEngine is the only Leader in this quadrant that can deliver a DEX solution.

SMB focus: ManageEngine has a large client base in the SMB space. It manages key popular platforms with these clients and provides attractive pricing to support their requirements. ManageEngine showcases multiple examples of supporting SMB clients with diverse requirements, such as device policy enforcement, management and preventing shadow IT usage and the BYOD approach.

Caution

ManageEngine focuses on endpoint analytics and end-user experience management. This is a natural evolution of device management solutions. However, DEX and end-user experience management (EUEM) may be too overwhelming for SMB clients for the next few quarters as they still focus on pureplay MDM.





Unified Communications and Collaboration as a Service (UCCaaS)

Unified Communications and Collaboration as a Service (UCCaaS)

Who Should Read This Section

This report is relevant to enterprises across industries in different geographies for evaluating the vendors of unified communication and collaboration as a service (UCCaaS).

In this quadrant, ISG highlights the current market positioning of the vendors of UCCaaS to enterprises worldwide and how each provider addresses the critical challenges enterprises face.

Enterprises globally are looking to strengthen their communication channel and seek a unified communications platform that helps them simplify and streamline their communication with organized conversations and easy-to-find information. Enterprises are also focusing on secured technology capabilities for Inclusive video calls, immersive meeting experiences and the ability to track and sync actions before, during and after meetings. To address such challenges, enterprises are looking for solution providers

that offer a single consolidated tool and the ability to integrate with a diverse set of tools to drive employee productivity, team collaboration, communication and engagement. Solution providers are enabling a unified platform for hybrid work styles, allowing enterprise access from any device and improving productivity.

Enterprises want to leverage unified communications and collaboration platforms to integrate with third-party tools, create bots for workflow automation and secure collaboration with external users while safeguarding company data. Solution with the best compliance practices (compliant communication channels, protecting sensitive data and meeting industry standards effectively) in unified communications and collaboration has been a top priority for enterprises globally.



Technology professionals should read this report to understand the relative positioning and abilities of communication solution providers that can help them effectively plan and select a UCCaaS tool.



Customer service professionals should read this report to see how solution providers address the challenges related to compliance and security while maintaining a seamless EX.



Digital professionals should read this report to understand how unified communication and collaboration solution providers fit their digital transformation initiatives.

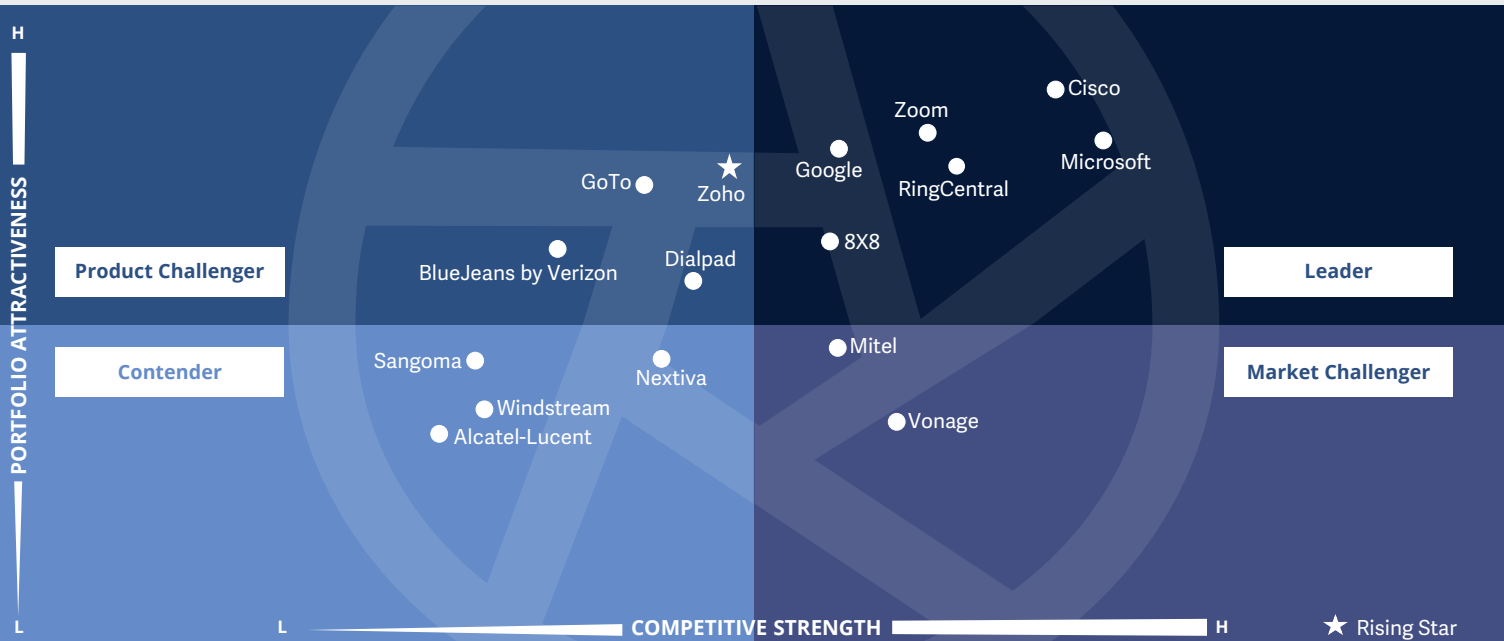


Procurement professionals should read this report to better understand the current landscape of unified communication and collaboration solution providers.



Future of Work (Workplace) - Solutions
Unified Communication Collaboration as a Service (UCCaaS)

Global 2023



This quadrant assesses technology providers' capabilities in **unified communication collaboration** and their ability to cover diverse other use cases, such as **meetings, conferencing, webinars and productivity**.

Mrinal Rai



Unified Communications and Collaboration as a Service (UCCaaS)

Definition

This quadrant assesses global technology providers of unified communications and collaboration as a service (UCCaaS) software solutions. UCCaaS is a cloud-based software solution that enables business communication and collaboration across multiple channels and devices. It combines voice over Internet Protocol (VoIP), enterprise messaging, online meetings (web, video and audio), team collaboration, application integration and presence on a single integrated cloud platform. It can be accessed from any device, such as desktops, laptops, tablets or mobile phones. The solution enables large businesses and IT departments to cut costs and achieve greater scalability, security and reliability.

A UCCaaS software solution can also enable online communication and interaction by combining messaging, supporting content sharing and providing audio and video meetings. These solutions often follow protocols to protect information online through encryption and compliance with globally accepted security and privacy standards.

While on-premises unified communication (UC) and cloud-hosted unified communications as a service (UCaaS) are well established in the market, ISG adds a “collaboration” aspect to UCaaS. While some UCCaaS solutions offer in-house collaboration capabilities, others can support popular collaboration solutions. UCCaaS providers offer VoIP telephony either by supporting a public switch telephony network (PSTN) or “bring your own carrier (BYOC)” capability.

The UCCaaS providers offer APIs and SDKs to integrate with increasing enterprise business applications enhancing experience. In addition, many UCCaaS providers also increasingly offer contact center as a service (CCaaS) capabilities natively or in partnership.

Eligibility Criteria

1. Support private branch exchange (PBX) **telephony integration**, built-in **VoIP** and toll-based audio calling options
2. Provide **audio/videoconference controls** and the ability to invite guests to meetings
3. Provide meeting features such as **chat, remote access and desktop and application sharing**
4. Enable **integration with enterprise applications** such as CRM and marketing
5. Support **different endpoints**, from room systems to personal computers, laptops, smartphones and tablets
6. Offer **in-built collaboration features** and/or integrate with collaboration solutions such as enterprise file sync and share
7. Offer **communication platform as a service (CPaaS)** contact center solution is a plus
8. **Global presence** with client bases in all major geographies



Unified Communications and Collaboration as a Service (UCCaaS)

Observations

This is the third year of ISG comparing technology providers in the UCCaaS space. There is only a slight change in the positioning of different providers. One major change this year is removing Fuze, which was acquired by 8x8 last year. Verizon has recently announced that it is shutting down its BlueJeans business. However, at the time of writing this report, the solution was still used by some clients. The Leaders in this quadrant retain their position from last year with the addition of Google. Microsoft Teams is a major player in this space because of its tremendous growth and reach. Other UCCaaS providers had no option but to support Teams within their solution despite competing against it. Most providers have introduced features to support interoperability with Teams, either through telephony, integrating their meeting conferencing solution with Teams or supporting the meeting hardware devices by making it compatible with Teams. Many UCCaaS providers are concentrating their innovation efforts more toward their contact center offering than the UCC part. ISG has given

low weightage for the contact center part as ISG conducts another ISG Provider Lens™ study that compares the common providers in the CCaaS space. The providers positioned as Contenders successfully fulfilled the quadrant's eligibility criteria and provided competing solutions. The Product Challengers have a comprehensive offering beyond conferencing and meetings. Some also offer productivity and IT solutions. The Market Challengers are more focused on the VoIP and telephony aspects than others. These providers offer strong solutions and innovative features leveraging AI and generative AI technology.

From the 55 companies assessed for this study, 16 have qualified for this quadrant, with six being Leaders and one a Rising Star.

8x8

8x8 has gained many new clients after acquiring Fuze last year. It has also expanded its managed user and client base for the Microsoft Teams voice solution leveraging a strong partnership with Microsoft.

Cisco

Cisco is strongly positioned on portfolio attractiveness as it offers a strong portfolio of software solutions and physical devices for meeting and conferencing. It strongly focuses on leveraging AI and generative AI technology to improve and enhance its solutions.

Google

Google leads with its Workspace offering, where its productivity applications offer collaboration solutions, while Google Meet, Voice and Chat offer the UCCaaS solution. It is strongly focused on security, privacy and continuous innovations with AI.

Microsoft

Microsoft Teams continues to grow and improve and is widely adopted by clients of all sizes. Microsoft continues to invest in improvements and upgrades to Teams while strengthening its partnership with other UCCaaS providers and has the strongest competitive advantage.

Ringcentral

RingCentral retains its leadership position as it continues to grow with partnerships and integrations. Its recent partnership with Mitel, updated Microsoft Teams integration and ability to support software developers are key differentiators.

Zoom

Zoom is the only Leader that has not come from the traditional telephony or UCC space. After witnessing strong growth during the pandemic with its video conferencing business, Zoom continues to innovate with AI and is expanding in areas where most other Leaders are not.

Zoho

Zoho (Rising Star) has entered the UCCaaS market with its strong Zoho Cliq and Zoho Meeting feature set, and clients deeply invested in the Zoho Workplace elements can benefit from these solutions.





Productivity and Collaboration Solutions for SMBs

Who Should Read This Section

This report is relevant to SMBs across industries in different geographies for evaluating productivity and collaboration solutions vendors.

In this quadrant, ISG highlights the current market positioning of the providers of employee engagement and productivity platforms to enterprises worldwide and how each provider addresses the key challenges faced.

In the digital and technology-driven remote work environment, SMBs seek productivity and collaboration solutions that offer scalability, seamless integration with existing tools, real-time collaboration features, communication channels and mobile accessibility for improved efficiency and streamlined teamwork. To address such needs enterprises are looking for solution providers focusing on continuous improvements and upgrading their tools and platforms by leveraging analytics, automation and AI and ML capabilities.

Solution providers pitch productivity and collaboration solutions for SMBs that encompass many features and benefits, such as cloud-based platforms, team communication tools, project management capabilities and integration to enhance productivity and streamline collaboration workflows.

The SMBs oversee making an employee more productive by creating an environment that is well connected and, hence, want to engage with solution providers that provide improvised offerings to match the different working styles of employees and enhance EX.



CHRO leaders should read this report to know which vendors are leading in productivity and collaboration solutions to help them effectively plan and enhance EX with technology.



Technology professionals, including workplace technology leaders, should read this report to understand the relative positioning and capabilities of productivity and collaboration solution vendors.



Digital professionals should read this report to understand how the solution vendors of productivity and collaboration fit their digital transformation initiatives.

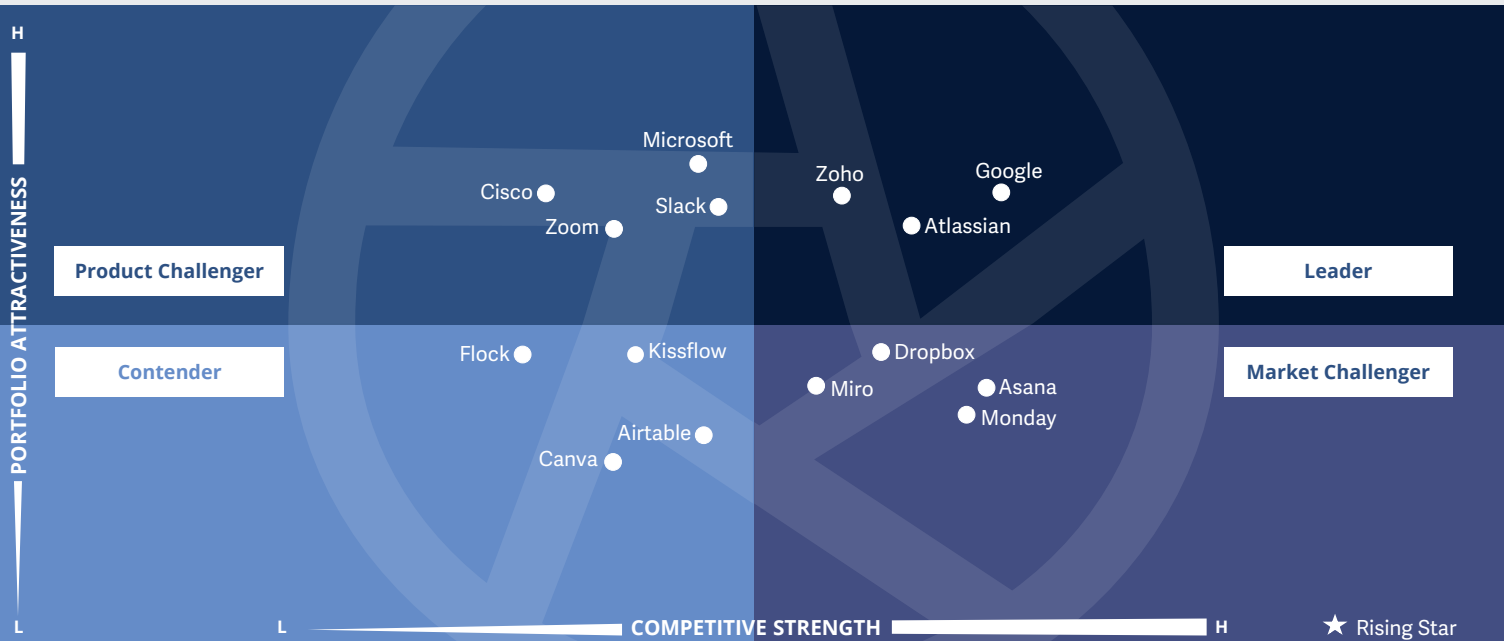


Line-of-business leaders should read this report to better understand the current landscape of productivity and collaboration solutions vendors.



Future of Work (Workplace) - Solutions
Productivity and Collaboration Solutions for SMBs

Global 2023



This quadrant assesses **technology providers** offering solutions that **enhance individual and team collaboration and productivity** by leveraging **native features** or through **integrations and interoperability** with other apps.

Mrinal Rai



Productivity and Collaboration Solutions for SMBs

Definition

This quadrant assesses technology provider solutions that offer productivity collaboration capabilities and enhance employee productivity for the SMB market. The software products include, but are not limited to, unified communication, productivity software, meeting/conferencing, business communications, workflow management and automation, plus team- and content-centric collaborations. These can also extend to providing groupware, knowledge management, email, conferencing, activity streams, microblogging, talent and skills management.

The requirement for SMB or the midmarket differs from large enterprise clients. These clients tend to maximize value with minimal investments. Productivity and collaboration solutions for SMBs tend to provide a single consolidated tool or integrate with a diverse set of tools to drive employee productivity and team collaboration. These clients typically do not have a large user base and want to invest in a technology stack or single solution that drives communication, collaboration, office productivity and engagement for their

employee base. These software solutions support productivity enhancements for end users, offering them new and improved ways of communicating with peers and continuous improvements to the enterprise knowledge base. They ensure that team or project employees are connected, regardless of device or location. These solutions can also offer communication and meeting conferencing features natively included and/ or can be integrated with leading UCCaaS solutions. The objective is to enhance employee engagement and business communication, which also contributes to improving user productivity and digital dexterity.

Eligibility Criteria

1. Provide a **single software solution** or **support integration** to provide/support **office productivity applications** and **team collaboration**
2. **Global presence** with a sizable client base in all major geographies
3. Must have a **high percentage of clients in SMBs** with a high brand recall value for this market segment
4. Support **communications and collaboration over chat, audio/ video meeting/conferencing** with **abilities to scale** as needed
5. Provide **native solutions/ integrate or support existing productivity applications** to create documents, spreadsheets and presentations, and others
6. Provide **native capabilities or integrate with existing task/project management capabilities**, support for workflow management and employee engagement is a plus



Productivity and Collaboration Solutions for SMBs

Observations

This is the first time ISG is comparing technology providers in this space. This competitive landscape consists of providers from different domains and areas. There is a mix of meeting conferencing, team collaboration, content collaboration, individual productivity and task and project management solutions. This is because SMB clients tend to leverage existing solutions to provide the required functionality for their employees. For SMB clients, investment in large-scale office productivity applications or UCC products could be costlier. Hence, they leverage existing task management solutions with interoperability with UCC products to support productivity and collaboration needs. The Product Challengers in this quadrant are the providers that offer strong individual productivity solutions and are increasingly gaining traction. Some of them offer native communication and chat features. Others offer workflow automation capabilities. The Market Challengers in this space are well-known

task management solutions and content collaboration providers that do not offer native communication collaboration solutions but integrate with well-known providers. The Product Challengers in this quadrant are well-known team collaboration, meeting and conferencing technology providers catering more to both large enterprises and SMBs. The Leaders in this quadrant are a unique set of providers that offer solutions for office productivity, employee engagement and collaboration with support for task and project management.

From the 55 companies assessed for this study, 13 have qualified for this quadrant, with three being Leaders.

Atlassian

Atlassian, with its Confluence, Trello and other products, provides solutions to enhance team collaboration and experience and the required task and project management capabilities. Many SMB clients are deeply invested in the Atlassian ecosystem.

Google

Google Workspace leads the market with its strong product set that aims to enhance and improve users' productivity and collaboration needs. Google also offers a strong feature set to assist developers in creating and leveraging custom applications within its ecosystem.

Zoho

Zoho Workplace, its component products and the latest Trident app are key enablers of productivity and collaboration for the SMB segment. The company has 92 percent of its clients from this segment, which contributes to its leadership position in this quadrant.





Appendix

The ISG Provider Lens™ 2023 – Future of Work (Workplace) - Solutions 2023 study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Future of Work (Workplace) - Solutions market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



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Mrinal Rai is the Principal Analyst for Digital Workplace and enterprise collaboration. His area of expertise is digital workplace services and enterprise social collaboration both from a technology and business point of view. He covers key areas around the Workplace and End User computing domain viz., modernizing workplace, Enterprise mobility, BYOD, VDI, managed workplace services, service desk and modernizing IT architecture. In Social business collaboration, he focuses on enterprise social software, content collaboration, team collaboration, social media management and chatbot platforms.

He has been with ISG for close to 10 years and has more than 14 years of industry experience. Mrinal works with ISG advisors and clients in engagements related to workplace modernization, social intranet, collaborative workplace, cloud-based VDI, end user computing and service desk. He is also the ISG official media spokesperson in India.



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Sonam Chawla is a senior analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Future of Work – Services and Solutions, Cybersecurity Solutions and Services. Sonam comes with an experience of over 5 years in market research industry and is skilled in secondary research, report writing and company profiling. Her areas of expertise include digital workplace, enterprise collaboration, employee experience services, and conversational AI. She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights.

In addition, she also handles custom engagement requests from providers and advisors. Prior to this role she has worked as research analyst, where she was responsible for authoring syndicated research reports as well as consulting research projects.





IPL Product Owner

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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™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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iSG

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OCTOBER, 2023

REPORT: FUTURE OF WORK - SOLUTIONS GLOBAL