

***ISG** Provider Lens™

SIAM/ITSM

Business Value Service Management

U.S. 2020

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



March 2020

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 March 2020 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.

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EXECUTIVE SUMMARY

SIAM/ITSM 2020

Digitalization is omnipresent and all-pervasive in the service integration and management (SIAM)/IT service management (ITSM) market. A shift from information technology (IT) to business technology (BT) is occurring across markets and with this the predicted extension of the IT value chain has become a reality. The customers of a company have direct access to business warehouse (BW) information or enterprise resource planning tools (ERPs) or even business applications for details about product design, availability or delivery dates. Commercial ERP is connected with smart factory systems to offer build-to-order services to customers and a smart factory can reach out to suppliers to ensure “just-in-time” delivery. In the healthcare industry, information can be shared easily. For instance, clinical data easily gathered through electronic health records can encourage R&D departments of pharmaceutical companies to undertake research to manage chronic conditions such as diabetes. Customers can use virtual reality (VR) and augmented reality (AR) to design a kitchen or select curtains for the living room using the smartphone camera. And extension at the other end of the IT value chain happens in B2B relations and in shop floor integration with the same pace.

The ITSM/SIAM market has been impacted twofold by digitalization. At the outset, IT4IT™ is a reality. Emerging technologies are available and systems of engagement together with the systems of record act as platforms for enterprise management systems (EMS). We, at ISG, are of the opinion that we need to talk about the extended enterprise system management (xESM) market as the one responsible for operating BT, and the need to secure business process operations beyond the boundaries of a company's BT environment.

Secondly, the market for service integration (SI) and managed services for Extended Enterprise Management Systems (EESM) is growing rapidly. SI is important as the BT management systems are driven by three forces: they need to support business process, the need to combine emerging technologies with legacy systems and user satisfaction. In this scenario, managed service providers (MSPs) are more in demand as there is a paucity of skilled resources to operate the complex solutions.

The SIAM/ITSM market is undergoing a fundamental change — moving from labor-intensive implementations to highly automated functions. Vendors are investing heavily in automation capabilities and using available/emerging modern technologies to unlock new value for their services. While the IT environment has been producing data since technology was invented, analytical tools are now being used to transform correlated data into information. With this intelligent automation (IA), IT can deliver incremental value by integrating the systems of record with the systems of engagement, even within IT itself. This integration is being used to make decisions or to automatically trigger activities based on extensive solution catalogs. User experience is improved by using highly sophisticated natural language processing (NLP) techniques across a large variety of input channels, resulting in a seamless and personalized human-machine experience. Early use cases are being built using machine learning (ML) capabilities to act faster and to prevent incidents.

As mentioned earlier, IT4IT™ is reality and emerging technologies are available and in use. In this respect, “in use” has to be understood as technologies being used by vendors to offer enhancements in the automation of processes. In some cases, for example in sourcing information management, such technologies allow better integration by helping to format unstructured data or by automatically sending an alert during pattern recognition in mass event data. In use does not necessarily mean that SIAM customers are extensively using this already operational technology. We have observed that even though such technologies are available only few, very experienced or mature clients, often working in close relationship with the vendor or system integrator, are using the available solutions. For the majority of IT organizations, the lack of internal readiness prevents them from fully utilizing them.

However, compared with last year’s study, the functionalities in the product offerings have increased dramatically. We, at ISG, had to take that into account while comparing the different offers; to plot the results in the charts for this report, we had to adjust the scaling heavily to ensure that the charts were not top heavy. Hence, it is necessary to understand the position of a provider in comparison with the other providers and not in comparison with its last year’s position. In some cases, it may appear that a vendor has lost ground but, in reality, it has gained ground with respect to the functionality but has lost ground relative to other offerings as they simply developed faster.

Business units need to constantly improve customer experience to win and retain customers, hence, the number of IT services underpinning business solutions is constantly growing, raising the importance of structured SIAM rapidly. Most of the business-related services need to come from a large group of outside vendors to meet the requirements of companies in the ever-increasing competitive business environment. More companies understand that running and managing the IT environment today requires a two-pronged approach. First, operational IT service management activities must evolve from people-driven actions to automated, self-managed and machine-performed executions, and second, professional orchestration of the IT supply is needed, through a large number of suppliers, to build a robust service ecosystem that can deliver end-to-end business services. IT operations management is evolving into a complex environment of service elements and providers and is changing rapidly.

Traditionally, IT organizations kept core infrastructure and application management in-house. With the increasing demand for more agility, a growing number of companies are realizing that they cannot keep pace with this evolution. Labor shortages, along with the need for deep knowledge about a variety of new and complex technologies, is compelling IT departments to re-think their management approaches. The demand for managed services is growing, and vendors are developing high-tech solutions with focus on the zero-touch operating model to guarantee a sustainable business IT environment.

Vendors in this market can be separated into three groups. One group comprises the classic vendors that focus on developing feature-rich tool sets that are easy to implement, easy to enrich and can be leveraged by IT department, MSPs or system integrators. Even though the IT market is moving toward anything-as-a-service (XaaS) delivery models, the market is still favorable for on-premise installations. Local legal requirements and legacy installations are the driving forces here. This market segment is mainly split between ServiceNow, BMC Software, Cherwell, Microfocus, Broadcom/CA Technologies, Atlassian, and Ivanti. However, there are some smaller players that offer feature-rich products that have gained a certain market share, such as 4me, Matrix42 or Mphasis.

The second group comprises consulting and IT service companies that use the platforms of the first group and enhance the base functionality with specific features based on their industry-specific or other specialized knowledge. These vendors range from global IT services companies such as Accenture, Deloitte or EY to focused local players such as Plat4mation, Trianz, Fusion GBS, FlyCast Partners and RightStar. These companies offer a variety of services, including implementation consultancy and managed services.

The third group comprises IT service companies that have, over time, developed feature-rich, proprietary tool sets normally used only in a managed service environment. Some of the companies in this group are Capgemini, HCL, Infosys, LTI, Orange and TechM. This study looks at all of these product solutions independent from the delivery model and provisioning.

Given the high variances in client maturity regarding SIAM, the success of vendors in the market depends on their ability to demonstrate extensive knowledge of ITSM, SIAM and governance, risk and compliance (GRC) processes. This knowledge needs to feed an internal reference model used to define a robust, agile and secure SIAM framework that combines people, processes and tools seamlessly. In some cases, the reference model is being supplemented with some already established models in the market such as IT4IT™, defined by The Open Group. Proprietary assessment and coaching methodologies, together with high transformation skills and a flexible pricing model, are additional and important success factors in this market.

Even though this market is not large, it is one of the fundamental pillars of every digital transformation strategy. With IT operational budgets still tight, and margins somewhat skinny, this market is clearly a very attractive one for vendors; given their strategic position inside client organizations, SIAM/ITSM vendors are playing a key role and are about to get a seat at the internal IT and business-decision table. Achieving such a position requires a great deal of trust. This is either being gained through long-term, trusted relationships or through high delivery quality, resulting in better user experience or a high customer satisfaction (CSat) or net promoter score.

Introduction

Simplified illustration

SIAM / ITSM (2020)			
System Integrators for ServiceNow Products	Business Value Service Management	Sourcing Information Management	System Integrators for BMC Software Products
	Service Design & Transition	Service Operation & Delivery	

Source: ISG 2020

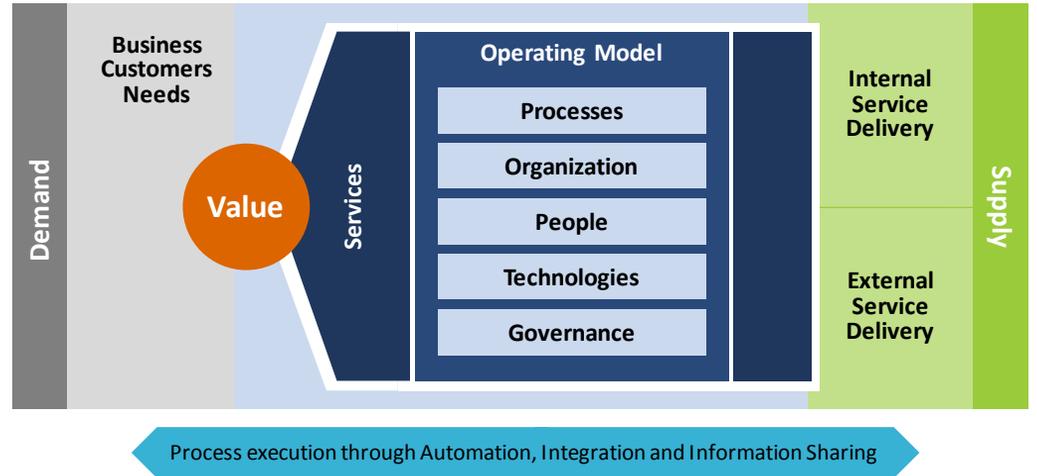
Definition

SIAM, as a part of enterprise service management (ESM), is a holistic approach used to manage a dynamic, multivendor and multiservice ecosystem. It is the result of the evolution of ITSM, IT operations management (ITOM) and the governance, risk and compliance (GRC) discipline. While ITSM is historically focused on designing business-related services based on existing IT services and on managing individual service performance, SIAM focuses on adding additional services through a full-scale service lifecycle; at the same time, it integrates such individual services into an end-to-end, business process-oriented approach that includes vendor performance and management issues. While the integration of the various processes and management disciplines become important, enterprises are looking for solutions that support such efforts. The solutions can be products that support internal teams or external service providers. This study focuses

Definition (cont.)

on products/tools available in the market and on companies that enhance such tools through extensions and add-ons. It encompasses solutions that are being built by service providers, but it only analyzes the functional capabilities of such tools and solutions and not the service delivery capabilities of the providers.

In addition, the study analyzes the companies in the U.S. that provide system integration services for the above-mentioned combined system of records and/or systems of engagement ecosystems. For better comparison, this study focuses on system integrators (SIs) that deliver consulting and services on the two platform systems that have found high acceptance in the U.S. market: BMC software's suite of Helix® and Truesight® products, and ServiceNow's current release, New York, and forthcoming release, Orlando. ISG recognizes that there are several other, well-designed and functionally rich platforms, but for the sake of not over-burdening the study we have decided to focus on the above-mentioned two systems. Some of the SIs we have analyzed offer services for other platform systems such as Cherwell, Micro Focus, Broadcom/CA and Atlassian, but do not have any impact on the analysis in this study.



Source: ISG 2020

Definition (cont.)

ISG studies are intended to anticipate the investigation efforts and buying decisions of typical enterprise clients. These clients will benefit from a study that examines the functional capabilities while contemplating a significant strategy transformation, making infrastructure purchase-versus-rent decisions, supporting the implementation of agile practices or incorporating automation into their environments. The study comprises multiple quadrants covering a spectrum of process automation capabilities that an enterprise client would require. Our research investigates several of the tool capabilities (templated data structures, automated process policies, integration capabilities and standardized outputs) and the support capabilities that provide consulting and managed services in addition to the tool solutions.

Scope of the Report

The scope of the report covers product functionalities and service portfolios offered by vendors in the heterogeneous SIAM environment. Due to the broad scope and non-standardized SIAM definitions, this report is based on a sub-set of ISG's own SIAM reference model, where a key focus area are the automation capabilities delivered by vendors for the operational tasks inside SIAM. The more sophisticated areas covering GRC issues are excluded from this report and may be covered in another ISG Provider Lens™ study.

The six quadrants of the report focus on the processes through a plan-design-manage approach underlined with an information layer feeding the three operational process clusters. Two quadrants focus on the SI companies specialize in either ServiceNow's platform or BMC Software's offerings around the Helix® or TrueSight® product sets.

Definition (cont.)

The six quadrants that are covered are:

- Business Value and Service Management (BVSM): It covers the processes for demand analysis, catalog management, chargeback and customer satisfaction.
- IT Service Design (SD): It incorporates all service design (SD)-related processes, ranging from capacity availability management to service validation and deployment.
- IT Service Operation (SO): It covers all operational processes for event and problem management, including all reporting and improvement activities.
- Sourcing Information Management (SIM): It is the underlying process cluster that gathers, stores and provides data to the management processes; it includes data homogenization and golden record management within the configuration management database (CMDB) to support asset, configuration and access management.
- Service Integrators for BMC Software products (BMCSI): It includes companies that are dedicated to help clients design an architecture, build, customize and/or operate SIAM/ITSM solutions primarily based on the Helix® and TrueSight® offerings, and also recognizes other products such as ControlM®.
- Service Integrators for ServiceNow's products (SNSI): It includes companies that are dedicated to help clients design an architect, build, customize and/or operate SIAM/ITSM solutions based on the current release, New York, while it also recognizes the support of other recent releases.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

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

Product Challenger

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

Market Challenger

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

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

SIAM/ITSM - Quadrant Provider Listing 1 of 3

	System Integrators for ServiceNow Products	System Integrators for BMC Software Products	Business Value Service Management	Service Operation & Delivery	Service Design & Transition	Sourcing Information Management
4me	● Not In	● Not In	● Market Challenger	● Contender	● Contender	● Contender
Accenture	● Leader	● Not In	● Not In	● Not In	● Not In	● Not In
Atos	● Leader	● Not In	● Not In	● Not In	● Not In	● Not In
BMC	● Not In	● Not In	● Market Challenger	● Leader	● Market Challenger	● Market Challenger
Capgemini	● Rising Star	● Product Challenger	● Leader	● Leader	● Leader	● Leader
Cherwell	● Not In	● Not In	● Contender	● Product Challenger	● Contender	● Contender
Cognizant	● Leader	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Column Technologies	● Not In	● Leader	● Not In	● Not In	● Not In	● Not In
Deloitte	● Leader	● Not In	● Not In	● Not In	● Not In	● Not In
DXC	● Not In	● Not In	● Market Challenger	● Market Challenger	● Leader	● Leader

SIAM/ITSM - Quadrant Provider Listing 2 of 3

	System Integrators for ServiceNow Products	System Integrators for BMC Software Products	Business Value Service Management	Service Operation & Delivery	Service Design & Transition	Sourcing Information Management
EY	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In
Flycast Partners	● Not In	● Rising Star	● Not In	● Not In	● Not In	● Not In
Fusion GBS	● Not In	● Leader	● Not In	● Not In	● Not In	● Not In
HCL	● Leader	● Not In	● Leader	● Leader	● Leader	● Leader
Highmetric	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In
IBM	● Leader	● Not In	● Not In	● Not In	● Not In	● Not In
Infosys	● Leader	● Product Challenger	● Leader	● Product Challenger	● Product Challenger	● Product Challenger
InSource	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In
LTI	● Leader	● Leader	● Rising Star	● Rising Star	● Rising Star	● Rising Star
Matrix42	● Not In	● Not In	● Not In	● Not In	● Contender	● Not In

SIAM/ITSM - Quadrant Provider Listing 3 of 3

	System Integrators for ServiceNow Products	System Integrators for BMC Software Products	Business Value Service Management	Service Operation & Delivery	Service Design & Transition	Sourcing Information Management
Mindtree	● Market Challenger	● Not In	● Not In	● Contender	● Not In	● Not In
Mphasis	● Not In	● Not In	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Orange Business Services	● Contender	● Contender	● Leader	● Rising Star	● Leader	● Leader
Plat4mation	● Rising Star	● Not In	● Not In	● Not In	● Not In	● Not In
RightStar Systems	● Not In	● Rising Star	● Not In	● Not In	● Not In	● Not In
ServiceNow	● Not In	● Not In	● Leader	● Leader	● Market Challenger	● Leader
Stefanini	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In
Tech Mahindra	● Contender	● Not In	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
Trianz	● Rising Star	● Not In	● Not In	● Not In	● Not In	● Not In



SIAM/ITSM Quadrants

ENTERPRISE CONTEXT

BVSM Quadrant

This quadrant report is relevant for enterprises of all sizes and across all industries in the U.S. for evaluating tools that automate IT processes and can turn client demand into business-oriented IT services.

The report assesses and positions service providers in the U.S. based on their capabilities to automate the integrated process framework. These capabilities range from demand gathering and service catalog management to IT customer satisfaction for this market.

Two types of offerings are currently available. The single platform approach uses established toolsets and adds more capabilities through software extensions. The broad ecosystems offering combines best-of-breed tools through integration platforms to enable a seamless data exchange.

While seeking software solutions, IT clients ask for strong inter-process communication and a robust process reference model as part of the tool. ISG sees that additional core requirements could be addressed by adapting process structures and dynamically enabling automated request handling.

It is critical that the tools in this area can communicate seamlessly with IT clients to enable automate request handling. ISG sees that mobile access and virtual agent technology are the norms in this space.

The use of IT is no longer limited to employees of the enterprise, and it is important to deliver a strong user experience to ensure accessibility, ease of use and immediate and automated request handling. Data from interactions will be used to automatically feed a demand forecast system so that repetitive requests can be handled even before additional demand rises.

This report is relevant for:

CIOs and IT leaders to understand what is technically possible while automating the demand facet of the ITIL reference model.

Project leaders who are responsible for automating and maintaining the customer facing IT processes to better understand the main differentiators among leading tool providers in the region.

Business leaders to understand how to communicate and interact with clients and address their demands.

The CPO, VP of vendor governance or VP of sourcing and vendor management to see how different services in a multi-vendor ecosystem can be integrated and how financial aspects can be handled and reported.

BUSINESS VALUE SERVICE MANAGEMENT

Definition

This quadrant covers outbound (IT customer oriented) and forward-looking strategic processes, of ITSM and more general management issues. Understanding a client's demand, while designing, building and managing a service portfolio, is at the heart of this quadrant. Financial management processes and customer satisfaction are included because they require direct client access and feedback.

It examines four process clusters:

- Managing a client's service demand through demand forecasting, financial and consumption management, financial planning and chargeback and showback activities;
- Managing service portfolio and maintaining the related service catalog;
- Dealing with regular service requests and managing non-standard requests;
- Management the complete customer satisfaction process.

SIAM / ITSM

Business Value Service Management

2020

U.S.



Source: ISG Research 2020

BUSINESS VALUE SERVICE MANAGEMENT

Definition (cont.)

A focus area of this quadrant is social media that enhances the level of communication between IT staff and clients. The SIAM process that manages customer satisfaction will, in an omni-channel approach, use information from social media channels to automatically generate information about the status. In this area, the use of bots and robotic process automation (RPA) is also important.

Turning data into information with the use of artificial intelligence (AI) and big data will support the financial analysis and chargeback process. Seamless integration of the various processes will lead to service portfolio management that is much more customer-oriented, with faster and better aligned service delivery.

Eligibility Criteria

- Functional breadth of product offering;
- Use of modern technologies to reduce human intervention;
- Product strategy utilizing emerging technologies such as AI and machine learning (ML);
- Adoption of social media and omni-channel technologies;
- Customer relationships and experience;
- Use of templates and pre-defined routines, reusable use cases and other assets while installing the solution;
- Support capabilities in the U.S.

BUSINESS VALUE SERVICE MANAGEMENT

Observations

As with IT in general, there are possibilities of using emerging technologies. While the processes that form this quadrant's functional content focus on establishing communication between business users and IT, the platform solutions try to automate the repetitive requests.

Compared with last year's study, the quality of the solutions available has improved dramatically with the use of modern technologies. To plot all the suppliers on the chart, we had to adjust the maturity for portfolio attractiveness extensively. The results can only be compared partially with last year's results; simply comparing the two pictures will not deliver meaningful results. Vendor that appear to have lost ground, have also grown; it simply means that others have grown faster. The main reason for this observation is that small vendors in particular have their core capabilities in other quadrants.

Some of the key observations in this quadrant include:

- Request management is highly automated. Repetitive tasks are either implemented as one-click-requests using bots that are directly linked to service catalog or chatbots to automatically execute a sequence of tasks while interacting with an IT customer.
- Process integration is getting high scores across the board. As process automation can only happen with strong process integration, this area has seen high focus and investments. Also, in this area, platform functionality has increased heavily providing independent software vendors (ISVs), MSPs, and SIs with a strong foundation.
- Business process integration capability is improving. Demand acknowledge, especially demand fulfillment, delivers strong value when integrated with relevant HR processes, for instance automating the employee onboarding process. Such integrations are now available either through Integration-Platform-as-a-Service (IPaaS) or through traditional Exchange Bus solutions. Whichever technical solution is used, the result is strong integration capabilities, even with ERP systems.

BUSINESS VALUE SERVICE MANAGEMENT

Observations (cont.)

- IT service providers dominate this quadrant. With focus on maximizing efficiency in service delivery, IT service providers are always at the forefront of automation. As they operate large-scale infrastructures, they have had to raise the level of automation since inception and have the technical expertise for it.

Leaders in this quadrant are:

- **Capgemini** sees SIAM as a digital enabler. With agile methods and a strong DevOps approach it extends its digital ecosystem transformation initiative, supporting U.S. clients quickly capture the value of Digital SIAM. While supporting operations, the company enables a client to report optimal business results.
- **HCL**, as a leader in SIAM, offers SIAM solutions as a part of its DRYICE® division. This dedicated business unit uses new technologies to deliver AI-powered products and platforms. DRYICE® iAutomate, an intelligent runbook automation product, which brings AI and collaboration as key features into the automation domain is a good example of its performance.
- **Infosys'** core offering is the Enterprise Service Management (ESM) Café. This is an AI-powered solution built on a ServiceNow platform with over 60 deployment-ready apps. Even though ESM Café is a ServiceNow-based offering, Infosys also supports BMC environments. Its well-developed methodologies make it a leader in this quadrant.
- **Orange Business Services**, as a leader in this quadrant, has long years of experience in handling demand-oriented services. Being a leading global telecommunication provider, Orange understands the mass-volume request business in a business-to-consumer (B2C) environment. As a result, Orange's BVSM offering is a single, unified structured service catalogue that ensures easy and fast ordering of services across technologies.
- **ServiceNow**, being a leader in this year's study again, with its most recent release, New York, adds a strong mobile component to the already feature-rich solution. As BVSM is looking at IT outward oriented process integration of IT clients, the customer is the key component.
- **LTI** is this year's rising star in the quadrant. As all processes in this quadrant are used to communicate business requirements and convert them to relevant business services, its NLP driven Virtual Analyst Lymbyc LENI allows users to conversationally access information and insights. With this approach, LTI's clients are able to "do less, faster, better, more."

ORANGE BUSINESS SERVICES

Overview

To stay competitive, Orange Business Services is making significant investments in innovation centers with its extensive people resources. The company has built the expertise to serve its large number of clients and deliver professional services; it is becoming a major player in digital innovations and over the years has become the ideal partner in digital transformation.

Orange defines SIAM (or MSI, as the company calls it) as a solution that allows an enterprise to achieve seamless governance, unification, standardization and end-to-end management of their services. Within this set-up, business value service management is realized through joint opportunity assessments turning business demand into delivery services. Continual gap analysis ensures that defined services stay relevant even with changing business demands. This approach enables the company to secure value, mitigate risks arising out of misaligned services and accelerate service deployment.

Strengths

Strong experience in emerging technologies: As a ServiceNow Premier Service Provider Partner, the company integrates the ServiceNow functionality into its Service Management Suite.

Strong Governance approach in SD ensures BSVM compliance: Services are designed to provide business value and the company focuses on providing transition and transformation support.

Strong alliances: The company has numerous alliances with leading edge technology providers, which ensures continuous innovations in its solution offerings.

Caution

Orange Business Services solution is only available as a managed service, hence clients that are looking for a solution that they can use on their own will be discouraged from approaching the provider.

Orange Business Services does not offer its services to relatively small companies.



2020 ISG Provider Lens™ Leader

Orange Business Services' Joint Opportunity Assessment tool translates business demand into value-generating services.



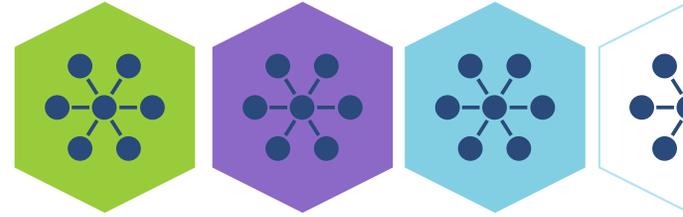
Methodology

METHODOLOGY

The research study “ISG Provider Lens™ 2020 – SIAM/ITSM” analyzes the relevant software vendors/service providers in the US market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of SIAM/ITSM 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



Authors and Editors



Lutz Peichert, Author

Executive Advisor, ISG Research

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

Lutz joined ISG in 2017 when ISG acquired Experton Group. From 2014 on Lutz served as a COO at Experton Group responsible for all research and consulting activities. Until mid-2014 Lutz worked as Vice President and Principal Analyst for Forrester Research, where he was responsible for the "Sourcing and Vendor Management" practice and also published Forrester's "SVM Practice Playbook". Prior to that he worked 10 years for META Group as a Principal Director within the CIO Consulting Division.

Lutz is an experienced speaker on national and international conferences, such as the National Dutch Outsourcing Conference, the German Computerwoche Forum, the Slovak CIO Conference and other events.

Lutz started his career in the late 1970ies as a system manager at the German Navy. He has a vocational diploma and has completed training as radio and TV technician.

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Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, services provider, ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric Archetype reports and the Quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

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