

ServiceNow Ecosystem Partners

An analysis of the ServiceNow ecosystem,
including providers' portfolio attractiveness and
competitive strengths

Customized report courtesy of:



Executive Summary	03
Provider Positioning	06
Introduction	
Definition	10
Scope of Report	12
Provider Classifications	13
Appendix	
Methodology & Team	42
Author & Editor Biographies	43
About Our Company & Research	45
Star of Excellence	39
Customer Experience (CX) Insights	40

ServiceNow Consulting Services	14 – 22
Who Should Read This Section	15
Quadrant	16
Definition & Eligibility Criteria	17
Observations	19
Provider Profile	22
ServiceNow Implementation and Integration Services	23 – 31
Who Should Read This Section	24
Quadrant	25
Definition & Eligibility Criteria	26
Observations	28
Provider Profile	31

ServiceNow Managed Services Providers	32 – 38
Who Should Read This Section	33
Quadrant	34
Definition & Eligibility Criteria	35
Observations	36
Provider Profile	38

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ServiceNow fuels and drives digital transformation, elevating enterprise success and user experience

In 2023, ServiceNow strengthened its partnership ecosystem by establishing strategic alliances with industry-leading service providers to deliver customized solutions to specific client needs. Collaborations with companies such as Accenture, Deloitte, Capgemini, TCS and IBM underscore its commitment to empowering organizations through innovative services and expertise. ServiceNow also expanded its service offerings, introducing specialized solutions for critical industries such as healthcare, finance and retail to address sector-specific challenges and drive digital transformation. These industry-specific and function-specific workflow solution bundles solidified ServiceNow's position as a leading provider of digital workflow solutions, empowering U.S. businesses to streamline

operations, improve efficiency and deliver exceptional experiences to the customers and employees of client enterprises. Recently, there has been an increased focus on strategic IT-OT-BT integrations, with initiatives from ecosystem partners and their client enterprises using ServiceNow to monitor environmental, social and governance (ESG) and governance, risk and compliance (GRC), as per the emerging regional market needs.

This year's focus centers on technology advancements through the ServiceNow Build on Now and Build with Now initiatives. There is also an emphasis on leveraging generative AI (GenAI) applications to support AI and ML use cases and applications, a predominant feature of the portfolio of new offerings. The Global Elite and Elite Service Provider partners of ServiceNow in the U.S. market have designed these enterprise-grade process and workflow automation solutions to be highly scalable and customizable, allowing enterprises to customize these solutions to meet their requirements. Whether organizations must process millions of transactional workflows daily or

Strategic delivery
partnerships
enrich ServiceNow's
**sector-specific
offerings.**



require advanced customization capabilities, service providers are focused on developing teams that can scale to meet unique and industry-specific client needs.

ServiceNow advancements and developments in the past 12 months

In 2023, ServiceNow introduced numerous features and capabilities designed to enhance the partner ecosystem's ability to better serve its clients. Its focus was on workflow engineering and integrating IT, OT and BT, with integrative modules poised to revolutionize digital workflows across various U.S. industries. The Vancouver release marked a significant milestone in ServiceNow's journey toward empowering organizations with enhanced automation, intelligence and flexibility. A standout feature of the Vancouver release was the Now Assist GenAI platform, which leverages advanced ML algorithms to automate repetitive tasks, provide intelligent recommendations and streamline decision-making processes. Additionally, ServiceNow introduced Build on Now and Build with Now offerings, empowering organizations to customize

and extend the platform according to their unique requirements. These offerings enable businesses to seamlessly develop custom applications, integrations and workflows, fostering innovation and agility.

ServiceNow further strengthened its partnership ecosystem by collaborating with leading technology providers and service partners on services and workflow innovations. These collaborations include building industry-specific solutions and pre-trained function-specific knowledge and workflow modules on the Now Platform. These strategic alliances enable ServiceNow to deliver comprehensive solutions tailored to specific industry needs, driving digital transformation and accelerating business growth. Through these initiatives, ServiceNow reaffirmed its commitment to empowering organizations in the U.S. to thrive in an increasingly complex and competitive digital landscape.

Its Document Intelligence solution and Document Understanding module, typically at the core of any business workflow and functions automation solution stack, are on

top of Now. Document Intelligence utilizes advanced ML algorithms to extract critical information from unstructured documents such as contracts, invoices and legal documents. The Document Understanding module streamlines document processing workflows by automatically identifying and removing relevant data points, reducing the need for manual intervention and minimizing the risk of errors. This feature enables organizations to accelerate document processing times, improve data accuracy and enhance compliance with regulatory requirements. This solution includes a Document Classification module, leveraging AI-powered classification algorithms to categorize documents automatically based on their content and context. By analyzing the text and structure of documents, the Document Classification module can identify patterns, keywords and metadata to accurately classify documents into predefined categories.

As the partner ecosystem showcased several customer case studies in the U.S. market this year, these features and modules prove particularly valuable for large ServiceNow client organizations dealing with large volumes of

documents across diverse business functions, such as finance, human resource and legal. Streamlining document processing and knowledge engineering, such as automatically classifying documents, enables organizations to seamlessly execute document retrieval, improve search capabilities and optimize document storage and organization. The knowledge extraction module, using AI-powered data extraction algorithms, enables organizations to extract specific data fields from documents, such as names, dates and amounts. This capability benefits organizations that must capture structured data from unstructured documents, including invoices and purchase orders. These features and functionalities are now widely adopted for solutions such as Order-to-Cash and Procure-to-Pay modules, which have become mainstream integrated workflow applications on top of ServiceNow as an enterprise platform. By automating the knowledge extraction and integration process, the partner ecosystem of ServiceNow organizations accelerates data entry tasks, reduces manual errors and improves data quality.



Unlocking enterprise efficiency: Integrating GenAI with ServiceNow for strategic insights and workflow optimization

By integrating additional GenAI functionalities into these modules, organizations can gain valuable insights into their document repositories. This integration enables them to search and identify complex and hidden trends, patterns, dependencies and anomalies within workflows. The insights module uncovers hidden insights that inform strategic decision-making and process optimization by analyzing metadata, usage patterns and content. Service providers utilize these patterns and metadata to help clients optimize their enterprise functions. Thereby, client organizations seamlessly incorporate these capabilities into their existing workflows, applications and business processes by leveraging the power of the ServiceNow platform in an integrated manner alongside AI and ML, deep learning and predictive analytics modules. This practice enables organizations to maximize the platform's potential across their entire enterprise, spanning customer service and IT operations, finance and legal departments. NLP and NLU technologies

empower these modules to automate integrated business processes and tasks, enhance decision-making processes and improve overall operational efficiency. With seamless integration with the ServiceNow platform and advanced customization capabilities, ServiceNow's solutions are poised to transform how organizations handle workflows, leveraging enterprise service and process knowledge repositories.

The latest release of ServiceNow's Now Assist platform, expanded in Vancouver, marks a significant advancement in service management solutions. With its innovative features and streamlined user interface, Now Assist promises to revolutionize how organizations handle their service operations. This release introduces cutting-edge capabilities such as AI-powered virtual agents, advanced analytics and enhanced automation, empowering businesses to deliver exceptional service experiences while optimizing efficiency and cost-effectiveness. The Now Assist platform's integration with ServiceNow's broader ecosystem further enhances its value proposition, enabling seamless collaboration

across departments and workflows. Its intuitive design and robust functionality make it a game-changer for businesses looking to elevate their service delivery capabilities. As ServiceNow continues to expand its presence in the U.S. market, clients are poised to benefit significantly from adopting Now Assist. Leveraging its capabilities can drive innovation, improve customer satisfaction and achieve operational excellence. Now Assist's potential to streamline processes, reduce response times and enhance overall service quality represents a compelling solution for U.S.-based ServiceNow clients seeking to stay ahead in today's competitive landscape. As organizations increasingly prioritize digital transformation and customer-centricity, Now Assist emerges as a strategic tool for driving success and staying ahead of the curve. Some forward-looking partners in the U.S. market are collaborating and working with ServiceNow. Firstly, they aim to build the talent pipeline equipped to drive GenAI application initiatives on Now Assist, and secondly, they advise on and implement industry and function-specific enhanced modules tailored for Now Assist.

Enterprises benefit from ServiceNow's strategic alliances, accessing AI-driven, industry-customized workflows to enhance agility, efficiency and productivity in IT and non-IT digital operations.




Provider Positioning

Page 1 of 4


	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Accenture	Leader	Leader	Leader
Aspire Systems	Product Challenger	Contender	Product Challenger
Capgemini	Leader	Leader	Leader
Cask	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
EPI-USE	Not In	Contender	Contender
Eviden (an Atos Business)	Product Challenger	Product Challenger	Product Challenger



 Provider Positioning


	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Evoke Technologies	Contender	Not In	Not In
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Market Challenger	Not In	Not In
Genpact	Product Challenger	Product Challenger	Product Challenger
GlideFast	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
HGC Technologies	Contender	Not In	Not In
IBM	Leader	Not In	Not In
Infosys	Leader	Leader	Leader



 Provider Positioning

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
INRY	Product Challenger	Product Challenger	Product Challenger
Jade Global	Rising Star ★	Rising Star ★	Product Challenger
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Product Challenger	Rising Star ★
LTIMindtree	Leader	Leader	Leader
NTT DATA	Leader	Not In	Market Challenger
ProV	Not In	Contender	Contender
RapDev	Not In	Product Challenger	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Rising Star ★	Leader	Leader



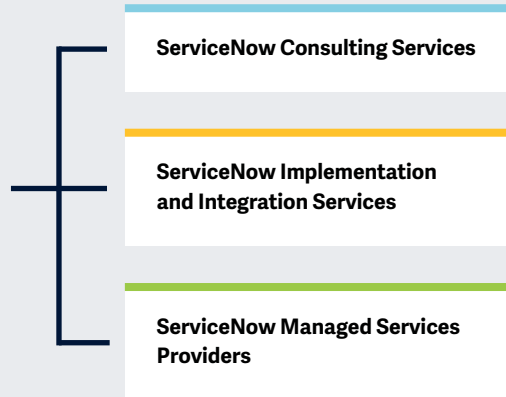
 Provider Positioning

	ServiceNow Consulting Services	ServiceNow Implementation and Integration Services	ServiceNow Managed Services Providers
Trianz	Product Challenger	Product Challenger	Product Challenger
Unisys	Not In	Product Challenger	Product Challenger
UST	Product Challenger	Not In	Product Challenger
Wipro	Leader	Leader	Leader
YASH Technologies	Not In	Product Challenger	Product Challenger



Key focus areas for ServiceNow Ecosystem Partners.

Simplified Illustration Source: ISG 2024



Definition

ServiceNow continues to experience substantial growth, recording revenue of \$2,150 million in the second quarter of 2023, a 23 percent YoY increase. This growth demonstrates ServiceNow's ability to meet customer requirements.

ServiceNow adoption and workflow engineering trajectory indicate a future where enterprise clients consistently optimize efficiency by embedding technology components. Service providers are pivotal in crafting these tailored, intelligent workflow solutions that propel businesses forward in the competitive digital economy. Service providers are responding positively to these shifts by adopting ServiceNow capabilities to develop bespoke solutions catering to the needs of vertical industries. A growing trend toward industry-specific workflows is evident through strategic acquisitions and partnerships to enhance domain expertise. Growing demand from enterprise clients is driving service providers to explore GenAI and ML capabilities, adding predictive and prescriptive analytics into workflows to facilitate smarter and more

proactive operations. ServiceNow's Now Platform introduces GenAI features, such as Case Summarization and Text-to-Code, integrated into all workflow offerings. These capabilities leverage ServiceNow's proprietary large language models (LLMs) and are purpose-built for the ServiceNow platform, reducing repetitive work and significantly improving productivity.

ServiceNow recently announced the Vancouver release, with a heightened focus on GenAI, broadening the customer engagement opportunities for the vendor with a growing customer set.

Strategic consolidation of partner programs indicates platform maturity and the evolution of service offerings, competence and innovation, all focused on delivering connected value. The technology and industry inclusion in workflow engineering aligns with market demand.

ServiceNow is transitioning from being a preferred ITSM process management tool to an enterprise-wide portfolio operations tool that drives a comprehensive customer-business-creator experience and value.



Key ServiceNow announcements in the past 12 months included a deepened relationship with NVIDIA and a revamped and realigned partner engagement model. This partner relaunch has enabled ServiceNow to improve partner-centric activities by realigning incentives and program details to maximize mutual benefits. ServiceNow partners have responded positively to the new program, gaining clarity on tiers and incentives, which is the most important factor.

The ISG Provider Lens™ ServiceNow Ecosystem 2024 study analyzes services and offerings from ServiceNow partners in the U.S., Brazil, Europe and Australia, focusing on select segments. Enterprises seek accredited and reliable professional services (in multiple segments that ISG analyzes individually) to fully utilize ServiceNow's expanding functionalities, ranging from process redesign and software implementation and integration to increased application management and

training requirements. Partner companies' focus is indicated by their various offerings and certification levels, which can cover full-scale lifecycle support and specific services for distinct tasks.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: ServiceNow Consulting Services, ServiceNow Implementation and Integration Services, and ServiceNow Managed Services Providers.

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

- Transparency on the strengths and weaknesses of relevant 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.
- **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).

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.





Provider Classifications: Quadrant Key

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

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

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

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

★ **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.





ServiceNow Consulting Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating providers offering ServiceNow consulting services. In this quadrant, ISG highlights the current market positioning of these providers for U.S. enterprises and how each provider addresses critical challenges faced in the region. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape in the U.S.

In mature markets, including the U.S., enterprise clients seeking ServiceNow consulting services prioritize comprehensive capabilities such as the ability to develop long-term roadmaps, transform processes and demonstrate proven execution skills.

Enterprises require ServiceNow consulting services to leverage the transformative power of AI and ML, the rise of which presents a major opportunity for enterprises to automate workflows, gain better business insights, enhance operational efficiency and achieve higher CSAT. Enterprises are focused on obtaining optimal results using ServiceNow's capabilities, including Now Assist, to harness GenAI and elevate overall productivity.



Strategy professionals should read this report to understand the trends and changing patterns in the ServiceNow consulting area.



IT and business professionals should read this report to understand the design framework, evaluation methodologies, maturity and complexity of processes associated with ServiceNow adoption in industries.

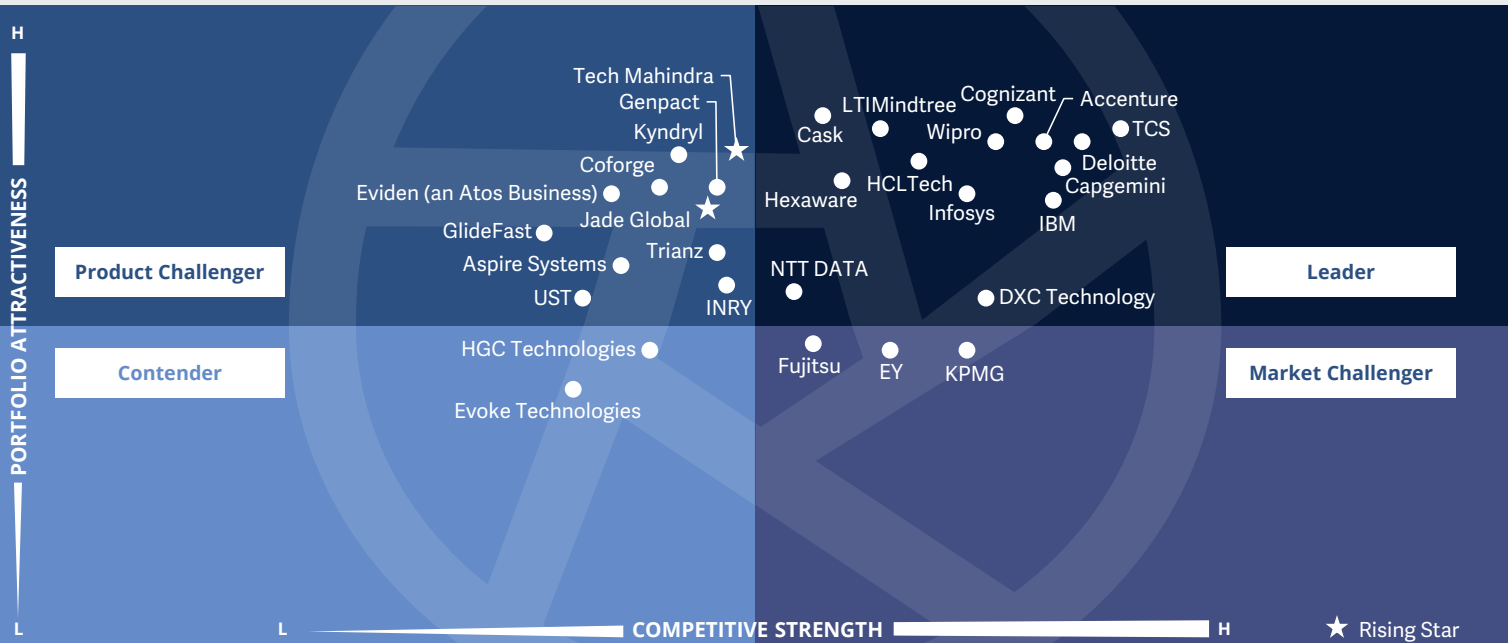


Technology professionals should read this report to learn about industry-specific solutions and providers' prowess in conducting consulting assignments for diverse industries.



Digital transformation professionals should read this report to know how service providers design ServiceNow solutions and map respective technologies.





This quadrant assesses providers' capabilities to **drive transformation and modernization** in the **enterprise workflow landscape** using the ServiceNow platform. This includes **introducing new technologies**, enhancing business service capabilities, and managing customer and IT services.

Tapati Bandopadhyay



ServiceNow Consulting Services

Definition

This quadrant assesses consulting service providers that help clients prepare for workflow management services. ServiceNow consulting services are gaining traction, with two main drivers: the company's growth regions and new offerings and because of new economic realities that raise enterprise emphasis on cost optimization. Many clients will face budget restrictions, emphasizing preserving existing investments.

Newer and strategic functionalities on the ServiceNow platform, including those in non-IT HR, finance, legal, facilities, environment, sustainability and governance (ESG) and governance, risk and compliance (GRC) workflows, are rapidly gaining importance as key priorities for clients across regions. Clients aspire to maximize operational and strategic value from their existing enterprise platform, which remains a fundamental aspect of their future strategy.

Strategic ecosystem partners in both IT and non-IT services identify and realize integrated workflow engineering opportunities for their clients.

Clients prefer consulting companies that have already invested in reference models and assessment methodologies, industry-specific benchmarking data and capabilities and have referenceable peers and verifiable outcomes from the platform. This enables these providers to understand clients' maturity and current challenges. Service providers should possess comprehensive knowledge of ServiceNow's technical capabilities and future releases, including new features, modules and technology solutions, such as Now Assist with GenAI capabilities. These tools help in designing non-linear workflow transformation solutions and deploy strategic platform value streams and road maps.

Utilizing ServiceNow as the primary enterprise engagement platform presents both challenges and opportunities. The platform's new functionalities in customer services, facility management, field services and ESG compliance offer various potential use cases. Designing road maps that maximize the platform's value for organizations is essential.



Eligibility Criteria

1. Use of reference models, templates and frameworks: **Implementing best practices** for opportunity identification and assessments for new **ServiceNow competencies**; **providing frameworks and tools for ROI and business case development** and benchmarks for realizing value
2. Experience in broad workflow and service management: **Designing client road maps** to use ServiceNow as an integrated "platform of platforms" for major enterprise business operations, IT services, **ESG and integration with GRC** and security policies
3. Ability to predict and leverage long-term disruptive technological developments: Using **integrative platforms capabilities** across technology ecosystems, including identifying opportunities for disruptive AI applications, such as **GenAI, transformers and LLMs; employing tools and methodologies** for market intelligence analysis with ML; actively participating in new-age technology communities and knowledge forums
4. Knowledge of ServiceNow capabilities and other tools: Understanding different releases, functional and **business processes supported** by ServiceNow, and expertise in ITSM and ITOM; specialization in areas such as **CSM, HR, F/A, facility management, ESG and security**
5. Strategic approach and knowledge utilization of ServiceNow, Now Platform and Now Assist in different industry scenarios: Providing **strategic guidance in vision and mission**; developing **industry-specific solutions**, such as in BFSI, healthcare, manufacturing and telecommunications; engaging in rapid engineering, experimentation and development, with new functionalities, for instance, GenAI on Now Assist
6. Possess relevant certifications: Holding ServiceNow **certifications and workflow badges**, expertise in ITIL 4, COBIT, DevOps and ESM-related accredited experience, ESG and GRC-related capabilities, integration experience and industry and region-specific regulatory knowledge
7. Experience in organizational change principles and practice: **Planning, delivering and supporting organizational changes** with proven case studies and client storyboards from various industries; **adoption and platform performance assessments** by industries of different sizes and levels of maturity



ServiceNow Consulting Services

Observations

ServiceNow has emerged as a crucial platform for enterprises seeking to streamline operations and enhance service management across various domains. In the U.S., the ServiceNow consulting space is witnessing significant trends that reflect the evolving demands of enterprise clients and innovative approaches by service providers. These trends shape how services are delivered, offering more value, efficiency and customization to meet the complex needs of businesses undergoing digital shifts. Critical trends in the ServiceNow consulting space in the U.S. include:

Focus on customized solutions and integration services: There is a growing demand for tailored ServiceNow solutions closely aligned with specific business needs and objectives. Service providers focus on custom application development and integration with enterprise systems, emphasizing flexibility and customization to fully optimize workflows using ServiceNow.

Adoption of industry-specific frameworks:

ServiceNow consultants are developing sector-specific frameworks for industries such as healthcare, finance and education, offering more relevant ServiceNow implementations. This approach aims to drive value and compliance, reflecting an understanding of sector-specific needs.

Emphasis on strategic technology advisory, change management and business transformation consulting: Beyond technical implementation, consultants are focusing on strategic advisory, governance and managing the change process. This holistic approach ensures the effective adoption of ServiceNow solutions, considering the human and cultural aspects of transformation.

From the 35 companies assessed for this study, 30 qualified for this quadrant, with 14 being Leaders and two Rising Stars.

accenture

Accenture, recognized as ServiceNow Worldwide Partner of the Year 2023, continues to differentiate itself as a leading service provider across industries. It delivers innovative client solutions by uniting its strategic business units, multifunctional teams and industry strategists.

Capgemini

Capgemini drives ServiceNow consulting with an innovation-centric approach. Its accelerators, such as ASE (Accelerated Solutions Environment) and People Experience Labs, bring together the right people and immersive technology to enable cocreation, stakeholder alignment and visualization of future experiences.

Cask

Cask's ServiceNow consulting services combine extensive technical knowledge and deep functional know-how to enable clients to drive digital transformation and hyperautomation through ServiceNow. It is reputed for its expertise in the government and healthcare verticals.

cognizant

Cognizant focuses on expanding its ServiceNow consulting capabilities, giving clients access to a wider certified resource pool. It continues to enhance its advisory practice with proven functional and cross-industry expertise.



Deloitte.

In partnership with ServiceNow, **Deloitte** equips organizations to navigate continuous disruptions through innovative intellectual property and essential tools. Its ServiceNow Assets & Solutions Group (ASG) offers industry-specific, GenAI-infused solutions.

DXC TECHNOLOGY

DXC Technology leverages multi-industry expertise and strong technical knowledge to strengthen its ServiceNow consulting offering. It bolsters clients' confidence through proactive risk mitigation advisory, helping achieve significant cost and value advantages.

HCLTech

HCLTech's ServiceNow consulting solutions enable clients to strategize and realize value through its ValueNow Assessment Framework. Its domain-expert-led CoEs for product lines, GenAI capabilities and industry solutions maximize platform adoption and innovation.

HEXAWARE

Hexaware's ServiceNow consulting focuses on diagnosing client challenges and assessing maturity levels to tailor the ServiceNow platform adoption. It is committed to process harmonization and service transformation, driving seamless platform convergence to boost business efficiency and innovation.

IBM

IBM continues differentiating its ServiceNow consulting offering by combining clients' systems and data with its deep ML algorithms to curate and create tailored solutions. It delivers unique solutions across customer, employee and technology workflows.

Infosys

Infosys is expanding its ServiceNow offerings with RapidFlow, a practice dedicated to developing vertical industry solutions beyond IT. Leveraging GenAI for cost efficiency and driven by seasoned experts, Infosys delivers specialized services across SecOps, Integrated Risk Management (CSM), Integrated Risk Management (IRM), Human Resource Service Delivery (HRSD), IT operations management (ITOM) and IT business management (ITBM).

LTIMindtree

LTIMindtree advances ServiceNow consulting by integrating proprietary frameworks for aligning service delivery with business processes, driving transformative outcomes. Their approach prioritizes end-user satisfaction, combining innovative solutions with a focus on enhancing the overall experience and business impact.

NTT DATA

NTT DATA leverages deep platform expertise to optimize ServiceNow for clients, driving digital transformation and operational excellence with a focus on strategic value and innovation. It has progressively moved from a Market Challenger in 2023 to a Leader in 2024.

TCS TATA CONSULTANCY SERVICES

TCS leads in ServiceNow consulting by merging thought leadership with deep industry insights, particularly in manufacturing, life sciences, telecom and media. It specializes in modernizing enterprise processes and addressing unique industry challenges with tailored solutions.



ServiceNow Consulting Services



Wipro leverages digital design thinking to enable clients to optimize ServiceNow investment. Extensive domain expertise and innovative use of GenAI within ServiceNow position Wipro as a catalyst for efficient, future-ready transformations in key industries.

Jade Global

Jade Global (Rising Star) enriches its ServiceNow consulting practice with insights gained from developing solutions for ServiceNow itself, further strengthened by its mastery of complementary technologies. This unique quality helps deliver exceptional results for clients.



Tech Mahindra (Rising Star) empowers the adoption of new-age technologies in AIOps, ZeroOps and process automation. Its Cognitive Service Management framework enables clients to leverage ServiceNow as a platform of choice for seamless end-to-end service delivery.



Capgemini



“Capgemini has a strong ServiceNow consulting talent pool, now available in the U.S. market, enabling clients to access industry and domain-specific experienced resources.”

Tapati Bandopadhyay

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. The company's expansive consulting practice spans from strategy to execution, with industry-specific offerings and deep technology expertise. Capgemini operates three delivery centers in the U.S., with two in Texas and one in Florida, supported by global delivery centers in Brazil, Canada, India and Morocco.

Strengths

Industry talent pool in the U.S.: Capgemini's ServiceNow consulting practice has made significant strides in the U.S. market this year, enriching its talent pool with deeper domain- and industry-specific expertise.

Innovative solutions and benchmarking: Capgemini has unveiled innovative solutions in the ServiceNow ecosystem for the U.S. market to enhance clients' digital transformation. Leveraging ServiceNow's cutting-edge platform and incorporating complex AI and predictive analytics features and modules from San Diego, Utah and now Vancouver releases, the company introduced tailored offerings focused on streamlining IT and business service operations and workflows.

Focus on enhanced EX as key platform

outcomes: Capgemini has intensified its focus on optimizing EX and bolstering customer service capabilities. These advancements underscored the company's commitment to delivering comprehensive solutions that empower organizations to navigate complex challenges effectively. This drive toward operational efficiency fosters sustainable growth in the rapidly evolving client business landscapes in the U.S.

Caution

Capgemini can further augment its positioning and messaging in the U.S. market by codeveloping value propositions for its ServiceNow consulting practice and presenting them alongside its large, established clientele in the region.





ServiceNow Implementation and Integration Services

ServiceNow Implementation and Integration Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating ServiceNow implementation and integration services providers.

In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow implementation and integration services to U.S. enterprises and how each provider addresses regional challenges. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape in the U.S.

Enterprises seek implementation service providers to unlock the ServiceNow platform's complete potential, extending beyond initial use cases to sustain continued productivity gains. Issues such as limited resources, change management hurdles and budget constraints acting are challenges to broader adoption.

Therefore, enterprises require service providers that can offer strategic guidance and ensure cross-functional alignment, enabling them to maximize their ServiceNow investment. Enterprises understand the need for innovation and adaptability to emerging trends required for leveraging ServiceNow capabilities. They expect service providers to stay informed of the platform's evolving technology landscape and complexities. As ServiceNow continues to evolve rapidly, enterprises seek service providers that can implement and optimize the platform to meet their growing business requirements.



Strategy professionals should read this report to choose the right systems integration partner to develop a long-term technology roadmap for ServiceNow implementation.



Technology professionals should read this report to gain insights into the latest technology trends and patterns aligned with their business goals.

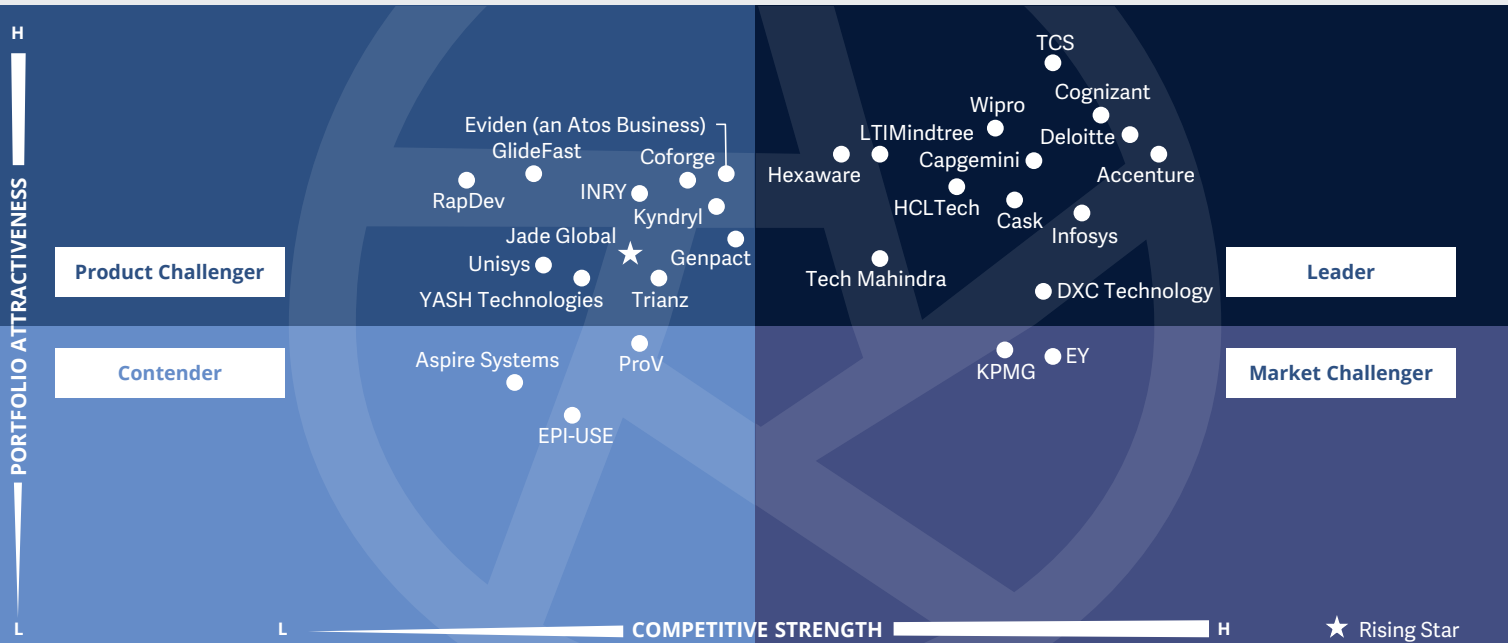


Engineering professionals can use this report to understand the developments in software solutions so they can invest in and build intellectual properties and accelerators for cloud platforms and various industries.



ServiceNow Ecosystem Partners
ServiceNow Implementation and Integration Services

U.S. 2024



This quadrant assesses service providers' integration and configuration competencies for **implementing ServiceNow solutions and offerings**. The focus is on simplifying the complexity between ServiceNow and various business systems, **aiming to build enterprise process resilience**.

Tapati Bandopadhyay



ServiceNow Implementation and Integration Services

Definition

ServiceNow serves as the central system that brings together external and internal clients, fulfilling requirements without adding to the organization's internal complexity. Implementing such an intelligent workflow platform in a complex enterprise requires expertise, experience and specialized capabilities for seamless integration with other applications, software and tools, minimizing data reformatting. The focus is on deploying industry-specific and functional solutions on the ServiceNow platform using newly added capabilities, which have become a growing strategic differentiator.

To meet the growing technical and business requirements, service providers must have reliable methodologies and an agile workforce trained in modern techniques and capable of rapid scaling. They also require excellent capabilities in system architecture, deep coding experience for low/no-code developments and a thorough understanding of AI and ML to embed intelligence into decision-making processes and simplify complex tasks.

Multicloud, multitenant architectures are highly complex, and the growing cybersecurity concerns prompt clients to seek highly efficient service providers. Service providers should also focus on obtaining certifications to demonstrate their credibility to clients.

Integrating advanced AI and ML capabilities on the ServiceNow platform, including the GenAI applications within the Now Assist modules, is quickly emerging and enabling the engineering and development of augmented enterprise workflows. These applications are built and tested in industry-specific solutions and services as well as technology services.



Eligibility Criteria

1. Use of predefined solutions, accelerators and templates: **Experience in Agile project management** (PMP certifications, SAFe and Scrum), continuous integration/continuous development, **DevOps best practices and toolchains**, proficiency in containerization platforms, application performance monitoring and platform-specific operation management tools
2. Experience with emerging technologies, including GenAI on Now Assist: experience in **enterprise shared services/ BPO, cloud and multicloud integration**, E2E management for ML techniques and **NLP and AI capabilities paired with cognitive computing to enable digital service management (DSM)**, virtual agents and self-service; expertise in enterprise workflow transformation and **cognitive knowledge leverage** applications experimented and developed using **GenAI services and the Now Assist** platform; experience in design and development across personas, such as customers and employees, **developing autonomous and automated experience delivery solutions**
3. Speed of adoption and value realization: **Deploy new features, modules and enhancements** on the ServiceNow platform in a **cost-effective and efficient manner**
4. Ability to offer maintenance support: Support with installations, **upgrades and new feature/module release management**, migration, patch management, lifecycle management for ServiceNow instances and maintenance after **ServiceNow release migration**
5. Size and capabilities of local and global delivery teams: **Expertise in relevant ServiceNow technologies**, such as API development, JSON and Python
6. Experience in system, data and process integration: **Integration with the hub-and-spoke model** at various levels (starter, standard, professional and enterprise)



ServiceNow Implementation and Integration Services

Observations

ServiceNow has recently revamped its strategy to evolve partner profiles significantly through a new structure that emphasizes competencies and capabilities. Service providers in the U.S. market position ServiceNow as a key driver of digital business transformation and process engineering. Due to the diverse and disparate technology ecosystems, including cloud services, addressing technical and technological complexity remains a critical challenge for service providers, further complicating the market landscape.

Demand for ServiceNow experts and new competencies: The surge in ServiceNow's popularity and complexity has accelerated the demand for skilled professionals and partners possessing new certified badges and product line achievements for specific geographies.

Validated badges from customers are becoming increasingly crucial. Partner segments specializing in building, consulting and implementation play a critical role in delivering ServiceNow applications and modules. Service providers and enterprise clients seek certified

ServiceNow developers, administrators, consultants, Certified Master Architects, Certified Technical Architects and project managers capable of delivering high-quality solutions and services.

Implementation of ServiceNow products and industry solutions: ServiceNow offers a wide range of products that cover various domains, including IT, HR, customer service, security, risk and governance. Service providers are strategically adopting more product line certifications to enhance their digital capabilities and streamline workflows. Some of the most popular products include IT service management (ITSM), IT operations management (ITOM), IT business management (ITBM), customer service management (CSM), security operations (SecOps), and governance, risk and compliance (GRC).

ServiceNow — the platform of innovation and engineering: Positioned as a tool for automation, orchestration, innovation and transformation, the ServiceNow platform is instrumental for providers and enterprise clients alike. Leveraging the platform, they

create custom applications, integrations and extensions tailored to address specific business needs and challenges. Moreover, the platform serves as a catalyst for enabling new business models, such as service orchestration, service brokering and service aggregation.

From the 35 companies assessed for this study, 29 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture, acclaimed as the 2023 Worldwide IT Workflow Partner of the Year, leads in ServiceNow implementations. Its full-spectrum partnership with ServiceNow ensures seamless service and multifunctional integration, accelerating value through prebuilt automation libraries and accelerators.



Capgemini differentiates its ServiceNow implementation offering through a strong focus on CX. Its People Experience with ServiceNow solution unifies disparate workplace technologies to enable end-to-end people-driven operations on a single platform.



Cask seamlessly integrates and implements ServiceNow's Now Assist capabilities into clients' existing systems and workflows, drawing upon its deep integration expertise. It leverages Now Assist as a foundation for engineering industry-specific solutions for client enterprises.



ServiceNow Implementation and Integration Services



Cognizant has significantly invested in expanding its service delivery centers worldwide, supporting ServiceNow implementations. The company is expanding the Now Platform's role within its AI-led Neuro® Suite for IT operations to drive end-to-end digital transformations.

Deloitte.

Deloitte drives ServiceNow implementations with a focus on GenAI and sector-specific strategies. Its Intelligent Delivery Platform (IDP) and ServiceNow Assets & Solutions Group (ASG) synergize innovative ServiceNow solutions and industry expertise.



DXC Technology excels in sophisticated ServiceNow implementations, leveraging proven integration, analytics and intelligence capabilities for customers across high-technology industries. It focuses on enabling customers to strategically mature digital environments over time.



HCLTech intensifies its focus on non-ITSM and industry-specific offerings, allowing customers to consolidate digital enterprise tools via ServiceNow. The company stands out for its expertise in implementing touchless autoremediation, GenAI and hyperautomation features.

HEXAWARE

Hexaware is elevating ServiceNow implementations with custom solution architecture and bespoke implementations, including specialized application development and an automation bot factory. Its approach focuses on supporting global businesses with scalable and agile ServiceNow solutions crafted for diverse enterprise needs.



Infosys enhances its AI-powered ESM Café, offering a comprehensive AIOps framework and pre-packaged solutions for swift ServiceNow implementations. It ensures rapid deployment and enhances operational intelligence through predictive analytics and service outage prevention.



With its CoE, ExcellenceNow, **LTI Mindtree** delivers ServiceNow implementation through expert insights, best practices and continuous innovation. Its investment in CoE for customer service management (CSM) and IoT, coupled with AI capabilities, ensures advanced, scalable solutions tailored to specific industry needs.



TCS' ServiceNow implementations leverage the Crystallus™ suite and Agile Innovation Cloud framework, focusing on cross-skilling and local talent to modernize enterprise processes. Its approach emphasizes rapid, outcome-focused innovations and GenAI utilization to enhance service management across domains.



Tech Mahindra has progressed from a Market Challenger in 2023 to a Leader in 2024, transforming its ServiceNow implementation expertise. The shift in focus from cloud and infrastructure-only to digital enterprise application workflows marks a strategic evolution.



ServiceNow Implementation and Integration Services



Wipro's implementation framework combines ServiceNow with proven frameworks and solutions, such as Intelligent Operations Management, Boundaryless Enterprise on NOW and CyberTransform. This holistic approach aims to achieve digital transformation and operational excellence.

Jade Global

Jade Global (Rising Star) leverages a suite of accelerators for ServiceNow implementations for ITSM, ITOM, CSM and HRSD modules. Solutions, including intelligent document processing and enterprise mobility tracking, are tailored to specific industry needs.





“Capgemini has proven ServiceNow implementation and scope augmentation capabilities, which is evident through enduring engagement models with marquee large enterprises in the U.S.”

Tapati Bandopadhyay

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Capgemini strategically develops industry-specific solutions to bolster ServiceNow implementations for clients, offering specialized services such as Future Franchise for hospitality and clinical service orchestration for life sciences. The company operates three delivery centers in the U.S., two in Texas and one in Florida, and is supported by global delivery centers in Brazil, Canada, India and Morocco.

Strengths

Industry solutions implementation:

Capgemini focuses on leveraging ServiceNow's latest platform capabilities to solve non-IT or IT-business technology challenges in collaboration with clients' operational needs. The company has advanced its industry-specific tailored solutions to optimize IT service management, enhance employee productivity and elevate overall CSAT.

AI and analytics integration: By harnessing cutting-edge GenAI integrated modules from ServiceNow's latest releases and its industry expertise, Capgemini's implementation teams are at the forefront of driving digital transformation across various sectors.

Strategic expansion focus:

Capgemini's ServiceNow implementation services in the U.S. market involve a series of strategic initiatives aimed at transforming client workflows and enhancing digital experiences. It has strategically expanded its ServiceNow platform portfolio of solutions and capabilities within large and proven U.S. client accounts, including one of the world's largest U.S.-headquartered quick service restaurants.

Caution

Capgemini should strategically highlight and communicate its engineers' domain-specific expertise and collective ServiceNow experience through impactful storyboards tailored for the U.S. market. This approach will showcase its expertise, creating a compelling narrative that resonates with potential clients and stakeholders.





ServiceNow Managed Services Providers

ServiceNow Managed Services Providers

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating companies that provide ServiceNow managed services. In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow managed services to U.S. enterprises and how each provider addresses regional market challenges. ISG defines the current positioning of these providers, with a comprehensive overview of the market's competitive landscape in the U.S.

Managed service providers (MSPs) play a major role in facilitating digital transformation initiatives within enterprises using ServiceNow, presenting significant opportunities for enhancing competitiveness in an evolving business landscape. Enterprises seek MSPs that can provide a skilled and adaptable workforce with technical expertise and a deep understanding of their specific needs and objectives.

Given ServiceNow's ongoing evolution through the introduction of new features and functionalities, it is imperative for service providers to stay updated. To achieve this objective, providers must invest in continuous training and certification programs to ensure their teams possess the necessary skills and knowledge to deliver enhanced support services.



Strategy professionals should read this report to understand service providers' capabilities to manage and support the maintenance of ServiceNow solutions across portfolios.



Service delivery professionals should read this report to understand how ServiceNow managed service providers retain their credibility and service quality.

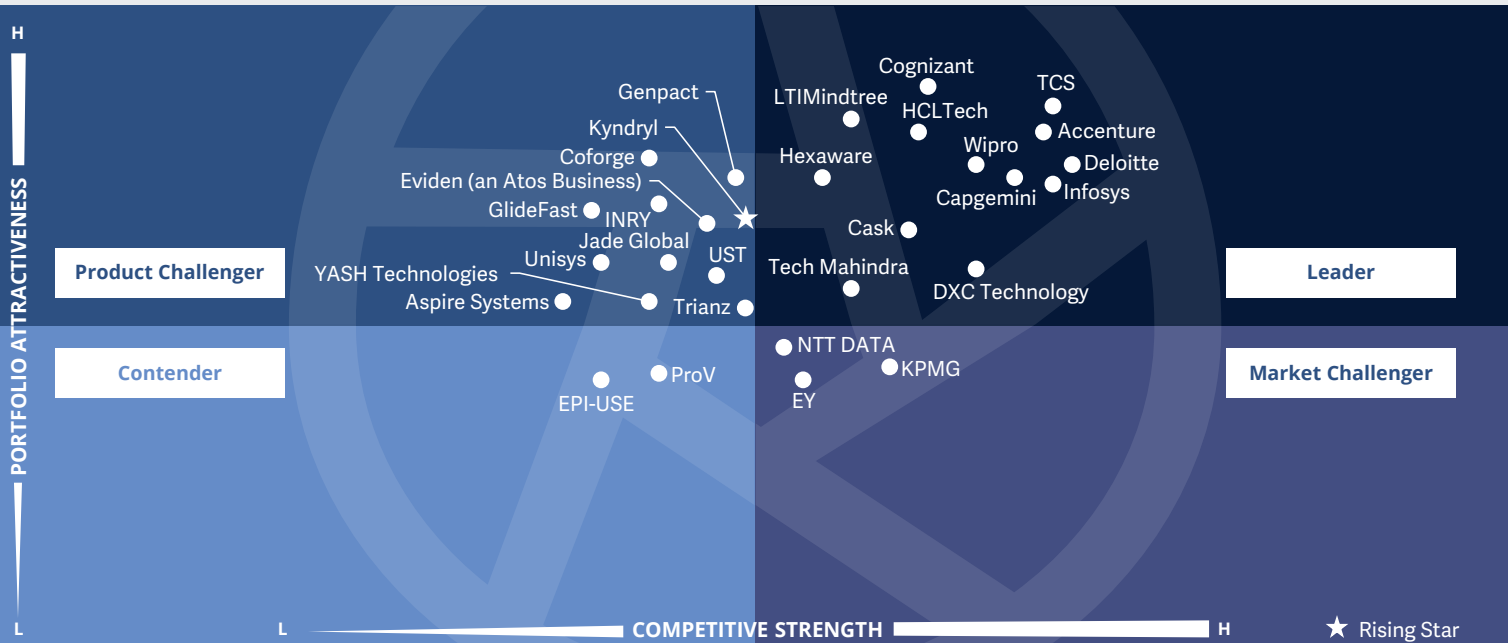


Service line and functional professionals should read this report to rationalize the fitment of ServiceNow resources and workflows across services.



ServiceNow Ecosystem Partners
ServiceNow Managed Services Providers

U.S. 2024



This quadrant assesses service providers' capabilities to **manage the ServiceNow environment post deployment**, including customized solutions. Enterprise clients are increasingly prioritizing **optimized cloud operations and FinOps** for enhanced efficiency and financial management.

Tapati Bandopadhyay



ServiceNow Managed Services Providers

Definition

This quadrant assesses providers based on their ability to offer managed services for maintenance and support functions, including monitoring, remote support and centralized management of the Now platform, workflows and associated applications.

With the growing popularity of the DevOps method, managed service providers are expected to comply with a new set of requirements. These providers need to be prepared for the platform's continuous evolution, which can challenge the status quo of the existing solution and manage two new releases in a short period.

Considering the complexity of workflows that require support, providers must deliver services globally and across different organizational domains. They must manage a highly sophisticated and integrated application landscape, demonstrating how they operate within or integrate with a multivendor environment.

When analyzing providers in this quadrant, factors such as maintenance effectiveness, data quality management, data security and compliance are taken into account. Managing multicultural aspects, especially in nearshore/offshore delivery cases, is as important as offering different deployment options, considering potential data privacy and residency concerns. Offering different pricing options due to the new economic situation in many countries is also significant.

As ServiceNow increasingly becomes the unified enterprise platform, effectively managing its lifecycle and services assets built and operated on top of it poses a critical challenge along its long-term maturity curve. Evaluating the platform costs and license management versus the value and ROI realization of the strategic platform assets is also essential, considering CloudOps and FinOps capabilities on the platform. Managing the risks associated with critical features and workflows on the platform is another essential capability required for effective RiskOps.

Eligibility Criteria

- 1. Experience with support:** Involves extensive experience with ServiceNow's Now platform, workflows, third-party applications, integrators and accelerators, newly released features/ modules and upgrades
- 2. Delivery capabilities:** Efficient delivery with proximity to clients
- 3. Technology partnerships:** Partnerships with key software providers and a comprehensive application management service (AMS)- related portfolio
- 4. Service integration and management (SIAM) and delivery models:** Expertise in managing ServiceNow in broader applications under CloudOps, such as AIOps, MLOps, FinOps, RiskOps and ITOps
- 5. Delivery and contract models maturity:** Ability to
- 6. Broad customer base:** Includes local use cases and references
- 7. Intelligent, adaptive and progressive maintenance:** In sync with upgrades and functionality enhancements from ServiceNow and technology ecosystems and with service integrators, in-house engineering teams, external partners and specialized tool providers
- 8. Ability to manage decentralized deployment within the organization:** Adoption of low-code/no-code and citizen developer techniques; offering training for identification and delivery; providing user knowledge updates on new releases, versions, features



ServiceNow Managed Services Providers

Observations

Enterprise clients actively seek strategies to consolidate, standardize, enhance and optimize their global service delivery. ServiceNow stands out as a unified platform capable of integrating multiple systems, data sources and partners, offering visibility, governance and automation in service delivery. Furthermore, ServiceNow empowers enterprises to leverage AI and ML capabilities to augment service quality, efficiency and innovation.

Evolving service delivery narratives: There is a noticeable paradigm shift in how ServiceNow is perceived in business transformation journeys among service providers and enterprise clients. Moving beyond the traditional *implement-manage-maintain* approach, the focus has shifted toward *amplify-innovate-personalize*. This transition signifies a move toward exploring new, highly customized and personalized solutions on and with ServiceNow. It repositions the platform as a pivotal digital engineer for managing internal and external workflows.

Growing importance of FinOps: In the quest to optimize licensing expenditures, FinOps solutions are becoming increasingly crucial. Service providers now offer tailored FinOps strategies to optimize ServiceNow licensing costs and maximize return on investment for platform implementations. These strategies leverage detailed insights into ServiceNow's usage and billing metrics, aligning investment with actual requirements for efficient license management and cost optimization. Service Providers are also integrating licenses from various systems and software, including ERP, CSM and workflow management platforms, to develop comprehensive enterprise-level value propositions.

Emergence of new managed services streams: The shift toward digital business transformation fosters customization and personalization, necessitating the development of new applications and solutions. Residing on the Now Platform, these applications incorporate automation and AI components, demanding enhanced support and maintenance. Consequently, service providers are expanding

their offerings to include post-deployment support engagements, focusing on AI models, automation and data management. From the 35 companies assessed for this study, 30 qualified for this quadrant, with 13 being Leaders and one a Rising Star.



Accenture's ServiceNow managed services transform workplace experiences, creating a future-ready management system with ServiceNow's Workplace Service Delivery solution. This transformation enhances customer and agent satisfaction while reducing costs through integrated services, proprietary intellectual property and accelerators.



Capgemini leverages its business case centers, people analytics labs and experience management office to establish interactive dashboarding and reporting capabilities and track experience KPIs. These solutions enable clients to demonstrate true value realization through their ServiceNow implementations.



Cask continues to expand Cask Reserve, its ServiceNow managed services capability and Tech Direct, a dedicated expert team of consultants. Such initiatives enable clients to leverage Cask's ServiceNow technical capabilities to improve ServiceNow results continually.



Cognizant's ServiceNow managed services focus on transforming infrastructure and workplace management with the Now Platform. Its AI-led Neuro® Suite for IT operations enables full monitoring and automated detection and resolution of operation incidents.



Deloitte integrates ServiceNow managed services with Now Assist GenAI capabilities, offering end-to-end operational services. This integration blends domain expertise with advanced AI for superior service management, enhancing service delivery and operational excellence for clients.



ServiceNow Managed Services Providers

DXC TECHNOLOGY

DXC Technology combines deep application insights and global resources to drive ServiceNow-managed services. Its Platform X enriches ITSM, ITOM, CSM, HR and ESG solutions, enabling clients to harness ServiceNow's full potential for mission-critical systems.

HCLTech

HCLTech offers accelerators bundled with ServiceNow Managed Services to improve end-to-end stakeholder experience. Its *built-on* products, such as iMigrate, Go Mapping and MarketVista, enable enterprises to accelerate, automate and optimize workflows across functions.

HEXAWARE

Hexaware is expanding its managed services in 2024 to include comprehensive ServiceNow platform support, establishing centers of excellence and innovation and specialized services such as ITSM and software assessment service as a service. The firm

focuses on industry-specific solutions, such as CAPA for healthcare and Hex Assure for optimized service delivery.

Infosys

Infosys leverages its extensive partner ecosystem to integrate advanced AR, AI and data analytics into its ServiceNow managed services. It offers cutting-edge solutions in predictive AIOps, enterprise monitoring and asset management through its specialized services and innovation hubs.

LTIMindtree

LTIMindtree enhances its managed services with the Mosaic and Leni accelerators, scaling ServiceNow engagements efficiently. Their deep analytics expertise and specialized CoE, governed by industry SMEs, ensure comprehensive, high-quality ServiceNow solutions that drive significant value and operational excellence for clients.

TCS TATA CONSULTANCY SERVICES

Through Crystallus™ accelerator and its Machine First Delivery Model, **TCS'** ServiceNow managed services offer rapid deployment and automation across ITSM, ITOM and ITBM suites. Its industry-specific customer service management and field service management solutions optimize service delivery and automation.

TECH **mahindra**

Tech Mahindra's ServiceNow managed services leverage its TechM amplifAI engine to build custom AI and ML solutions and bots for enhanced operational efficiency. The company has evolved from a Market Challenger in 2023 to a Leader in 2024.



Wipro's ServiceNow managed services enhance productivity and experiences with accelerators such as the ServiceNow FirstWatch. Its approach transforms security and enterprise-wide IT and non-IT workflows, ensuring a unified and efficient operational landscape.

Kyndryl

Kyndryl (Rising Star) differentiates its managed services practice by offering unique solutions built in partnership with ServiceNow. Its leading-edge solutions help clients maintain business continuity and constantly adapt to new threats and regulatory standards.





“Capgemini enables clients with sustainable and well-governed ServiceNow managed services, ensuring significant gains in operational efficiencies through the effective management of ServiceNow instances.”

Tapati Bandopadhyay

Capgemini

Overview

Capgemini is headquartered in Paris, France. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. Leveraging its CoE-backed ServiceNow process frameworks and adoption accelerators across ITSM, CSM and HRSD, the company enables rapid organizational transformation. With three delivery centers in the U.S., two in Texas and one in Florida, and global support from centers in Brazil, Canada, India and Morocco, Capgemini ensures comprehensive service delivery.

Strengths

Operational efficiency gains: Capgemini introduces tailored managed services solutions, leveraging the robust ServiceNow platform to enhance client operations, improve digital capabilities and drive operational efficiency in areas such as optimizing IT infrastructure and service delivery. For example, Capgemini provides a ServiceNow platform and product licenses designed to deliver tower services incorporated within its managed services offering.

Trusted partner: Capgemini’s strong focus on GRC in the ServiceNow ecosystem establishes it as a trusted partner for organizations seeking to maximize the value of their ServiceNow investments. This positions Capgemini to empower


clients for sustainable growth and competitive advantage in today’s dynamic business landscape.

Integrated AI-automation-analytics: Capgemini showcases its commitment to delivering scalable and agile managed services that align with clients’ evolving needs by harnessing automation, analytics and AI-driven insights. These integrated technology initiatives strengthen Capgemini’s position as a leading provider of innovative ServiceNow implementation services in the U.S. market.

Caution

Capgemini possesses experiential knowledge and databases on ServiceNow managed services for effective and compliant instance maintenance. The company should consider articulating and showcasing them frequently to maximize the impact of these capabilities.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

The ISG Provider Lens 2024 – ServiceNow Ecosystem Partners study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2024, 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 ServiceNow Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Author



Dr. Tapati Bandopadhyay
Lead Analyst

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Research Analyst



Arjun Das
Research Specialist

Arjun Das is a research specialist at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platform and Services and SAP HANA Ecosystem Services. He supports the lead analysts in the research process and authors the global summary report. Arjun also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Arjun has helmed his current role since 2020. Prior to this role, he has worked across

several syndicated market research firms and has more than 8 years of experience across research and consulting, with major areas of focus in collecting, analysing and presenting quantitative and qualitative data. His area of expertise lies across various technologies like IoT, Artificial Intelligence, VR/AR and blockchain.



Author & Editor Biographies



Study Sponsor

Aman Munglani
Director and Principal Analyst

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a 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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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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REPORT: SERVICENOW ECOSYSTEM PARTNERS