

ServiceNow Ecosystem Partners

ServiceNow Consulting Services

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

Customized report courtesy of:



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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


	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



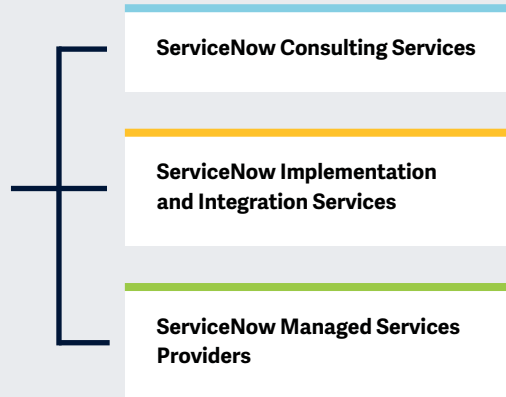
 Provider Positioning

	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.

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

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

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

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

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





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.

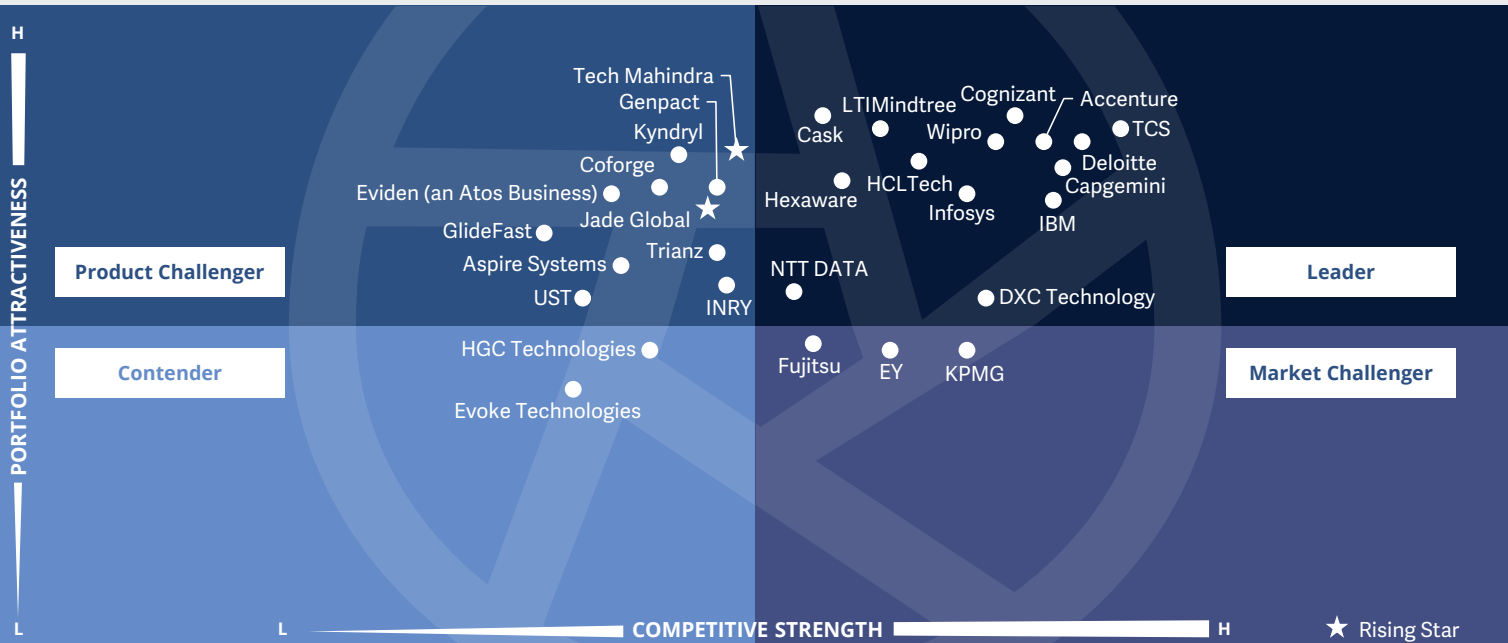


Technology professionals should read this report to learn about industry-specific solutions and providers' prowess in conducting consulting assignments for diverse industries.



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.



NTT DATA



“NTT DATA has established itself as a Leader in the ServiceNow consulting space, offering deep technology expertise and a strong talent pool to address client demands in the U.S. market.”

Tapati Bandopadhyay

Overview

NTT DATA is headquartered in Tokyo, Japan. It has more than 196,900 employees across 208 offices in 56 countries. In FY23 the company generated JPY 3,490.2 billion in revenue, with Financial as its largest segment. The company has progressively moved from a Market Challenger in 2023 to a Leader in 2024. With profound expertise in ServiceNow, NTT DATA offers a suite of consulting services in the U.S. aimed at digital transformation and operational efficiency. Its strategic approach ensures alignment with best practices and an enhanced end-user experience.

Strengths

Deep technology expertise on the platform:

NTT DATA's ServiceNow consulting and adjacent services in the U.S. encompass a comprehensive suite of tools and offerings tailored to drive digital transformation and operational excellence. Drawing on its expertise in ServiceNow implementation and integration, the company assists enterprises in optimizing their ServiceNow platforms to meet specific business needs and objectives.

Focus on innovation: With a focus on innovation and CSAT, NTT DATA empowers organizations to unlock the full potential of ServiceNow for driving business growth and agility in the current dynamic market landscape, which faces continuous cost, performance and efficiency pressures in the U.S.


Strategic value focus: NTT DATA's

ServiceNow practices include strategic planning, process design and solution architecture, ensuring alignment with industry best practices and regulatory requirements. It also offers managed services to provide ongoing support, maintenance and enhancement of ServiceNow environments. This approach enables clients to maximize efficiency, minimize downtime and improve overall user experience.

Caution

Given the increasing demand for deep technology and domain talent in the ServiceNow space in the U.S., NTT DATA is well-positioned to build and communicate its differentiated talent pipeline storyboards. Sharing global client success stories can further enhance its positioning in the market.





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.

Customer Experience (CX) Insights

Source: ISG Star of Excellence™ research program, Insights till January 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **ServiceNow Ecosystem Partners** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

- ▲ **Most satisfied**
Legal/Compliance
- ▼ **Least satisfied**
Other Line of Business

Region

- ▲ **Most satisfied**
Middle East
- ▼ **Least satisfied**
Africa

Industry

- ▲ **Most satisfied**
Healthcare
- ▼ **Least satisfied**
Chemicals

Industry Average CX Score



- ▲ Highest CX: 96.5
- ▼ Lowest CX: 43.5

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 406

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	50.3%
Nearshore	20.5%
Offshore	29.2%





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.



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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.

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