**ISG** Provider Lens™

# ServiceNow Ecosystem Partners

## ServiceNow Implementation and Integration Services

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

**QUADRANT REPORT | MAY 2024 | EUROPE**

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# Executive Summary

*Report Author: Ashwin Gaidhani*

**ServiceNow: Redefining digital workflows**

ServiceNow is a pivotal platform for digital workflow transformation across various industries and business capabilities. It is a leading cloud-based platform that enables digital workflows for enterprise operations. It is widely adopted and holds significant growth potential in the European market. ServiceNow is also an innovation and development platform, adapting and evolving with the market needs and trends. It acts as a strategic partner for enterprises seeking to drive their digital transformation and business goals. The transformative technologies embedded in ServiceNow shape the future of enterprise operations and enhance the last-mile experience.

In 2023, ServiceNow unveiled the highly anticipated Vancouver release, with several new features and capabilities that revolutionize digital workflows and enhance user experiences.

This release introduced advancements across various modules, including IT service management (ITSM), HR and customer service management (CSM). Notable features include enhanced AI capabilities for intelligent automation, improved analytics for data-driven insights and expanded mobile capabilities for seamless accessibility. The new and enhanced modules include functionalities such as Document Intelligence, Generative AI Controllers, Natural Language Understanding, Now Assist releases, Predictive Intelligence modules, Process Mining and Task Intelligence Admin Console and User Experience Analytics.

The ServiceNow Ecosystem study focuses on three critical entities, namely, enterprise clients, service providers and the ServiceNow platform, each with significant potential and propensity to accelerate business transformation. European enterprises are rapidly adopting ServiceNow to streamline operations, enhance CX and differentiate themselves by developing focused and aligned solutions. The platform's robust application suite in ITSM, IT operations management (ITOM) and IT business

ServiceNow is the **new workflow engineering platform**, and service providers are the **new innovation partners**.

management (ITBM) has become indispensable for organizations striving to improve efficiency and agility. ITSM has always been the first goal for ServiceNow adoption and is deeply rooted in enterprises that manage information communication technology (ICT) infrastructure. Enterprises prioritize compliance with regulatory and security mandates, particularly GDPR, in Europe's stringent regulatory environment. ServiceNow's platform offers comprehensive tools to manage and automate governance, risk and compliance (GRC) processes, enabling enterprises to meet legal standards and protect sensitive data effectively. The increase in partnerships between global systems integrators (GSI) and ServiceNow is enabling the development of verticalized solutions that meet the needs of enterprise clients and help them upgrade their business process offerings by leveraging existing domain knowledge to address ongoing challenges.

### Internationalization driving the European ServiceNow market

As an expansion strategy, European enterprises expand their service coverage beyond local regions with existing clients.

Large service providers are building leadership based out of Europe to focus on regional growth. These actions are part of an extensive GSI internalization strategy to mark their presence in large European markets. Large service providers partner with local counterparts and support enterprise clients in their regions. This partner ecosystem drives the European market, spanning diverse regions, languages and regulatory nuances. Talent shortage is another major factor driving the expansion strategy in areas with technical resource density. ServiceNow invests in various initiatives, such as the Rise Up program, to build diverse, certified, platform-ready talent pools.

Enterprise clients are building a robust strategy to advance on the digital maturity scale by adopting cloud-native platforms for business, corporate and technology workflows. However, the onboarding of multiple platforms increases the complexity. Most workflows and domain-centric platforms are expanding into adjacent areas, which commonly duplicate workflow modules, creating ambiguity among enterprises in choosing the right platform. Workday and ServiceNow products are perfect

examples of human resources management systems and HCM modules partly overlapping but being part of independent platforms. Hence, the license cost needs rational justification for onboarding. The enterprise product management portfolio encompasses ERP systems, CRM platforms and workflow management tools to work cohesively to facilitate seamless information transfer, adding to the enterprise intelligence.

### ServiceNow: Leading sustainable transformation in European enterprises through ESG and GRC integration

ServiceNow has adeptly positioned itself to address the intricate requirements of European enterprise clients, particularly in the domains of environmental, social and governance (ESG) and GRC. The company acknowledges the escalating significance of sustainability and ethical governance within Europe and has tailored its solutions to assist organizations in managing ESG and GRC comprehensively. Through ServiceNow's platform, companies can embed ESG criteria into their fundamental business strategies, thereby enhancing transparency, accountability and sustainability.

This strategic integration is paramount for businesses striving to adhere to the rigorous regulatory frameworks and reporting mandates prescribed by the EU. These regulations necessitate detailed consideration of environmental impact, social responsibility and stringent governance practices. ServiceNow's GRC solution enables companies to streamline risk and compliance management cohesively, automate workflows, and gain instant visibility into compliance procedures. By harnessing advanced analytics and AI, enterprises can proactively detect and mitigate risks, ensuring compliance with the intricate regulatory landscape governing European enterprises. ServiceNow's commitment to sustainable and ethical business practices highlights its dedication to aiding clients in navigating the changing regulatory environment, building trust and promoting long-term value creation.

### ServiceNow advancements and developments in the past 12 months

This year, the ServiceNow Build on Now and Build with Now initiatives focus on technology advancements in the banking sector. The new offering portfolio features generative AI (GenAI)

applications to support AI and ML use cases and applications. The Global Elite and Elite Service Provider partners of ServiceNow in the European market have designed highly scalable and customizable enterprise-grade process and workflow automation solutions. These solutions can be tailored to meet organizations' unique needs, such as processing millions of transactional workflows daily or executing advanced customizations. Service providers also focus on developing teams that can scale to meet unique and industry-specific client needs.

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 revolutionizes how organizations handle their service operations. This release also 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 expands its presence in Europe, clients are poised to benefit significantly from adopting Now Assist, leveraging its capabilities to drive innovation, improve customer satisfaction and achieve operational excellence. With its potential to streamline processes, reduce response times and enhance overall service quality, Now Assist is a compelling solution for European-based ServiceNow clients seeking to stay ahead in today's competitive landscape. As organizations increasingly prioritize digital transformation and customer-centricity, Now Assist will serve as a strategic tool to drive success and competitive advantage. Some forward-looking partners in the European market are already working with ServiceNow to build a talent pipeline equipped to drive the GenAI application initiatives on Now Assist.

This partnership will enable them to consult and implement industry- and function-specific enhanced modules engineered on top of Now Assist.

ServiceNow's Document Intelligence solution and Document Understanding module are critical to all business workflows and automation solution stacks built on top of ServiceNow. Document Intelligence employs advanced ML algorithms to extract vital information from unstructured documents, such as invoices, contracts and legal documents. By automatically identifying and extracting relevant data points, the Document Understanding module streamlines document processing workflows, reducing the need for manual intervention and minimizing the risk of errors. This screening allows organizations to accelerate document-processing times, improve data accuracy and ensure compliance with regulatory requirements. The solution also includes a Document Classification module, which uses AI-powered classification algorithms to categorize documents automatically based on their content and context. By analyzing the text and structure

of documents, the module can accurately order and sort them, saving time and reducing the risk of errors. Enterprise clients will focus on enhancing and institutionalizing business capabilities to improve business outcomes.

> ServiceNow reshapes Europe's business landscape, driving digital innovation and operational excellence across all enterprise portfolios.

## Provider Positioning  **Page 1 of 4**

| | ServiceNow Consulting Services | ServiceNow Implementation and Integration Services | ServiceNow Managed Services Providers |
|---|---|---|---|
| Accenture | Leader | Leader | Leader |
| agineo | Leader | Leader | Product Challenger |
| Aspire Systems | Contender | Contender | Not In |
| Bechtle | Market Challenger | Contender | Contender |
| Capgemini | Leader | Leader | Leader |
| CGI | Product Challenger | Contender | Product Challenger |
| Coforge | Not In | Product Challenger | Not In |
| Cognizant | Leader | Leader | Leader |
| Computacenter | Market Challenger | Market Challenger | Market Challenger |
| Deloitte | Leader | Leader | Product Challenger |

## Provider Positioning   **Page 2 of 4**

| | ServiceNow Consulting Services | ServiceNow Implementation and Integration Services | ServiceNow Managed Services Providers |
|---|---|---|---|
| Devoteam | Contender | Market Challenger | Contender |
| DXC Technology | Product Challenger | Product Challenger | Product Challenger |
| Eviden (an Atos Business) | Leader | Leader | Leader |
| EY | Contender | Product Challenger | Market Challenger |
| Fujitsu | Market Challenger | Leader | Leader |
| Genpact | Not In | Product Challenger | Product Challenger |
| HCLTech | Product Challenger | Leader | Product Challenger |
| Hexaware | Rising Star ★ | Product Challenger | Leader |
| IBM | Product Challenger | Product Challenger | Product Challenger |
| Infosys | Leader | Leader | Leader |

## Provider Positioning    **Page 3 of 4**

| | ServiceNow Consulting Services | ServiceNow Implementation and Integration Services | ServiceNow Managed Services Providers |
|---|---|---|---|
| iTSM Group | Product Challenger | Not In | Contender |
| KPMG | Leader | Market Challenger | Market Challenger |
| Kyndryl | Product Challenger | Leader | Leader |
| LTIMindtree | Leader | Product Challenger | Leader |
| NTT DATA | Product Challenger | Product Challenger | Leader |
| Plat4mation | Leader | Leader | Product Challenger |
| Sopra Steria | Contender | Not In | Not In |
| TCS | Leader | Leader | Leader |
| Tech Mahindra | Product Challenger | Product Challenger | Product Challenger |
| The Cloud People | Contender | Not In | Product Challenger |

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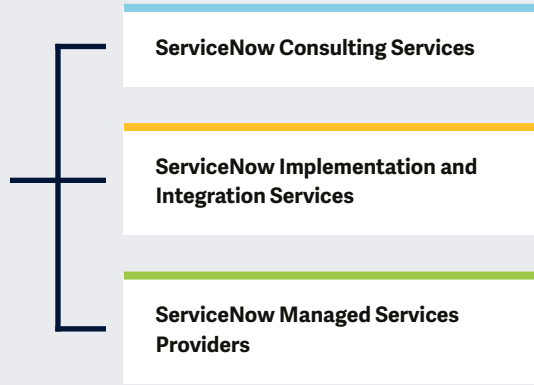
## Provider Positioning

**Page 4 of 4**

| | ServiceNow Consulting Services | ServiceNow Implementation and Integration Services | ServiceNow Managed Services Providers |
|---|---|---|---|
| Tietoevry | Product Challenger | Rising Star ★ | Rising Star ★ |
| T-Systems/OS | Leader | Leader | Leader |
| Unisys | Not In | Contender | Not In |
| Wipro | Leader | Leader | Leader |
| Wrangu | Not In | Product Challenger | Rising Star ★ |
| WSP-Consulting | Market Challenger | Market Challenger | Not In |

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## Key focus areas for **ServiceNow Ecosystem Partners**.

Simplified Illustration; Source: ISG 2024

**ServiceNow Consulting Services**

**ServiceNow Implementation and Integration Services**

**ServiceNow Managed Services Providers**

**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 requirements for application management and training. Partner companies' focus is indicated by their various offerings and certification levels, which can covering 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.

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

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

## Provider Classifications: Quadrant Key

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

**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.

★ **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.

**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.

# ServiceNow Implementation and Integration Services

## ServiceNow Implementation and Integration Services

**Who Should Read This Section**

This report is relevant to all European enterprises across industries for evaluating ServiceNow implementation and integration service providers.

In this quadrant, ISG highlights the current market positioning of providers offering ServiceNow implementation and integration services to enterprises in Europe and how each provider addresses the critical challenges faced in the region.

ServiceNow's expansion of its offerings through acquisitions and regular updates may lead to overlaps with an enterprise's existing applications and investments. Many large European enterprises are early adopters and own complex legacy technology stacks and business service landscapes.

Thus, they need implementation and integration service providers with technical capabilities and industry expertise to address their business-specific requirements.
In Europe, enterprises expect implementation and integration service providers to evaluate factors such as ROI, vendor lock-in and future security and licensing expenses and implement the optimal solution.

**Strategy professionals** should read this report to choose the suitable systems integration partner for ServiceNow implementation and development of a long-term technology road map.

**Technology professionals** should read this report to gain insights into the latest technology trends and patterns aligned with their company goals.
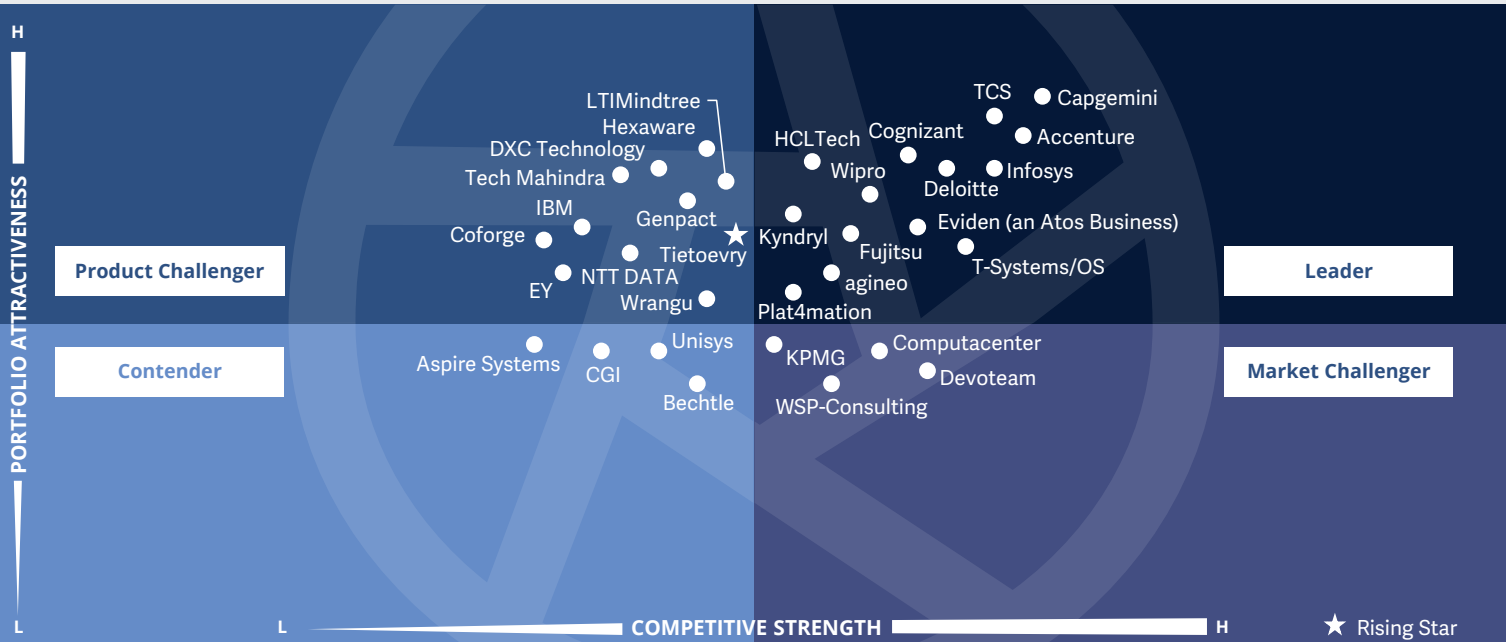
**Engineering professionals** can use this report to understand the developments in software solutions. Accordingly, they can invest in and build intellectual property and accelerators for cloud platforms for various industries.

ISG Provider Lens™

ServiceNow Ecosystem Partners
ServiceNow Implementation and Integration Services

Europe 2024

**PORTFOLIO ATTRACTIVENESS**

H

Product Challenger

Contender

**COMPETITIVE STRENGTH**

L    H

LTIMindtree
Hexaware
DXC Technology
Tech Mahindra
IBM
Genpact
Coforge
Tietoevry
EY    NTT DATA
Wrangu

TCS    Capgemini
HCLTech    Cognizant    Accenture
Wipro    Infosys
Deloitte
Eviden (an Atos Business)
Kyndryl    Fujitsu
agineo    T-Systems/OS
Plat4mation

Leader

Market Challenger

Aspire Systems    Unisys
CGI
Bechtle

KPMG    Computacenter
Devoteam
WSP-Consulting

L

★ Rising Star

This quadrant evaluates service providers with the **latest technology capabilities** in delivering **seamless ServiceNow platform implementation and integration**. Enterprise clients focus on the **accuracy and speed of platform deployment** with minimal disruptions to the ecosystem.

*Ashwin Gaidhani*

## 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**

ServiceNow Implementation and Integration Services

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 is recognized as a hub for innovation and process engineering, providing a robust foundation for automation, orchestration, digital transformation, and development of bespoke applications, integrations and extensions tailored to unique business needs. It facilitates the improvement of existing business models and the creating of new ones, such as service orchestration, brokering and aggregation, highlighting its pivotal role in driving innovation and engineering excellence.

**Growing need for ServiceNow expertise and advanced competencies:** The rising demand for ServiceNow and its expanding complexity increase the need for proficient professionals and partners. These entities must possess new certifications and product line achievements tailored to specific regions alongside customer-validated badges. The segments that concentrate on developing, consulting and implementing solutions aligned with specific business needs are crucial for the successful execution of ServiceNow applications and modules. Therefore, there is

an extensive search for certified ServiceNow developers, administrators, consultants (CMA), architects (CTA) and project managers capable of delivering high-quality solutions and services.

**Ad option of ServiceNow products and sector-specific solutions:** ServiceNow's extensive product suite spans several areas, including IT, HR, customer service, security, risk and governance. Service providers are increasingly pursuing product line certifications to bolster their digital capabilities and optimize workflows. ITSM, ITOM, ITBM, CSM, security operations (SecOps) and GRC are among the most sought-after offerings.

From the 36 companies assessed for this study, 33 qualified for this quadrant, with 14 being Leaders and one a Rising Star.

### accenture

**Accenture** is ServiceNow's largest Global Elite Partner and authorized training partner. It acquired Organize Cloud Labs, strengthening its existing IT capabilities and industry experience in cloud strategy, migration, implementation and management.

### agineo

In 2024, **agineo** partnered with InfoBeans to empower global clients with a broader portfolio. The partnership strengthens the agineo team with more than 350 ServiceNow-certified experts. agineo was ServiceNow EMEA Customer Workflow Partner of the Year 2023.

### Capgemini

**Capgemini** and ServiceNow leverage people, processes, technology, data and services to deliver superior experiences and sustainable business outcomes. In 2022, it was awarded the ServiceNow EMEA Employee Workflow Partner of the Year.

### cognizant

**Cognizant** is a ServiceNow Elite Partner that offers consulting and implementation services to clients. The company has 1,600 core ServiceNow FTEs. It has a CSAT score of 4.61/5 and over 290 ServiceNow clients.

### Deloitte.

**Deloitte** is a ServiceNow Consulting & Implementation Partner that delivers implementation, integration, deployment and transformation services to its clients. It has over 1,000 ServiceNow FTEs and 200 ServiceNow clients.

### EVIDEN

**Eviden** and ServiceNow share a 14-year-long partnership. It is a ServiceNow Gold Services, Gold Sales and Global ServiceNow Partner. The company provides implementation and support services to its customers worldwide through its global delivery capabilities.

### FUJITSU

**Fujitsu**, a ServiceNow Elite Partner with a 4.45/5 CSAT score, offers product lines on HR, App Engine and ITSM Standard for EMEA. The company has 12 skilled CMA and 22 CTA experts. It has a global presence with delivery centers in the Americas, AP&J and EMEA.

## ServiceNow Implementation and Integration Services

### HCLTech

**HCLTech** is a ServiceNow Reseller, Service Provider, Consulting & Implementation, and Build Partner with Elite status. It has more than 539 ServiceNow clients and a CSAT score of 4.4/5. The company has global coverage with more than 210 delivery centers and 60 innovation labs across 54 countries.

### Infosys

**Infosys** is a ServiceNow Consulting & Implementation Partner with over 306 ServiceNow clients globally. The company employs over 3,150 ServiceNow service professionals. ServiceNow recognized it as the 2023 ServiceNow Worldwide Partner of the Year.

### kyndryl

**Kyndryl** has a ServiceNow Elite Partner status and is a Reseller, Service Provider, Consulting & Implementation, and Build Partner. It has over 1,600 core FTEs with a ServiceNow CSAT score of 3.67 /5. It has seven customer innovation centers globally.

### PLAT4MATION

**Plat4mation** is a Service Elite Partner. It has a pool of more than 450 ServiceNow experts and 11 expert domains with a CSAT score of 4.3/5. It was the 2023 Worldwide Partner of the Year, the 2021 Global Partner of the Year and the EMEA Partner of the Year for 2021 and 2020.

### TCS TATA CONSULTANCY SERVICES

**TCS** Crystallus™ on ServiceNow exemplifies strategic innovation in digital transformation by leveraging advanced AI and automation to enhance enterprise operations. This integration accelerates workflows, optimizes service management and fosters agility.

### T·Systems

**T-Systems/OS** and ServiceNow have had a longstanding partnership since 2014, delivering digital transformation solutions. T-Systems/OS employs over 250 ServiceNow experts and possesses over 300 certifications. ServiceNow was the EMEA Creator Workflow Partner of the Year 2022.

### wipro

**Wipro** was the 2023 Worldwide Partner Award winner. In May 2023, Wipro and ServiceNow extended their partnership to invest in and develop new solutions to empower clients' business and digital transformation initiatives and increase business value.

### tietoevry

**Tietoevry** (Rising Star) is a ServiceNow Global Elite service provider, Reseller, and Consulting & Implementation Partner. The company joined the Sales and Service Provider Program in 2017 and was recently awarded the Elite Partner status in 2023.

# Plat4mation

*"Plat4mation offers ServiceNow implementations, merging strong integration capabilities with cutting-edge IP and accelerators."*

*Ashwin Gaidhani*

### Overview

Plat4mation is headquartered in Utrecht, The Netherlands. It has more than 450 employees across nine offices in eight countries. The company is a pure-play global ServiceNow partner that designs and creates workflows. It boosts productivity by implementing solutions that enable customers to improve performance continuously. Plat4mation recently strengthened its position in Europe by establishing three new delivery centers in Poland and Switzerland, the southeastern European region. Additionally, Plat4mation added a new nearshore office in Greece to enhance its capabilities and streamline its operations.

### Strengths

**Strong risk and security management practice:** With over 40 successful ServiceNow IRM implementations, Plat4mation's expert team empowers customers to make informed, risk-based decisions, elevating the maturity of enterprise risk and compliance frameworks through a technology-first approach.

**Innovative proprietary solutions:** Plat4mation's development of innovative solutions like MeetNow and Schedule4U, alongside the CI/CD connector 4DevOps, illustrates its commitment to enhancing the ServiceNow platform. These solutions improve the workplace and IT service delivery and streamline scheduling and development processes within ServiceNow, demonstrating Plat4mation's innovative edge in the ecosystem.

**Robust integration capabilities:** Plat4mation's proficiency in integrating ServiceNow with various ITSM tools, mainly through the integration accelerator Connector4U, showcases its ability to establish robust connections efficiently and enhance system interoperability. Its innovative IP, including the CI/CD connector 4DevOps, underscores its commitment to driving continuous improvement and DevOps maturity in ServiceNow environments.

### Caution

As Plat4mation continues to innovate with proprietary ServiceNow solutions like MeetNow and 4DevOps, enhancing the visibility and marketing of these offerings on their website will be crucial in educating customers.

# 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

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

**78.2**

▲ 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 Europe 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

## Lead Analyst

### Ashwin Gaidhani
**Research Partner**

Ashwin Gaidhani has a comprehensive view of IT shared-managed services portfolios and digital business transformation initiatives with approximately two decades of experience. As an ISG Research Partner and subject matter expert in enterprise services, IT governance and digital technologies, he is presently contributing as a Lead Author with the ISG Provider Lens™ team. Ashwin comes to this work with business and technology experience revolving around service management, management consulting, emerging capabilities (AI and intelligent automation), work design methodologies and implementation frameworks

## Research Analyst

### Arjun Das
**Research Specialist**

Arjun Das is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Enterprise Service Management, ServiceNow Ecosystem, Banking Platforms 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 eight 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

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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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# ISG Provider Lens™

**MAY, 2024**

**REPORT: SERVICENOW ECOSYSTEM PARTNERS**