

# Digital Innovation Services

Analysis of service companies that help accelerate  
performance through digital innovations



Introduction	3	Invited Companies	12
About the Study		About our Company & Research	18
Quadrants Research	4		
Definition	5		
Quadrants by Regions	8		
Schedule	9		
Client Feedback Nominations	10		
Contacts for this Study	11		

Digital innovation services are solutions that use emerging technologies to solve business problems, improve organizational processes and create new products and services.

Transformation services help organizations adapt to changes in the market, society and technology by implementing digital strategies that involve hybrid cloud orchestration, application management, cybersecurity and analytics.

A customer journey involves a customer's experience when interacting with an organization, from the first contact to after-sales. The services offered in this area seek to understand customer needs, expectations and behaviors using tools such as design thinking, customer journey mapping, omnichannel and CRM.

Extended reality is a term that covers technologies that alter the perception of reality, such as VR, AR and mixed reality (MR). The services offered allow the creation of immersive and interactive experiences through applications such as training, entertainment, marketing, education and health.

Various technologies not mentioned here, together with the above described, are transforming and innovating business purposes. Organizations can use these technologies to solve complex problems, improve organizational processes and create new products and services that meet the needs and expectations of their enterprises.



The report identifies the main areas in the **Digital Innovation Services 2023** study according to the Brazilian market demands.

**Digital Transformation Services**

**Customer Journey Services**

**Extended Reality Services**

**The ISG Provider Lens™ Digital Innovation Services 2023 study offers the following to business and IT decision-makers:**

- Transparency about the strengths and areas of concern of relevant suppliers
- A differentiated positioning of suppliers by assessing their competitive strengths and the attractiveness of their portfolios
- Focus on the Brazilian market

Our study is an important decision-making basis for understanding and positioning suppliers, key relationships and market entry considerations. ISG's consultants and corporate clients also use the reports to evaluate their current supplier relationships and potential engagements.

Simplified Illustration; Source: ISG 2023



## Digital Transformation Services

### Definition

Digital business transformation services include services provided to companies in their customer and employee journeys, digital business strategy and operations across their digital journey. These services help companies build new business models using existing resources, taking advantage of market opportunities. The services provided must generate significant benefits for customers and drive growth. Service providers in this quadrant must be able to help organizations transform and optimize their operating environments through research, benchmarking and consulting, focusing on information technology, business process transformation, program management services and organizational change management.

CX design is transforming how companies organize marketing, sales, delivery and after-sales processes. This customer-centric approach changes a company's business processes around a customer. These actions should be part of the transformation agendas of companies that put customers at the center.

Participating companies must be able to help their clients throughout their digital journey, from conceptualizing the vision to delivering actions for transformation in different sectors.

### Eligibility Criteria

1. **Offer one or more consulting and innovation services** throughout an organization's digital journey
2. **Advise clients** on the different facets of their digital journey, including strategy, data, technology, organizational change management, operations and industry process consulting
3. **Help clients formulate their digital roadmaps and build** short- and long-term **digital strategies**
4. **Offer advice and guidance** on process optimization to deliver tangible benefits
5. **Provide solutions to business problems by developing solutions and applications**
6. **Strong thought leadership** skills
7. **Proven capacity** with resources, R&D projects and partner network, including hardware and software suppliers



## Customer Journey Services

### Definition

This quadrant assesses the ability of digital service providers and agencies to offer business model innovation, enabling companies to build competitive differentiation in today's digital economy. Providers in this quadrant must be able to provide consulting and implementation services to improve their clients' CX, focusing on specialized services for specific sectors.

Digital customer experience indicates how digital companies design differentiation in the end-customer journey. This quadrant focuses on conceptualizing customer journeys to create new business models and derive benefits using new technologies and business ecosystems. Companies in this area design how an ideal customer (or persona) interacts with a product or brand. The design process includes technology experts, sales and marketing representatives and customers in a collaborative way. Leading companies use analytics to extract insights from user data. Cognitive computing extracts data from conversations, texts and social media.

Experience is measured with simple A/B tests and complex sentiment analysis captured from customer interactions.

Customer journeys involve real-time monitoring, measuring various touchpoints that drive customer journeys and supporting technology and business processes. A CX team produces a continuous change in digital business, offering innovation in business models and enabling companies to build competitive differentiation in today's digital economy.

### Eligibility Criteria

1. **Focus on delivering an end-to-end customer journey** supported by advanced technologies such as AI, ML, IoT and data analytics
2. **Offer consulting, integration and managed services** to enable CX services
3. **Offer high-quality customer support**, including fast problem resolution and personalized services
4. **Show in-depth knowledge of the sector and the client** in business transformations and structures and channel and cultural changes
5. **Provide an established CX governance structure**
6. **Offer services using innovative technologies** such as augmented and virtual reality
7. **Demonstrate the ability to personalize actions with users and consumers**, adapting purchasing processes to customer preferences and needs



## Extended Reality Services

### Definition

The Extended Reality Services quadrant evaluates service providers that offer strategic consulting, integration and delivery services to support clients in integrating digital reality services. Providers can showcase their capabilities to advise clients on the development of digital reality service roadmaps, industry-specific solutions, thought leadership and experience in delivering one or more use cases. Providers need to work closely with corporate clients on ideation, consulting, evaluation, storyboarding, prototyping and user testing. They must also use a comprehensive framework or methodology to use digital technologies such as IoT, machine learning, AI and advanced analytics to ensure a 360-degree immersive experience, meeting business requirements and challenges.

Extended reality represents how upcoming transformation approaches technology through a comprehensive and immersive experience that puts human users at the center of the design. It comprises various technologies and products that simulate reality in multiple ways, including AR, VR and mixed reality (MR). Companies and organizations in all sectors are embracing the need for AR, VR and MR.

Adopting technologies such as blockchain, IoT, AI, machine learning, digital twin and computer vision is further reshaping extended digital reality service offerings.

### Eligibility Criteria

1. **Experience and interdisciplinary skills** in AR, VR and MR
2. **Develop solutions, tools, accelerators** and other intellectual property specific to the sector
3. **Experience integrating one or more technologies** such as IoT, advanced analytics, digital twin, computer vision, AI, machine learning and 3D
4. **Create RM solutions** and develop **AR and VR applications** for various sectors, AR, VR and RM environments, content management, data security and governance frameworks
5. **Experience integrating** extended reality **services** with other IT systems such as ERP, CRM and learning management systems
6. **Demonstrate delivered use cases** or PoCs ready for pilot implementation



## Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we present the following four quadrants in Digital Innovation Services 2023:

Quadrant	Brazil
Digital Transformation Services	✓
Customer Journey Services	✓
Extended Reality Services	✓





The research phase takes place between August and September 2023, during which time the survey, evaluation, analysis and validation will take place. The results will be presented to the media in November 2023.

Phases	Home	Closing
Launch	September 2023	
Research phase	September 2023	September 2023
Preview	October 2023	October 2023
Press Release & Publication	November 2023	

Consult this [link](#) to view/download the ISG Provider Lens™ 2023 research agenda.

#### Access to the Online Portal

You can view/download the questionnaire [here](#) using the credentials you have already created or refer to the instructions provided in the invitation email to generate a new password. We look forward to your participation!

#### Disclaimer of research output:

ISG collects data for the purpose of writing surveys and creating provider/supplier profiles. The profiles and supporting data are used by ISG consultants to make recommendations and inform their clients about the experience and qualifications of any applicable provider/supplier for the outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to use this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/suppliers and the availability of experienced analysts for those countries or regions. The information submitted can also be used for individual research projects or for briefing notes that will be written by the lead analysts.



### ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

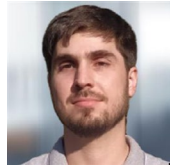
Here is the email address:  
[ISG.star@isg-one.com](mailto:ISG.star@isg-one.com)



Contacts For This Study



**Mauricio  
Ohtani**  
**Lead Analyst and  
Author, Brazil**



**Gabriel  
Sobanski**  
**Research Analyst  
and Author, Brazil**



**Bruno  
Nakazone**  
**Research Analyst,  
Brazil**



## Invited Companies

**If your company is listed on this page or you think your company should be listed, please contact ISG to ensure that we have the correct contact person(s) to actively participate in this survey.**

4MSTech	Agência DDWB	Approach Comunicação	BeeCloud
4Results	Agencia FG	Arbit	BeOnUp
A3Data	Agencia Mestre	Artefact	Best Projects
Accenture	Agência Varanda	Atile.digital	Betha Sistemas
ACCT	Agencia242	Atos	BHS
Acxiom	Aldeia Comunicação	Atua Agencia	Big Brain
AD Digital	Alest	AudioCodes	BigData Systems
Adapcon	Alfama Web	Aunica Interactive Marketing	Binder
Adaquest	Alfapeople	Avenue Code	BIP
Add IT	Algar Tech	Aveva	BIX Tecnologia
Adin	All Set Comunicação	Avivatic	Bizapp
ADSPLAY	Amaris	AX4B	Blueshift
Adtail	Amber	Axians	Bowe   B2B
ADTsyst	Ampliva/Adglow	Ayesa	BR Media Group
Afilio	Aoop	Bedu.tech	Brascin



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Brasoftware	CI&T	Cortex	DISYS
Brivia	Claranet	CSP Tech	DNX Brasil
BRLink	Class Solutions	Darede	DP6
BRQ	Cloud Target	DataEX	Dreamm Tecnologia
BSP Cloud	CMCorp	dataRain Consulting	Driven.CX
BT	Cognatis	Dataside	Druid
Builders	Cognitivo.ai	DBACorp	DXC
By Seven	Cognizant	Deal	e-Core
Cadastra	Compass UOL	Dedalus	ED Soluções - Eletric Dreams
Capgemini	Computécnica Tecnologia	Delloite	Elifegroup
CDN Comunicação	Compwire	Dentsu	Embratel
Central IT	Conecta Nuvem	DEx01	Encora Inc.
CentralServer	Content House	Digital Group	Energy Telecom
Certsys	Conversion	DigitalReef	Enext
CESAR	CoreBiz	Dinamio Tecnologia	Engesoftware Tecnologia



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Engineering Brasil	Fujitsu	GRVPPE	I4D
Enkel TI	G&P	GSW	IBM
EPAM	G3 Solutions	GWCloud	ilegra
Equinix	Gauge	Hands Mobile	ília
Escale Digital	GAVB	Havas	Ilumeo
ESX	GCore	HCL	Imaginedone
Everymind	Geneses IT Consulting	Hepta	Ímpar
Exata Tech	Gentrop	Hit Digital	Impeto
Extreme Group	GFT	Hogarth	Implanta Informática
Fbiz	GhFly	Hook Digital	Indra Minsait
FCamara	Global Hitss	Hotmart	inetum
Fênix Sistemas	Globant	House of Hagens	Infosys
Flexa Cloud	Greenz	HPE	Ingram Micro Cloud
Foundever	Grey Brasil	Hubify	Inmetrics
Fri.to	Grupo Gpac	Hvar Consulting	Inpulso



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InterOp	Just a Litte Data	Leega	Marketdata
InventCloud	K2 Partnering Solutions	Lima Consulting Group	Match.mt
IOS	Keyrus	liveSEO	Math
IPNET	KOMUH	Logicalis	Media.Monks
iprospect	KPMG	Lume Tecnologia	Metadados
IPSense	Kumulus	Lumen	Mfield
iSmartBlue	Kurier	M I Montreal Informática	Microservice
Isobar	Kyndryl	Macfor	Mignow
IT Core	Kyraly	MadeinWeb	Mindworks
Iteris	L3	Maeztra	Moldsoft
JCDecaux	LabsXD	Magazord	Môre
Jellyfish	Lan Designers	Magna Sistemas	Movti
JFox	Lanlink	Mapa360	MPS Informática
Jotacom	Lattine Group	MAPData	MRM Brasil
Jüssi	Leadlovers	Marke Consultoria	MSG



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Multiedro	Numen	Pitang	Rackspace Technology
Mundo do Marketing	NWB - Network Brasil	PMWeb	Rank My App
Mutant	O2B	Polis Consulting	RCR Desenvolvimento de Software - ESX
Mutato	Ogilvy	Predicta	Reach
MXM Sistemas	Oliver Agency	Prime IT	Redbelt
myCloudDoor	Olos	Processor	Repanse
Nação Digital	OPUS SOFTWARE	Programmer's Informática	Reply
NerdWeb	Orange Business Services	Projetas	Reweb
Netsecurity	OSF Digital	Propz	Rocket Content
Nexer	OST Tecnologia	Prosperi	Rocket.chat
Nextios	OTG	Publicis Brasil	Safetec
Niteo	Outmarketing Brasil	Publya	SantoDigital
Non Stop	Pentare	PWC	Sapient AG2
NTT DATA	Peppery	QI Network	Sauter
Nuage IT's everywhere	Performics	Qualiserve	Scansource





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Seidor	Softtek	Stilingue	ThoughtWorks
Select Soluções	SoftwareONE	Stratesys	TIT Consultoria e Serviços
Semantix	Soko	Suba	TIVIT
Senior Sistemas	Solo Network	SuporTI	T-Systems
Seprol	Solutis	Surfe Digital	Unisys
Servix	Solvimm	Sys4B	V8 Tech
SGA	Sonda	SysMap	Valcann
Sinqia	Sottelli	Take	Valtech
Sioux group	SOU.cloud	Talent Marcel	Venha Pra Nuvem
Sky.One	Sphere IT	TCS	Vexia
Smart Consulting	Sprinklr	Tech Mahindra	Vitrio
Snack Content	Squid	Tech6	Wipro
SND	SR Consulting	Techedge	
Sofist	ST IT Cloud	Telefonica	
Softline	Stefanini	Teltec	



### 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](#).

### iSG Research™

iSG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. iSG Research™ delivers guidance that helps businesses accelerate growth and create more value.

iSG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about iSG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

### 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 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 more than 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](http://isg-one.com).





**SEPTEMBER, 2023**

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**REPORT: DIGITAL INNOVATION SERVICES**