

ServiceNow Ecosystem Partners

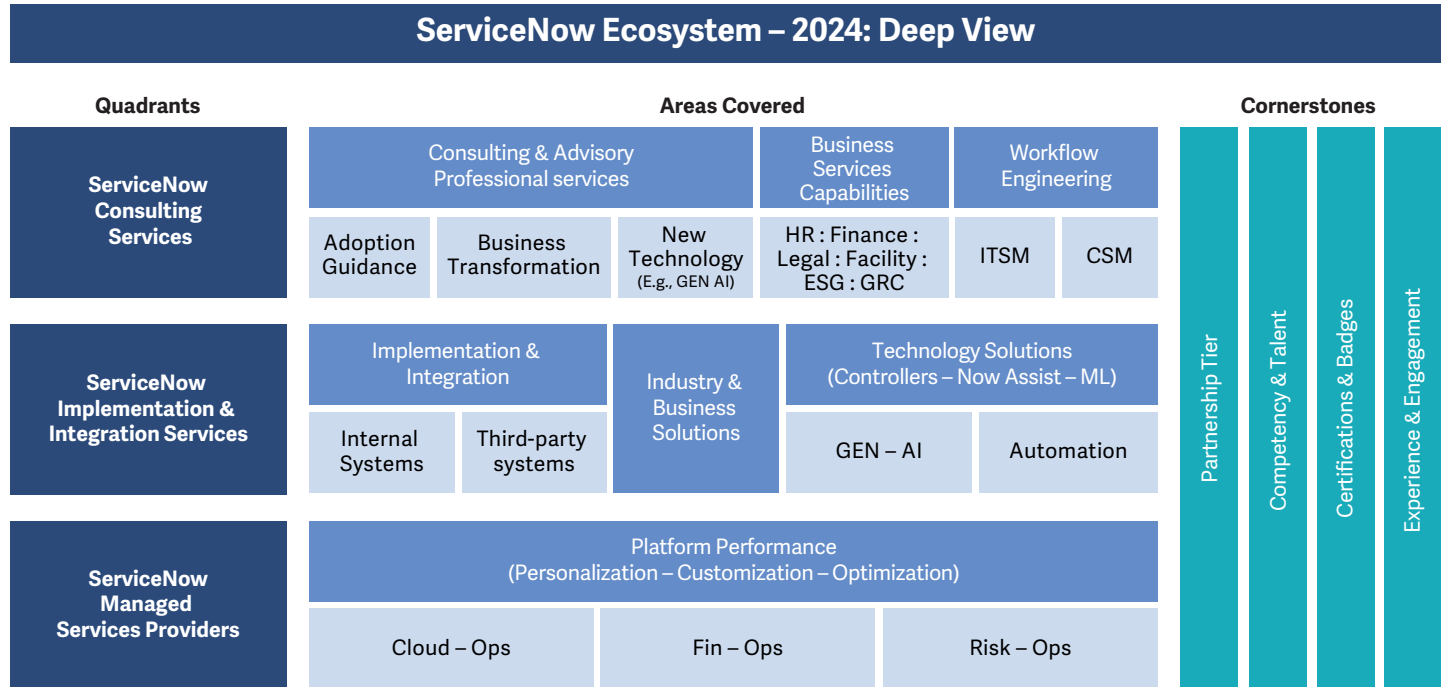
An analysis of ServiceNow ecosystem,
including providers' portfolio attractiveness
and competitive strengths



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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.

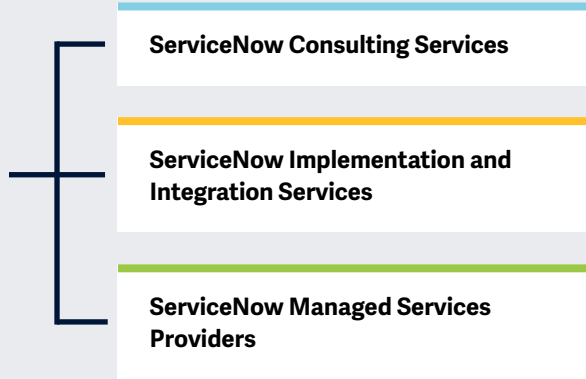
Key ServiceNow announcements in the past 12 months included a deepened relationship with NVIDIA and a revamped and realigned partner engagement model. This partner relaunch has enabled ServiceNow to improve partner-centric activities by realigning incentives and program details to maximize mutual benefits. 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 cover full-scale lifecycle support and specific services for distinct tasks.



Key focus areas for ServiceNow Ecosystem Partners

Simplified Illustration; Source: ISG 2023



The ISG Provider Lens™ ServiceNow Ecosystem Partners offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, Regions are Australia, Brazil, Europe and U.S.

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



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 roadmaps.

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 roadmaps 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 roadmaps** 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 Implementation and Integration Services

Definition

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

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

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

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



Eligibility Criteria

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



ServiceNow Managed Services Providers

Definition

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

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

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

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

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



Eligibility Criteria

- 1. Experience with support:** Involves extensive experience with ServiceNow's Now platform, workflows, third-party applications, integrators and accelerators, newly released features/modules and upgrades
- 2. Delivery capabilities:** Efficient delivery with proximity to clients
- 3. Technology partnerships:** Partnerships with key software providers and a comprehensive application management service (AMS)-related portfolio
- 4. Service integration and management (SIAM) and delivery models:** Expertise

in managing ServiceNow in broader applications under CloudOps, such as AIOps, MLOps, FinOps, RiskOps and ITOps

- 5. Delivery and contract models maturity: Ability to manage multiple vendors** and dependencies between toolchains while adhering to support SLAs
- 6. Broad customer base:** Includes local use cases and references
- 7. Intelligent, adaptive and progressive maintenance:** In sync with upgrades and functionality enhancements from ServiceNow and technology ecosystems, and with service integrators, in-house engineering teams

(, external partners and specialized tool providers

- 8. Ability to manage decentralized deployment within the organization:** Adoption of low-code/no-code and citizen developer techniques; offering **training for identification and delivery**; providing user knowledge updates on new releases, versions, features and modules



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on ServiceNow Ecosystem Partners 2024:

Quadrant	Australia	Brazil	Europe	U.S.
ServiceNow Consulting Services	✓	✓	✓	✓
ServiceNow Implementation and Integration Services	✓	✓	✓	✓
ServiceNow Managed Services Providers	✓	✓	✓	✓



The research phase falls in the period between November and December 2023, during which survey, evaluation, analysis and validation will occur. The results will be presented to the media in April 2024.

Milestones	Beginning	End
Survey Launch	November 13, 2023	
Survey Phase	November 13, 2023	December 18, 2023
Sneak Previews	March 2024	
Press Release & Publication	April 2024	

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

Access to Online Portal

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

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may 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



Contacts For This Study



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Brazil**



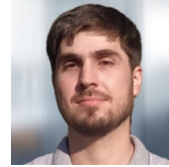
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Sobanski**

**Research Analyst,
Brazil**



**Anuj
Sharma**

**Data
Analyst**



ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisor to this study



Bill
Huber

**Partner, Digital
Platforms and Solutions**



Yadu
Singh

Director



Invited Companies

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

* Rated in previous iteration

AC3*	Aoop*	Bright Consulting	Contender Solutions
Accelare	Appmore	BT Automation	Coreio
Accelerate ITS	Artycs*	Capgemini*	Covestic
Accenture*	Aspire Systems*	Cask*	Crossfuzer
ActionNet	Atomic Solutions	CDI	Crowe
Advance Solutions*	Atos*	CDW Logistics	Dell Technologies
Advania	Axians AB	Certsys Tecnologia*	Deloitte*
AGILE-TM	Bechtel*	CGI*	Devoteam*
agineo*	Bell Techlogix	Cloudaction	Digisystem Serviços*
Ahead	Beniva Consulting	CloudGo*	DXC Technology*
AJUVO	Beyond20	Coforge*	DxSherpa
Alcor	BitHawk	Cognizant*	ECS
Algar Tech	Booz Allen Hamilton	Computacenter*	Enable (Fujitsu)*
Alparservice*	Bravium	Computer Aid	entrigo



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* Rated in previous iteration

EPAM Systems

Epicon IT Solutions*

EPI-USE*

Evoke*

Evora IT Solutions

Extreme Group*

EY*

Fast Lane Tecnologia*

FlyForm

Fujitsu*

Fully Managed

FX INNOVATION

GDIT

Genpact*

GFT Group

GlideFast*

Globalweb

Globant

GWCloud*

Hand Cloud

Hatchit Studios

HCLTech*

Hexaware*

HGC*

Hitachi Solutions

IBM*

ICF

Inetum-Do IT Wise

Infocenter

Infosys*

inMorphis

INRY*

Insource

Intact Technology

IntegrityPro Consulting

Intelbliss

IOS Informática

IT2B

iTech AG

ITS

iTSM Group*

Ivee Digital Tech

Jade Global

JDS Australia*

JIT

Kaptius

Keyrus

Kinetic IT*

Kloves

Konversational

KPMG*

Kyndryl*

LEIDIT

Leidos*

Logicalis

LTIMindtree*



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* Rated in previous iteration

Lutech Spa

Maryville

MATT LABS

Memora Processos Inovadores

Methods Business & Digital Technology

Nagarro Software

ND and Co

Net2Apps

Netgain

NetImpact

NewRocket*

Nexon & CSA*

NTT DATA*

Nuvolax*

Nuvolo Technologies

Open Tecnologia*

Optimim Healthcare

Orange Business

Orange Business Services

P1 Consulting

Pathway Consulting

Planhorizon*

Plat4mation*

Protiviti

ProV International*

Proven Optics

Prozessfux

Rapdev*

RSM US

RXP Services

SAIC

Savli Group

SCC

Servos

SHI International

Sigital

Sii Poland

Sofigate

Softtek

SoftwareOne

Solugenix

Sopra Steria*

SPOC

Stefanini

Swisscom

Sysintegra*

TCloud*

TCS*

Tech Mahindra*

Techport Thirteen

TEKsystems

Templar Shield

The Anti

The Cloud People

The Mastermind Group

Thirdera*



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* Rated in previous iteration

Tietoenvy	Virtusa
TIVIT*	Volteo
TMLabs	Volteo Digital
TOW 80	V-Soft Consulting
Trianz*	Windward Consulting
T-Systems*	Wipro*
Unifii	World Wide Technology
Unisys	Wrangu
UP3 Services	WSP-Consulting*
UST Global*	Yash*
VA EXPERT	Yssy*
ValueFlow IT*	
Veracity Consulting	
Veteran Enhanced	



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, call +1.203.454.3900, or visit 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.





NOVEMBER, 2023

REPORT: SERVICENOW ECOSYSTEM PARTNERS