Digital Business Transformation
Archetype Report

A research report aligning enterprise requirements and provider capabilities

August 2018

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Mindtree
About this Report

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The research and analysis presented in this report include 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 was current as of August 2018. 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.

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ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers’ strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals, as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

While digital transformation has been one of the hottest topics of discussion among enterprises, consultancies, research companies and academics for as long as a decade, it is inherently difficult to understand fully in terms of scope, breadth of reach and potential impacts across the enterprise. Digital transformation comprises many technological topics, business coverage areas, organizational functions and business processes. As these digital transformational areas are being analyzed, the overall Internet of Things (IoT)- and information and communication technology (ICT)-enabled world is increasingly evolving, rapidly causing exponential change.

Enterprises are by necessity evaluating means to increase their competitiveness. A large part of this challenge is not just technological, but also has to do with how to transform established processes, organizations and traditional management practices. Often, the question is how companies can enjoy a sufficient degree of flexibility, speed and collaboration across departments and enterprise boundaries, while enabling them to master their challenges so they can deliver benefit to themselves and their (ever more mobile) customers. The focus in this model rapidly switches to one of enabling businesses to efficiently address individual customer expectations and requirements, rapidly, with minimal unplanned cost, effort or disruption for the enterprise, thus increasing the corporation's competitiveness. This requires companies to move to a digital transformational technology and process level as soon as possible and then strive for continuous change – both internally and externally.

In our recently published ISG Provider Lens quadrant study on Digital Business Transformation, we examined the requirements and capabilities of the provider landscape globally as well as by some specific geographies within the following digital transformation areas:

**Enabling the Digital Customer Journey**

A customer journey comprises the individual cycles clients experience before and during the decision-making process for buying or using a product or service, and their product or service experience after making the purchase. Digital technologies can be used to allow for a completely new customer experience. This category comprises agencies and service providers that have specialized in developing comprehensive portfolios of digital go-to-market and business strategies, brand communications, creative service, design and experience offerings, as well as those providers that have acquired such agencies to add to their overall services offering. The providers are not limited to their own underlying technology and solutions, ensuring they can offer the enterprise client an integrated strategy to roadmap the digital customer journey.
Digital Enterprise Operations

This segment covers the digitization of the processes of a typical large-scale organization. Digitization is accomplished using an ecosystem of components, tech platforms, processes and system integration. It may use either PaaS, or in-house operations/data center or as-a-service (aaS) operations and main data center functions in a managed and integrated (end-to-end) manner. It includes DevOps tools and improvement to all operational and rapid provisioning processes.

Digital enterprise operations providers help customers operate smart, IT-based infrastructures, platforms and networks that connect sales, service and partners across the whole value chain. This market segment combines traditional operational excellence, including highly sophisticated technology, with managed services know-how and an in-depth understanding of customers' business and industry-specific challenges.

These implementations are often considered starter steps in the journey from traditional or current operations towards cloud-based operations that map to the inspirational enterprise “customer journey” plans. They are, in many cases, considered initial iterations that are replaceable by more customized and comprehensive PaaS and/or XaaS offerings.

Digital Transformational Platforms (PaaS)

This segment covers PaaS multi-tenant platform solutions, which can be integrated together and offered to enterprise by system integrators (and potentially by vendors acting in a SI role). It focuses upon solutions with a high degree of automation that are ready to use out of the box (pre-built), and those that need customization by the SI (and partners) but are designed for easy customer tailoring and modification (via open, modular and customizable components). Data center managed service, IaaS and hybrid cloud management are optional, because a client may have another provider for infrastructure management. Cloud computing is the foundation and the philosophy behind these platforms, which can be enhanced and refined based on an expansive partner ecosystem.

Solutions may consist of a technological mix, including hybrids of in-house developments and best-of-breed solutions by leading product and platform-as-a-service providers. They are embedded in web platforms and cloud marketplaces, which provide networking effects and integrate and distribute products or services from the platform provider and third parties.

Digital Transformational Services / aaS

This covers “cloud first” aaS service offerings that are focused on digital transformation with out-of-the-box solutions or solutions (often open or modular) that are easy to customize for specific enterprise needs. The provider can manage the solution or service end to end if required. This may be individually focused areas of the entire digital transformation enterprise service chain (for example, CRM or mobile apps and IoT integration, microservice and API integration and provisioning, ERP, etc.) or may be complete solutions based upon the overall design and transformational roadmap for the enterprise, as delivered through strategic planning.

Digital Product Creation and Customization

This category covers the creation of new digital products from the ground up for enterprise, either as new service components for the business, or by adapting existing but outmoded
service components. These developments and customizations may be offered as a service but fall short of the full continuous delivery paradigm. Monetization of these products should be built in and part of the development process. Some examples of digital transformational products include application accelerators, browse-and-buy capability for mobile end users, hotspot marketing, try-before-buying/demo subscriptions, and digital mirroring that simulates trying a product and provides stats and customer acceptance feedback. Accelerating innovation to translate information into revenues is based on lean, flexible and customer-centric business processes. The processes should be supported with inclusive agile development that is highly mapped to the enterprise goals.

**Digital Continuous Delivery**

Digital continuous delivery gives organizations the ability to develop and deliver high-quality software faster and more efficiently than ever before. It allows the use of development pods, innovation labs and direct feedback from end users and customers to increase the relevance of software being released into the market, and to shape new specific products and microservices. End user and customer feedback is often captured automatically via usage pattern analytics. Enterprises can have in-house continuous development and innovation staff, access resources jointly with in-house and external partner companies or through an as-a-service arrangement, with only the management and authorization function remaining in-house. Providers of this set of services must be able to offer all of the benefits and practices of companies in the Digital Product Creation & Customization quadrant, and also offer a workplace or shared workspace experience for collaboration. Under this environment, employees or user groups crowdsource to develop new products and services designed for new digital experiences. The providers have assets to support product ideation and prototype testing, such as: collaboration tools, virtual reality labs, IoT platforms for prototyping, telepresence for remote team collaboration, design thinking, A/B tests and methodology experts to facilitate product creation. Prototypes can be created and tested very quickly using agile methods. Providers that compete in this market can engage by project or as a continuous permanent innovation lab and may share revenues from product monetization.

**Blockchain as a Service**

This is a vast and potentially highly disruptive area. There are approximately 700 applications that use the blockchain operating system today and this number is growing rapidly. One example of blockchain’s evolution and broad application beyond digital currency is the development of the Ethereum public blockchain, which is providing a way to execute peer-to-peer contracts. Another example is provenance and authenticity tracking, which allows a chain of evidence based on numbers, codes, readable tags and even photographic evidence to be available in an unbroken chain from an item’s manufacturer or provider, through distributors and third parties, to the purchaser/end user. The process can provide evidence of the item and record all steps in its supply chain from origin to end user, (applicable in “ethical product” sourcing). Such distributed ledger approaches increasingly are being used for tracking art and other valuable objects or high-volume retail objects and in areas such as manufacturing, aircraft and vehicle maintenance and part inventory supply and control.

Blockchain’s decentralized, open and cryptographic nature allow people to trust each other and transact peer to peer, making the need for intermediaries obsolete. The technology and processes it enables also bring unprecedented security benefits. Hacking attacks that commonly impact large centralized intermediaries like banks would be virtually impossible to carry out on a blockchain, because every block ever made on a subject, across the entire internet or network, would have to be over-written, as would the backups.
Introduction

The digital transformation megatrend is a top priority on corporate agendas. The delivery of digital transformational solutions, coupled with corporate agility, is fully supported by advisors and researchers that are concentrating upon future-oriented business models. The focus is on enabling businesses to efficiently address individual customer expectations and requirements, rapidly, with minimal unplanned cost, effort or disruption for the enterprise, thus increasing the corporation’s competitiveness. This requires companies to move to a digital transformational technology and process level as soon as possible and then strive for continuous change – both internally and externally.

This report uses research and analysis from ISG’s long-running work with enterprise user clients and services providers alike to identify and examine key changes in, approaches for, and buyers of digital transformational services, and then to map the user-side requirements we see to provider-side offerings and capabilities.

Obviously, not every user enterprise has the same requirements. In this report, we use five “buyer archetypes” – detailed in the following sections – to identify and assess buy-side requirements for business value versus provider-side offerings and capabilities. The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their services requirements, and from working with providers to understand how those buyer requirements influence the development of – and go-to-market strategies for – suitable solutions.

The capabilities of 43 providers are assessed in this report. Some services providers that are typically included in our work are not included in this report because either they were not able to participate or declined to participate. They may be included in future versions of this report, based on merit and on the service providers’ willingness to provide current and relevant materials.

Readers should not make any inferences based upon a service provider’s absence from this report.
About This Research

This ISG Provider Lens™ report summarizes the relative capabilities of 43 digital business transformation service providers and their abilities to address the requirements of five typical, frequently encountered categories of enterprise buyers (archetypes). Each archetype represents a unique set of business and technological needs and challenges.

Our research found no shortage of providers with capabilities adequate to satisfy the digital business transformation needs across most user archetypes. This is due in large part to two core realities regarding the archetypes:

1. The characteristics of each archetype are moving targets because, while the core requirements rarely change, the relative importance of different requirements can vary based on business and/or technological environment changes.

2. Most enterprises, especially larger firms, tend to include multiple archetypes. As each archetype's requirements evolve based on business and technological changes, so too does the presence and value of each archetype within the enterprise. Therefore, enterprises have an ongoing series of choices when it comes to services provider selection. They will need to strike a balance between optimal business value and relative cost of the provider engagement, integration and management. Market changes, new business models, fluctuating economic factors and other variables will continually add to and subtract from user needs. The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their services requirements and from working with services providers to understand how those buyer requirements influence the development of suitable solutions and go-to-market strategies.

Where any revenues or monetary values are referenced, they are in in U.S. dollars ($US) unless noted.
How to Use This Report

This report is intended to provide advice founded on ISG's experienced-based, proprietary assessment of services providers' relative suitability to the needs of the typical digital business transformation customer. This advice is then applied across each of the five archetypes as profiled. No recommendation or endorsement is indicated, suggested or implied. Clients must make the decision to engage with any provider based not only on their specific, current workplace needs, but also on other factors such as cost, culture and timing.

This report is organized as follows:

Client Archetype Descriptions – This section identifies and describes the most common user-side archetypes that we have identified in our ongoing research and analysis.

Assessments by Archetype – These sections first detail each of the client archetypes, along with the types of service offerings that each typically requires to realize the most business value. Each archetype section includes our assessment of the relevant capabilities and positioning of the services providers surveyed and interviewed. It covers the relative suitability of the providers for each archetype based on the information they have provided to ISG. These assessments are developed using the data, analysis and comparative methodology described in the methodology section.

Methodology – In this section, we outline and explain how we developed and applied the data, analysis and insights provided in this report.

Please note: This report presents services providers’ known capabilities in the context of user enterprises’ typical project needs (which are categorized as specific archetypes). This report is not meant to rank providers or to assert that there is one top provider with capabilities that can meet the requirements of all clients that identify themselves as a particular archetype.
CLIENT ARCHETYPE DEScriptions

Client archetypes used in this report (and in our ongoing advisory and consulting engagements) represent the various types of clients ISG has observed and how we classify them according to their relative service maturity and objectives. Each client archetype encapsulates the typical characteristics of a specific type of buyer that is looking to implement one or more process or functions. The use of archetypes enables us to repeatedly across multiple environments, industries, provider types and other variables within one service line.

The archetypes are not meant to be comprehensive examinations of all potential or likely client situations and requirements. They are meant to provide a simple, relevant and repeatable set of user-side requirements against which a similarly simple, relevant set of provider capabilities can be assessed.

The archetypes included in our reports are based on the most current marketplace knowledge regarding prevalent buy-side goals, resources, initiatives and requirements. Archetype characteristics are also developed and refined over time based on our advisory and consulting work with enterprise clients and service providers, and on our global business market research and advisory programs.
TRANSFORMATIONAL BY STRATEGY
These clients have deep experience in sourcing their services. They have evolved from legacy siloed solutions and will not have IT as a disjointed function, but rather a function that enables business differentiation – often already cloud based. They will have created a strategy roadmap for digital transformation and will be approaching this in “bite-sized” phases (but may now be under pressure to accelerate the plan). These clients will take best-of-breed solutions from across the market and will look for a digital transformation solution aimed at business enablement and achieving business goals, such as revenue increase, cost decrease and improvement to customer service delivery and satisfaction.

AD-HOC (LEGACY) TRANSFORMATION
These clients usually have a legacy-heavy enterprise IT function that has multiple silos and is disjointed from the business. For these organizations, enterprise IT is usually a cost center, not a value generator. These clients undertake the digital transformation journey because of an ad-hoc requirement, such as an acquisition, merger, divesture, competitive reaction, or an initiative to enter a new geography or adopt a completely new technology. A digital transformation program and strategy would represent a significant improvement overall for such organizations, but they often are not well prepared to leverage digital transformation methods, processes or technology. These clients require advisory and consulting services for digital transformation and to assist in roadmap and strategy creation.
**CLOUD-FIRST TRANSFORMATIONAL**

These clients are early adopters of cloud, they take a “cloud-first” approach and have relatively small and agile internal IT organizations. Their focus is on using cloud applications and services to leverage cloud-native capabilities. These clients are not encumbered by the requirements of legacy operations. They consider IT as a change agent, and in many cases, as an enabler of revenue and profit growth for the business. Agility and flexibility are their watchwords, together with DevOps and “smart” operations and management control. They see digital transformation as an extension of what they are already doing. They may be prepared in some specific circumstances or applications to consider disruptive or new solutions, after extensive testing, by means of proof of concept (POC) or pilot projects. However, they typically will limit these to specific areas of the business, rather than adopt them enterprise wide.

**DIGITAL ENTERPRISE NATIVES**

These clients typically will have a heritage of evolving from the Cloud-first Transformational or Transformational by Strategy archetypes. They are very customer-centric companies that create competitive advantage by utilizing current and emerging digital transformation methods, processes and technologies. These companies will very often have multi-channel customer touchpoints. For companies in the Digital Enterprise Native archetype, the focus is on generating more revenues by using IT, rather than simply reducing costs. Increasing revenue is the major driver behind their strategy, coupled with improving flexibility, agility, competitive positioning and speed of reaction to competitive pressure. They are comfortable with crowdsourcing and crowdfunding, user micro service creation, continuous development/improvement, etc. They are happy to form partnerships and engage in profit sharing or pay-as-used relationships with providers, rather than simply buying sourcing contracts. They are prepared in some specific circumstances to adopt disruptive or new solutions, relatively rapidly, by means of POCs or pilot projects, but typically will limit these to specific targeted solutions, especially if deploying enterprise wide.
DISRUPTION EMBRACERS – EXPLORERS

These clients will have a heritage typically of evolving from the Cloud-first Transformational or Digital Enterprise Native archetype. Like Magellan, Drake and Columbus, who used the new sciences of long-distance navigation coupled with efficient oceangoing ship technology, these modern-day explorers will be looking to utilize their stable but advanced IT situation to gain additional competitive advantage by adopting leading edge or disruptive methods. Enterprises in this archetype are typically highly competitive or are seeking to create a USP that will protect their current customer base from erosion due to other companies’ offerings. They are highly flexible, with mature and solid IT ecosystems in place and embrace spinning up proof of concept and pilot projects to prove or disprove concepts and solutions rapidly, with the ability to quickly move to limited or full-scale deployments if validation occurs. They create or defend competitive advantage by using emerging, potentially disruptive, methods, processes and technologies (such as blockchain) as early as possible. Disruption Embracers – Explorers are happy to form partnerships and collaborations with providers (from small to large) on a seed payment, no success/no fee, profit sharing or pay-as-used basis, although they also are happy to undertake simple sourcing contracts, where the value of such is clear to them. For this archetype, the potential of being explorers on a voyage of discovery holds great interest and potentially great rewards.
Digital Business Transformation Archetypes
These clients usually have a legacy-heavy enterprise IT function that has multiple silos and is disjointed from the business. For these organizations, enterprise IT is usually a cost center, not a value generator. They undertake the digital transformation journey because of an ad-hoc requirement, such as an acquisition, merger, divestiture, competitive reaction, an initiative to enter a new geography or adopt a completely new technology. A digital transformation program and strategy would represent a significant improvement overall for such organizations, but these organizations often are not well prepared to leverage digital transformation methods, processes or technology. These clients require advisory and consulting services for digital transformation and to assist in roadmap and strategy creation.

The typical characteristics of Ad-hoc clients include:

- The need to consolidate and manage their enterprise IT workplace and customer environments, often on an urgent basis.
- The identified need to migrate many functional areas to the cloud and reform their IT department.
- The view of IT as a cost center and the need for ways to reduce costs, without necessarily looking at business improvements beyond that.
- Seekers of advice and use cases of how to transform in the short, medium and long terms, with focus on the short term.
- A lack of proactiveness and a hesitation to adopt digital transformation technology due to perceived risk and disruption to “business as usual.”
- May have multiple smaller projects running in parallel to “fix” perceived problems, while not addressing overall overarching issues.

When it comes to digital business transformation, an Ad-hoc client will look for the following:

- Migration to the transformed ecosystem in manageable phases over time without disrupting the legacy environment.
- Service providers with deep experience and understanding in the client’s industry, with references and use case examples.
- Advisory and consulting support on the specific transformational area, and, the overall roadmap, transformational strategy and understanding of how the two fit together.
- Benefits examples KPIs and other metrics that are applicable to the new solutions rather than the old.
Ad-hoc clients will require a service provider partner to at least offer the following:

- Vision, focus and experience in helping clients with either a large legacy setup or clients that are in the initial stages of a transformation journey.
- Roadmap and strategy creation experience, as well as project management competency, relating these to real-world examples to phase plan transformations.
- Work with the client to create new metrics and KPIs to demonstrate the benefits and ROI of new solutions, and to manage and track them.
- Excellent portfolio of its own solutions plus ecosystem partners, all with demonstrable references and use cases.
- Demonstrable scale to support the clients transformation projects and processes and future state operations.
AD-HOC Client Objectives

- Urgently consolidate and efficiently manage IT solutions while sinking costs.
- Fix existing weaknesses/issues in IT.
- Create a short term and long-term transformational roadmap.
- Move from in-house legacy to more cloud-based digital transformation solutions.
- Start journey of flexible and agile IT linked to business objectives.

Fig 1

AD-HOC Influence of Provider Capabilities

- Increase in future influence
- Decrease in future influence

Size based on relative current importance in the archetype profile
Of the 43 service providers included in our research, we found nine that stand out above the others as matching the Ad-hoc legacy archetype based on our assessment of their capabilities as described in the Methodology section in the Appendix. These nine, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 2, and briefly examined in the following sections.

**Note:** The service providers listed are arranged in alphabetical order. No ranking is implied.

### Ad-hoc Archetype Leaders

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>Fix existing issues / Consolidate</th>
<th>Roadmap advisory and migration planning</th>
<th>New portfolio and implementation</th>
<th>Continued lower cost/smooth operations</th>
<th>New metrics and business linking</th>
</tr>
</thead>
</table>
Mindtree focuses primarily on customers across the CPG, retail, banking, insurance, travel, high technology, media and services industries. Mindtree provides current state analysis, digital transformation analysis and migration planning, including product and service replacement where required, together with data analytics and optimization. In the digital transformation space Mindtree delivers in five key areas: Digital, Engineering R&D, Operations, Enterprise Software and IT Consulting. Each has a plethora of focused units. The Digital service line has The Digital Pumpkin, which is Mindtree’s digital innovation hub. It is an interactive space where multidisciplinary teams come together to ideate, design and craft meaningful business solutions in a collaborative environment. The environment helps clients accelerate digital innovation, conduct primary research and create functional prototypes and piloteable solutions.

Mindtree has a strong product engineering foundation coupled with a comprehensive portfolio of digital offerings across industries. It couples the offerings with innovative creation and delivery methods, including the innovation hub, which enables them to effectively compete and deliver on a global basis for major enterprises, of which the company has a strong reference portfolio.
OTHER NOTEWORTHY PLAYERS – AD-HOC LEGACY

Some other providers scored high in or more areas that are important for the Ad-hoc Legacy client. However, they were not categorized as Leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for Ad-hoc Legacy clients are:

- ATOS
- Hexaware
- Infosys
- Luxoft
- Mphasis
- UST Global

Fix existing issues / Consolidate
Roadmap advisory and migration planning
New portfolio and implementation
Continued lower cost/ smooth operations
New metrics and business linking

ATOS
Hexaware
Infosys
Luxoft
Mphasis
UST Global
ATOS
Hexaware
Infosys
Softtek
ATOS
Hexaware
Infosys
Mphasis
These clients have deep experience in sourcing their services. They have evolved from legacy siloed solutions and will not have IT as a disjointed function, but rather a function which enables business differentiation – often already cloud based. They will have created a strategy roadmap for digital transformation and will be approaching this in bite-sized phases, (but may now be under pressure to accelerate the plan). These clients will take best-of-breed solutions from across the market and will look for a digital transformation solution aimed at business enablement and achieving business goals such as revenue increases, cost decreases and improvement to customer service delivery and satisfaction.

The typical characteristics of Transformational by Strategy archetype clients include:

- While the planning horizon to justify projects varies by project, Transformational by Strategy clients usually take a long-term view that exceeds two or three years.
- Technology is viewed as just a means to achieve the end. Older technology is still acceptable if it can assist in the transformation and help maintain the technical edge.
- Projects are managed closely and conform to milestones and business cases. Projects have regular review cycles with senior management.
- Clients advocate digital transformation, automation and agile development and operations. They have many projects using the latest technology and solutions in progress.
- SaaS applications are being used in many centrally deployed solutions, such as email, finance and HR. Transformation plans may exist for other legacy applications but may not (yet) be in process.

When it comes to digital transformation, a Transformational by Strategy client will look for the following:

- Partners that have a vision and focus on implementing digital transformation-based environments and solutions, with references and use cases.
- IT organization redesign and realignment from a silo structure to a streamlined organization experience, to support the new environment.
- Business advocates within the IT organization that not only make sure that end users and business units are being supported, but also have an added responsibility to look for opportunities where IT can be a growth enabler.
- Expertise in creating financial models that link with business models and outcomes, and in establishing new KPIs and other metrics for managing them.
Transformational by Strategy clients will require a service provider partner to at least offer the following:

- Capabilities to assess the existing IT environment and help shape the future state (roadmap), along with the consulting and expert advice capabilities to allow a focus on transformation phase requirements.
- Strategic partnerships with leading digital transformation solution providers that have references and demonstrable experience.
- A risk sharing, profit sharing or similar alternative to the traditional pricing model where clients pay for services provided.
- Experiences and references in legacy to digital transformation projects that are industry specific and similar sized, with use cases.
- Experience in structuring and managing transformation project management and operations contracts.
To constantly reinvent and transform itself to move and stay ahead of the competition, moving towards the leading edge to be more effective over time.

- To consider IT not as a cost center, but as a growth enabler.
- To link business objectives and outcomes to technology objectives and deliverables.
- To enable more flexible and agile technology and application delivery to support the business and customer.
- To use a longer-term planning horizon to justify investments if needed.
- To use alternative payment/pricing models, such as risk/reward, wherever possible.

Transformational by Strategy

Influence of Provider Capabilities

- Increase in future influence
- Decrease in future influence

Size based on relative current importance in the archetype profile
Of the 43 service providers included in our research, we found nine that stand out above the others as matching the Transformational by Strategy archetype based on our assessment of their capabilities as described in the Methodology section in the Appendix. These nine, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 5, and briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

<table>
<thead>
<tr>
<th>A2</th>
<th>Migration &amp; Implementation expertise</th>
<th>Consulting / Advisory on roadmap</th>
<th>Partnership Pantheon</th>
<th>Sourcing Contract Flexibility</th>
<th>New Digital Transformation Solutions</th>
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<tbody>
<tr>
<td>Atos</td>
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<td>Tech Mahindra</td>
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<td>Wipro</td>
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</tbody>
</table>
Some other providers scored high in or more areas that are important for the Transformational by Strategy client. However, they were not categorized as Leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for Transformational by Strategy clients are:

**Fig 6** Other Noteworthy Players – Transformational by Strategy

- Migration & Implementation expertise
  - Fujitsu
  - Infosys
  - Mphasis
  - TCS
  - Verizon

- Consulting / Advisory on roadmap
  - Infosys
  - Mphasis
  - TCS

- Partnership Pantheon
  - Fujitsu
  - Infosys
  - Intellectsoft
  - UST Global

- Sourcing Contract Flexibility
  - Oracle
  - Salesforce

- New Digital Transformation Solutions
  - GE
  - Oracle
  - Salesforce
These clients are early adopters of cloud, they take a cloud-first approach and have relatively small and agile internal IT organizations. Their focus is on using cloud applications and services to leverage cloud-native capabilities. These clients are not encumbered by the requirements of legacy operations. They consider IT as a change agent, and in many cases, as an enabler of revenue and profit growth for the business. Agility and flexibility are their watchwords, together with DevOps and “smart” operations and management control. They see digital transformation as an extension of what they are already doing. They may be prepared in some specific circumstances or applications to consider disruptive or new solutions, after extensive testing, by means of proof of concept (POC) or pilot projects. However, they typically will limit these to specific areas of the business, rather than adopt them enterprise wide.

**The typical characteristics of Cloud-first Transformational clients include:**

- Early cloud adopter and a “cloud first” approach.
- Prefer “born-in-the-cloud” applications.
- Believe that IT is an enabler for business growth.
- Usage-based pricing is the preferred method for cost allocation.

- Agility, speed and flexibility to respond to changing needs are valued immensely.
- Staff is well versed in the latest technologies (including DevOps, cloud and agile).
- These clients look for a highly automated IT support system with a heavy dependency on self-service and knowledge asset features.

When it comes to digital transformation, a Cloud-first Transformational client will look for the following:

- Highly flexible service provider contractual arrangements that are linked to business outcomes.
- Data analytics used increasingly to measure cause and effect.
- Use of automation to promote self-service and optimize costs as a prevalent offering.
- Agility and flexibility to provide competitive advantage, including new microservice creation and provisioning, which are key issues.
- “What next?” visibility regarding next-gen solutions coming over the horizon in digital transformation.
Cloud-first Transformational clients will require a service provider partner to at least offer the following:

- Innovative, but proven, solutions mapped to the client's strategic roadmap.
- Ability to formulate a creative supply contract structure and explore alternate models in the risk/reward areas.
- Strategic partnerships with leading and proven digital transformation solution providers and cloud service providers.
- Experience working with "cloud first" clients in the same industry type and of similar sizes.
- Experience implementing and managing transformation projects and programs that are cloud based, with references and use cases.
Cloud-first Transformational

Client Objectives

- Adaptation of transformative cloud technologies in digital transformation for competitive advantage.
- Adoption of a “cloud first” approach for reducing the IT organization and removing silos while improving efficiency.
- Flexible service provider contractual arrangements that are linked to business outcomes.
- Advanced use of automation to give competitive advantage and optimize costs.
- Agility, speed and flexibility for delivering solutions as required by the client and business conditions.

Cloud-first Transformational

Influence of Provider Capabilities

- Increase in future influence
- Decrease in future influence
- Cloud first solution expertise
- Partnership pantheon of solution providers
- New digital transformation solutions
- Innovative sourcing contract options
- Vision/focus and advisory service mapping

Size based on relative current importance in the archetype profile
Of the 43 services providers included in our research, we found 11 that stand out above the others as matching the Cloud first transformational archetype based on our assessment of their capabilities as described in the Methodology section in the Appendix. These 11, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 8, and briefly examined in the following sections.

Note: The service providers listed are arranged in alphabetical order. No ranking is implied.

### Cloud-first Transformational Archetype Leaders

<table>
<thead>
<tr>
<th>Provider</th>
<th>Vision / Focus and advisory service mapping</th>
<th>Cloud first solution expertise</th>
<th>Partnership pantheon of solution providers</th>
<th>Innovative sourcing contract options</th>
<th>New digital transformation solutions</th>
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</table>
Mindtree

Mindtree is extremely strong in cloud migration and cloud first programmes for enterprise and provides current state analysis, digital transformation analysis and migration planning, including product and service replacement where required, together with data analytics and optimization. Mindtree delivers in five key areas: Digital, Engineering R&D, Operations, Enterprise Software and IT Consulting. Each has a plethora of focused units. Mindtree's digital innovation hub has an interactive space where multi-disciplinary teams come together to ideate, design and craft meaningful business solutions in a collaborative environment for the cloud. The environment helps clients accelerate digital innovation, conduct primary research and create functional prototypes and pilottable solutions.

Mindtree has a strong product engineering foundation coupled with a comprehensive portfolio of cloud based digital offerings across industries. It couples the offerings with innovative creation and delivery methods, including the innovation hub, which enables them to effectively compete and deliver on a global basis.
OTHER NOTEWORTHY PLAYERS – CLOUD-FIRST TRANSFORMATIONAL

Some other providers scored high in or more areas that are important for the Cloud-first Transformational client. However, they were not categorized as Leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for Cloud-first Transformational clients are:

- Deloitte
- Fujitsu
- Sprint
- GE
- Verizon
- Agilepoint
- Sprint

Fig 9 Other Noteworthy Players – Cloud-First Transformational
These clients are early adopters of cloud, they take a cloud-first approach and have relatively small and agile internal IT organizations. Their focus is on using cloud applications and services to leverage cloud-native capabilities. These clients are not encumbered by the requirements of legacy operations. They consider IT as a change agent, and in many cases, as an enabler of revenue and profit growth for the business. Agility and flexibility are their watchwords, together with DevOps and “smart” operations and management control. They see digital transformation as an extension of what they are already doing. They may be prepared in some specific circumstances or applications to consider disruptive or new solutions, after extensive testing, by means of proof of concept (POC) or pilot projects. However, they typically will limit these to specific areas of the business, rather than adopt them enterprise wide.

The typical characteristics of Digital Enterprise Natives include:

- Deep experience in sourcing services with business outcome and risk/reward models in play.
- New service or development requirements originate from the business or customer side, and may be automatically fulfilled by means of microservice delivery.
- The solution ecosystem is an aggregation of the latest technologies and applications driven by business integration, rather than technology end users.
- There is a focus on agility, flexibility and speed in deploying new capabilities to support a rapidly changing business landscape.
- IT organizations may be primarily outsourced and cloud based. They have an IT service brokerage function that support access from any device, anywhere and anytime in an intuitive manner, including personalization and location information.
- Highly secure, self-healing networks and applications with distributed data using the latest encryption and security methods automatically, without negatively impacting user experience.

When it comes to digital transformation, a Digital Enterprise Native client will look for the following:

- Highly flexible contractual arrangements with service providers; (for example, risk/reward, BOT, vendor financed, investment in micro business, usage based, success based, hourly, fixed, outcome-based, etc).
- Highly automated IT support systems that make extensive use of self-service and knowledge asset features.
Highly automated provisioning and service/microservice ideation-to-creation systems based on usage patterns or personalization.

Consolidated IT in a nearshore or on-site location, with flexibility to support proximity of user and user clusters as required.

Services and solutions that operate in the cloud wherever possible and appropriate.

Personalized solutions for users that are vendor agnostic and device agnostic (fixed, mobile, wired, wireless, etc.) and are delivery internationally, 24/7/365.

Digital Enterprise Native clients will require a solution provider partner to at least offer the following:

- Agility, flexibility and innovation in services and service pricing.
- A partner that has a vision for and demonstrable experience with business-integrated digital transformational enterprises and solutions aimed at improving ROI or business differentiation.
- A partner with agile and innovative solutions, backed by continuous improvement and organic and/or inorganic growth in its portfolio.
- A provider that can demonstrate how fast it can respond to market changes itself, and with reference projects and use cases at live clients.
- A partner with a portfolio of specific industry solutions and a dedicated digital practice.
Digital Enterprise Natives

Client Objectives

- Digital transformation initiatives tied with dynamic business requirements and outcome-based pricing.
- Increased end-user experience and high efficiency and flexibility in service delivery.
- Competitive differentiation, preferably with USPs/defensible barriers, enabled by native digital solutions.
- Cloud, mobility and legacy app access solutions as per business requirements.
- A future-ready and automation-enabled digital enterprise able to rapidly deliver required services at optimal cost and/or generate additional revenue.
Of the 43 services providers included in our research, we found 11 that stand out above the others as matching the Digital Enterprise Natives archetype based on our assessment of their capabilities as described in the Methodology section in the Appendix. These 11, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 11, and briefly examined in the following sections.

*Note: The service providers listed are arranged in alphabetical order. No ranking is implied.*

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Digital Enterprise Natives Archetype Leaders

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OTHER NOTEWORTHY PLAYERS – DIGITAL ENTERPRISE NATIVES

Some other providers scored high in or more areas that are important for the Digital Enterprise Native client. However, they were not categorized as Leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for Digital Enterprise Native clients are:

- Alegri
- BCG
- Capgemini
- Ernst & Young
- Horvath & Partners
- Infosys
- KPMG
- McKinsey
- Orange (OBS)

- BCG
- Capgemini
- Ernst & Young
- Infosys
- KPMG
- McKinsey
- Orange (OBS)

- Capgemini
- Infosys
- KPMG
- McKinsey

- C3IoT
- Capgemini
- GE
- Horvath & Partners
- Mphasis
- PwC
- Trianz
- GE
- Horvath & Partners
- Infosys
- Mphasis
- PwC
- Trianz
DISRUPTION EMBRACERS
- EXPLORERS

These clients will have a heritage typically of evolving from the Cloud-first Transformational or Digital Enterprise Native archetype. Like Magellan, Drake and Columbus, who used the new sciences of long-distance navigation coupled with efficient oceangoing ship technology, these modern-day explorers will be looking to utilize their stable but advanced IT situation to gain additional competitive advantage by adopting leading edge or disruptive methods. Within the transformational space, this effort currently is focused upon the blockchain ecosystem of methods, processes and technologies. Enterprises in this archetype are typically highly competitive or are seeking to create a USP that will protect their current customer base from erosion due to other companies’ offerings. They are highly flexible, with mature, solid IT ecosystems in place and embrace spinning up proof of concept and pilot projects to prove or disprove concepts and solutions rapidly, with the ability to quickly move to limited or full-scale deployments if validation occurs. They create or defend competitive advantage by utilizing emerging, potentially disruptive, methods, processes and technologies (such as blockchain) as early as possible. Disruption Embracers – Explorers are happy to form partnerships and collaborations with providers (from small to large) on a seed payment, no success/no fee, profit sharing or pay-as-used basis, although they also are happy to undertake simple sourcing contracts, where the value of such is clear to them. For this archetype, the potential of being explorers on a voyage of discovery holds great interest and potentially great rewards.

The typical characteristics of Disruption Embracers – Explorers clients include:

- Will be evolving from a Cloud first or Digital Native structure and will use that as a basis to rapidly create POCs or pilots with new or disruptive technologies – currently the emphasis is specifically blockchain based projects – or alternate solutions as required by business.

- Will have either a flexible and business-supported approach to trialing new solutions, or will have a specific business issue which must rapidly be addressed utilizing blockchain core methods and approaches.

- New service or development requirements originate from the business side and existing traditional solutions may not address them optimally.

- There is a focus on agility, flexibility and speed in deploying new capabilities to support a rapidly changing business landscape.

- The enterprise is in a highly competitive environment and wishes to derive competitive advantage or defensible barriers potentially by rapidly implementing non-traditional, alternative solutions based on blockchain.
When it comes to digital transformation, a Disruption Embracers – Explorers client will look for the following:

- Highly flexible contractual arrangements with service providers similar to the Digital Native expectations.
- A viable solution with use case exploration in their industry, generally irrespective of the size of the provider the offering solution.
- Clearly demonstrated differentiation between traditional (and potentially existing legacy solutions) and the new proposed disruptive solution/technology.
- Ability to trial and pilot blockchain solutions rapidly while demonstrating the ability to scale the solution and get support from partners as required.
- Cloud-based delivery that is vendor agnostic and media agnostic wherever possible.
- Clearly illustrated business benefit from implementing the blockchain or alternate disruptive methods or technology.

Disruption Embracers – Explorers clients will require a service provider partner to at least offer the following:

- Agility, flexibility and innovation in service pricing, and preferably a risk/reward sharing model.
- A partner that has solutions aimed at improving ROI or business differentiation or addressing specific issues identified by business, irrespective of their size.
- A partner with fast start or boilerplate templates available to allow rapid customization and enterprise specific solution roll-out within blockchains.
- A partner with agile and innovative blockchain solutions, backed by organic and/or inorganic growth and partners to allow it to scale if required.
- A provider that can demonstrate how fast it can respond to the business requirements, and give success references, even if not for the specific (new) solution.
- A provider that is aware of the industry and business type and can flex its solution to fit them seamlessly.
Disruption Embracers - Explorers Client Objectives

- Solution to fix an issue or create new differentiation.
- Competitive differentiation, preferably with USPs/defensible barriers, enabled by new, disruptive solutions.
- Rapidly test and deploy new applications or solutions that deliver definable business benefit beyond existing traditional ones as often as required in a sustainable manner.
- Actively seek out “what next?” innovations and rapidly move through idea development to pilot phase to develop and a leading-edge portfolio of services that beat competitors.
- Remain “future safe” and de-risk as much as possible
- Reduce unplanned reacting to competitors’ initiatives by early deployment of disruptive technologies, rather than “me too” tactics.
Of the 43 services providers included in our research, we found eight that stand out above the others as matching the Disruption Embracers – Explorers archetype based on our assessment of their capabilities as described in the Methodology section in the Appendix. Theseseight, referred to as Archetype Leaders, and their relevant capabilities are presented in Figure 14, and briefly examined in the following sections.

*Note: The service providers listed are arranged in alphabetical order. No ranking is implied.*

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>Solution applicability and customization</th>
<th>Industry / Business knowledge and use cases</th>
<th>Flexible sourcing models</th>
<th>Partners and scalability</th>
<th>Innovation and “What’s next”</th>
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OTHER NOTEWORTHY PLAYERS – DISRUPTION EMBRACERS - EXPLORERS

Some other providers scored high in or more areas that are important for the Disruptor Embracing Explorer client. However, they were not categorized as Leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for Disruptor Embracing Explorer clients are:

- **Solution applicability and customization**
  - TCS
  - Infosys

- **Industry / Business knowledge and use cases**
  - HCL
  - Infosys
  - Mphasis
  - TCS

- **Flexible sourcing models**
  - Phillips Blockchain Labs
  - UST Global
  - Zensar

- **Partners and scalability**
  - TCS
  - Hexaware
  - UST Global
  - Zensar

- **Innovation and “What’s next”**
  - Hexaware
  - Phillips Blockchain Labs
  - UST Global
  - Zensar
## SERVICE PROVIDERS ACROSS ARCHETYPES

<table>
<thead>
<tr>
<th></th>
<th>Ad-hoc (Legacy) Transformation</th>
<th>Transformation by Strategy</th>
<th>Cloud First Transformation</th>
<th>Digital Enterprise Natives</th>
<th>Disruptor Embracing &quot;Explorers&quot;</th>
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</table>

★ = Leaders  
✔ = Noteworthy Providers (number of check marks indicate the degree of alignment with the capability requirements of each client archetype)  
☐ = Not In (the Service Provider wasn’t considered a leader in any of the capability requirements for this archetype)

NOTE: All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to the capability requirements were identified as Leaders or Noteworthy Providers.
## SERVICE PROVIDERS ACROSS ARCHETYPES

<table>
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<tr>
<th>Provider</th>
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★ = Leaders
✔ = Noteworthy Providers (number of check marks indicate the degree of alignment with the capability requirements of each client archetype)
□ = Not In (the Service Provider wasn’t considered a leader in any of the capability requirements for this archetype)

NOTE: All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to the capability requirements were identified as Leaders or Noteworthy Providers.
### SERVICE PROVIDERS ACROSS ARCHETYPES

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<tr>
<th>Service Provider</th>
<th>Ad-hoc (Legacy) Transformation</th>
<th>Transformational by Strategy</th>
<th>Cloud First Transformational</th>
<th>Digital Enterprise Natives</th>
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GUIDANCE

This research report has highlighted the multiple archetypes that ISG is experiencing in the area of digital business transformation. It is clear from our research that as businesses transform more to become customer centric, rapidly responding enterprises, technology is linked ever closer to business agility and success, and it affects and/or reflects organizational decisions more than ever. As a result, the archetypes highlighted in this study not only lend themselves to categorizing the current and future state situations of enterprises, but also aid in differentiating between the various types of problems or opportunities that they are intending to solve. The archetypes are not meant to be comprehensive examinations of all potential or likely client situations and requirements. They are meant to provide a simple, relevant and repeatable set of user-side requirements against which a similarly simple, relevant set of provider capabilities can be assessed.

In this report, we have detailed different buyer behaviour based on current enterprise needs in the digital transformation journey. It addresses a flow from the Ad-hoc Traditional clients, which transform only as absolutely necessary due to their legacy and business-as-usual environments, through different levels of transformation involving the cloud and aaS, including PaaS, to Digital Natives and Disruptor Embracers – Explorers at the other end of the transformation journey, for whom business as usual is a fully digitally transformed enterprise. The characteristics of each archetype are a moving target over time, because while the core requirements rarely change, the relative importance of different requirements can vary based on business and/or technological environment changes. Multiple archetypes may be, and often are, present in many larger scale and geographically widespread enterprises. One business unit's needs and goals may be justifiably different from another's. As the requirements of each archetype evolve and adapt based on business and technological change, so too does the presence and value of each archetype.
Enterprise Leadership Actions

Enterprise decision makers are facing ever increasing challenges in ensuring their overall business, together with their technology, is delivering the agility and services required by the customer and business plan to ensure continued growth and success. This is increasingly true in a market which is ever more competitive and rapidly adopting new methods, solutions, technology sets and organizational paradigms within the digital transformational ecosystem.

Business leaders are working increasingly closely with IT and technology departments to ensure that the right mix of advanced and competitively positioned solutions are offered, while saving internal costs on CapEx and personnel where possible. They are doing that by means of renting what they need through aaaS or alternative pricing models that can be hosted either on-premises or increasingly (often preferably) in the cloud. In the end, ICT executives must ensure that each solution set meets the business and customer needs and preferences, while being fully supported by stable technology and processes – this is true irrespective of the archetype or combination of archetypes. However, the rapidity of change and technology advancement does not remove the need to have some basic questions resolved. These questions are presented below.

Is there sponsorship and agreement from the C-suite on the roadmap?
Effective and successful digital transformation doesn’t just happen and doesn’t happen purely by being driven from the IT and technology areas of a business. It is vital to have acceptance and sponsorship from executives across the entire enterprise spectrum to drive the changes required consistently within the enterprise. These changes may include organizational, pricing, revenue stream types, branding, marketing and more. A roadmap must be constructed with phased releases planned in the traditional manner, as well as allowance for unplanned changes that are required by customers or business conditions. The roadmap should also consider customer-side users and testing pilot groups for solutions, as well as rapid prototyping and continuous delivery models. This roadmap must be regularly reviewed as a living document and be in a form that all levels of the business can understand.

Partner models: Can suppliers/vendors be chosen to fulfil discrete parts or conglomerated parts of the roadmap?
- Based on the roadmap, can suppliers be found that offer differing pricing and delivery models, are flexible and able to work with the enterprise as trusted partners?
- Will purchased solutions, rented solutions (aaaS), self-management on the enterprise’s own infrastructure in-house, management by a supplier, or a mix of these options be the preferred model(s) chosen?
- Will a best-of-breed approach for specific solutions from a larger number of suppliers, or a large-scale supplier that supplies solutions from a head-of-contract role be required?
- No one size will fit all enterprises, and enough time must be reserved to perform evaluations and supplier selection processes during the digital transformation journey.

Does the solution being considered meet both the customer AND the business need?
It is past time for enterprises to understand that digital transformation is happening. There is a plethora of success stories and use case information generally available. Most of these success stories involve companies that planned to make the change, road mapped the journey and implemented the plan with chosen trusted partner companies that enabled the change. It is particularly important for clients in the Ad-hoc Legacy archetype to change their thinking. Fortunately, many organizations have adopted rapid prototyping linked to business outcome-type approaches, often using collaboration labs or innovation labs that involve customers for input to design or solution requirements and result testing.

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Provider Leadership Actions

A clear portfolio offering and consultative approach to the enterprise is key to understanding its needs and mapping them to your abilities to deliver upon those needs, either from organic resources and capabilities or from your partner ecosystem. The most successful case studies of digital transformation all contain this approach element, as well as the provider demonstrating clear understanding of the enterprise’s industry, together with capability statements of how the offered portfolio fulfills the enterprise requirements within that industry. Key tasks to be performed and issues to be considered to enable success in a client approach or partnering situation include:

Ensure that your enterprise architecture and roadmap inputs are correct. A high-level, pace-layering exercise will identify the systems of engagement that should attract the investment and focus. Updating or modifying the enterprise roadmap in conjunction with the enterprise-side executives is an artefact of such work.

Plan for innovation and transformation. Large digital transformations and undertakings should be treated as proof of concept and pilot engagements, and then scaled to commercial release programs, with built-in functionality and fit-for-purpose testing, innovation management and almost real-time reporting and adaptation to the roadmap.

Enable the enterprise change. Don’t forget the enabling process workflows across the entire organization. This isn’t just an IT department exercise. One often forgets the RFP and purchasing workflows, finance and accounting departments, HR workflows, sales and marketing/branding workflows, legal and regulatory compliance and other functions.

Go beyond the general technology and solution and provide the right model for specific industries. The days of a one-size-fits-all delivery and function model are over within the digital transformation space. Each archetype will need a separate delivery model, which in turn may be significantly different dependent upon industry and the enterprise size/type within that industry.

Perception of value/cost in each archetype is different. Offer value-based deals and/or alternate risk sharing pricing. Success in each archetype is defined differently – and the archetype-specific definition will impact both key performance indicators and how value is perceived (and priced), and may impact your positioning as a “trusted partner” supplier with long term engagement with the enterprise.

Be the change agent and advisor that your client needs. Each archetype addresses a different challenge, and a problem or opportunity might be a mix of archetypes. Define your value add not just on the offered solution, but on the advice you give your client as a trusted partner and in the frictionless manner you enable your client’s journey from one archetype to the next.
APPENDIX

Methodology
As previously noted, this report uses five archetypical sets of buy-side client requirements to assess the relative suitability of digital business transformation services providers. Data regarding the providers' capabilities and positioning was provided to ISG via briefings, ISG advisor interviews and surveys of service providers, including client references if appropriate and from secondary public and subscription sources.

Digital business transformation services providers (SPs) shared their data across different digital business transformation service dimensions through the research initiatives noted above. These dimensions cover their technological competency, preferred engagement models, scope of work performed, service capability, functional expertise and industry and regional presence.

Report Methodology

1. Categorize and assess provider data
2. Weight Importance of capability requirement
3. Determine provider position in quartile
4. Create cumulative score
5. Categorize providers in archetypes
Methodology Details

1. The data provided by the services providers were categorized and assessed according to the digital business transformation services requirements described for each of the 5 client archetypes. In cases in which provider descriptions and data were not worded as precisely as our archetype requirements, our digital business transformation services analysts relied on their expertise and experience to classify provider capabilities.

2. Each archetype capability requirement was weighted based on its relative importance to that archetype’s typical requirements. Weightings for each archetype’s requirements add up to a total of 100 percent. Specific weightings are not disclosed in this report. The relative importance of each capability requirement is depicted in illustrations at the beginning of each archetype section using differently sized “hexagon” icons.

3. Once the relative ability of each services provider was assessed for each of the archetype requirements, each provider was then positioned in a relevant quartile (for example, top 25 percent, second 25 percent and so on). The top quartile was awarded a numerical “capability score” of 4/4; the second quartile earned a score of 3/4, the third quartile earned a score of 2/4, and the fourth quartile earned a score of 1/4. Those with no capabilities to meet the archetype requirements were not included in the assessment.

4. Provider capability scores from Step 3 were then multiplied by the weightings developed for each client archetype requirement in Step 2. The results for each provider were then totaled to develop a cumulative score for each service provider. These cumulative scores are not disclosed in this report.

5. The cumulative scores were then used to identify the services providers most well suited for each archetype’s requirements. These providers are listed alphabetically and briefly profiled in each archetype section. Where relevant, additional services providers with noteworthy capabilities are also mentioned (e.g., providers that may have scored well on a specific requirement but not across all the requirements for that archetype).

Please note: This report simply presents services providers’ known capabilities in the context of user enterprises’ typical project needs. This report is not meant to rank providers or to assert that there is one top provider with abilities that meet the requirements of all clients that identify themselves with a particular archetype.
The cumulative score for each of the selected services providers against each archetype requirement is represented using Harvey Balls. For example: if a provider is assessed with a score of 4 out of 4, then a full Harvey Ball is used to represent their capability against that requirement. Similarly, if a provider is assessed a score of 1 out of 4, then a one-quarter Harvey Ball is used, as shown in below.
Additional Relevant Digital Business Transformation Services Providers

The capabilities of 43 providers were assessed in this report. Some services providers that are typically included in our work are not included in this report. Some of the companies that were not included were not able to participate and others declined. Providers that do not offer a full portfolio of digital business transformation services have not been included in the study. They may be included in future versions of this report, based on merit and on the services providers’ willingness to provide current and relevant materials. Readers should not make any inferences about a services provider’s absence from this report.

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