Digital Business – Solutions and Service Partners

Digital Customer Experience Services

Australia 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

December 2020
About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2020 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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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.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under ISG Provider Lens™.

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EXECUTIVE SUMMARY

General Trends

After a comprehensive market scan, 123 providers across Australia were identified for potential inclusion in this study. After extensive review, briefings and survey responses, ISG rated 50 providers for the "Digital Business Solutions and Services 2020" report across five quadrants for the Australian market. This is the first time this study has been conducted in Australia, and a large number of vendors participated, indicating the importance of digital services in this economy.

Digital transformation (DX) is one of the key trends in modern business. It refers to both the digitization of existing processes and the development of new and digitally enabled ways of doing business. It is a broad term that encompasses many technologies and business processes. Many new and evolving technologies, such as artificial intelligence (AI) and the Internet of Things (IoT) are accelerating these trends and leading to exponential changes in many areas.

Australian enterprises are continuously evaluating ways to increase their competitiveness, improve their delivery structures and enable remote working and business continuity. These trends were significantly accelerated due to the COVID-19 pandemic which, although it affected Australia less severely than many countries, was still extremely disruptive to business practices. The challenge is not just technological, it is also cultural, because it involves changing mindsets, transforming established processes and testing traditional management practices. Effective DX also requires the achievement and maintenance of flexibility, agility, speed and collaboration across departmental and enterprise boundaries, while enabling the workforce and delivering benefits to customers.

Building a digitally transformed enterprise involves much more than the traditional areas of agile development, now commonly called DevOps. True enterprise agility comes through the ability of a business to respond to changes in the competitive environment in real time. Speed and effectiveness of response is critical for the enterprise's end-to-end value stream.

Enterprises undertaking digital transformation understand that technologies like AI, IoT, blockchain, open source, and workplace automation and collaboration have a significant influence on agility, costs and productivity. In Australia, there has been strong movement in recent years to cloud-based processing and away from models based on in-house data centers, with many benefits. But for most organizations, the journey is far from complete.

In a competitive and digitally transformed world, this means that many Australian organizations are essentially becoming their own software providers. They are increasingly hiring developers and training employees to become developers, while removing the boundaries between the development and use of applications. They are moving toward DevOps modes of working and engaging more closely with users. All staff in the organization are being encouraged to think like developers and look for ways to create and implement digital solutions quickly, often using low-code platforms.

Digital transformation evolves through virtualization of technologies and operations while integrating the virtual and physical worlds. From the perspective of IT infrastructure, ‘virtual’ simply means running workloads remotely in the cloud, with a software-defined architecture and infrastructure.
Digital transformation of functions includes technologies and techniques such as automation, AI and cognitive technologies, and feedback and analytical capabilities that can be applied in both the real world (such as production facilities, customer contact centers, retail environments and other customer touchpoints, including mobile) and in the virtual world by automating responses and interaction with clients, partners and governments. Software and applications are increasingly being developed in digital or virtual test labs — often through automation — and tracked using internal or external sensors or compatible touchpoints during and after delivery to identify customer preferences in real time.

Digital services typically have a number of characteristics:

- They combine automation with autonomy, providing multiplatform compatibility. Service performance can be guaranteed independent of utilization rates, based on automated and predictive system provisioning tools. Service delivery is based on ubiquitous communications and information networks that include stationary and mobile networks and low-power, wide-area (LPWA) networks such as IoT and narrowband IoT (NB-IoT).

- Despite a high degree of automation, digital services provide individual variants (such as efficiency, prioritization, dynamic response and provisioning, automated policy mapping and high security) that are based on an integrated service management approach. Performance can be adjusted based on information from the digital customer journey, such as information gathered by cookies and movement profiles. Service variations and improvements are location- and time-independent and are performed based on customer preferences or categorization for other influencing factors.

- They often contain self-healing mechanisms. Reporting and forecasting models are used to detect and contain problems and resolve them where possible. To trace and improve forecasts or automate methods, results and reports are stored and shared with stakeholders based on the DevOps model to improve the quality of a service.

- Highly modular services and microservices are provisioned ad hoc, providing an application programming interface (API)-controlled data model that classifies and handles device and personal data, information and applications. Service billing is done through multiple channels such as credit cards, PayPal mobile wallets and cryptocurrencies.

- Many services are produced within decentralised and globally scaled ecosystems with complementary business partners and offerings. Users of such services can also become providers, or ‘prosumers’, and contribute their own data or content. Ultimately, they become part of the value or supply chain. Individual services can be chained into new mash-up services, based on any number of third-party services, allowing for exponential growth, many innovations and the success of niche products and non-linear business models.

Digital transformation is challenging many established business models and changing an enterprise’s relationships with customers, employees and business partners at every stage of the value chain. It is essential that Australian enterprises find the appropriate software and services providers, consulting houses, and IT vendors that can provide the support they need in a fast-changing world.
To better understand how suppliers are delivering DX products and services to their clients, ISG has developed a framework with five broad service delivery areas:

- Digital Business Consulting Services
- Digital Product Lifecycle Services
- Digital Customer Experience Services
- Blockchain Services
- Digital Supply Chain Transformation Services

This report looks at the leading suppliers in each of these five segments to analyze the Australian market and identify the providers that are the current market leaders and strongest competitors. We also identify a Rising Star in each segment.

Digital Business Consulting Services

As digital transformation becomes the norm, there is increased demand for products and services that help organizations plan, implement, and manage the process. This ISG analysis focuses on Australian suppliers that specialize or excel in these services, which cover a broad range of activities provided by many suppliers. The Australian market is very mature, with many local and multinational players.

Digital transformation usually involves designing and implementing a significant number of new business processes. New ways of doing things imply new ways of thinking, which means a cultural change. This means that Digital Business Consulting Services covers significantly more territory than traditional technology-based consulting. It also includes change management, metrics and auditing and even competitive analysis. It can also include the management of an organization’s digital backbone, which can encompass public and private public cloud, serverless computing and in-house infrastructure.

On the technical side, this can include API and microservices performance management, service catalogs, application performance monitoring (APM), AI platform management and other emerging operations that require efficient management. Traditional managed services providers do not usually consider these additions. Digital Business Consulting Services providers have generally moved to a level higher on the digital services maturity scale, monitoring their clients’ business process performance, operating on IoT data and measuring business outcomes, including the external customer experience (CX).

Digital Customer Experience Services

Customer Experience (CX) is an integral part of the digital delivery of an organization’s products and services. Australia is well advanced in CX techniques and technologies. Australia is an important Information and Communications Technology (ICT) market. It is the 14th largest economy in the world, with a GDP of over US$1.3 trillion and a population of nearly 26 million. Australian consumers have high expectations and demand a good customer experience, which poses additional challenges to service providers.

CX is a prominent point of discussion for most businesses across all vertical markets in Australia. It is essentially the capacity to drive customer decisions toward the desired action — usually a sale — that defines their journey. By understanding the behavior of their customers, organizations can design an interaction path that influences the customer decision to buy a product or service or commit to a brand.
In the modern world, an appealing design and a superior CX is fundamental to capturing an individual's attention. That has led many suppliers to acquire digital design agencies. Good design, which is central to the customer experience, is applied to stores, branches, apps, websites, social media presence and marketing campaigns. It shows how a customer can interact with the organization's touchpoints. Australia has been especially strong in digital design, with many local production houses acquired by larger players for their expertise.

In recent years, digital marketing, of which the CX is an essential component, has emerged as a critical differentiator. It adds the skills needed to understand and improve the touchpoints' effectiveness. Ideally, digital marketing involves a heavy use of research and statistics. Vast volumes of data are typically captured at each touchpoint, which requires sophisticated data analytics tools, powered by AI and machine learning (ML), to provide actionable insights.

Digital Product Lifecycle Services

ISG defines three phases of the digital product lifecycle services:

- **Ideation:** A digital product begins with a concept. It may be nothing more than the digitalization of an existing product or service, or it may be an entirely new way of working. It may end up being an evolution from the first to the second.

- **Creation:** Development products and practices have matured over the last few years. Agile and low-code development are gradually being replaced by a combination of development and operations that has come to be called DevOps. It empowers agility, because an increasing number of enterprise clients now recognize the increased importance of automated testing.

- **Continuous delivery:** Ideally, the continuous delivery of updates should prevent products from becoming obsolete and ensure products never need wholesale replacement. But the market for these products rarely exists for long enough to validate this assumption. DevOps is becoming increasingly important. DevOps automation enables continuous delivery and ensures the quality of each product update. DevOps is gradually replacing the term ‘agile’ to describe the process of continuously developing and deploying updates through a digital product lifecycle.

Blockchain Services

The blockchain services market has attracted many service providers and remains a hot topic in the media, in Australia and globally. As the market evolves, pure blockchain distributed ledger systems are being displaced by more generic, permissioned distributed ledger technologies (DLTs). ISG has collected more than 100 blockchain case studies around the world, most of which are permissioned with a central authority or sponsor that handles the cost of running DLT. In practical terms, DLT is easier to implement and provides concrete results at lower complexity and cost.
ISG research shows that after they go into production, blockchain projects take seven months, on average, to implement, and return on investment (ROI) is obtained on an average of around 18 months. But blockchain projects are usually small and can be quickly executed, which indicates the need for only small teams. Costs are usually also comparatively low. There are many successful blockchain use cases in Australia.

Digital Supply Chain Transformation Services

Supply chain management (SCM) has long been an important and recognized discipline in business. Most Australian enterprises have mature SCM processes, and the discipline is well served by local suppliers and consultants. SCM has traditionally dealt with physical objects. In the digital world, the supply chain, like business itself, has been transformed. Digital supply chain transformation deals with both the application of digital technology to traditional SCM and the use of SCM techniques to manage the new breed of digital products and services born out of digital transformation. Digital technology has transformed the traditional supply chain, which is now part of massive global network that enables the speedy delivery of physical products.

Suppliers of Digital Supply Chain Transformation Services help their clients achieve these objectives by providing such services as advising on strategy, choosing and implementing appropriate products and technologies and improving metrics for improved performance and forecasting. One of the most important aspects of digital supply chain transformation is visibility; the ability to track and trace all links in the supply chain. Visibility is a precondition to all other supply chain functions and an enabler of further improvements in efficiency.
Introduction

Digital technologies are permeating all aspects of Australian business. The use of information technology (IT) to change the customer journey, improve business agility or deliver digital products causes a digital disruption that spans across all business processes. These include sales, trading, production, supply chain, product design and human resource (HR) management, among others.

Enterprise agility goes beyond software development and encompasses the way organizations can adjust business, development and operations workstreams to survive and thrive when competition and customer requirements are constantly changing. This adjustment and the speed at which this happens are relevant and critical for increasing business value.

This year, ISG introduced the ISG Digital Cube™, an interactive model of the enterprise capabilities required for digital transformation. The model illustrates the six capabilities any business must have to fully realize its digital ambitions. These include digital backbone, emerging technologies at scale, enterprise agility, digital ecosystem, insights and business model innovation.

Definition

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ISG uses this Digital Cube™ as the main reference model to guide clients through their digital transformation. This ISG Provider Lens™ study is focused on identifying Australia-based service providers that can support clients in achieving these important digital capabilities.

Digital-ready service providers understand the full scope of digital services in providing constant innovation to improve user experience, accelerate business delivery and incorporate intelligent solutions. They partner with leading technology vendors and articulate the use of cognitive computing and learning systems to digitalize any client organization.

This ISG Provider Lens™ study offers Australian IT decision makers:
- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segment
- A perspective on the market in Australia.

Definition (cont.)

Scope of the Report

The 2020 Digital Business Solutions and Services report intends to assist buyers in reviewing their digital business strategy as well as in choosing solutions and service providers. Enterprise clients will also benefit from the study as it incorporates ISG’s strengths in global sourcing advisory, contract knowledge databases, regional research and expertise in technology ecosystems and innovations.

A comprehensive market scan of the Australian Digital Business Solutions and Services market was conducted, which identified 123 companies as active in Australia and potentially meeting criteria for inclusion in the report. Coverage depended on provider responses, survey participation and relevance. Of these, 50 companies satisfied the criteria for inclusion in one or more of the five ISG Provider Lens quadrants as illustrated below.

The quadrant descriptions are as follows:

**Digital Business Consulting Services**: This quadrant assesses a provider’s capability to advise clients across the different facets of their digital journey, including strategy, design, data, technology, organizational change management (OCM), operations, digital culture and innovation. It covers services that leverage emerging technologies such as IoT, analytics, AI, advanced mobile and the cloud.
Definition (cont.)

**Digital Customer Experience Services**: This quadrant assesses a provider’s portfolio and capacity to deliver business model innovation, enabling enterprises to build competitive differentiation in the current digital economy. Providers in this space design the way an ideal customer (or persona) interacts with a product and a brand. Technology experts and designers, along with sales and marketing teams, work collaboratively with clients in the design process.

**Digital Product Lifecycle Services**: This quadrant assesses a provider’s capacity to adapt the delivery model to each digital product with required speed, enabling a client enterprise to adopt agile and adaptive operating models. A provider’s portfolio includes Agile, testing and DevSecOps to rapidly deploy or transform products and services according to market changes.

**Blockchain Services**: This quadrant assesses a service provider’s competence in consulting, designing, deploying and operating blockchain. Leaders are identified by their experience in prototyping, testing and validation of blockchain solutions, as well as by their ability to run the solutions in production environments.

**Digital Supply Chain Transformation Services**: This quadrant assesses service providers across consulting, integration, support and managed services for the supply chain, covering planning, execution and insights. This also includes the use of comprehensive frameworks or methodologies for digital technologies such as IoT, ML, AI and predictive analytics across the supply chain.
Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

**Leader**

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

**Product Challenger**

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

**Market Challenger**

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

**Contender**

Contenders are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.
Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

**Rising Star**

Rising Stars are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

**Not In**

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.
## Digital Business – Solutions and Service Partners - Quadrant Provider Listing 1 of 4

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- **Infosys**: Leader
- **Kinetic Consulting**: Not in
- **KPMG**: Market Challenger
- **LimeBridge**: Not in
- **Logica**: Contender
- **LTI**: Product Challenger
- **McKinsey**: Leader
- **Mindtree**: Product Challenger
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Digital Business – Solutions and Service Partners Quadrants
ENTERPRISE CONTEXT

Digital Customer Experience Services

In this quadrant report, ISG evaluates providers offering customer experience (CX) solutions and services, with the ability to deliver business model innovation and enable enterprises to build competitive differentiation in today’s digital economy.

ISG lays out the current positioning of CX players in Australia with a comprehensive overview of the competitive landscape of the market. ISG observes a lack of investment among enterprises in harnessing the advantages of the CX to increase brand awareness, customer satisfaction rates, and customer retention rates. Also, by adopting CX services, enterprises are expecting to increase productivity, innovation, and change management capabilities to keep pace with competitors’ offerings, increase revenue, and maintain margins, quality, and level of operations.

When companies respond to changing consumer behaviors due to COVID-19, building digital-led experiences that help them connect empathically with their customers can increase customer loyalty. In Australia, digital adoption by enterprises continues to gain popularity to ensure the continuity of enterprise services to their customers. The importance of multichannel servicing through websites, live chat, and social media is increasing. The enterprises are expecting to deliver consistent experience across all channels, both online and offline. Adoption of AI chatbots is also increasing in the region.

The following can use this report to identify and evaluate different service providers:

**IT leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and improve the reliability and availability of their business.

**Security and data management leaders** should read this report to gain a competitive global overview of the data centers that are managed and hosted by providers. The report also gives an outline to operate with strengthened security in the shared infrastructure of public cloud.

**Digital transformation professionals** should read this report to understand a provider’s capability to deliver seamless omnichannel solutions, leveraging artificial intelligence (AI) and analytics for superior CX. The report would also give an insight into how the providers can be compared with one another.

**Business strategy leaders**, through this report, will gain knowledge of providers’ product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality for agents.
This quadrant assesses a service provider’s portfolio and capacity to deliver business model innovation, enabling enterprises to build competitive differentiation in today’s digital economy. CX design involves transforming the way companies organize their marketing, sales, delivery and post-sales processes. Essentially, it transforms all the business processes of an enterprise around the customer.

CX refers to the way digital companies design differentiation. This area includes conceiving customer journeys to create new business models that require next-generation technologies and business ecosystems. These companies design the way an ideal customer (or persona) interacts with a product and a brand. The design process has technology experts, designers, sales and marketing teams working collaboratively with clients. Design thinking and lean are
Focus on user experience to design apps, web resources and product/services with an omnichannel approach.

Employ design thinking or alternative methodologies that involve the customer in designing products and services.

Offer consulting and integration services for client’s end-to-end customer journey cycle.

Provide services with local expertise in Australia.
Australia is well advanced in customer experience (CX) techniques and technologies. CX is an integral part of the digital delivery of an organization's products and services. In recent years, many Australian service providers have built or acquired CX expertise to help their clients, often through acquisition.

Australia is an important IT market. It is the 14th largest economy in the world, with a GDP of over US$1.3 trillion and a population of nearly 26 million. Australian consumers have high expectations and demand a good customer experience, which poses additional challenges to service providers.

CX is a prominent point of discussion for most businesses across all vertical markets. It is essentially the capacity to drive customer decisions toward the desired action — usually a sale — that defines their journey. By understanding the behavior of their customers, organizations can design an interaction path that influences the customer decision to buy a product or service or commit to a brand.

In the modern world, an appealing design and a superior CX is fundamental to capturing an individual's attention. That has led many suppliers to acquire digital design agencies, including smaller Australian design consultancies. Good design, which is central to the customer experience, is applied to stores, branches, apps, web sites, social media presence and marketing campaigns. It shows how a customer can interact with the organization's touchpoints.

In recent years digital marketing, of which the CX is an essential component, has emerged as a critical differentiator. It adds the skills needed to understand and improve the touchpoints' effectiveness. Ideally, digital marketing involves a heavy use of research and statistics. Vast volumes of data are typically captured at each touchpoint, which requires sophisticated data analytic tools, powered by AI and machine learning (ML), to provide actionable insights. Data-driven AI/ML insights do not replace people but allow for scaling operations. CX is central to the process.

What clients should look for: For enterprise clients it is essential to separate the customer journey from product development. The latter is assessed in the Digital Product Lifecycle Services quadrant, where clients can find the scope and buying selection criteria. Customer experience improvements involve more than digital products. Improvements in existing applications and processes are often necessary, but new development is not always necessary. When contracting customer journey services, clients should...
DIGITAL CUSTOMER EXPERIENCE SERVICES

Observations (cont.)

examine a vendor’s capacity around market research, design, customer behavior analytics, business process improvements and prototyping and validation, and its ability to change a client organization, making it more customer centric.

CX services should have clear definitions of scope and delivery. One alternative is to start defining metrics in areas such as sales, e-commerce navigation, omnichannel experience, taking a client from the landing page to the buy button, and other action sequences that define the customer experience. The project delivery or outcome should be measurable, through such metrics as an improvement in the sales conversion rate of one item or product line, an increase in in-store or e-commerce traffic, and a rise in the number of requests for quotes. Clients can obtain better project control by restricting the change perimeter.

Of the 28 providers in this quadrant, 11 are leaders and two are Rising Stars:

- **Accenture** is continuously acquiring companies with digital agencies, design, marketing, and analytics and data service capabilities to evolve its CX service offerings. It has substantial CX expertise and a dedicated Customer Operations services division, with four innovation hubs in Australia.

- **Coforge**, formerly known as NIIT, is a Rising Star in digital CX services in Australia. It has a strong CX focus, a mature digital architecture and a strong suite of design tools. It is in the process of rebranding and reinventing itself and is developing a considerable range of digital capabilities.

- **Cognizant** is a leader in digital CX services, with its 360° Vision methodology, offering real-time insights with AI analysis. It is very strong in design and digital content.

- **Cybage Software** is a Rising Star in this quadrant and is growing quickly in Australia. It is a CX and digital services specialist, with its Cybage Digital division providing a complete range of design, content and e-commerce capabilities.

- **Deloitte Digital** is a leader in digital CX services. In October 2020, Deloitte Australia acquired Ekulus, a Melbourne-based digital consultancy firm, specializing in delivering Oracle CX cloud implementation services.
HCL has a good CX story and a strong product line. In October 2020, it acquired publicly listed Australia-based IT services company, DWS, which will increase its client base and depth of services significantly.

IBM is a leader in digital CX services. It has great depth in AI and modeling, with an extensive range of systems-backed CX and business transformation processes. It has a large CX partner ecosystem, which includes a strong relationship with Adobe.

Infosys is a leader with a robust digital and CX framework. It can offer extensive training and has a very hands-on approach of implementation. Its CX platform is based on the Oracle Fusion Integration Framework.

Mindtree has a large CX consulting practice, which includes a large Experience Design Group (EDG). It integrates its extensive CX capabilities within product design, with a focus on building connected, cognitive and edge-enabled processes.

Publicis Sapient is a CX leader that has expanded the meaning of the term to include ‘computational experience’. Its profile in Australia expanded considerably in March 2020 when it acquired Australia-based IT management consultancy, Third Horizon.

TCS is a leader in digital CX services with a robust CX platform that uses a machine-led approach and an extensive range of CX assessment tools and has strong data analytics capabilities.

Tech Mahindra has very strong CX design capabilities and well-integrated product set. It is well-established in Australia, with a large client base spread across many verticals.

Wipro is a CX leader with extensive design skills and a strong tradition of co-innovation with customers. It maintains a pool of user experience (UX) specialists in consulting, design and development services.
Accenture offers a seamless end-to-end capability in the CX space in Australia and is able to deliver from strategy through ideation to finished and released product effortlessly.

Accenture is constantly adding more agencies, design studios, content providers and design and service creation companies to its digital portfolio. Such continuous mergers and acquisitions (M&A) typically require time to allow the company to offer fully embedded end-to-end solutions seamlessly.
COGNIZANT

Overview

U.S.-based Cognizant provides a range of IT services, including digital, technology, consulting, and operations services. It had annual revenues of US$16.8 billion in 2019, and 281,000 employees. It has a strong presence in Australia. Cognizant is strong in CX services, especially in design and digital content. In recent years it has acquired a number of companies in Australia: SaaSFocus, Adaptra, Nova IT and Odecee.

Strengths

CX capabilities: Cognizant has substantial CX and employee experience (EX) skills across strategy and design, data analytics and AI, digital marketing, digital content and experience technologies.

Artificial intelligence: Cognizant's Customer360.Next creates a single view of each customer with pre-built data models. Customer Journey AI (CJAI) aggregates customer data across channels, including web, mobile and IVR. Persona Engine is an algorithm wireframe accelerator for predictive analytics. Elf is a "data ingestion" toolkit that provides audit, balance and controls.

Growing presence in Australia: Cognizant's recent Australian acquisitions greatly increased its footprint and skills base in Australia, ensuring much greater depth to its delivery capabilities.

Caution

Cognizant has made many acquisitions, in Australia and globally, not all of which have been fully integrated. It also often uses separate teams for consulting and delivery, which may lead to problems.
Deloitte Digital began in Australia and has a comprehensive suite of services, including a strong CX offering.
HCL

Overview

HCL Technologies is a global IT services company based in India. It has strong CX capabilities, both home-grown and through acquisition. The firm had an annual revenue of US$9.9 billion in FY20 and employs 150,000 people in 44 countries, including 6,000 in Australia, where it has operated since 1999. In October 2020, HCL announced its intention to acquire publicly listed Australia-based IT services company DWS for over US$100 million. The acquisition will substantially boost HCL’s presence in Australia, bringing an extra 700 staff and many new customers into the organization.

Strengths

CX acquisition: In 2019, HCL acquired Strong-Bridge Envision, a U.S.-based digital consulting firm — specializing in CX strategy, business transformation and change management — to strengthen its overall digital consulting and CX capabilities.

Contact center expertise: HCL is particularly strong in helping clients improve the CX of their contact centers. It has deep skills with AI tools and customer analytics and has worked with many contact centers in India and globally to improve its CX interface.

CX integration: HCL helps its customers create multidisciplinary teams (UX and CX, full-stack technologies, AI, big data, augmented reality/virtual reality (AR/VR)) to work together across geographies on digital transformation programs at scale.

Caution

HCL is still in the process of integrating DWS into its CX team. Clients should ensure they are dealing with HCL CX specialists across all its relevant products and services.
IBM

Overview

IBM is a major global IT hardware, software and services provider with significant market share in all Digital Business Consulting Services quadrants. It had an annual revenue of US$77 billion in 2019, and it employs 350,000 people worldwide. IBM Australia employs more than 4,000 people, with an annual revenue of about US$2 billion in 2019. IBM has a research lab in Melbourne that conducts CX analysis.

Strengths

**Innovation, AI and modeling strengths:** IBM’s Watson AI capability has many discrete suites of business focus areas with specific algorithms for the CX space, such as Watson Assistant, Watson Studio and Watson Advertising. The IBM SPSS Modeler uses a predictive analytics platform for CX decisions and implementation.

**Adobe, IBM, and Red Hat partnership:** The partnership aims to accelerate clients’ digital transformation and strengthen data security. Initially, the focus will be on the flexibility of hybrid cloud deployment, adopting Adobe’s CX solutions enabled for financial services.

**CX integration with e-commerce:** IBM’s CX capabilities integrate with CRM platforms such as Salesforce and Genesys to accelerate the customer journey, from design to omnichannel marketing to delivery. IBM has many strong reference sites for e-commerce integration.

Caution

IBM has a very large product suite and multiple delivery teams. These can be difficult at times for customers to navigate. Constant acquisitions and reorganizations do not help.

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IBM has probably the most complete range of offerings of any digital services vendor. It operates across all industry sectors and client structures.
Infosys is a large IT services provider based in Bengaluru, India. The firm employs 242,000 people in 46 countries and had an annual revenue of US$12.7 billion in 2019. It employs around 4,000 people in Australia, where it opened its first office in 2003. It is now represented in all major capital cities. It has a strong CX alignment around inclusivity; customer orientation; readiness; and ability to change people, process and technologies.

**Strengths**

**Strong digital and CX framework:** Infosys has developed a client digital journey framework that begins with design and CX. It begins with defining a CX strategy and follows with shaping the CX journey, designing the architecture, building the digital platform and then delivering the speed and agility. The Maturity Assessment measures multiple parameters.

**Hands-on CX training and implementation:** Infosys offers practical CX narration workshops, journey mapping, maturity and future capability assessments, package evaluations and a transformation roadmap. It takes a very hands-on approach.

**Omnichannel offering:** Infosys supplies cross-channel CX engagement, leveraging mobility-based smart services, social media and market intelligence to populate its CX platform, jointly developed with Oracle based on the Oracle Fusion Integration Framework.

**Caution**

Infosys has a strong CX offering, but some customers see it as lacking flexibility.
Mindtree was founded in 1999 and is based in Bengaluru, India. It had an annual revenue of US$1.1 billion in 2019 and employs 22,000 people worldwide. Since 2019, it has been majority-owned by a US$21 billion Indian conglomerate, Larsen & Toubro, but operates independently. In Australia, it has offices in Sydney and Melbourne. Mindtree serves clients from devices to cloud to enterprise, which it calls a 'metal-to-cloud capability'.

**Overview**

Mindtree has a large CX consulting practice that includes an Experience Design Group (EDG) including customer interaction and new media specialists, industrial and visual researchers, information architects, artists and psychologists. Mindtree’s key strength lies in driving business agility “from idea to product launch” leveraging its Digital Pumpkin Labs. The inclusion of nontechnical specialists enables the company to look at CX from several perspectives, including impact and brand value perception and customer loyalty. It has a strong partner ecosystem in Australia that includes Microsoft, Adobe, Sitecore, AWS, Google, and Duck Creek.

**Strengths**

**Broad CX specialty:** Mindtree has a large CX consulting practice that includes an Experience Design Group (EDG) including customer interaction and new media specialists, industrial and visual researchers, information architects, artists and psychologists. Mindtree’s key strength lies in driving business agility “from idea to product launch” leveraging its Digital Pumpkin Labs. The inclusion of nontechnical specialists enables the company to look at CX from several perspectives, including impact and brand value perception and customer loyalty. It has a strong partner ecosystem in Australia that includes Microsoft, Adobe, Sitecore, AWS, Google, and Duck Creek.

**CX-based product design and management:** Mindtree integrates CX capabilities in depth in product design. The integration starts with concept creation, based on customer needs, and determined by market research, ideation and evaluation. Product design involves the creation of a minimum viable product (MVP), leading to product development and deployment. Product sustenance extends the life of mature products while improving revenue and customer retention.

**‘Digital Next’ strategy:** Mindtree focuses on building connected, cognitive and edge-enabled processes. Mindtree's consulting and advisory offering spans strategy, roadmap design, hardware and platform integration, applications and security. The company is centered around edge, intelligence, cloud and design thinking. Services range from assessing the value of a project, to implementing at scale and providing post-implementation services.

**Caution**

The takeover by Larsen & Toubro is yet to see it merged with the company's technology subsidiary, LTI.
Publicis Sapient was founded as Sapient in 1990. It was acquired by France-based advertising firm Publicis in 2015. It had a revenue of US$1.5 billion in 2019. Publicis Sapient has three offices in Australia, employing more than 200 people. The company's profile in Australia expanded considerably in March 2020 when it acquired Australia-based IT management consultancy Third Horizon, which has a strong presence in the government and utilities sector. The acquisition increased the company's headcount in Australia by 50 percent and boosted its CX capabilities considerably.

Deep knowledge of customer requirements: Publicis Sapient provides high-quality digital experience design capabilities as a core element of its transformation solution model, which makes extensive use of rapid prototyping.

‘Computational experience’: Publicis Sapient expands the definition of CX to include what it calls computational experience, which it says is necessary for the effective design of CX interfaces with ‘commerce, culture and community’. It uses AI and analytical tools to derive custom CX solutions for its clients.

Industry knowledge: The acquisition of Third Horizon has expanded Publicis Sapient’s market reach across verticals in Australia, especially in state and federal government and utilities. The firm has formal alliances with many major vendors, including Adobe, AWS, Google Cloud, IBM, Microsoft, Salesforce, SAP Hybris and Sitecore.

Publicis Sapient in Australia is still integrating its purchase of Third Horizon. While this brings the company many strengths, prospective clients need to ensure they are dealing with a cohesive team.
Tata Consultancy Service Limited (TCS) is the largest India-based software and services company, with an annual revenue of US$22 billion in 2019 and 448,000 employees worldwide. It was founded in 1968 as Tata Computer Systems, a division of the Tata Sons conglomerate. It went public in 2004. TCS entered the Australian market in 2005 and acquired financial software company Financial Network Services (FNS). It has more than 4,000 employees in Australia. TCS has a very strong range of CX tools.

### Robust CX platform:
TCS's CX Assurance Platform Services is a holistic platform that uses a machine-led approach for integrating test infrastructure (devices, OS/browser combinations) and the skills required to deliver a solid CX.

### CX assessment tools:
TCS has a comprehensive range of CX quality assessment tools to measure factors such as performance, security, usability, accessibility and compatibility, and map CX maturity. TCS' ScriptBot-based test automation provides browser compatibility, accessibility testing and machine-led performance testing capabilities to deliver insights on potential CX weaknesses; its Business Process Consulting Services determine the maturity of existing processes; its Digital Readiness Assessment Services use a framework to assess preparedness of all digital assets.

### Data analytics capabilities:
TCS' Connected Intelligence Platform (CIP) is an integrated big-data management and analytics platform that ingests, manages, and analyzes large volumes of data to uncover patterns and correlations for deeper insights and better decision-making. It combines an enterprise-grade Hadoop data lake with ML libraries, real-time processing of streaming data, a predictive scoring engine, workflow management, data visualization and enterprise-grade security.

TCS is an information services powerhouse with a broad range of capabilities. It will suit clients looking for a broad-brush approach.

TCS has strong CX offerings, but they are firmly integrated with its wider digital portfolio. It may be difficult for clients to find a dedicated CX specialist within the organization.
Tech Mahindra is a well-established IT services company with mature CX capabilities. It should be a good fit for most digital transformation projects.

Some of Tech Mahindra's CX capabilities are newly acquired. Clients should ensure the team they engage with has all capabilities offered by the company.

Overview

Tech Mahindra, based in Pune, India, is a global IT services company with annual revenues of US$5.2 billion in 2019 and with 125,000 employees. It is part of the US$21 billion Mahindra group, one of India's largest industrial conglomerates. Tech Mahindra has had a presence in Australia since 1998. It employs 6,000 people locally and had a revenue of around US$400 million in 2019. It has grown its digital skills organically and has recently acquired Mad*Pow (behavior-led CX design, U.S.-based), BORN group (agency with content, commerce and creative capabilities in U.S., Europe and Asia Pacific), and Zen3 Infosolutions (U.S.-based new age tech company), thus increasing its CX capabilities significantly.

Strong presence in Australia: Tech Mahindra has offices in Sydney, Melbourne, Brisbane, Perth and Canberra. Sydney and Melbourne are the major delivery centers, and one in Brisbane is currently being planned. Australia is one of the largest international markets for the company. Half of its local employees are Australian citizens, and it has over 50 clients, including many major financial institutions, telcos, media and entertainment firms, transport and logistics companies and large government agencies.

Design capabilities: Tech Mahindra strongly promotes its design capabilities in a number of areas, even acquiring a majority stake in iconic Italy-based design house Pininfarina. It has extended these skills into the digital arena, most notably with its November 2019 acquisition of New-York-based BORN Group, a major CX consultancy. Through this acquisition, it has established digital design relationships with a number of tertiary institutions, including the RMIT University, in Melbourne, and the University of Western Sydney.

Well-integrated product set: Tech Mahindra had done a good job of integrating its homegrown and acquired CX capabilities across the whole digital lifecycle. It is capable of implementing CX digital strategies across multiple client channels.

Strengths

Caution

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Tech Mahindra is a well-established IT services company with mature CX capabilities. It should be a good fit for most digital transformation projects.
Wipro has become a major player in UX and CX. Combined with its strength in other areas, it is a serious contender for most organizations’ needs in this area.

**Overview**

Wipro is a major global IT consultancy and software house based in India. It operates in over 100 countries and had an annual revenue of US$9 billion in 2019. Wipro employs 175,000 people globally, and over 2,000 of them in Australia. It entered the Australian market in the late 1990s and has been very successful, mostly offering its services to large enterprises in the government, financial services, telecommunications and utilities sectors.

In February 2020, Wipro acquired Rational Interaction, a U.S.-based digital CX company, which has greatly increased its expertise in the area.

**Strengths**

**CX design skills:** Through organic development and acquisition (for instance, of Cooper and Syfte) Wipro has significant capabilities in CX design skills. Its Horizon program is designed to incubate and translate innovative CX concepts into commercialized products, solutions and capabilities. Wipro uses Circular Design and Transition Design to incorporate ‘societal and ecosystem transitions’ into the core of the product’s future lifecycle.

**Co-innovation with customers:** Wipro’s gain-share labs and labs-on-hire services are designed to solve business problems through co-innovation with its customers. Its Innovation Centers and Digital Pods worldwide are spaces for co-innovation and co-creation that bring together ideas, technologies and agile teams, employing Wipro’s Topcoder crowdsourcing platform.

**Dedicated UX service:** Wipro maintains a pool of UX specialists in consulting, design and development services. Their focus is on building usage through intuitive design, aesthetics, utility, ergonomics, performance and consistency across devices. The products and techniques used by Wipro’s UX studio include iRise, Balsamiq, pencil prototyping, XMind and the Adobe Creative Suite.

**Caution**

Wipro was a little slow with market-leading CX expertise and is yet to fully integrate Rational Interaction post acquisition.

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2020 ISG Provider Lens™ Leader

Wipro has become a major player in UX and CX. Combined with its strength in other areas, it is a serious contender for most organizations’ needs in this area.
RISING STAR: COFORGE

Overview

Coforge was founded in 1981 as NIIT, taking its name from the Indian Institutes of Technology (IIT), where its founders had studied. It changed its name to Coforge in a major rebranding exercise in August 2020. It had revenues of US$120 million in 2019 and employs 2,600 people globally. In 2019, Baring Private Equity Asia acquired a controlling interest in the company. Coforge operates as two companies in Australia: Coforge Technologies (Melbourne) and Coforge DPA (Sydney). The Sydney office was formerly branded Incessant Technologies (an NIIT company). It is particularly strong in the design aspects of CX.

Strengths

CX focus: Through its Interactive Practice, CX is the most mature of Coforge’s four digital areas of digital practice, which also includes consulting, product lifecycle services and blockchain. CX services include digital strategy assessment and validation, UX/UI design, personalization and textual marketing, content management system (CMS) development and migration.

Mature digital architecture: Coforge has developed a Digital Capability Reference Model and a DevOps Maturity Model to guide its clients through the digital journey. Its Enterprise Digital Library provides the tools for each step, ensuring a unified and converged architecture and a consistent user experience.

Suite of design tools: Coforge’s design portfolio includes process, checklist and template building on human-centered design through to robust visual wireframes. It uses a Design Thinking Bootleg toolkit from Stanford University to augment its service design templates. Coforge’s Digital Foundry is a repository of reusable assets developed in the digital space. Its components are DX Studio, Integration Studio, Data Studio, Cognitive Studio, Cloud Studio, QE Studio and Blockchain Studio.

Caution

The two arms of Coforge in Australia need to come together and present a more integrated and more elevated profile to the market.
Cybage Software is a comparatively small IT services company founded in Pune, India, in 1995. It had an annual revenue in 2019 of around US$150 million (one-third of this from digital services) and employs 6,300 people globally. It has a presence in eight countries, including an office in Sydney, Australia, which is growing rapidly. Cybage specializes in outsourced product engineering services, working mostly with leading independent software vendors (ISVs), and is particularly strong in CX design and usability testing.

**Strengths**

**CX and digital services specialist:** CybageDigital provides a complete range of digital and CX services, including branding, creative production, digital content marketing, creative production campaign management, usability, UX and visual design, enterprise content management, enterprise mobility, customer relationship management, e-commerce, e-learning and technical content.

**Usability research and testing:** Cybage has developed a comprehensive range of UX testing tools, including formalized user interviews, focus groups, usability testing, contextual inquiry and user surveys. It uses many interactive design methodologies, including the development of hypothetical users, scenario development, usability reviews, comparative analysis and extensive prototyping.

**Campaign management:** Cybage is strong in digital campaign management, including creative concept and production and marketing automation, where it uses tools like Pardot, Marketo, Adobe Marketing Suite, Salesforce Marketing Cloud and Hubspot. It specializes in helping clients build long-term relationships with their digital customers.

**Caution**

Cybage is a small company that may not be suitable for clients looking for a more complete offering.
The research study "ISG Provider Lens™ 2020 – Digital Business Solutions and Service Partners" analyzes the relevant software vendors/service providers in the Australian market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Digital Business Solutions and Service Partners market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements
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Distinguished analyst and author Craig Baty has extensive research and thought leadership experience in the Asia Pacific and Japan ICT markets. Craig is Principal and Founder of DataDriven, an Asia Pacific-based research and advisory firm that is an ISG Research partner. Craig has over 30 years of executive and board-level experience in the ICT industry, including as a Group VP and Head of Gartner Research APJ, CEO of Gartner Japan, Global VP Frost & Sullivan, EGM Marketing and CTO Fujitsu ANZ, GM Marketing Strategy and Alliances at BT Syntegra Australia, and more recently as VP Global Strategy and VP Digital Services in Fujitsu Tokyo HQ. As a well-known ICT commentator and analyst, Craig has written more than 200 research pieces and presented at over 1,500 events globally. He is also regularly quoted in regional media. Craig is actively involved in the ICT community as a board member of the Australian Information Industry Association (AIIA) and Vice Chair of the Australian Computer Society NSW (ACS). He is currently also pursuing a Doctor of Business Administration by Research (DBA) in the area of national culture and IT Strategic use and investment.
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