

Enterprise Service Management — Services

A report assessing providers focused on optimizing service operations through AI-driven and engineering-led ESM



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Enterprise service management (ESM) has transformed from a structured IT support function into a key driver of enterprise agility, operational resilience and digital innovation. Initially rooted in ITSM methodologies, ESM now extends across HR, finance, operations and customer service. Service providers are pivotal in enabling this transition through cloud, automation and GenAI solutions to create intelligent, proactive service ecosystems.

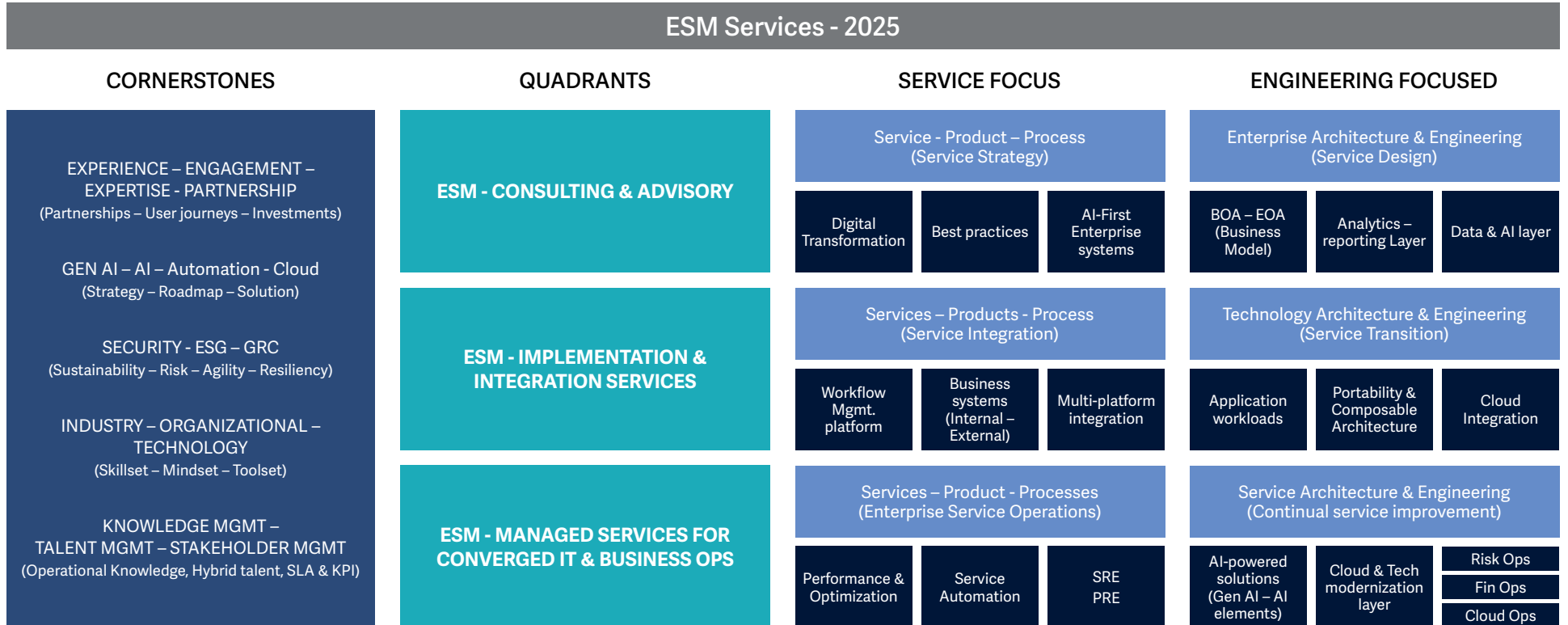
The current wave of transformation is powered by AI-driven decision engines that optimize workflows, enhance predictive analytics and streamline service orchestration between business and IT. Enterprises increasingly demand service platforms that integrate automation, real-time data insights and engineering-led innovation to improve responsiveness and scalability. AI-powered forecasting and RPA are reshaping delivery models, enabling enterprises to preempt disruptions, streamline operations and enhance UX.

Providers that embed engineering principles into ESM stand out as strategic enablers of business transformation. In a digital-first era, ESM serves as a command center for data-driven decision-making, bridging enterprise portfolios and ensuring service resilience. Providers are also redefining user engagement through self-service portals and intuitive designs, improving satisfaction and efficiency.

This study examines the extensive capabilities of service providers, encompassing functional knowledge, industry process experience, and diverse IT and software support competencies. Service providers should provide a comprehensive suite of services and engineering capabilities, leveraging expertise across industry domains, organizational processes and technology workflows to ensure enterprise-scale transformation and sustainable business outcomes.



ESM Services - 2025



The ESM study focuses on a **self-optimizing ecosystem to enhance service architecture**, AI-driven autonomy and engineering-led innovation.



Simplified Illustration Source: ISG 2025

Definition

The ISG Provider Lens™ Enterprise Service Management study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on the U.S. market.

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



Definition

This quadrant evaluates providers based on their expertise in driving enterprise service strategies, service design and engineering-led innovation across business, corporate and technology portfolios. These providers play a critical role in aligning strategic objectives with modern service management frameworks, ensuring operational excellence. Enterprise service strategy focuses on enabling digital transformation by adopting best practices such as ITIL frameworks and integrating AI-based enterprise systems to drive automation, predictive decision-making and intelligent operations. Providers must have strong experience in enterprise architecture and engineering to create scalable and adaptive solutions. This quadrant also assesses providers that unify strategic consulting, ESM and AI-driven engineering to help organizations achieve intelligent and future-ready transformations.

Eligibility Criteria

- Strategic advisory and digital transformation expertise:** Demonstrate **deep industry knowledge, guiding enterprises in business transformation, operational excellence and digital-first strategies**
- Proven AI-first enterprise systems implementation:** Expertise in **AI-driven automation, predictive analytics and intelligent business processes** to enhance ESM
- Enterprise architecture and service design competency:** Experience in designing BOA and EOA frameworks that align IT with business strategies
- Data- and AI-driven innovation: Capabilities in AI/ML-driven decision intelligence, data analytics** and enterprise-wide reporting solutions for improved insights and automation
- ITIL compliance and best practices implementation:** Adherence to ITIL frameworks and best practices implementation for **governance, security and risk management** to ensure operational resilience and regulatory compliance
- Cloud, DevOps and platform modernization expertise:** Ability to support enterprises in adopting **cloud-native architectures** and DevOps **practices for enhanced scalability** and agility
- Proven track record of measurable business impact:** Showcase successful enterprise engagements with tangible outcomes in cost savings, operational efficiencies and service innovation



Definition

This quadrant evaluates service providers that specialize in seamless enterprise service implementation, system integration, engineering-led innovation and service transition strategies across business, corporate and technology portfolios. Providers in this quadrant must demonstrate expertise in workflow management platforms, ensuring automation-driven process efficiency while integrating internal and external business systems to enhance enterprise-wide interoperability. Their capabilities should also include multiplatform integration to facilitate seamless connectivity across cloud, on-premises and hybrid environments, enabling enterprises to migrate, optimize and manage workloads in cloud-native environments. In addition, service providers must excel in developing various technology architectures for managing scalable application workloads.

Eligibility Criteria

- Expertise in enterprise service implementation and system integration:** Proficiency in **deploying workflow management platforms, integrating internal and external business systems** and ensuring multiplatform interoperability through a robust technology and software partnership ecosystem
- Strong competency in technology architecture:** Capabilities in **developing scalable application workloads, ensuring portability and composable architecture** for modular and reusable enterprise components
- Cloud integration and migration excellence:** Experience in **seamless cloud adoption, enabling hybrid and multicloud integration** with robust security and compliance measures
- API-driven and DevOps integration:** Leverage API-based communication, **DevOps automation and event-driven architectures** to enhance service orchestration and system interoperability
- AI-enabled process automation and intelligent workflows:** Use AI/ML-driven automation for **predictive analytics, self-healing IT operations** and intelligent process automation
- Adherence to security, compliance and governance requirements:** Ensure cloud security, regulatory compliance and risk **management across service implementations** and integrations
- Proven track record in scalable and future-ready solutions:** Successful engagements **with tangible business outcomes, enabling high-availability architectures** and continuous enterprise innovation



Definition

This quadrant evaluates providers based on their expertise in enterprise service operations, performance optimization and continual service improvement across IT and business functions. Providers must leverage service automation, implementing AI-driven ITSM and workflow orchestration for enhanced operational efficiency, reliability and proactive monitoring. Additionally, site reliability engineering (SRE) and production readiness engineering (PRE) are critical competencies, ensuring scalability, availability and proactive fault resolution within enterprise IT ecosystems. Beyond operational excellence, providers must focus on integrating GenAI- and AI-powered solutions to enhance predictive maintenance and drive intelligent automation. Their cloud and technology modernization expertise should enable enterprises to adopt cloud-native architectures, modernize platforms and implement agile IT frameworks.

Eligibility Criteria

- Expertise in enterprise service operations and optimization:** Capabilities in **performance optimization, real-time monitoring and proactive resource** utilization across IT and business functions
- Service automation and AIOps:** Leverage AI-powered automation, **ITSM orchestration and self-healing workflows to enhance operational efficiency** and reduce manual intervention
- Expertise in SRE and PRE:** Implement **scalable, fault-tolerant and high-availability enterprise service models** to ensure minimal downtime and continuous availability
- Proficiency in GenAI and AI-powered solutions:** Should **integrate AI-driven analytics, predictive insights and automation** for intelligent decision-making and process optimization
- Experience in cloud and technology modernization:** Enable cloud-native transformations, **platform modernization and multicloud integration** for IT-business convergence
- CloudOps, FinOps and RiskOps capabilities:** Offer **cost-efficient cloud management services, financial governance and risk-mitigation** strategies for enterprise IT operations
- Proven track record in scalable and secure managed services:** Successful enterprise engagements with tangible results in cost savings, **security, automation-driven efficiencies and business resilience**



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Enterprise Service Management — Services:

Quadrant	U.S.
Consulting and Advisory Services	✓
Implementation and Integration Services	✓
Managed Services for Converged IT and Business Ops	✓



The research phase falls in the period between March and July 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2025.

Milestones	Beginning	End
Survey Launch	March 27, 2025	
Survey Phase	March 28, 2025	April 23, 2025
Sneak Preview	July 2025	August 2025
Press Release & Publication	September 2025	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

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

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Enterprise Service Management – Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

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



ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the Voice of the Customer concept. ISG has designed the Star of Excellence program to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

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

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

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

Our vision for the Star of Excellence is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments. To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence [website](#).

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

Here is the email address:
star@cx.isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2025 – Enterprise Service Management — Services research study analyzes the relevant software vendors/ service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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



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ISG Provider Lens™ Advisors Involvement Program

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

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

The consultant advisors:

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

ISG Advisor to this study



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**Partner, Digital
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Invited Companies

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

* Rated in the 2023 iteration

Accelare	Capgemini*	Critical Design Associates	Foulk Consulting
Accenture*	Cask*	Crossfuzo	Fujitsu*
Acumatica	CDW	CSS Corp (Movate)	Fully Managed
Advance Solutions Corporation*	CGI	Dell	Fusion Y Business Solutions
AHEAD, Inc.	Cloudaction	Deloitte*	FX INNOVATION
Alcor	Cognizant*	DXC Technology*	G2IT
Aricoma (Seavus)	CompuCom	Edgile	Genpact
ASGN (Glidefast)	Compulink	Emtec	Grant Thornton
Aspire Systems*	Concurrency, Inc.	Envecon	GreenLight group
Beyond20	ConfigureTek	EPAM	HandCloud
Birlasoft*	ConnectAll	Epicor	HCLTech*
Booz Allen Hamilton	Contegix	Ernst and Young LLP	Hexaware*
Bravium Consulting Inc.	Contender Solutions	Eviden	HGC Technologies
Bravium Consulting Inc.	Coreio	EXL	Hitachi Vantara
CAI (Computer Aid, Inc.)	Covestic, Inc.	Flycast Partners*	HPE



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ICF	Kyndryl*	New Rocket*	Ramco
InfoBeans	Logicalis	NTT DATA*	Results Positive
Infocenter	LTIMindtree*	Nuvolo	RightStar
Infor	Maryville Consulting Group	Online Business Systems	RJR Innovations
Infosys*	Mastek	Oracle	RSM US LLP
Inmorphis	Melillo Consulting	Pathways Consulting Group	Sage Group/Infoniq
INRY	Mercer	Pegasystems	SAIC
Insight	Meritide	Persistent Systems*	Savli Group
InSource	Mobius	Plex	ScienceSoft USA
Intact	Movate*	Praecipio Consulting	Serviceberry
Inetum	Mphasis*	ProV International, Inc	SHI
ISM/ ECS	Navvia	Proven Optics	Sigital LLC
ITS Partners	Ivanti	PWC	Softtek
Kloves Inc.	Ness Digital Engineering (FKA Linium)	QAD	Solugenix
KPMG	Netcenergy	Rackspace	Sutherland Global



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* Rated in the 2023 iteration

Synoptek
SysPro
T4S Partners
TCS*
Tech Mahindra*
TEKsystems
The Anti
Trianz*
Tricentis
Unisys
Unit4
United Layer
UST
VerisVisalign
Virtusa

Volteo
V-Soft Consulting
Vyom Labs
Wipro*
WNS
World Wide Technology
Zensar Technologies



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

ISG Research™

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

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

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ISG

[ISG](#) (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





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