ISG Provider Lens™

ServiceNow Ecosystem Partners

Enterprise workflow Management:
Benchmarking ServiceNow partners ecosystem
on competitive strengths and service portfolio

BROCHURE | NOVEMBER 2024 | AP&J, BRAZIL, EUROPE AND U.S.

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Introduction

ServiceNow is a cornerstone of digital transformation, facilitating streamlined workflows across industries with its cloud-based platform. As a leader in enterprise operations, it adapts to market demands, making it a strategic partner for businesses pursuing digital overhaul and operational efficiencies. Advanced AI capabilities, including document intelligence and GenAI controllers, enhance automated and intelligent workflows.
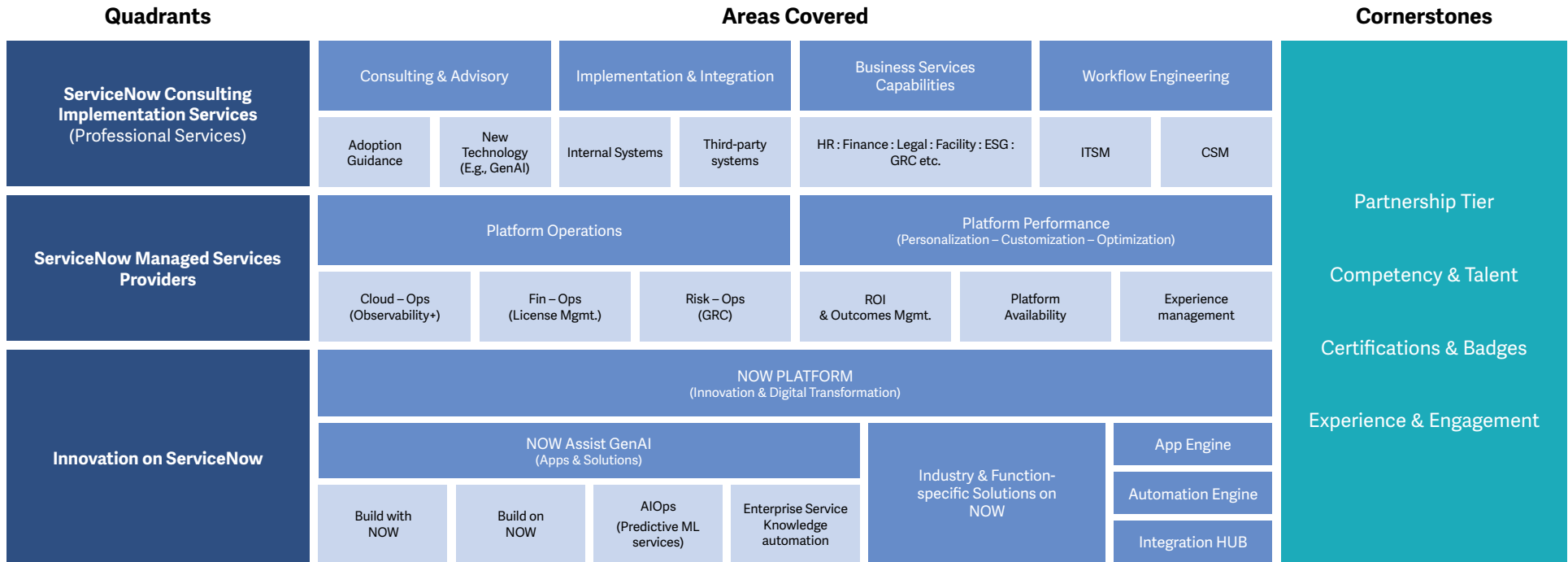
The ServiceNow Xanadu release confirms AI's mainstream status, introducing new IT, employee and customer workflow features. It offers enhanced AI integrations, automation and industry-specific solutions, focusing on user experience, low-code development and advanced analytics to drive digital transformation, predictive maintenance and operational efficiency. Key inclusions are GenAI, predictive analytics and workflow automation tools.

Digital business transformation is now the core theme for ServiceNow partners, with the release of Now Assist, which adds digital engineering competency to the platform. *Built with* and *Built on* are the new transformative opportunities, and businesses can directly consume these without any dependency on other ServiceNow modules. Industries are adopting App Engine and Integration Hub to drive industry-aligned process modernization.

ServiceNow's ecosystem encompasses three key stakeholders: enterprise clients, service providers and the platform, each integral to driving transformation. The collaboration among these entities, coupled with strategic partnerships and initiatives like the RiseUp program, cultivates a rich talent pool and supports regional growth strategies, significantly impacting the global digital landscape.

ServiceNow Ecosystem – 2025: Deep View

Quadrants	Areas Covered				Cornerstones
ServiceNow Consulting Implementation Services (Professional Services)	Consulting & Advisory	Implementation & Integration	Business Services Capabilities	Workflow Engineering	Partnership Tier
	Adoption Guidance / New Technology (E.g., GenAI)	Internal Systems / Third-party systems	HR : Finance : Legal : Facility : ESG : GRC etc.	ITSM / CSM	
ServiceNow Managed Services Providers	Platform Operations	Platform Performance (Personalization – Customization – Optimization)			Competency & Talent
	Cloud – Ops (Observability+) / Fin – Ops (License Mgmt.) / Risk – Ops (GRC)	ROI & Outcomes Mgmt. / Platform Availability / Experience management			Certifications & Badges
Innovation on ServiceNow	NOW PLATFORM (Innovation & Digital Transformation)				Experience & Engagement
	NOW Assist GenAI (Apps & Solutions)	Industry & Function-specific Solutions on NOW	App Engine / Automation Engine / Integration HUB		
	Build with NOW / Build on NOW / AIOps (Predictive ML services) / Enterprise Service Knowledge automation				

ServiceNow drives **innovation, scalability** and **industry-specific solutions,** offering a competitive edge in automation, **AI and digital transformation.**

Simplified Illustration Source: ISG 2024

ServiceNow Consulting and Implementation Services

ServiceNow Managed Services

Innovation on ServiceNow

Definition

The ISG Provider Lens™ ServiceNow Ecosystem Partners 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 different markets, including AP&J, Brazil, Europe and the U.S.

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

ServiceNow Consulting and Implementation Services

Definition

ServiceNow consulting and implementation services help enterprises optimize workflow management across IT and non-IT functions, responding to changing economic pressures and enterprise needs. Consulting and implementation services help enterprises with adoption, development and ongoing operational support. Enterprises focus on maximizing returns from ServiceNow investments, prioritizing the implementation of strategic functionalities across HR, finance, legal, ESG and GRC workflows.

ServiceNow serves as an integrated workflow platform that bridges internal and external stakeholders, meeting diverse requirements while simplifying organizations' internal complexity. Successful implementation requires expertise to ensure integration with other applications and systems, enabling intelligent workflows while minimizing data conversion. This approach includes deploying industry-specific and functional solutions using new ServiceNow capabilities, which act as differentiators for clients seeking digital workflows for strategic outcomes.

Eligibility Criteria

1. Reference models, templates and frameworks: **best practices** for opportunity identification, assessments for **ServiceNow competencies, frameworks/ tools for ROI and business case development,** and value benchmarks

2. Workflow and service management experience: **client road maps** to use ServiceNow as an integrated *platform of platforms* for operations, IT services, **ESG and integration with GRC** and security policies

3. Certified ServiceNow professionals: Certified System Administrator, Certified Implementation Specialist and Certified Application Developer

4. Opportunity identification: AI implementation and integration, including **GenAI, transformers and LLMs, and use of tools/ methodologies**

5. Certifications: ServiceNow **certifications and workflow badges**; expertise in ITIL 4, COBIT and DevOps; accredited ESM experience; ESG and GRC capabilities; integration experience; and industry- and region-specific regulatory knowledge

6. System, data and process integration: **integration experience with the hub-and-spoke model at** starter, standard, professional and enterprise levels

7. Maintenance support: installations, **upgrades, new feature/module release management,** migration, patch management, **lifecycle management** and maintenance after ServiceNow release migration

8. **Successful implementations**: completed projects validated through case studies/client testimonials

ServiceNow Managed Services

Definition

This quadrant assesses ServiceNow partners offering lifecycle support for maintenance, including monitoring; remote support; and centralized management of the Now platform, workflows and applications. With the growing popularity of DevOps, managed service providers must comply with new requirements. They must be prepared for the platform's continuous evolution, which can challenge the existing solutions' status quo, and to quickly manage two new releases. Effective management involves balancing platform costs and licensing against the strategic value and ROI, focusing on CloudOps, FinOps and RiskOps to manage the platform's lifecycle and functionalities. Key provider evaluation parameters are maintenance effectiveness, data quality management, security, compliance, deployment options, addressing data privacy concerns and the provision of flexible pricing.

With the complexity of workflows, providers must deliver services globally and across domains. They must manage a sophisticated and integrated application landscape and operate within or integrate with a multivendor environment, emphasizing customization and modernization.

Eligibility Criteria

1. **Experience with support:** experience with the Now platform, workflows, third-party applications, integrators and accelerators, new features/modules and upgrades

2. **Delivery capabilities:** delivery with proximity to clients

3. **Technology partnerships:** partnerships with key software providers and a comprehensive AMS portfolio

4. **Service integration and management (SIAM) and delivery models:** expertise in managing ServiceNow in broader CloudOps Go to Template Contents applications, including AIOps, MLOps, FinOps, RiskOps and ITOps

5. **Broad customer base:** local use cases and references

6. **Delivery and contract models maturity: ability to manage multiple vendors** and dependencies between toolchains while adhering to SLAs

7. **Intelligent, adaptive and progressive maintenance:** alignment with upgrades and **functionality enhancements from ServiceNow** and technology ecosystems, service integrators, and in-house engineering teams (external partners and specialized tool providers)

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

Innovation on ServiceNow

Definition

This quadrant evaluates ServiceNow partners creating and delivering comprehensive offerings to promote innovation and digital transformation. The Now platform acts as the base for these offerings, generating solutions that improve workflows and support automation aligned with specific industries and business functions. It facilitates both Build with Now (allowing for the development of new solutions) and Build on Now (utilizing existing capabilities for customization). The platform's core is Now Assist GenAI, which integrates AI-driven services like AIOps (predictive ML services) and enterprise service knowledge automation to streamline operational efficiency and predictive analytics. The platform also includes industry- and function-specific solutions. App Engine, Automation Engine and Integration Hub offer scalable tools for application development, process automation, and seamless integration, enhancing ServiceNow's ability to create dynamic, efficient enterprise environments.

Eligibility Criteria

1. **Low-code/no-code development expertise:** proficiency in using ServiceNow's low-code/no-code development tools

2. **Track record of innovation: case studies and references for innovative solutions** built on and built with ServiceNow

3. **AI-driven solutions: integration of AI and ML services on ServiceNow,** using predictive ML models and AI-powered analytics

4. **Expertise in AIOps:** predictive analytics, anomaly detection, and **automation of ITOps,** using **AIOps within ServiceNow**

5. **Industry specialization: expertise in the industry served,** such as finance, healthcare, ITSM and HR

6. **App Engine development experience:** a portfolio of custom applications using **App Engine**

7. **API and integration expertise:** integration of third-party applications and services using **ServiceNow's APIs,** ensuring seamless **data flow** and process integration

8. **Automation implementation: deployment of automated workflows** using Automation Engine

9. **Seamless integration:** use of Integration Hub to connect different enterprise systems, ensuring smooth data exchange and process continuity

10. **Experience in multisystem integration:** successful integrations across various enterprise platforms (ERP, CRM and HRM) and IT systems

Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on ServiceNow Ecosystem Partners 2025:

Quadrants	*AP&J	Brazil	*Europe	U.S.
ServiceNow Consulting and Implementation Services	✔	✔	✔	✔
ServiceNow Managed Services	✔	✔	✔	✔
Innovation on ServiceNow	✔	✔	✔	✔

*Europe: Germany, Austria, Switzerland, Belgium, Netherlands, Luxembourg, England, Ireland, Denmark, Finland, Iceland, Sweden, Norway, Italy, France, Portugal, Czechia, Poland.

*AP&J (ASIA PACIFIC & JAPAN): Australia, Hong Kong, Indonesia, India, Japan, South Korea, Malaysia, New Zealand, Philippines, Singapore, Thailand.

*The ServiceNow partner must have at least one operating office and active clients outside their native regions.

The research phase falls in the period between December 2024 and January 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in April 2025.

Milestones	Beginning	End
Survey Launch	November 6, 2024	
Survey Phase	November 6, 2024	December 5, 2024
Sneak Preview	February 27, 2025	
Press Release & Publication	April 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

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 ServiceNow Ecosystem Partners 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.

Access to Online Portal

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

Research Production Disclaimer:

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

ISG Star of Excellence™ – Call for nominations

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

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

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

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

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

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

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

ISG Star of Excellence

The ISG Provider Lens 2025 – ServiceNow Ecosystem Partners 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 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 November 2024, 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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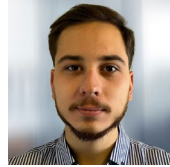
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If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

4MATT LABS	Aoop*	Capgemini*	Crossfuze
AC3	Appmore	Cask*	Crowe
Accelare	Artycs*	CDI	Dell Technologies
Accelerate ITS	Aspire Systems*	CDW Logistics	Deloitte*
Accenture*	Atomic Solutions	Certsys*	Devoteam*
ActioNet	Eviden (an Atos Business)*	CGI*	Digisystem*
Advance Solutions	Axians AB	Cloudaction	DXC Technology*
Advania	Bechtle*	CloudGo*	DxSherpa
AGILE-TM	Bell Techlogix	Coforge*	ECS/Global Logic
agineo*	Beyond20	Cognizant*	Enable (Fujitsu)
Ahead	BitHawk	Computacenter*	EPAM Systems
AJUVO	Booz Allen Hamilton	Computer Aid Inc (CAI)	Epicon*
Alcor	Bravium	Contender Solutions	EPI-USE*
Algar Tech	Bright Consulting	Coreio	Evoke Technologies*
Alparservice*	BT Automation	Covestic	Evora IT Solutions

Invited Companies

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

* Rated in previous iteration

Extreme Group*	Hatchit Studios	Intelibliss	KPMG*
EY*	HCLTech*	IOS Informática	Kyndryl*
Fastlane Technology Solutio	Hexaware*	IT2B	LEIDIT
Go to Template Contents	HGC Technologies*	iTech AG	Leidos*
FlyForm	Hitachi Solutions	ITS	Logicalis
Fujitsu*	IBM*	iTSM Group*	LTIMindtree*
Fully Managed	ICF	Ivee Digital Tech	Lutech Spa
FX INNOVATION	Inetum (Do IT Wise)	Jade Global*	Maryville
GDIT	Infocenter	JDS Australia*	Memora Processos Inovadores
Genpact*	Infosys*	JIT	Methods Business & Digital Technology
GFT Group	inMorphis	Kaptius	Nagarro Software
GlideFast*	INRY*	Keyrus	ND and Co
Globalweb	Insource	Kinetic IT*	Net2Apps
Globant	Intact Technology	Kloves	Netgain
GWCloud*	IntegrityPro Consulting	Konversational	NetImpact Strategies

Invited Companies

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NewRocket	Prozessfux	Sopra Steria*	Tietoevry*
Nexon*	Rapdev*	SPOC	TIVIT*
NTT DATA*	Royal Cyber	Stefanini	TMlabs
Nuvolax/The Cloud People	RSM US	Swisscom	TOW 80 (DGS)
Nuvolo Technologies	SAIC	Sysintegra*	Trianz*
Open Tecnologia*	Savli Group	TCloud	T-Systems/OS*
Optimum Healthcare	SCC	TCS*	Unifii
Orange Business Services	Servos	Tech Mahindra*	Unisys*
P1 Consulting	SHI International	Techport Thirteen	UP3 Services
Pathway Consulting	Sigital	TEKsystems	UST*
Planhorizon	Sii Poland	Templar Shield	VA EXPERT
Plat4mation*	Sofigate	The Anti	ValueFlow*
Protiviti	Softtek	The Cloud People*	Veracity Consulting (RGP)
ProV*	SoftwareOne	The Mastermind Group	Veteran Enhanced
Proven Optics	Solugenix	Thirdera	Virtusa

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* Rated in previous iteration

Volteo Digital

V-Soft Consulting

Windward Consulting

Wipro*

World Wide Technology

Wrangu*

WSP-Consulting*

YASH Technologies*

Yssy*

About Our Company & Research

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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

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

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

NOVEMBER, 2024

BROCHURE: SERVICENOW ECOSYSTEM PARTNERS