

NEAT EVALUATION FOR NTT DATA:

# Advanced Digital Workplace Services

Market Segment: Overall

## Introduction

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This is a custom report for NTT DATA presenting the findings of the NelsonHall NEAT vendor evaluation for *Advanced Digital Workplace Services* in the *Overall* market segment. It contains the NEAT graph of vendor performance, a summary vendor analysis of NTT DATA for advanced digital workplace services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering advanced digital workplace services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall, and with specific capability in build services, run services, and around Microsoft products.

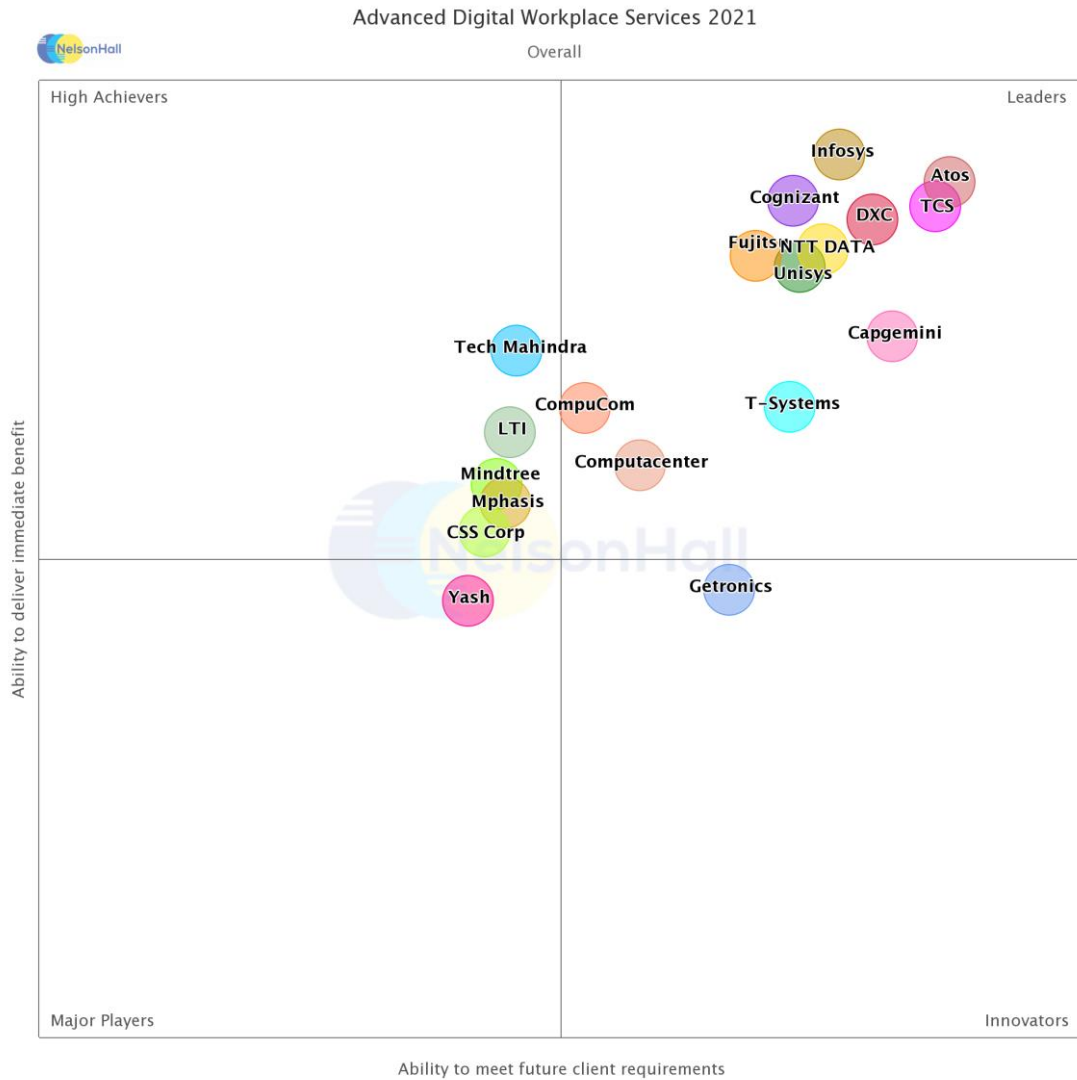
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Atos, Capgemini, Cognizant, CompuCom, Computacenter, CSS Corp, DXC Technology, Fujitsu, Getronics, Infosys, LTI, Mindtree, Mphasis, NTT DATA, TCS, Tech Mahindra, T-Systems, Unisys, and Yash Technologies.

Further explanation of the NEAT methodology is included at the end of the report.



## NEAT Evaluation: Advanced Digital Workplace Services (Overall)



NelsonHall has identified NTT DATA as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects NTT DATA’s overall ability to meet future client requirements as well as delivering immediate benefits to its digital workplace services clients.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *Advanced Digital Workplace Services* NEAT tool (*Overall*) [here](#).



## Vendor Analysis Summary for NTT DATA

### Overview

NTT DATA takes a vendor-agnostic approach to digital workplace services, which it provides under its Dynamic Workplace Solutions framework. Its Nucleus Intelligent Enterprise Platform sits across this and provides a consolidated view across the workplace.

NTT DATA is moving toward a software view of workplace services, with greater use of infrastructure as code (IaC), ML, and AI. It has established workplace productivity centers to provide the intersection between business, application support, tech support, and client-facing service center. The center focus areas include:

- *Investigate*: continuous evaluation and adoption of new technologies to drive sustained innovation for the digital workplace
- *Measure*: analytics-driven measures to improve digital workplace transformation program performance through business, operations, and user experience metrics
- *Change*: collaborating with and augmenting the OCM program performance to support the adoption of new technologies and models of work by the client's end-users
- *Transform*: identify, define, deploy, and manage service transformation and automation initiatives and oversee their acceleration through standards, guidelines, and methodologies.

The centers are focused on meaningful engagement around CX, XLAs, and outcomes, and are designed to deploy automation, write scripts and code, or push work out to teams where they do not have the expertise.

NTT DATA has implemented a CX to XLA solutioning methodology and industrialized XLAs. It utilizes Nucleus Data Intelligence Fabric for XLA and outcome reporting. It has developed an XLA dashboard that includes a proactive and reliable workplace, including a productivity score that looks at self-healing rate, automation satisfaction, and effectiveness. Under reliability, it looks at device application availability, network availability, and device performance. It also utilizes CSAT and survey data, sentiment analytics from service desk calls and then aggregates it. NTT DATA will look to provide an overall outcome to clients. Pricing models include XLAs, Utility Consumption, Cost plus, RU with ARC/RRC, business outcomes, event outcomes, and T&M.

NTT DATA's Digital Operations Management (DOM) connects devices, data, analytics, processes, and security under a single pane of glass. Through DOM, it focuses on reliability and performance through proactive, predictive, and intelligent automation. It is a key CoE for continuous digital transformation. It brings together key skills, including CX, process engineers, data engineers, and automation engineers. NTT DATA is developing DevOps engineer skillsets in support of this capability to help clients think in DevOps terms not from an IT perspective but a business perspective. Essential skills include core (i.e., GitHub, Ansible, Chef, Puppet, Jenkins, etc.), programming skills, data processing (SQL/NoSQL), and cloud management (AWS, Azure, VMware). Focus area expertise includes virtual workplaces (Citrix, VMware, Azure, AWS), PowerPlatform, and core robotic services.

In collaboration with wider NTT operating companies, NTT DATA has embedded specialist capabilities into its Dynamic Workplace platform, for example utilizing everis for intelligent portals and NTT for safe and smart campus. Defined outcomes it looks to drive across the workplace include attracting and retaining talent, healthier workplace, enhanced productivity,



sustainability, lower operating costs, and distributed workforce. NTT DATA Dynamic Workplace accelerators utilized in response to COVID-19 include:

- *Workspace as a service/VDI*: cloud-hosted, fully managed VDI and virtualized applications
- *Unified communication and collaboration*: user productivity solutions via familiar video, chat, and document collaboration systems, including Teams enablement
- *Unified Endpoint Management*: real-time visibility and flexible control over any device anywhere, and getting cloud access gateways up in config manager, and Intune policies rolled out, and moving more channels digitally in support of service desk
- *Omnichannel user support*: rollout of self-service support solutions and channels of choice.

NTT DATA is simplifying its Dynamic Workplace portfolio with a focus on three areas:

- *Flexible Workplaces*: walk-up kiosks, IT vending machines/smart lockers, field services, asset lifecycle management, procurement as a service/DaaS, smart & safe campus (visitor management, spatial insights, healthy building control, FM, and sustainability management), asset lifecycle management, orchestration and automation services, and workplace design and strategy
- *Modern Workers*: self-help and self-service, advanced service desk, virtual assistants, mobile application, information management, CX measurement, performance analytics, predictive analytics, data governance, and enterprise search
- *Digital Workstyles*: virtualization/VDI (device as a service), managed public and private virtual workspaces, virtual workspaces automated testing, workspace as a service, modern device management, IoT and endpoint automation, digital lifecycle management, integrated security, third-party app integration, UC&C, cloud voice, digital events, and intelligent portals.

NelsonHall estimates that NTT DATA has ~15k FTEs supporting workplace services. It supports ~10.3m end users, ~3.5m devices, and ~14.1m annual contacts.

NelsonHall estimates that NTT DATA has ~420 managed service clients across digital workplace services, split by geography as follows: U.S. 72% (~305 clients), Europe 20% (~84 clients), and APAC 8% (~32 clients).

## Financials

NelsonHall estimates NTT DATA's CY 2021 revenues were ~\$21.5bn, and of this, NelsonHall estimates that ~25% (~\$5.4bn) relate to IT infrastructure management services. Furthermore, NelsonHall estimates that ~24% (~\$1.3bn) is associated with digital workplace services.

The estimated geographical split of NTT DATA's CY 2021 digital workplace services revenues is: North America 75% (~\$975m), EMEA 15% (~\$195m), and Asia Pacific/Japan and APAC 10% (~\$130m).

The estimated vertical industry split of NTT DATA's CY 2021 digital workplace services revenues is: financial services & insurance 30% (~\$390m), manufacturing/telco/energy 25% (~\$325m), government/public sector 20% (~\$260m), healthcare 15% (~\$195m), and commercial industries including retail and others 10% (~\$130m).



## Strengths

- Robust toolsets across both proprietary (Nucleus Intelligent Enterprise Platform, Digital Operations Management, NTT DATA AFTE, and reusable automation assets across IT and industry verticals) and third-party in support of dynamic workplace services and automation
- Ongoing investment in automation, AI, ML, and analytics
- Developed Workplace Productivity Centers to enable a data-driven insights approach supported by SRE, process engineers, CX, automation, and data engineers
- Driving XLA outcome-based approach
- Broad global delivery footprint across cloud and infrastructure services and established client base in digital workplace services
- Expanding global CoEs and innovation centers
- NTT Group innovation fund.

## Challenges

- Limited client footprint in EMEA
- Expanding consulting & advisory capability
- Expediting digital re-skilling initiatives across NTT DATA, including site reliability engineering (SRE) capabilities
- Expanding cognitive and AI capabilities
- Increasing virtual agent use cases.

## Strategic Direction

NTT DATA is looking to expand its digital workplace services capabilities through the following initiatives:

### Dynamic Workplace Service Ecosystem

NTT DATA is investing in DWS services and capabilities underpinned by AI, analytics, Workplace Productivity Center, and Nucleus Foundational Core and Data Intelligence Fabric, including:

- Employee resource center: including Nucleus intelligent assistance IP (NIA) with AI/NLP and interactive content to enable L2/3 engineers to solve problems quickly. It is further expanding this knowledge-based aggregator capability to enable clients to ingest knowledge from the public domain, web, their own knowledge base, and those of NTT DATA
- Workplace productivity services: ramping automation and skillsets in support of digital lifecycle management, modern device management, IoT and endpoint, DaaS, VDI, modern collaboration, cloud voice, and digital events
- Immersive experience: enhancing Digital Intelligence Fabric and taking signals from Systrack, Nexthink, IE Tachyon, and sentiment analysis from Nuance and ServiceNow. It is taking this data and using AI to provide content to make end-users more productive



- Further developing Digital Operations Management (DOM) and proactive, predictive, and intelligent automation.

### **Investing in Nucleus Intelligent Enterprise Platform**

NTT DATA is investing in AI, ML, and analytics over the next 12 months in support of its Nucleus Intelligent Enterprise Platform, including:

- Enhancing automation, analytics, and value-delivery capabilities in Nucleus to translate to XLA enablement and business outcomes
- Investments in preventive maintenance and predictive analytics in support of the infrastructure environment, with more sophistication around failures and incident prevention and real-time reaction to data analytics workload
- Expanding its ecosystem of integrated third-party tooling providers within the established reference architecture of Nucleus.

### **Developing skillsets**

NTT DATA is investing in CoE capabilities in support of AI, ML, and analytics, of which it will also look to utilize NTT Group's R&D budget of \$3.6bn innovation fund, including:

- Expanding to ~5k SMEs across CoEs by end FY 2021 (March 2022)
- Increased investment in Agile PODs and go-to-market approach.

## **Outlook**

NTT DATA has simplified its portfolio across Dynamic Workplace, focusing on modern workers, flexible workspaces, and digital workstyles. It is further investing in workplace productivity centers focusing on data-driven insights through a DevOps engineering-led approach. Its Nucleus Intelligent Enterprise platform further supports this approach. A key investment includes Data and Intelligence Fabric within the Nucleus platform to further support its automation approach through improved data analytics capabilities.

NTT DATA is industrializing XLAs and has implemented a CX to XLA solution methodology based on business outcomes. It provides clients with a standard CX measurement dashboard for each service it delivers. It engages in a consulting-led approach to conduct experience assessment workshops with clients to align with their IT and business CX goals. It will need to ramp its onshore consulting resources to support these client initiatives and drive XLAs across its client base. It is also increasing its innovation CoEs and labs supporting a design-thinking, co-creation approach with clients in this area.

Across Dynamic Workplace, it has developed Digital Operations Management (DOM) to connect all devices, data, analytics, processes, and security in a single pane, and it is focusing on proactive, predictive, and intelligent automation to enhance UX further. It will need to continue to ramp its automation, AI, and cognitive services to support digital workplace services.

NTT DATA is enhancing its agile capabilities and skillsets, including DevOps engineers, SMEs, and architects, across the cloud and workplace to further reinforce DevOps from a business perspective. We expect NTT DATA to further expand its agile framework across workplace services with key ecosystem partners to target agile go-to-market models for clients and adopt an SRE-led approach. It will need to continue to expedite its digital reskilling program to support this.



NTT DATA is investing in an employee resource center, utilizing Nucleus intelligent assistance IP with AI/NLP to quickly drive more knowledge-based interactive content from multiple sources and expedite end-user issues. A key investment area includes immersive experience and investing in MarTech capabilities to contextualize the workplace and target specific ads to end-users. Also, there is a greater focus on sentiment analysis and utilization of Microsoft Viva capabilities. It is also developing connected workplaces to support employee safety, wellbeing and enable more meaningful workplace environments. We expect NTT DATA will see traction across all these areas from clients as they move to a hybrid working environment.

Finally, we expect NTT DATA to look at further acquisition targets to bolster its capabilities, particularly across AI, analytics, and ML. A recent example includes Acorio (ServiceNow specialist) and integrating its business process capabilities with Dynamic Workplace in payroll, HR, and facilities management. In addition, we expect it to ramp ecosystem partnerships in support of Dynamic Workplace, in particular with start-ups and digital ISVs.



## Advanced Digital Workplace Services Market Summary

### Buy-Side Dynamics

The key decision factors in selecting a vendor to deliver digital workplace services are:

- Providing proactive & predictive support services (self-healing, remote monitoring, automation, AIOps, cognitive service desk and proactive and predictive analytics)
- Self-serve capabilities (portal-based access to knowledge articles, smart chat, AI powered self-help and self-serve including virtual agents and mobile support applications)
- On-site and virtual support services (Tech Cafes, smart lockers, IT vending machines, remote video support)
- Focusing on wellbeing, and driving digital adoption through organizational change management (OCM)
- AR/VR and immersive technologies for remote support and field services
- Smart meeting rooms and smart offices including voice and gesture controls, and safety management in support of the phy-gital workplace
- Accelerating adoption of Device as a Service, Workspace as a Service, VDI, and cloud productivity platforms M365, Cisco WebEx, Citrix Collaboration, Amazon Workspaces, and VMware Workspace ONE
- Increasing focus on XLAs and sentiment analysis to further enhance employee experience, and driving a human-centric approach across DWS
- Increasing proactive experience centers and a real-time data insights-driven approach across the workplace
- Expanding AI virtual agent to HR (onboarding and offboarding)
- Deploying Microsoft Viva for employee wellbeing
- Driving personas by industry and personalized experience services
- Developing new skillsets including machine coaches, business value specialists, automation and AI architects, CX leads, service resiliency engineers, cloud architects, and cloud DevOps orchestrators
- Increasing low-code/no-code (Power Platform) skills
- Expediting resources building automation use cases and system capability by industry, and dedicated automation and AI leads by client account
- Ability to support clients' ESG initiatives and drive carbon-neutral agendas
- Providing agile and DevOps frameworks and methodologies across the workplace environment
- Provision of design thinking-led consulting engagements, supplemented with dedicated innovation centers for co-innovation and co-creation across the digital workplace
- Enabling safe return to the office and supporting a hybrid working environment
- Ability to enact AI-Ops and an AI-led service desk environment





- Providing a fault-free IT infrastructure environment in support of remote workers
- Increasing productivity of cloud environments to expedite new cloud services
- Flexibility in approach and cultural alignment of the vendor across the client organization
- Ability to provide industry-specific expertise across digital workplace services.

## Market Size & Growth

The global digital workplace services market is estimated by NelsonHall as ~\$43,312m in 2021. It is expected to grow at 3.1% CAGR to reach ~\$48,856m by 2025.

## Success Factors

The key success factors for digital workplace services vendors include:

- *Modern Management*: provide Evergreen services to enable clients to keep up to date with latest features and release updates on Windows 10 and M365, and Evergreen CoE to drive adoption of new features. Also, providing support for Windows 365, Windows 11 and Apple DaaS. Increasing modern management toolsets including Microsoft Autopilot, Intune, and VMware Workspace ONE. Providing support for clients' ESG and carbon-neutral agendas through DaaS and Evergreen services
- *Consulting & Advisory Services*: increase onshore consulting and advisory services, supported by digital workplace SMEs, providing a design thinking and collaborative approach to define clients' hybrid digital workplace transformation roadmap, and virtual labs to showcase multiple use cases in support of a hybrid workplace
- *Increasing Skill-Sets*: ramp digital reskilling and new skill sets including automation architects, site reliability engineers (SRE), machine coaches, business value specialists, experience leads, hyperscaler full-stack SMEs, and AI/ML specialists
- *Intelligent Collaboration*: expanding intelligent collaboration capabilities to smart meeting rooms and utilizing AI and automation to enhance meetings. Increasing user adoption and transformation through Microsoft Teams and bringing LOB applications into teams (e.g., ServiceNow, Workday), and developing IP in the Teams app store
- *Increasing Automation and AI*: using AI-Ops to trigger automation and enable automated remediation. Expanding AI-Ops to No-Ops cloud managed services and developing more complex use cases in support of a hybrid workplace environment. Enabling agile and zero-touch service desk and digital support through self-healing, self-service, and AI-chat, including the expansion of AI virtual agent use cases. Providing one-click resolution of common issues, and IVR-led automation capabilities (AI-enabled voice for automation). In addition, enacting event and incident automation to diagnose and remediate (self-heal) incidents through AI, cognitive bots, and proactive and predictive analytics
- *XLAs and Employee Experience*: increase focus on XLAs and sentiment analysis including wellbeing and HR (Microsoft Viva), to further enhance employee experience, and driving a human-centric approach across digital workplace. Developing proactive experience centers to monitor real-time data insights and XLA dashboard performance
- *Focus on Innovation*: expand AR/VR and immersive capabilities to support remote field support, in particular across Microsoft HoloLens and Mesh services. Combining digital kiosk solutions with digital experience and ability to interact with digital agent at locker or video conferences and collaborate with a live agent. Increase innovation hubs to drive an



experience-led approach and support co-innovation with clients on smart hybrid work environments

- *Low-Code/No-Code Development Capability*: utilize citizen development principles to reduce ongoing IT costs and increase the value of adopting low-code platforms (Microsoft Power Platform). Vendors need to ensure they have defined a robust and encompassing capability to support this transformation. This capability should span training the individuals, building foundational tools and processes, and defining governance structures
- *Deeper Personalization*: driving a hyper-personalized approach at the start of client engagements to better understand clients' business and customize services accordingly. Also, defining personas by industry and personalized experience services across the workplace and wider enterprise ecosystem
- *Smart Working Environment*: increase safe workplace capabilities including workplace signage for social distancing, gesture and voice control and biometric entry with building entry. Provide integration with third-party platforms including ServiceNow Safe Workplace Suite, and utilizing M365 to provide IoT and AI-enabled employee safety applications. Also, provision of management dashboards providing real-time monitoring and reporting capabilities. In addition, smart meeting rooms and wayfinding solutions for next-generation collaboration and parity of experience regardless of location.

## Challenges

The key challenges for digital workplace services vendors include:

- Clients want vendors to focus more on enabling the transformation to a hybrid workplace environment. The once typically constrained and traditional workplace services-focused RFP framework is now necessitating vendors to demonstrate both a proactive and transformative approach, and to bring collaborative 'blue-sky' thinking into the process. This is driven through a modular approach, IP, methodologies, modern toolsets, innovation hubs and ecosystem partnerships to achieve the client's desired outcomes
- Clients are placing greater focus on the experience and wellbeing of end-users across the workplace. They are increasingly looking to drive the adoption of digital tools, assets, and processes. Also, to increase the experience monitoring capabilities of end-users both from a device and HR (wellbeing) perspective, including remote onboarding. Through organizational change management, understanding how users react to change and identifying learning patterns. In addition, clients are further challenging vendors to deliver tailored workplace solutions targeting industry objectives to further drive adoption
- Clients are increasingly focused on defining and developing XLAs in parallel with SLAs as they seek to improve employee experience across the enterprise. Both vendors and clients need to ensure XLAs are well defined and structured, with a focus on developing XLA dashboard measurement across a number of areas including automation and virtual agent effectiveness. Also, measuring end-user sentiments across device, application, network, and home office. Vendors should also broaden the scope of XLAs across the wider enterprise, (e.g., onboarding and wellbeing in HR) to further improve employee experience across 'hire-to-retire'
- Clients are looking to adopt modern management capabilities and move to a hybrid workplace environment to facilitate a flexible, safe, work-from-anywhere culture. The office is now seen as a destination for collaboration. Clients are looking for the skillsets to facilitate this transition and drive employee experience and support the hybrid workplace of the future. Vendors need to ramp digital re-skilling initiatives to enable more



productivity for clients and a greater focus on purpose, wellbeing, experience, and sustainability as primary drivers for enterprises.

## Outlook

The future direction for digital workplace services will include:

- Greater focus on human-centric experience design and employee experience platforms including utilization of Microsoft Viva. Also, targeting installed M365 client bases with Viva to improve productivity and UX
- Investing in decarbonization measurement and reducing onsite support, and developing green apps to educate and provide end-users with visibility of their carbon footprints
- Development of proactive mass healing (L2/3) with service desk resolving data corrections or data validation errors and site reliability engineers (SRE) approving solutions offered by self-healing systems. Also, investing in platforms designed for the future of work, including the gig workforce and remote talent
- More focus on the development of industry-specific personas to create solutions and use cases to fit specific industry requirements for hybrid digital workplace services. Also, standardization of XLAs in support of digital workplace and customizing XLAs by persona, client verticals, and client-specific requirements
- Investing in MarTech and contextualizing the workplace for users, and targeting ads to an end-user in an enterprise for training and adoption services, and continuing focus on OCM to drive digital adoption
- Vendors will increase joint GTM and business plan approaches with strategic ecosystem partners (i.e., Microsoft, AWS, Google, Citrix, VMware), in particular across M365, Unified Device Management, DaaS, and Cloud Workspace
- Vendors will increase AI-Ops and ML capabilities to enable enterprises to utilize AI as a collaboration tool to augment workforces and further enhance UX. Also, supporting the transition to a future No-Ops model
- Greater focus on Teams including Teams Calling, Power Platform, Windows 365 (Cloud PC), Win 11 and Apple DaaS; and repurposing offices to become collaboration hubs
- Vendors will increase capabilities across AR/XR, IoT, 5E edge technologies and mixed reality IoT integration with virtual twin. Also, focusing on frontline workers as a service (FWaaS) capabilities across the workplace.



## NEAT Methodology for Advanced Digital Workplace Services

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NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet client future requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet client future requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

**‘Ability to deliver immediate benefit’: Assessment criteria**

Assessment Category	Assessment Criteria
Offerings	<ul style="list-style-type: none"> <li>VDI services and capabilities</li> <li>Modern management and Evergreen services capabilities</li> <li>XLA-based engagement capability</li> <li>Intelligent collaboration and M365 capabilities</li> <li>Digital support services and AI-enabled capabilities</li> <li>AR/VR, smart spaces and IoT-enabled capabilities</li> <li>Workplace security services</li> </ul>
Delivery	<ul style="list-style-type: none"> <li>DWS North America delivery capabilities</li> <li>DWS EMEA delivery capabilities</li> <li>DWS APAC delivery capabilities</li> <li>DWS LATAM delivery capabilities</li> <li>Dedicated resources for build capabilities and consulting-led approach</li> <li>Dedicated resources for run capabilities including DTCs, CoEs; and reskilling programs</li> <li>Ability to provide proactive and predictive self-serve and self-heal capabilities</li> <li>Ability to support next-generation AI-led workplace services</li> <li>Ability to utilize analytics to improve end-user insights and overall employee experience</li> <li>Extent of digital startups and ecosystem partner GTM for digital workplace services</li> </ul>
Presence	<ul style="list-style-type: none"> <li>Scale of Ops - Overall</li> <li>Scale of Ops – N. America</li> <li>Scale of Ops - EMEA</li> <li>Scale of Ops - APAC</li> <li>Scale of Ops - LATAM</li> <li>Number of clients overall for digital workplace services</li> </ul>
Benefits Achieved	<ul style="list-style-type: none"> <li>Level of cost savings achieved</li> <li>Improved speed problem resolution</li> <li>Reduced number of service tickets</li> <li>Increased end-user/business satisfaction</li> <li>Pricing approach</li> </ul>



*Exhibit 2*

**‘Ability to meet client future requirements’: Assessment criteria**

Assessment Category	Assessment Criteria
Overall Future Commitment to Advanced DWS	Financial rating Commitment to next generation digital workplace services Commitment to innovation in digital workplace services
Investments in Advanced DWS	Investment in IP and platforms, including cognitive and AI in support of DWS Investment in support of virtualization Investment in support of modern management (inc. Evergreen) Investment in support of XLA-based approach to workplace Investment in support of intelligent collaboration Investment in support of AI-enabled services, and data-driven proactive approach to DWS Investment in support of AR/VR, immersive services, and smart spaces
Ability to Partner and Evolve Services	Key partner Ability to evolve services

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.



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**Sales Enquiries**

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:  
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