

NEAT EVALUATION FOR DXC TECHNOLOGY:

# Advanced Digital Workplace Services

Market Segments: Overall, Build Services Capability, Run Services Capability, Microsoft Capabilities

## Introduction

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This is a custom report for DXC Technology (DXC) presenting the findings of the NelsonHall NEAT vendor evaluation for *Advanced Digital Workplace Services* in all market segments: *Overall, Build Services Capability, Run Services Capability, and Microsoft Capabilities*. It contains the NEAT graphs of vendor performance, a summary vendor analysis of DXC 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.

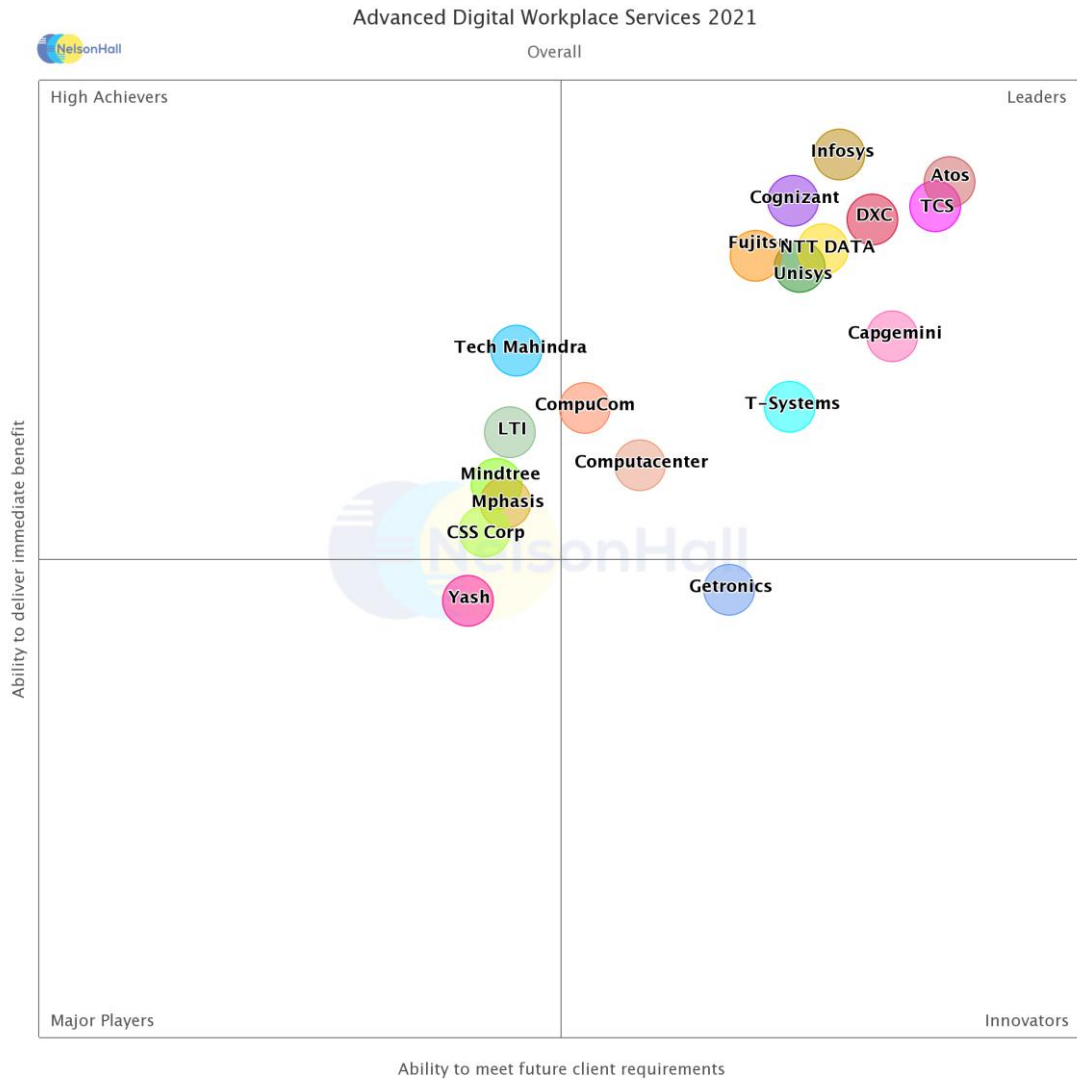
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

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)



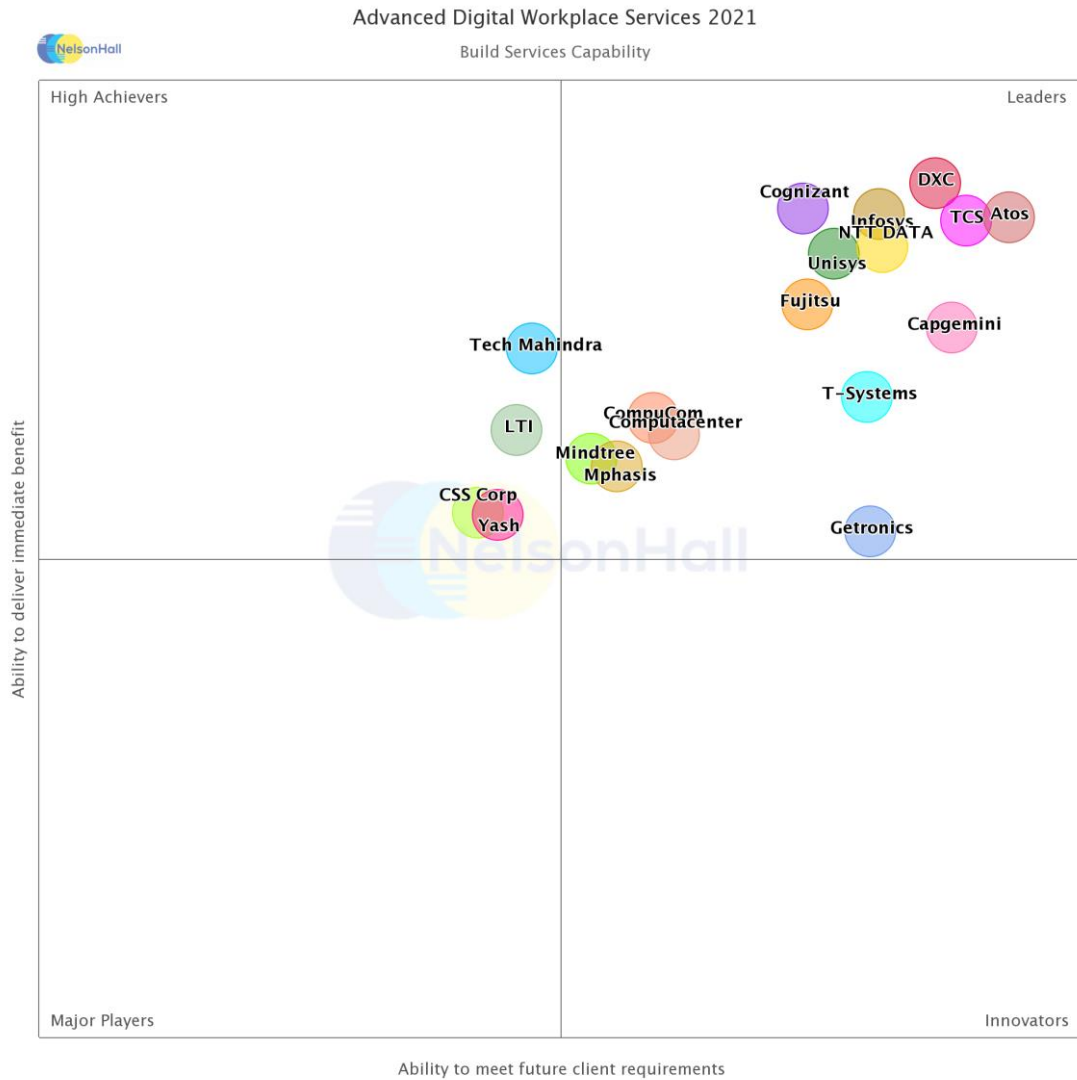
NelsonHall has identified DXC as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects DXC’s overall ability to meet future client requirements as well as delivering immediate benefits to its digital workplace services clients.

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](#).



## NEAT Evaluation: Advanced Digital Workplace Services (Build Services Capability)

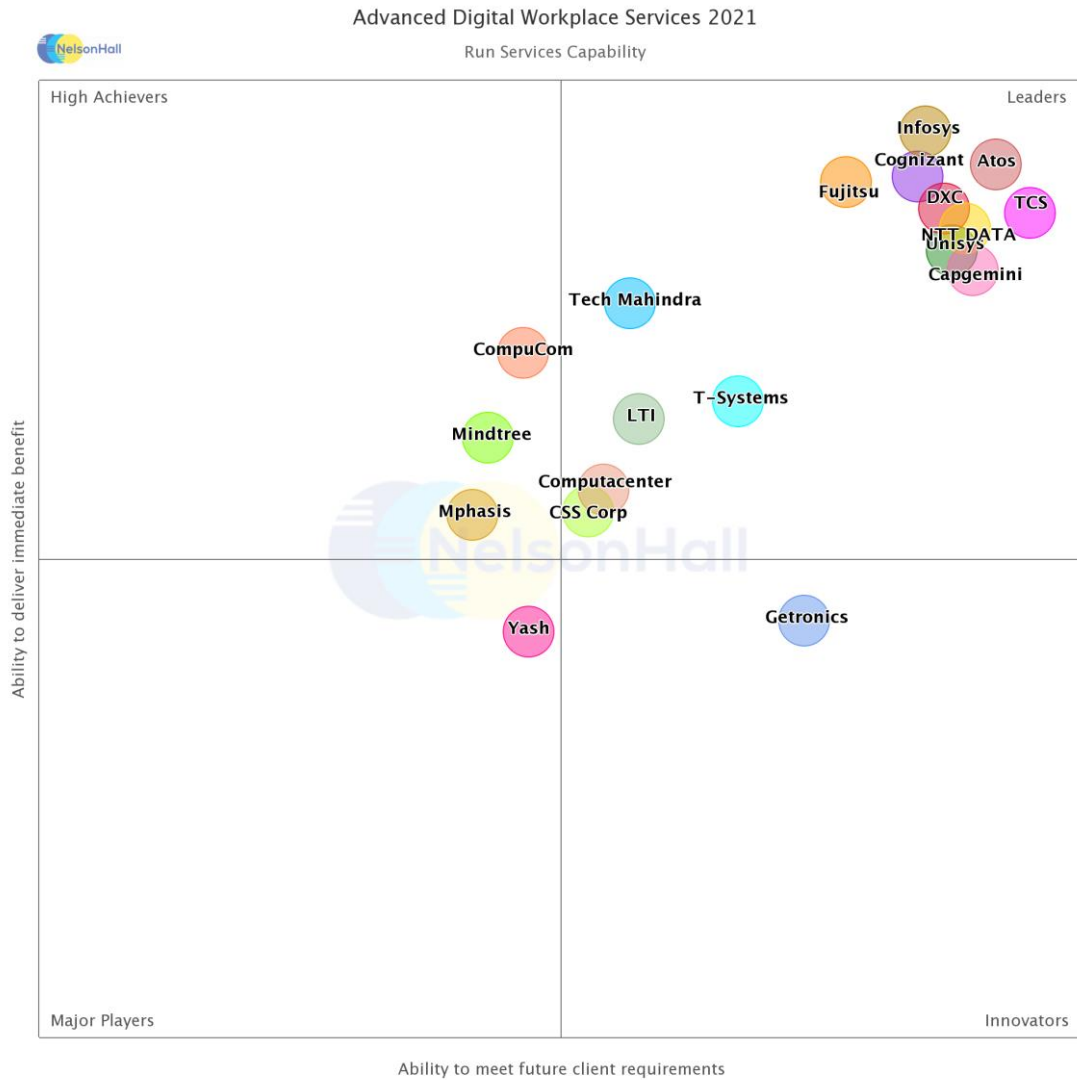


NelsonHall has identified DXC as a Leader in the *Build Services Capability* market segment, as shown in the NEAT graph. This market segment reflects DXC’s ability to meet future client requirements as well as delivering immediate benefits to its digital workplace services clients with specific capability in build services.

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



## NEAT Evaluation: Advanced Digital Workplace Services (Run Services Capability)

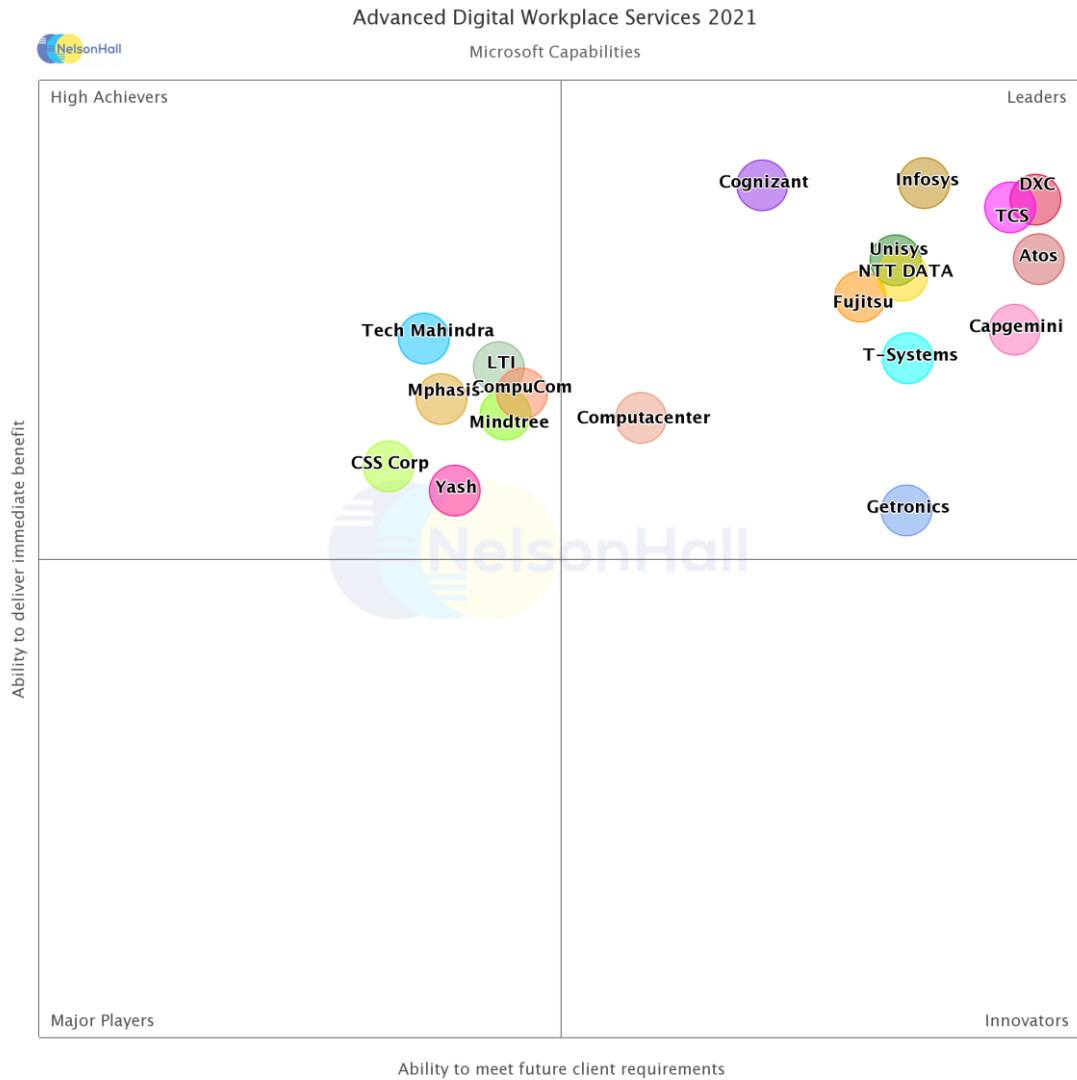


NelsonHall has identified DXC as a Leader in the *Run Services Capability* market segment, as shown in the NEAT graph. This market segment reflects DXC’s ability to meet future client requirements as well as delivering immediate benefits to its digital workplace services clients with specific capability in run services.

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



## NEAT Evaluation: Advanced Digital Workplace Services (Microsoft Capabilities)



NelsonHall has identified DXC as a Leader in the *Microsoft Capabilities* market segment, as shown in the NEAT graph. This market segment reflects DXC’s ability to meet future client requirements as well as delivering immediate benefits to its digital workplace services clients with specific capability around Microsoft products.

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



## Vendor Analysis Summary for DXC

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### Overview

DXC provides digital workplace services through its Modern Workplace practice. It aims to reimagine the workplace experience by providing a personalized, intelligent, and secure modern workplace and enhancing collaboration and productivity on any device, anytime, anywhere. DXC is moving from an IT-centric view to an employee-centric view, and employee experience is at the center of everything it does.

DXC is digitalizing the end-user experience through a new platform called Uptime, which is currently rolling out internally across DXC. It plans to propose Uptime to all clients, simplifying and centralizing workplace services, including collaboration, device management, digital support, and asset management. It provides a virtual, self-service marketplace that enables users to get the devices, tools, and software they need to do their job. DXC aims to consumerize the experience by providing an Amazon-like experience. For example, when onboarding, a user will receive an email to download an application onto a digital device to enable them to onboard themselves. It provides API links into VDI providers and hardware providers based on specific personas and access requirements to devices. DXC looks to automate as much as possible in the back end.

DXC focuses on the employee experience in a three-fold approach, which includes:

- *Improving digitalization*: running design-led workshops to define the experience, tracking technology, and gaining visibility of CMDB. Also, automating service request fulfillment, providing omnichannel services, and eliminating issues before they occur through proactive and predictive insights
- *Tracking employee sentiment*: proactively monitoring and measuring employee experience and wellbeing and integrating COTs tools with Uptime. It seeks to gain insights to improve service levels and share learnings with clients continuously. As an example, from a PC health check perspective, it tracks ~300 parameters on a typical device
- *Improving employee experience*: experience is personalized to each persona and aims to make the environment better for end-users across operations. Here, it looks to let users inform them on improving the environment and measuring the satisfaction users have with this environment, including sentiment analytics with Qualtrics integrated with Uptime.

DXC's Modern Workplace capabilities include:

- *Intelligent Collaboration*: traditional UCC services, workplace networks, and next-generation voice, video, web conferencing, meeting rooms, immersive collaboration, and mixed reality capabilities to enable employees to work and collaborate in new ways
- *Modern Device Management*: includes device as a service, managed print services, and virtual desktop and applications services. DXC supports 7.2m managed devices and 1.3m managed virtual desktops
- *Digital Support Services*: digital support tools underpinned by automation and analytics, including digital service desk, site support across onsite, virtual, and mobile channels, including depot services, self-service IT lockers, vending machines, and XLA user experience



- *Workplace Asset Management*: enabling clients to optimize legacy, hybrid, and cloud license estates. Software licensing and IT asset management services, including procurement, management, retirement, and disposal of hardware.

Across Modern Workplace Services, DXC credentials include:

- 7.2m devices managed globally
- 40 million contacts per year supported in 56 languages
- 5.6m M365 seats and 4.8m Teams seats managed
- 1.3 million virtual desktops managed
- 4.4 million unified communications seats managed.

Through Modern Workplace experiences, DXC claims to enable:

- 15% increase in productivity
- 30-35% TCO savings
- 50% reduction in IT incidents
- 25% reduction in service desk calls over 12 months
- 20% increase in first-time-right support.

DXC has 18,500 personnel globally supporting Modern Workplace, and has multiple delivery centers supporting Modern Workplace around the world.

DXC uses its Digital Transformation Centers (DTC) to facilitate workshops looking at client-specific issues, the initial stages in the approach of design thinking & ideation; prototyping (creating an MVP); development (integrating the MVP into the client environment using DevSecOps); and go-live & scaling to full production and rollout.

## Financials

DXC's CY 2020 revenues were ~\$18.2bn. Of this, NelsonHall estimates ~16% (~\$2.9bn) of these revenues are associated with digital workplace services.

NelsonHall estimates the geographical breakdown of DXC's digital workplace services revenues to be:

- Americas: ~37% (~\$1,073m)
- North and South Europe: ~27% (~\$783m)
- APAC: ~21% (~\$609m)
- U.K.I.: ~15% (~\$435m).



## Strengths

- Investing in IP, including Uptime platform, Actionable Moments Engine, Agile Service Desk, and technology ecosystem
- A clear focus on an integrated employee-centric view, with employee experience at the center of everything it does across Modern Workplace
- Investing in GTM and key offerings across digital workplace with Microsoft across all Modern Workplace offerings including Modern Device Management, Digital Support Services, Intelligent Collaboration, and Workplace Asset Management
- Expanding AI, analytics, and ML capabilities, including with Infinia ML
- Integrated delivery model across all layers of the stack (apps, platform, and infrastructure), including dedicated DevSecOps, and site reliability engineering resources
- Large IT infrastructure services client base across multiple sectors
- Extensive partner ecosystem (particularly Microsoft, ServiceNow, and AWS)
- Developing XLAs to improve UX and business outcomes
- Expanding digital transformation centers in support of clients' digital workplace roadmaps
- Investment from the top to drive Modern Workplace capabilities at scale
- Global cloud footprint across multiple industry verticals.

## Challenges

- Recruitment and retention of high-performing talent, considering recent workforce reduction programs; and attracting next-generation talent
- Needs to expedite digital-reskilling initiative across the company
- Increasing site reliability engineering (SRE) resources
- Transitioning clients to Uptime platform will take time
- Increasing XLA-based engagements and business outcomes
- Ramping AI and ML capabilities in support of Modern Workplace.

## Strategic Direction

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

### **Investing in IP, accelerators, and partner technologies**

- Investing in Uptime integrated platform and supporting IP and partner ecosystem integration, digitizing the user experience, and taking clients on their experience journey
- Digital Support and Actionable Moments Engine to drive reactive, proactive, and predictive analytical insights, and Agile Service Desk IVR, and Connect Chat AI enhancements





- Modern Device Management and Microsoft Managed Desktop, AVD, Windows 365 (Cloud PC) and Windows 11, and Apple industrialized with Jamf and Jamf to Intune integration
- Intelligent Collaboration and Teams Meetings and Meeting Rooms, Viva in M365, and frontline worker capabilities. Also, increasing networks capabilities around SD-WAN and zero-trust environments as clients move into hybrid or multi-cloud environments, including utilization of Viptela/Cisco
- Teams as a platform including Teams Calling, Power Platform, and Dynamics 365
- AR/VR innovation and investing in Mesh-enabled AltspaceVR and HoloLens, and mixed reality IoT integration with Virtual Twin
- M365 security including Azure AD Premium, Azure Information Protection, and Intune
- Focus on AI-Ops and partnership with Infinia ML for advanced machine learning and data analytics
- Expanding XLA library for workplace experience
- Increasing capabilities across agile, DevSecOps, and SRE to accelerate innovation
- Investing in dedicated cloud practices (AWS, Azure, Google, and VMware)
- Expanding repository of assets in GitHub to enable the development of industry-specific offerings at speed
- Increasing ecosystem of third-party tools to drive further automation use cases.

#### Investing in digital re-skilling

- Investing in and developing a workforce with digital-generation skills and introducing new talent-sourcing models, including full-stack engineer capabilities. Other initiatives include digital badging, inner sourcing, and re-skilling existing IT infrastructure personnel with new skills (e.g., cloud technologies). DXC is aiming to have 50% of the workforce digitally skilled by FY22
- Ramping digital hires in particular with cloud certifications, including Lambda, data scientists, SREs, and DevOps engineers with the ability to build a continuous delivery pipeline
- Deploying lean techniques and creating a lean culture and mindset throughout DXC
- Increasing dedicated cloud resources across account delivery teams
- Investing in further digital transformation centers (DTC) to support clients' cloud and digital workplace transformation journeys
- Scaling DevSecOps across tools, architecture, processes, and operating models throughout DXC.

## Outlook

DXC takes an employee-centric view with employee experience at the center of everything it does across the Modern Workplace. It is driving its approach to persona-based end-user experience through its Uptime platform. Uptime simplifies and centralizes workplace services and employee experience through a modular design, bringing disparate services onto one platform. This includes intelligent collaboration, device management, digital support services, and asset management. It provides a virtual, self-service marketplace that enables users to get



the devices, tools, and software they need to do their job. The Uptime platform utilizes DXC IP and provides third-party API integrations into multiple OEM vendors, cloud services providers, and partners, including Qualtrics and Nextthink, to drive sentiment analytics and enhance overall employee experience. DXC further integrates Microsoft Viva for tracking around employee HR, wellbeing, and cultural sentiment. The platform is available for a single price per user per month, and DXC will provide the platform to all new clients and retrofit existing clients. However, it will take time to transition clients onto the new platform.

DXC has also developed an Actionable Moments engine to provide reactive, proactive, and predictive support services across the workplace. This also includes API-driven events from 1E Tachyon, Nextthink, and Systrack to improve UX further. The engine can further self-heal and remediate, including with virtual agents and auto-fix. We expect DXC to continue investing in this area to enhance the UX across the entire enterprise. DXC has also created an XLA library for workplace experience, with several pilots running with clients currently. It will need to expedite its XLA approach in driving business outcomes across its client base.

DXC has a strategic partnership with Microsoft to deliver solutions across the Microsoft stack. For example, DXC is now Microsoft's leading integrator for Teams based on seats managed, and it is working with Microsoft sales globally to take clients through the modern workplace journey. Microsoft has committed SMEs to co-develop and co-build in terms of offerings areas. Key investment areas supporting Intelligent Collaboration include Viva and frontline worker capabilities and Teams as a Platform including Teams Calling, Power Platform, and Dynamics 365. It is also placing increasing focus on AR/VR with Microsoft Mesh services and HoloLens. We expect DXC to see increased traction in this area, with remote field services supporting hybrid working environments and supporting clients' ESG agendas. Across Modern Device Management, DXC aims to provide Modern Management transformation with Microsoft Intune, Autopilot and VMware Workspace One to many clients still utilizing SCCM. DXC sees increased traction for its Device as a Service (DaaS) based on standardized device lifecycle services, per-device, per-month price. It is further expanding its DaaS capabilities in support of Apple. As clients move to modern management, DXC is focused on as-a-service bundles, including integrated services and devices, virtual desktops, and applications. Through its Evergreen model, DXC can support the full solution lifecycle; for example, a client's rollout of Windows 365, where DXC will provide a service on a price-per-month basis.

Through Digital Support Services, DXC focuses on modernizing support toward digital-first integrated care with a clear focus on the experience. This includes proactive support, self-help, self-healing, and predictive analytics. DXC has further created IP in partnership with AWS to create a single multi-channel call center platform for the Agile Service Desk (ASD). It has also introduced a voice channel scenario to deploy automation, with a bot framework enabling IVR-led automation, with advanced use cases driven by analytics. DXC will need to continue to increase its capabilities in AI and ML across support services.

Through its modern field management program, DXC brings its digital-first approach of site support to enable a consumerized experience with badge swipe and smartphone interaction. DXC further deploys location-aware smart lockers, and its digital front-end brings a seamless support experience to end-users. In addition, DXC virtual agents are augmented by AI/ML insights to enable analytics-based decisions and operate autonomously. Through Workplace Asset Management, DXC aims to drive up to 20% cost reduction for clients through better utilization of data to drive decisions that impact investments for IT.

DXC is taking a consultative-led approach to digital workplace services, providing clients an iterative approach in enabling their modern workplace experiences. It has developed multiple digital transformation centers to facilitate design-thinking workshops looking at client-specific issues. We expect DXC to continue to expand its DTCs in support of clients' digital transformation initiatives, particularly in support of AI and automation.



DXC has developed an integrated delivery model across all layers of the stack (applications, platforms, and infrastructure), with dedicated CTOs, DevOps, site reliability engineers, and cloud SMEs further supporting the client's IT transformation programs. It will need to ensure it continues to ramp its dedicated skillsets in support of clients' multi-cloud and modern workplace initiatives, particularly across SREs. However, it has a company-wide program to have 50% of its workforce digitally trained by FY22.

Finally, we expect DXC to increase its ecosystem of partners, including startups and digital ISVs, supporting its Uptime platform, driving employee experience, and using joint-IP solutions in support of modern workplace services with key ecosystem partners including Microsoft, VMware, and AWS.



## 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.



[research.nelson-hall.com](http://research.nelson-hall.com)

**Sales Inquiries**

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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