**iSG** Provider Lens™

# Future of
# Work Solutions

A report comparing technology provider capabilities
to help decision-makers in evaluating vendors

Customized report courtesy of:

ZOHO

**QUADRANT REPORT | OCTOBER 2024 | GLOBAL**

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## Executive Summary

*Report Author: Mrinal Rai*

Modern technologies use AI to enhance solutions that address the future of work needs

**Digital Employee Experience**

Although the COVID-19 pandemic years are becoming distant memories, the changes it brought to how we work remain. Many global organizations tried, in vain, to reinstate the old ways of working with their Return-to-Office (RTO) policies. These policies face stiff resistance from the workforce, who have experienced the pros and cons of working remotely and understand that they can deliver quality output without physically being in the office. End-user technology, encompassing all the devices, applications and tools needed for work irrespective of location, has become a key driver in ensuring a successful hybrid work strategy. Ensuring an uninterrupted end-user technology experience is at the forefront of the list of priorities of enterprise IT teams. The enterprise IT teams should ensure that the devices and applications that employees use while working in a remote or hybrid environment are always up and running. There should be an automated resolution of issues associated with the end-user technology IT assets. If any issue requires reaching out to enterprise IT, it should be resolved immediately.

Digital employee experience (DEX) solutions have assisted enterprise IT organizations with these objectives for quite some time. Regardless of size, many global enterprises now realize the benefits of monitoring, measuring and managing EX with digital technologies. DEX solutions provide a quantifiable measure of EX that can be leveraged by enterprise IT organizations to assess the health of their IT estate. For large global organizations, identifying and discovering various IT assets, including devices and endpoints, in their complex environment is tedious. Similarly, they need help identifying their software and application licenses and ensuring their usage. Modern DEX solutions address this need by providing full-scale visibility into IT assets by covering devices of all types and providing software license optimization capabilities.

# DEX solutions expand to include AI-enabled insights to enhance predictive analytics.

DEX solutions also measure the performance of the endpoints and devices and can identify the right time to retire a device or send it for a refresh or refurbishment. These features assist IT teams with planning, budgeting and implementing green IT initiatives focused on sustainability.

Another critical aspect of DEX solutions that appeals to modern IT organizations is their ability to auto-resolve incidents before they occur. Many DEX solutions use analytics and automation to perform root cause analysis (RCA) and identify the cause of an issue. They offer a library of automated incidence resolutions that can be used to reduce IT tickets and optimize IT support costs.

The growing usage of AI has led to the vision of zero or near-zero service desks, where IT teams may not have to invest heavily in personnel to support issues. This is tied to the concept of autonomous IT, where machines can predict, identify and resolve issues independently. Enterprise IT organizations are also increasingly adopting AI capabilities to enhance their IT estate observability. AI adds value to DEX solutions by providing multiple options

to improve and expand functionalities. It enhances the AIOps capabilities by supporting continuous monitoring and observing of IT infrastructure, analyzing data to detect anomalies, predicting potential problems, automating repetitive tasks and continuously learning to improve efficiency and reliability. Leading DEX providers are deeply integrating these features into their solutions. IT teams must utilize these upgraded technologies to improve employee services, optimize cost and operations and enhance their overall business value.

This report evaluates key DEX technology providers that stand out in their abilities to support the growing need of enterprise IT organizations for technology-led experiences.

**Connected and Collaborative Work**

The future of work emphasizes technology solutions that support unified communications and effective collaboration among employees in a hybrid or remote setup. As global employees work from their preferred location, effectively managing work becomes increasingly important. Organizations that

# Connected and collaborative work is offered by providers from **diverse technology domains.**

## Executive Summary

have a distributed, remote and hybrid workforce are expected to adapt to a faster pace in completing tasks and resources that are ever-changing in availability. Given the constant evolution of project priorities and workforce transitions across organizations, ensuring an accessible and productive work experience is critical. A clear and adaptable work plan with defined tasks and activities is the first step to enable effective collaboration between team members and departments. Organizations looking to optimize work planning should consider adopting a collaborative work management platform, a unified process to plan and execute work with activities and tasks using the available resources.

The era of virtual workspaces has resulted in efficient collaboration and rapid completion of tasks and projects. Organizations will have to reevaluate their collaborative work management platforms to examine whether traditional workflows include the advantages of modern systems. According to ISG Research, by 2025, one-half of organizations will invest in work experiences and prioritize work management technologies that optimize time

for task and activity execution. Organizations with a structured work approach for supporting a productive and agile workforce can respond to sudden demands and provide precise planning to assure the customers. Preparation using a well-equipped work management platform can be a key differentiator in the marketplace.

Modern unified communication collaboration (UCC) and productivity solutions integrate features to support modern collaborative work canvas solutions that visualize complete work management and offer centralized access to all components and related content. This leads to blurring lines between work management and the work itself. Technology providers from diverse domains can provide such a connected and collaborative work environment. While traditional project portfolio management solutions have a head start in this space, technology providers from UCC, content collaboration, office productivity applications and enterprise applications also offer capabilities to address the needs of modern, connected and collaborative work.

Most work management solutions offer specialized solutions for managing projects across complex business functions such as marketing, creative content development, IT and general business operations. Providers that stand out now focus on tailored product solutions designed for industry-specific use cases.

AI offers significant opportunities for enhancing connected and collaborative work, improving individual and team productivity and efficient management. These solutions can boost individual productivity, while teams can leverage AI to improve project management endeavors. With AI, modern project managers can analyze the current state of various projects, identify risks, optimize resource allocation and derive insights from diverse data sources and content types.

This report evaluates key connected and collaborative work solution providers that stand out to support the increasing need for modern work management and collaborative work canvas.

> As global enterprises navigate the evolving landscape of future of work, encompassing both back-end IT management and front-end collaborative work management, AI provides innovative ways to enhance efficiency and improve overall performance.

## Provider Positioning

**Page 1 of 4**

| | Digital Employee Experience (DEX) Solutions | Connected and Collaborative Work Solutions |
|---|---|---|
| 1E | Leader | Not In |
| Adobe | Not In | Product Challenger |
| Airtable | Not In | Product Challenger |
| Asana | Not In | Leader |
| Atlassian | Not In | Market Challenger |
| Box | Not In | Market Challenger |
| Bumblebot | Contender | Not In |
| Cisco | Market Challenger | Not In |
| Citrix | Market Challenger | Not In |
| ClickUp | Not In | Product Challenger |
| Coda | Not In | Contender |

## Provider Positioning    **Page 2 of 4**

| | Digital Employee Experience (DEX) Solutions | Connected and Collaborative Work Solutions |
|---|---|---|
| ControlUp | Leader | Not In |
| Creatley | Not In | Contender |
| Dropbox | Not In | Market Challenger |
| eG Innovation | Product Challenger | Not In |
| Evernote | Not In | Contender |
| Google | Not In | Product Challenger |
| HCL Software | Contender | Not In |
| Hive | Not In | Product Challenger |
| HP | Contender | Not In |
| Ivanti | Product Challenger | Not In |
| Lakeside Software | Leader | Not In |

## Provider Positioning

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| | Digital Employee Experience (DEX) Solutions | Connected and Collaborative Work Solutions |
|---|---|---|
| Liquidware | Contender | Not In |
| ManageEngine | Product Challenger | Not In |
| Microsoft | Market Challenger | Leader |
| Miro | Not In | Contender |
| Monday.com | Not In | Leader |
| Nanoheal | Product Challenger | Not In |
| Nexthink | Leader | Not In |
| Nifty | Not In | Contender |
| Notion | Not In | Rising Star ★ |
| Omnissa | Product Challenger | Not In |
| Riverbed | Leader | Not In |

## Provider Positioning    **Page 4 of 4**

| | Digital Employee Experience (DEX) Solutions | Connected and Collaborative Work Solutions |
|---|---|---|
| ServiceNow | Market Challenger | Not In |
| Slack | Not In | Market Challenger |
| SmartSheet | Not In | Leader |
| Tanium | Rising Star ★ | Not In |
| Workelevate | Contender | Not In |
| Wrike | Not In | Leader |
| Zoho | Not In | Leader |
| Zoom | Not In | Market Challenger |
| Zscaler | Market Challenger | Not In |

iSG Provider Lens™       FUTURE OF WORK SOLUTIONS    |    OCTOBER 2024    **9**

This study evaluates technology providers that enable **back-end IT** and **front-end EX** in the future of work.
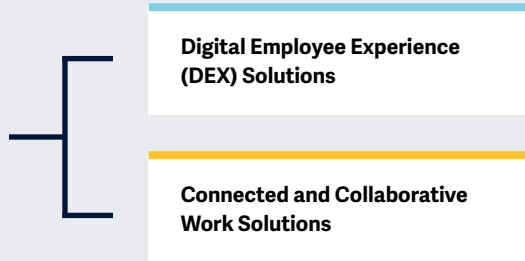
Simplified Illustration Source: ISG 2024

**Digital Employee Experience (DEX) Solutions**

**Connected and Collaborative Work Solutions**

## Definition

The future of work is evolving with the changes in technology and the resulting new opportunities. This report explores the technology solution providers best suited to explore these opportunities. While many organizations are adopting the return-to-office strategy, most global organizations are implementing a hybrid working model for their employees. According to the ISG Buying Behavior Research – Future Workplace Study, an average of 45 percent of the workforce will work remotely for global organizations.

## Technologies supporting back-end IT operations

With the continuation of remote working and the pressure on enterprise IT organizations to do more with less, the adoption of solutions that automate many back-end IT operations is rising. The performance of the workplace technology endpoints, be it the devices, applications or the associated network, profoundly impacts the end-user experience. Any interruption results in the loss of productivity, and enterprise IT organizations

do not want to be in the reactive mode of supporting such issues. They are increasingly interested in software solutions that automatically resolve issues that hamper end-user productivity.

## Technologies supporting collaborative work

Modern collaborative work needs are not confined to just unified communication and collaboration solutions. The importance of team collaboration within project management has also increased with the expanding scope of communication and collaboration. AI has opened new possibilities to enhance employee productivity and efficiency.

This report covers key areas for technology providers for future of work challenges and opportunities in the modern workplace.

**Scope of the Report**

In this ISG Provider Lens™ quadrant study, ISG includes the following two quadrants:

- Digital Employee Experience (DEX) Solutions
- Connected and Collaborative Work Solutions

The ISG Provider Lens™ Future of Work Solutions 2024 study offers the following to business and IT decision-makers:

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

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

**Provider Classifications**

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between$20 million and $999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptionsare possible).

## Provider Classifications: Quadrant Key

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

# Digital Employee Experience (DEX) Solutions

## Digital Employee Experience (DEX) Solutions

**Who Should Read This Section**

This report is relevant to enterprises across industries in different geographies for evaluating digital employee experience (DEX) solution providers. In this quadrant, ISG highlights the current market positioning of DEX solutions providers and how each addresses the critical challenges enterprises face.

Most enterprises globally have shifted from traditional monitoring tools to DEX, leveraging advanced analytics capabilities. These include automated guidance, root cause analysis for troubleshooting and remediation, user behavior analysis and sentiment tracking. This shift enables enterprises to reduce complexity, enhance device performance, lower costs, improve threat detection and deliver more personalized digital experiences for their workforce.

Enterprises are facing complex digital workplace challenges and are seeking providers that can offer comprehensive telemetry-based insights into their entire technology ecosystem. They prefer solutions with a user-friendly interface that integrates security and digital experience monitoring into a single console, empowering IT support and service desks. They also seek providers that continuously monitor endpoints, enabling automated resolution and remediation to ensure uninterrupted user productivity. Globally, enterprises are gravitating toward providers with an extensive DEX ecosystem.

**Chief human resources officers (CHRO)** should read this report to learn which providers are leading in DEX solutions. This information will aid them in planning and enhancing EX with technology.

**Technology professionals,** including workplace technology leaders, should read this report to learn about DEX solution providers' relative positioning and capabilities.

**Digital professionals** should read this report to learn how DEX solution providers fit their digital transformation initiatives and compare them to one another.
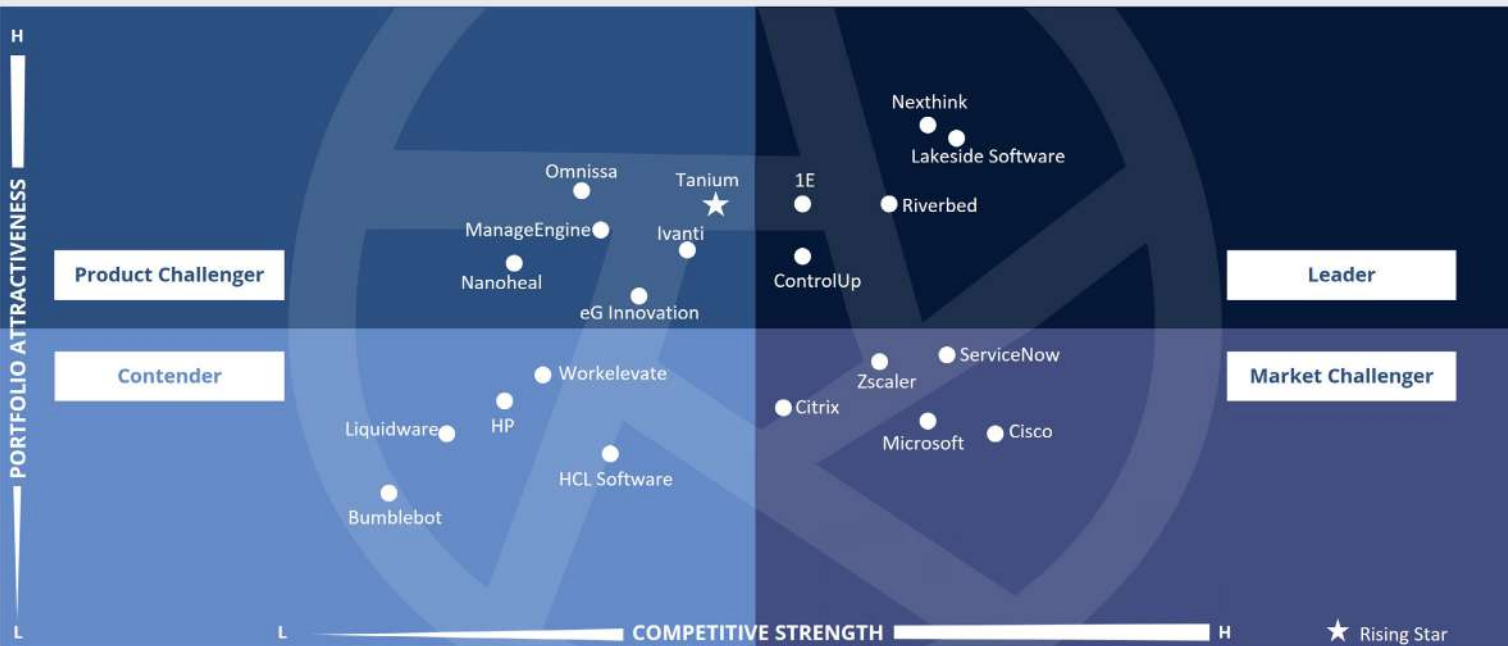
**Line-of-business (LOB)** leaders should read this report to learn the current landscape of DEX solutions providers.

ISG Provider Lens™

**Future of Work Solutions**
Digital Employee Experience (DEX) Solutions

Source: ISG RESEARCH

Global 2024

This quadrant assesses **software solutions** that **observe, assess, monitor, auto-fix** and **measure** digital workplace **technology-led experience** while **identifying and remediating issues** to support IT administrators.

*Mrinal Rai*

## Digital Employee Experience (DEX) Solutions

**Definition**

This quadrant assesses global technology providers that provide DEX solutions. Also known as end-user experience management (EUEM) solutions and digital end-user experience (DEUX) solutions, DEX solutions aim to measure, analyze, benchmark, manage and enhance end users' experience with workplace technologies. These technologies include, but are not limited to, endpoint devices, applications, operating systems and networks. DEX solutions analyze information by collecting data from endpoints used by end users, such as devices, network points and applications. They typically deploy an endpoint agent that collects this information. IT teams can combine this with direct user feedback, either collected using the DEX solution or deployed via a third party. Data collected through a DEX solution provides insights, enabling the enterprise IT organization to take actions to improve the overall end-user experience with digital workplace technology.

These solutions also offer automated and assisted issue remediation. DEX solutions have become popular among enterprise clients of all sizes as clients aim for increased automation and automated endpoint management. As employees work from locations of their choice and use various devices and endpoints to access their workplace, enterprise IT needs tools to ensure device security, technology performance and enhanced EX. DEX solutions assist enterprise IT support functions and service desks in supporting user issues with comprehensive information in real time. This helps support agents resolve those issues with speed and efficiency. These solutions help clients achieve high employee productivity with uninterrupted technology performance by proactively and automatically resolving issues.

### Eligibility Criteria

1. Offer DEX separately **or** as part of an existing broader IT/endpoint management solution

2. Continuously **monitor endpoints**, such as devices, applications and network touchpoints, **using a lightweight endpoint agent**

3. Provide **telemetry-based insights** into technology estate impacting EX within the entire digital workplace technology ecosystem

4. Offer **automated resolution and remediation** for issues, ensuring uninterrupted end-user productivity

5. Support **user self-help** to resolve issues at their end

6. Has a **global presence with clients** in all major geographies

iSG Provider Lens™

**Observations**

This is the second year of ISG evaluating DEX providers. There is an increasingly keen interest among IT buyers in DEX solutions; however, the objectives vary. While observability and monitoring remain crucial, automation and analytics are becoming key differentiators. This shift has led to adjustments in the positioning of the providers compared to last year. VMware, now Omnissa, emerges as a Product Challenger in the quadrant. Focusing beyond traditional observability and expanding to adjacent infrastructure elements are differentiators on the Portfolio Attractiveness axis. On the Competitive Strength axis, providers with a strong presence among IT buyers are differentiating. The Contenders in this quadrant offer telemetry, observability and experience management based on device performance. The Product Challengers provide enhanced insights and analytics to auto-resolve issues, automate workflows, and support adjacent IT infrastructure elements. Market Challengers have a robust IT infrastructure presence and cater to end-user computing and IT service

desk requirements. The Leaders in the quadrant offer everything others provide and have extensive experience managing diverse end-user technology environments and experience with endpoints, applications and other IT infrastructure elements.

From the 43 companies assessed for this study, 21 qualified for this quadrant, with five being Leaders and one as a Rising Star.

**1E**

**1E** utilizes AI for device performance, troubleshooting, endpoint automation and sentiment analysis. It partners with ServiceNow to enhance service desk automation.

**control** up

**ControlUp's** DEX platform provides real-time monitoring, remediation and insights across digital workspaces. It excels in virtual desktop infrastructure (VDI), SaaS and unified communications (UC) monitoring while leveraging a strong community.

**Lakeside Software's**

**Lakeside Software's** SysTrack collects extensive endpoint data, uses AI for predictive analytics and issue resolution and offers flexible, customer-centric solutions alongside 24/7 support.

**Nexthink**

**Nexthink** is a DEX pioneer with 15 million endpoints, strong MSP partnerships and innovative solutions such as Nexthink Flow and Nexthink Assist.

**Riverbed**

**Riverbed** Aternity's integrated platform offers extensive digital experience coverage with agent-based monitoring, AI-driven AIOps and comprehensive IT infrastructure visibility.

**Tanium**

**Tanium (Rising Star)** offers DEX solutions featuring real-time monitoring, automated self-healing, sentiment tracking, user surveys and self-help functionalities to enhance EX.

# Connected and Collaborative
# Work Solutions

## Connected and Collaborative Work Solutions

**Who Should Read This Section**

This report is relevant to enterprises across industries in different geographies for evaluating connected and collaborative work solutions providers. In this quadrant, ISG highlights the current market positioning of these providers and how each addresses the critical challenges enterprises face.

Globally, enterprises are embracing collaborative work management and enhancing user productivity by automating tasks and providing analytics-driven insights. Providers are catering to enterprises' needs by offering new possibilities through AI-driven personalization features, allocating intelligent skill-based resources, predicting project risks and increasingly utilizing AI to develop features that support workflow automation.

With the rapid digital adoption in this space, enterprises are increasingly concerned about privacy and compliance. To address these issues, providers are enhancing data governance measures and security controls.

Enterprises are seeking providers that can deliver a seamlessly connected and collaborative virtual workspace. This workspace should enable efficient work management and foster collaboration within the hybrid workforce. Enterprises are seeking essential capabilities such as support for third-party task and project management tools, reporting, dashboards and workflow automation. They prioritize service providers that meet their evolving hybrid work needs with comprehensive and technologically advanced virtual workspace solutions.

**Technology professionals** should read this report to learn the relative positioning and abilities of communication solution providers, which can help them effectively plan and select a UCCaaS tool.

**Digital professionals** should read this report to learn how unified communication and collaboration solution providers fit their digital transformation initiatives.

**Customer service professionals** should read this report to see how solution providers address the challenges related to compliance and security while maintaining a seamless EX.

**Procurement professionals** should read this report to learn the current landscape of unified communication and collaboration solution providers.

ISG Provider Lens™

Future of Work Solutions
Connected and Collaborative Work Solutions

Source: ISG RESEARCH

Global 2024

This quadrant assesses **software solution providers** that offer **collaborative work canvas, connected workspace** and **efficient task or project management capabilities,** either in-house or through integration.

*Mrinal Rai*

## Connected and Collaborative Work Solutions

**Definition**

This quadrant assesses technology providers that provide software solutions to support enterprise clients' connected and collaborative work requirements. Connected and collaborative work involves working with a team of remote and in-office employees sharing a virtual workspace. Different anchor point solutions can act as an entry point for these workspaces. These solutions include content collaboration, project/task management, note-taking and content creation. Collaborative work management solutions enhance user productivity by automating tasks and providing analytics-driven insights. These features enable users to conduct AI-enabled intelligent searches across diverse tasks, processes and milestones. Many content collaboration technology providers offer this capability to evolve beyond enterprise file synchronization and share and enterprise wiki solutions. These solutions either integrate with existing unified communication–as-a-service (UCaaS) solutions or offer support for asynchronous communication.

As AI adoption becomes more widespread, assessing its application in connected and collaborative work will be imperative. These providers explore opportunities utilizing AI to support new possibilities, such as suggesting additional automation based on project activities, generating the entire project structure, allocating intelligent skill-based automated resources and predicting project risks. Modern productivity application providers functioning in niche areas, such as notetaking and online presentation creation, are increasingly utilizing AI to develop features that support workflow automation, enterprise wiki, project management and automation. Hence, technology providers from diverse domains compete in this space.

### Eligibility Criteria

1. Offer a connected and collaborative virtual workspace that assists in **efficient work management** and **collaboration within the hybrid workforce**

2. Provide native features or support third-party **task and project management,** along with **reporting and dashboard and workflow automation**

3. **Deliver seamless access** across devices like **desktop apps, web browsers and mobile apps,** facilitating consistent UX

4. **Provide strong privacy compliance** program with new security controls, including data governance measures

5. Support integration for third-party productivity applications and **unified communication and collaboration tools**

6. **Offer an intuitive UI** for easy access to applications

7. **Provide AI-enabled features** to enhance productivity, conversational interfaces, personalized content, knowledge management and intelligent knowledge base search

## Observations

For the first time, ISG is evaluating providers in this space, a rapidly evolving market due to technological changes, the increasing needs of hybrid workers and the expanding capabilities of AI. On the Portfolio Attractiveness axis, ISG has considered the solution provider's ability to offer a connected workspace that can extend beyond individual productivity and depth of project and collaborative work management. On the Competitive Strength axis, providers differentiate through widespread client engagement across all sizes. The Contenders in this quadrant excel in enhancing individual or a team's productivity and leveraging AI for improved user experience and assistance with strong integration support. The Product Challengers provide strong collaborative work management solutions in addition to the capabilities of Contenders. The Market Challengers demonstrate a strong market presence for their own respective solution categories that can be extended to provide a connected workspace. The Leaders encompass all offerings of other categories, with a robust AI approach and proven track record in managing complex projects and use cases.

From the 43 companies assessed for this study, 22 qualified for this quadrant, with six being Leaders and one as a Rising Star.

### Asana

**Asana** excels in task and project management, integrating collaboration tools and offering AI-powered updates, smart answers and virtual collaborators.

### Microsoft

**Microsoft** Teams leads in collaboration, integrating with Microsoft 365 for seamless content access. Microsoft Loop offers a synchronized work canvas, enhancing teamwork.

### monday.com

**monday.com** offers a comprehensive platform with low-/no-code dashboards, open APIs and AI features for efficient work management.

### smartsheet

**Smartsheet** offers a robust work management platform with AI features, strong growth and high client satisfaction.

### wrike

**Wrike** provides a robust platform with core elements for resource planning, work execution and analytics. The platform supports diverse team needs and has innovative AI-powered features.

### Zoho

**Zoho** Projects has grown significantly, supporting 100 million users and achieving $1 billion in ARR with flexible pricing and 24/7 support.

### Notion

**Notion (Rising Star)** offers customizable workspaces with flexible templates, varied use cases for individual and team needs and AI-driven content creation and task automation while ensuring data privacy and encryption.

# Zoho

"Zoho stands out due to its comprehensive capabilities, collaborative features and seamless integrations with both Zoho's productivity suites and third-party applications."

*Mrinal Rai*

### Overview

Headquartered in India, Zoho offers connected and collaborative work solutions through its Zoho Projects and extensive product family. The firm employs 12,000 employees globally and operates in more than 180 countries. It serves over 100 million users with more than 50 applications. Zoho offers solutions for the entire technology spectrum, from firewalls, data centers, hardware, networks, servers and storage to apps, platforms, OS and services. A privately held software firm, it also offers software products in CRM, workplace, productivity, financial and HR, security and IT management and low/no-code development.

### Strengths

**Significant market growth:** Zoho Projects has grown significantly within the Zoho product family, now supporting 100 million users. With a 65 percent increase in migration from other solutions to Zoho Projects, Zoho generates $1 billion in ARR. It provides flexible user-based pricing, 24/7 assistance and dedicated account managers. After migrating from competitive project management solutions, enterprise clients can achieve significant cost savings and value optimization with Zoho Projects based on annual billing.

**Productivity and third-party integration:** Zoho Projects provides built-in collaboration tools at no extra cost. In addition to supporting Zoho's workplace and productivity applications, it provides add-ons for

Microsoft Teams, Slack, Google Workspace, Dropbox and other collaboration solutions. Zoho Projects also natively integrates social feeds, team messaging, whiteboard, content collaboration and audio/video conferencing.

**Innovation with AI:** Zoho Projects enhances team productivity through workflow and complex automation. Zoho's AI engine, Zia, provides OpenAI integration and GenAI capabilities to create status posts, add project descriptions or start forum discussions. Zia can also provide deep insights into project data to help make informed decisions. Zoho supports NLP search to assist users in searching in colloquial language across different Zoho applications. Zoho Blueprint automation is now available within projects, enabling admins to design visual workflows.

### Caution

Zoho has a strong client base in the SMB segments. Enterprise clients with complex work and project requirements should request reference examples and proof points relevant to their environment from Zoho.

# Appendix

The ISG Provider Lens 2024 – Future of Work Solutions 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.

**Study Sponsor:**
Heiko Henkes

**Lead Author:**
Mrinal Rai

**Research Analyst:**
Khyati Tomar

**Data Analysts:**
Pooja Rani Nayak and Aishwarya Pateriya

**Quality & Consistency Advisor:**
Jim Kane

**Project Manager:**
Swathi Amin

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

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

**The study was conducted in the following steps:**

1. Definition of Future of Work – Solutions global market

2. Use of questionnaire-based surveys of service providers/vendors across all trend topics

3. Interactive discussions with service providers/vendors on capabilities and use cases

4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)

5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.

6. Use of the following main evaluation criteria:

   * Strategy and vision

   * Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * Technology advancements

*Author*

### Mrinal Rai
**Assistant Director and Principal Analyst**

Mrinal Rai is Assistant Director and Principal Analyst at ISG and leads research for the future of work and enterprise customer experience. His expertise is in the digital workplace, emerging technologies and the global IT outsourcing industry. He covers key areas around the Workplace and End User computing domain, viz., modernizing workplace, Enterprise mobility, BYOD, DEX, VDI, managed workplace services, service desk and modernizing IT architecture. He also focuses on UCCaaS, enterprise social software, content collaboration, team collaboration, EX and productivity services and solutions.

He has been with ISG for 11+ years and has 17+ years of industry experience. Mrinal works with ISG advisors and clients in engagements related to the digital workplace, UC and service desk. He also leads the ISG Star of Excellence™ program that tracks and analyzes enterprise customer experience in the technology industry and authors quarterly ISG CX Index reports. He is also the ISG's official media spokesperson in India. Mrinal was awarded as one of the top analysts in APAC by Institute of Influencers and Advisory Relations (IIAR) and as an Indian Achiever by the Indian Achievers Forum 2023.

*Research Analyst*

### Khyati Tomar
**Research Analyst**

Khyati Tomar is a Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on the Microsoft Partner Ecosystem, the Future of Work – Services and Solutions, and OCM. She supports lead analysts in the research process and authors the Enterprise Context and Global Summary reports. Prior to this, she had over 2.5 years of experience in the technology research industry and had carried out various consulting and custom projects and co-authored CIS reports, mostly focusing on the public sector vertical.

# Author & Editor Biographies

## Study Sponsor

### Heiko Henkes
**Director & Principal Analyst, Global IPL Content Lead**

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice.

His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies, and change management in a Cloud-AI-driven business landscape. Henkes is renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.

## IPL Product Owner

### Jan Erik Aase
**Partner and Global Head – ISG Provider Lens/ISG Research**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes;. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry.

Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

## 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.

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**OCTOBER, 2024**

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