ISG Provider Lens®

ServiceNow Ecosystem Partners

ServiceNow Consulting and Implementation Services (Professional Services)

ServiceNow partner evaluation on competitive strengths, service portfolio and innovation potential

Customized report courtesy of: genpact

QUADRANT REPORT | MARCH 2026 | U.S.

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U.S. ServiceNow ecosystem shifts from *technical rollout* to governed, outcome-led autonomy

The 2026 U.S. ServiceNow Ecosystem Partner report assesses how service providers are enabling enterprises to convert the Now Platform into a governed system of action, where agentic AI, observability led operations and upgrade safe architectures translate intent into measurable outcomes. The study evaluates three quadrants — Consulting and Implementation, Managed Services and Innovation on ServiceNow. This framework covers the end-to-end functionality of ServiceNow ecosystem and enables service providers and enterprises to shift from strategy to scaled production.

The U.S. landscape has shifted decisively from project-based delivery to advisory led modernization, featuring value engineering upfront and XLA/ROI tracking in run state. Together with platform consolidation and industry blueprints, this shift moves organizations from isolated deployments to governed autonomy encompassing auditable architectures that can be upgraded and expanded without sacrificing control.

Market context — the forces reshaping the U.S. ecosystem

AI is now the default: In new implementations and in-run operations, U.S. buyers expect Now Assist capabilities and multi-agent patterns (A2A) to be available and safe on day one. Providers are responding to this by embedding AI Control Towers (for model/agent governance, lineage and rollback) directly into reference architectures rather than treating them as optional add-ons.

From observability to autonomy: Large U.S. estates are integrating observability telemetry and AIOps into workflows, enabling the platform to not only log events, but also detect, decide and resolve. As incident priority is tied to business impact, automation density becomes a leading indicator of value, not the number of closed tickets.

Consolidation to a backbone: With budget and risk pressures rising, enterprises are

Agentic AI raises U.S. expectations, pushing partners beyond implementation to strategy.

consolidating point tools and elevating ServiceNow to a platform of platforms, the workflow backbone that orchestrates IT and non IT domains while preserving compliance. This consolidation improves upgrade cadence, data quality and the adoption of new capabilities.

Industry verticalization at scale: Current demand concentrates in BFSI, healthcare, telecom, manufacturing and the public sector, where compliance-ready blueprints and domain data models compress time to value and reduce transformation risk. Buyers increasingly choose providers based on the strength of their ready to deploy patterns.

Emphasizing regulation and compliance: *Secure AI at scale* has become an architectural requirement. AI governance, agent/machine identity, audit trails and sovereign/regulated deployment patterns are expected, especially in BFSI, healthcare and the public sector.

Enterprise priorities — how service providers are adopting and scaling

Start with advisory and value, not build plans: U.S. programs begin with platform fit, CSDM/CMDB readiness, integration strategy and value discovery (often TBM/FinOps linked). This enables teams to commit to engineering, anchored in upgrade safe, back to box designs that minimize custom debt and preserve release velocity.

Treat AI as a run time operating discipline: For most clients, *leveraging AI* is insufficient without skills, tuning and governance to sustain outcomes. They deploy Now Assist and agents alongside AI Control Towers and human in the loop controls to keep autonomy safe and auditable.

Consolidate to move faster and spend smarter: Consolidation programs position the platform as the orchestration layer across IT and business operations. This enables consistent data models and accelerates cross suite rollouts, particularly when paired with factory re-platforming and instance consolidation.

Prioritize vertical outcomes over toolkits: Enterprises prioritize industry blueprints that align data, controls and process templates to regulated workflows:

- **BFSI:** Operational resilience and risk workflows with non-negotiable compliance
- **Healthcare/Life sciences:** Member/patient operations, regulatory workflows and experience modernization under strict guardrails
- **Public sector:** Secure/sovereign patterns and packaged templates with governance first AI
- **Telecom and manufacturing:** Observability driven autonomy connecting network/plant telemetry to service workflows

Measure value relentlessly: U.S. clients demand XLA dashboards and outcome contracts that tie funding to adoption and performance (for example, deflection, MTTR and EX/CSAT), with benefit calculators and live telemetry informing renewal and expansion.

Decoding buyer behavior: Deal size is fragmenting downward as midmarket entrants use ServiceNow as a fast path into AI. However, they carry a premium tolerance for governed outcomes rather than raw feature counts. Consulting and implementation are splitting. Pathfinding remains human centric, while execution is expected to become increasingly automated by agents over time. Consulting and implementation are diverging into two distinct motions: pathfinding remains a human led activity, focused on strategy, value, and governance, while execution is becoming increasingly automated, with agents taking over more delivery tasks over time.

Provider Dynamics — how supply is reorganized to meet U.S. demand

From delivery shops to *strategy through run* partners: Providers now initiate engagements with advisory to engineering motions, including readiness, roadmaps and TBM/FinOps-aligned value discovery) and conclude on the basis of measured outcomes rather than hours. The common denominator is governance by design, with AI Control Towers, identity/risk guardrails and sovereign/regulated patterns embedded across all architectures, especially for highly regulated U.S. estates.

Productization of innovation: Innovation has moved from slideware to shippable, upgrade ready solutions that combine agentic AI (A2A), observability and industry

IP. Multi agent libraries shift operations from prediction to resolution, while Store/IP accelerators reduce cycle time and drive consistent adoption.

Managed services rewritten: Run organizations are converging CloudOps, FinOps and RiskOps into Managed AgentOps, with human in the loop, XLA contracts and continuous modernization in run (back to box, release discipline, instance consolidation). Success is measured by automation density, governed AI at scale, upgrade velocity and demonstrable ROI.

Alliances and capability depth: Alliances emphasize observability interlocks and data fabric integration to ensure telemetry informs workflow decisions. Tuck in M&A strengthens talent benches and shortens the strategy to execution handoff, which is critical for U.S. enterprises seeking speed without sacrificing control. This enables providers to differentiate by running standardized, upgrade safe builds, shipping vertical playbooks and operating XLA/ROI dashboards in production.

Outlook (12–24 months) — what to expect and how to prepare

Emphasizing governed autonomy at scale:

- **Agents as a standard operating layer:** Expect expansion from L1/L1.5 into complex cross domain handoffs with A2A orchestration and human in the loop approvals.
- **Observability fused with workflows:** Telemetry and AIOps will drive self healing responses linked to business impact, shrinking MTTR while raising reliability.
- **Backbone architectures and data fabric:** Platform consolidation will continue, with CSDM/CMDB and knowledge modernization treated as prerequisites for safe AI scale up.
- **Vertical catalogs as on ramps:** Compliance ready blueprints remain the fastest route to outcomes in regulated sectors.

Key risks to manage:

- **Agent sprawl without control towers:** Absence of AI Control Tower oversight, lineage and rollback mechanisms can stall or reverse autonomy after incidents.
- **Skipping the foundations:** Weak CSDM/CMDB and knowledge hygiene degrade AI accuracy and change reliability, inflating risk just as automation scales.
- **Customization drag:** Heavy bespoke build erodes upgrade velocity and blocks adoption of the new capabilities in the Zurich release. Prioritizing back to box is the preferred default.

Leading indicators to watch:

- Growth in XLA linked commercials and capacity models in managed services
- Rise in pipelines focused on instance consolidation and factory replatforming
- Providers publishing reusable agent libraries and A2A blueprints rather than custom one offs
- Executive scorecards that assess data fabric maturity (CSDM/CMDB completeness and knowledge modernization) prior to AI activation

What enterprises should do now:

- **Institutionalize governance first:** Set up an AI Control Tower with policy, lineage and rollback criteria; mandate human in the loop oversight for material decisions; and align security and compliance artifacts to regulated workflows before scaling agents.
- **Contract for upgrade safe value:** Make back to box requirements, regression coverage and release cadences contractual, as well as link milestone payments to adoption and XLA metrics (deflection, MTTR and EX) rather than activity counts.
- **Integrate observability into action:** Integrate telemetry, service maps and runbooks directly into workflows to ensure incident priority reflects business impact and measure automation density in production.
- **Adopt vertical blueprints:** Select industry catalogs with pre built data and control models for BFSI, healthcare, telecom, manufacturing and the public sector to compress time to value and reduce risk.

- **Budget for AI run time:** Implement post-go-live programs for skills, tuning and guardrails and align managed services to Managed AgentOps with outcome dashboards and continuous modernization in run.

What service providers should prioritize:

- **Governance by default:** Standardize AI Control Towers, identity and access controls, audit capabilities and sovereign/regulated deployment patterns across U.S. regulated verticals;
- **Productize acceleration:** Scale Store/IP accelerators and reusable agent libraries that are upgrade ready and instrumented with before/after scorecards
- **Modernize while running:** Treat back to box, release management and instance consolidation as day 2 services rather than separate projects to ensure innovations in Zurich remain adoptable
- **Sell outcomes, not effort:** Anchor proposals on automation density, upgrade velocity and XLA/ROI telemetry drawn from production, instead of staffing ratios

Conclusion — *The U.S. blueprint for the next ServiceNow decade moves from modernization to measurable autonomy*

The U.S. ServiceNow agenda has evolved from projects delivered to platforms governed. Buyers expect agentic AI to operate under explicit controls, observability to drive self healing operations and upgrade safe design to keep innovation adoptable. Providers that package governance by design, ship vertical blueprints and prove value with live XLA/ROI telemetry will define the next phase of the U.S. ecosystem. The era of customizing everything has ended; the new era of measurable, governed autonomy has begun.

In the U.S., *go live* marks the beginning. Leaders are designing governed autonomy with fixed foundations (CSDM/CMDB), orchestrated agents (A2A), observability infused with workflows and upgrade-safe design, delivering measured, repeatable outcomes.

Provider Positioning

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	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Accenture	Leader	Leader	Leader
Atos	Leader	Leader	Rising Star ★
Birlasoft	Product Challenger	Product Challenger	Contender
Brillio	Contender	Contender	Not In
Capgemini	Leader	Leader	Leader
CDW	Product Challenger	Product Challenger	Not In
Coforge	Leader	Rising Star ★	Leader
Cognizant	Leader	Leader	Leader
Cprime	Product Challenger	Not In	Product Challenger

Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
EY	Market Challenger	Market Challenger	Market Challenger
Fujitsu	Product Challenger	Product Challenger	Product Challenger
Genpact	Leader	Product Challenger	Leader
GlideFast	Rising Star ★	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader
Hexaware	Leader	Leader	Leader
IBM	Market Challenger	Market Challenger	Market Challenger

Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Infosys	Leader	Leader	Leader
InMorphis	Product Challenger	Product Challenger	Product Challenger
INRY	Not In	Product Challenger	Not In
Jade Global	Contender	Contender	Contender
KPMG	Market Challenger	Market Challenger	Market Challenger
Kyndryl	Product Challenger	Leader	Product Challenger
LTM	Leader	Leader	Leader
NewRocket	Rising Star ★	Not In	Product Challenger
NTT DATA	Product Challenger	Market Challenger	Leader

Provider Positioning

	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Orange Business	Product Challenger	Not In	Not In
Pathways	Contender	Contender	Contender
Proven Optics	Not In	Not In	Contender
Randstad Digital	Product Challenger	Product Challenger	Product Challenger
RapDev	Contender	Contender	Product Challenger
SoftwareOne	Not In	Not In	Product Challenger
Stefanini	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader

Provider Positioning

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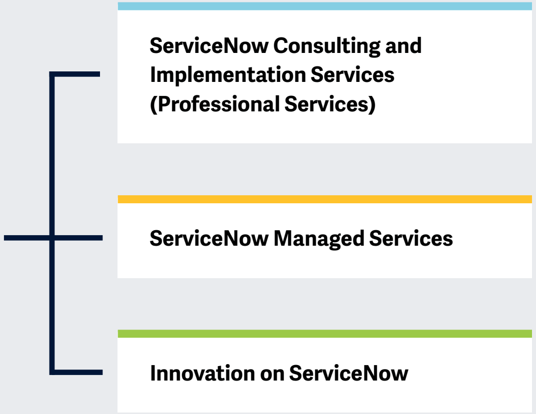
	ServiceNow Consulting and Implementation Services (Professional Services)	ServiceNow Managed Services	Innovation on ServiceNow
Unisys	Contender	Product Challenger	Product Challenger
UST	Product Challenger	Product Challenger	Product Challenger
Virtusa	Not In	Not In	Contender
Wipro	Leader	Leader	Leader
YASH Technologies	Not In	Contender	Contender
Zaelab	Market Challenger	Not In	Not In

The **ServiceNow Ecosystem Partners 2026** study highlights the latest partner developments shaped by rapidly evolving enterprise needs.



Simplified Illustration Source: ISG 2026

Definition

ServiceNow is a key driver of digital transformation, offering a cloud-native platform that streamlines enterprise workflows across industries. As a market leader, it is rapidly evolving with a growing focus on AI and automation, supported by a mature ecosystem of providers delivering specialized, outcome-driven services.

Recent platform releases mark a strategic shift toward agentic AI, transforming enterprise workflows into autonomous, multi-agent systems. Yokohama and Zurich introduced foundational capabilities, including Vault for security, Machine Identity Console, and agentic workflow design with DevOps integration, that enable secure, scalable AI deployment.

With Gartner forecasting that over 60 percent of enterprises will adopt AI agent platforms by 2029, ServiceNow is positioning itself as the central AI agent control tower. The Zurich release advances this vision with Build Agent and vibe coding, allowing natural language prompts to generate production-ready applications. The Developer Sandbox ensures safe experimentation, while Agentic Playbooks and Now Assist deliver automation with human oversight. ServiceNow's strength lies in its ability to act as an integration mesh, connecting best-of-breed agent platforms such as Google Agentspace, AWS Bedrock, Microsoft Copilot and Anthropic. Trusted by over 80 percent of Fortune 500 companies since 2021, it leverages Workflow Data Fabric (WDF), Knowledge Graph and CSDM to unify enterprise data.

For partners, the opportunity is to deliver modular, composable agentic workflows aligned to GRC requirements, underpinned by domain expertise and outcome-driven models. Sustained value will depend on robust ModelOps, LLMOps and AgentOps capabilities to ensure compliance, debiasing and dynamic updates across industries.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/solutions: ServiceNow Consulting and Implementation Services (Professional Services), ServiceNow Managed Services and Innovation on ServiceNow.

This ISG Provider Lens® study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant service providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing 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 (exceptions are 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.

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 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.

★ **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.

ServiceNow Consulting and Implementation Services (Professional Services)

Who Should Read This Section

This report is valuable for providers offering **ServiceNow consulting and implementation services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG analyzes how providers address consulting complexity, industry-specific needs and integration challenges within the ServiceNow ecosystem.

Strategy professionals

Should read this report to gain insights into the emerging trends in ServiceNow consulting, including AI-driven advisory and workflow optimization. It helps them identify partners capable of shaping long-term transformation strategies, aligning ServiceNow adoption with enterprise objectives and ensuring scalability across IT and business functions.

Technology professionals

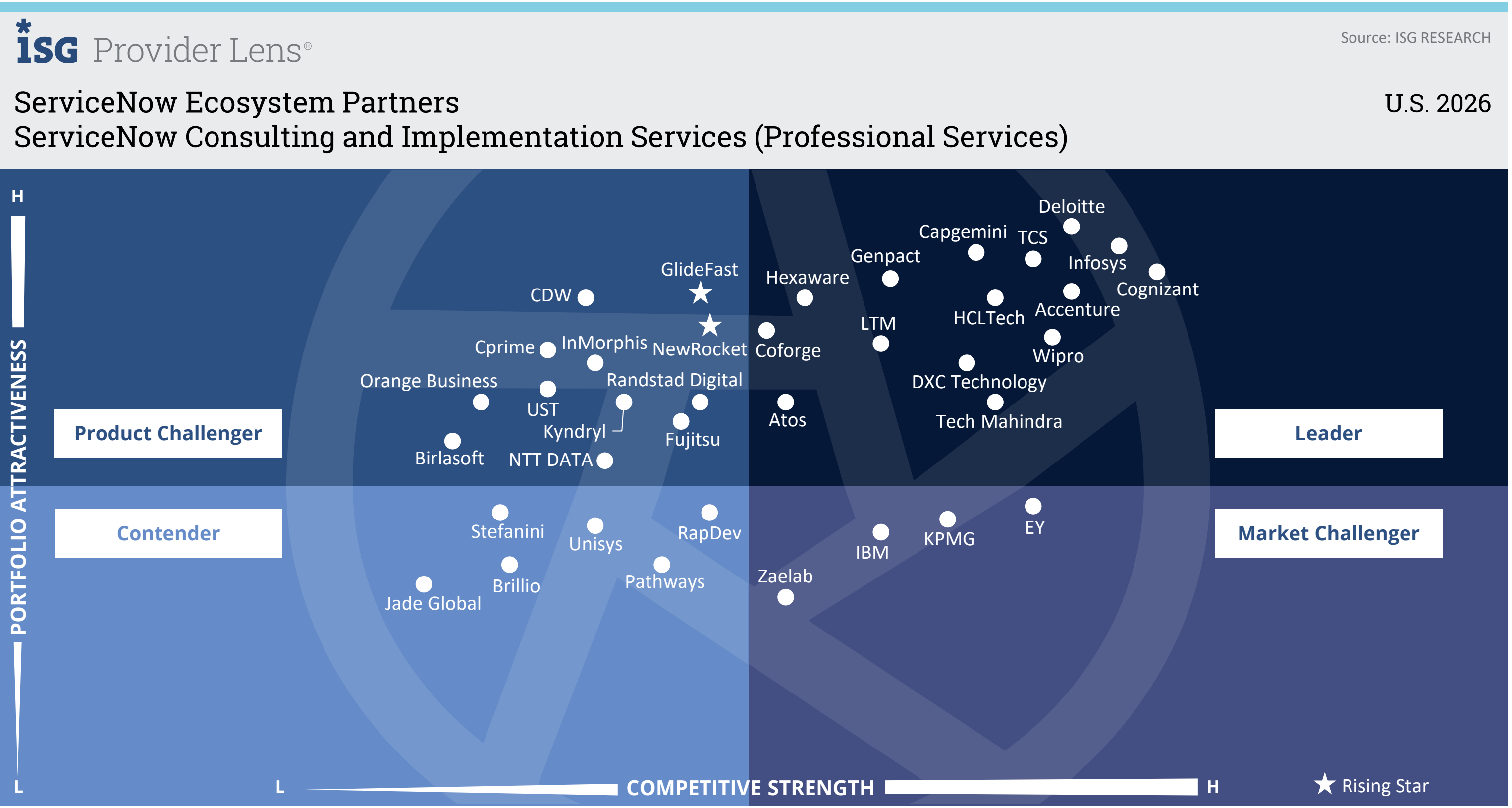
Should read this report to explore providers' expertise in implementing ServiceNow modules and integrating them into enterprise systems for industry-specific solutions. It offers clarity on service providers' integration capabilities across ERP, CRM and legacy systems, enabling informed decisions for seamless deployment and alignment with enterprise architecture.

IT and business professionals

Should read this report to understand process maturity, design frameworks and best practices for ServiceNow adoption across diverse organizational environments. It provides insights into the best practices service providers follow for designing workflows, managing complexity and ensuring operational efficiency.

Digital transformation professionals

Should read this report to learn how service providers leverage ServiceNow's AI-first capabilities, low-code platforms and automation tools to deliver scalable solutions. It highlights strategies implemented by providers for mapping technologies to business outcomes, accelerating enterprisewide digital transformation, and driving innovation through integrated workflows and advanced analytics.



This quadrant evaluates provider's ability to transform **IT and non-IT** workflows by advising on readiness and designing upgrade-safe ServiceNow architectures that integrate **AI-enabled capabilities** and cross-suite implementations.

Tapati Bandopadhyay

Definition

This quadrant evaluates providers that design, deliver and scale outcomes on the Now Platform through comprehensive professional services. It includes consulting and advisory services for AI-driven GRC and value discovery, solution strategy, readiness assessments and the use of Now Assist to align business cases, risk controls and adoption plans. It also covers implementation and integration of ServiceNow modules and full-stack orchestration across internal and external systems, leveraging robust interfaces, data models and Now Assist to accelerate time to value.

The quadrant assesses business services capabilities across IT, HR, customer, asset and field functions, as well as industry-specific solutions for regulated, complex verticals. Workflow engineering is evaluated through service architecture modernization, including ITSM, CSM and HRSD, with an emphasis on automation, analytics and continuous improvement. Providers are rated on advisory depth, delivery quality, platform architecture, AI implementation, domain blueprints and measurable outcomes, such as experience, risk reduction and operational efficiency, achieved through secure, scalable and compliant ServiceNow practices.

Eligibility Criteria

1. **Strategic advisory and value discovery:** Expertise in **strategic consulting, solution road maps, readiness assessments** and **business value identification** using frameworks such as AI GRC
2. **Platform implementation and integration:** Proven ability to deliver **end-to-end technical implementations, orchestrate complex processes** on the Now Platform and integrate with diverse enterprise systems
3. **Business-centric solution architecture:** Skill in designing **robust service architecture** and developing **industry-specific** and **function-focused solutions**
4. **Workflow engineering and optimization:** Technical mastery of core ServiceNow workflows, including **ITSM, CSM and HRSD**, with a track record of **enhancing process maturity** and **service optimization**
5. **AI and innovation adoption:** Success in consulting and deploying **modern platform capabilities**, including GenAI features such as **Now Assist**
6. **Certified talent and expertise:** A strong team of **certified ServiceNow professionals**, including holders of **advanced credentials** such as **certified technical architect** (CTA), to ensure high-quality delivery
7. **Proven client success and ROI:** Documented client outcomes linking technical execution to strategic value, showcasing **measurable ROI** and **business impact**

Observations

Over the past 12–18 months, the U.S. consulting and implementation market has pivoted from module delivery to advisory-led, outcome-priced modernization, with deals opening on value discovery (TBM/FinOps, readiness and roadmap) and closing on measurable KPIs rather than hours. Providers are standardizing back to box and using upgrade-safe architectures to reduce technical debt and maintain release velocity, while tuck-in M&A deepens consulting and talent benches to tighten the strategy-to-execution handoff. GenAI has moved from trials to production as Now Assist skills and A2A patterns are embedded into ITSM/ITOM, HRSD, CSM and risk, with curated agent libraries and early access programs signaling scale rather than experimentation. Implementation styles converge on observability-led orchestration, including Dynatrace and ITOM interlocks, telemetry-driven CMDB hygiene and runbook execution, to ensure incident priority tracks business impact. Demand is industry-specific, with BFSI, healthcare, telecom, manufacturing and public sector expecting industry blueprints and pre-built IP (including Store assets) that compress timelines and boost adoption. Governance has become architectural, with AI Control Towers, risk/identity guardrails and sovereign/regulated patterns are table stakes in regulated U.S. sectors. Value realization is explicit, as outcome contracts, benefit calculators and experience diagnostics link EX, MTTR and deflection to funding, rewarding partners that blend consulting rigor, agentic AI and upgrade discipline to deliver durable transformation in 2026.

From the 42 companies assessed for this study, 37 qualified for this quadrant, with 15 being Leaders and two Rising Stars.

Accenture secures its leadership through *Reinvention Services*, utilizing its 2025 Global Elite Partner of the Year status to deliver complex, industry-specific implementations that combine deep consulting expertise with large-scale digital core modernization.

Atos expands its advisory-led consulting and implementation practice, leveraging Elite partner status, broad certifications and local hubs. It uses sector references and *Envision Consulting* to standardize, de-customize and modernize estates for upgrade safe adoption across the U.S.

Capgemini's Intelligent Orchestration on Now (ION) framework and deep domain expertise enable it to deliver complex, large-scale implementations that move beyond IT-centric siloes to drive enterprise-wide digital transformation across regulated sectors in the U.S. and globally.

Coforge is strengthening its ServiceNow implementations by expanding industry focused capabilities across diverse industries, supported by targeted acquisitions, deep certification investments and structured delivery frameworks aligned with ServiceNow best practices.

Cognizant leverages its Global Elite status and *AI Builder* strategy to deliver large-scale implementations, focusing on eliminating technical debt and modernizing legacy data foundations into a unified System of Intelligence for complex, regulated industries.

Deloitte maintains its industry leadership by merging high-level strategy with technical depth. It uses its ServiceNow Assets & Solutions Group and large-scale implementation capability to deliver AI-driven value discovery and full-stack orchestration for U.S. enterprises.

DXC Technology delivers industry-focused implementations by scaling Assure BPM and Smart Apps for insurance, consolidating multi-instance estates and strengthening architect certifications, led by its VYNE value framework and deep partnerships with ServiceNow, Dynatrace and Boomi.

Genpact scales its consulting led programs by pairing domain SMEs with FSO, MCO, HRSD and procurement blueprints, expanding certifications under an Enterprise Training Agreement and re-platforming legacy estates via factory methods to accelerate autonomous deployments.

HCLTech delivers upgrade safe, value tracked transformations by leveraging its AI first programs, Transform to Now accelerators and industry blueprints, reinforced by Experience and Innovation Labs and Emerging Industry Partner of the Year recognition.

Hexaware's consulting-led approach is supported by co-build engagements with ServiceNow, expanding industry apps, rising expert certifications and conducting platform assessments to standardize architectures and accelerate cross suite implementations.

Infosys excels in consulting and implementation with an AI first, industry led consulting motion, backed by certified talent pipelines, ESM Café accelerators and a consistent record of cross suite transformations delivered through its Global Elite partnership model.

LTM offers consulting-led transformations through a comprehensive ServiceNow partnership, industry plays for financial services and manufacturing and flagship offerings that standardize cross suite implementations and integrations for faster adoption and measurable outcomes.

TCS modernizes its consulting led, AI first transformations using its proprietary accelerators, such as RapidNow accelerators, aligning with ServiceNow field teams to deliver composable architectures and cross suite implementations across IT and business domains.

Tech Mahindra's consulting led transformations infuse industry workflows with co created intellectual property (NetOps.now and B2B Digital Concierge) and an AI first Orion stack, supported by Elite partnerships and a structured go to market across priority verticals.

Wipro differentiates its ServiceNow consulting and implementation capabilities by positioning the platform as an enterprise operating layer, combining consulting led discovery, strong industry alignment and AI infused solution engineering.

GlideFast (Rising Star) strengthens its consulting and implementation capabilities by expanding its reach within the federal/public sector through prime channel partners and scaled delivery across regulated domains to enable fixed-scope, rapid deployments for complex, multi-module ServiceNow programs.

NewRocket (Rising Star) drives high-value transformation with its Employee Workflow Partner of the Year status and the FlightPath.AI methodology, launching the Intelligent Agent Crew to rapidly deploy purpose-built, agentic AI solutions for complex U.S. enterprises.

Leader

"Genpact blends process intelligence consulting with agentic implementation, backed by its AI Gigafactory, AI Tech Suite and A2A patterns, to deliver outcome driven ServiceNow programs that scale across IT, GBS and industry workflows."

Tapati Bandopadhyay

Genpact

Overview

Genpact is headquartered in New York, U.S. It has more than 140,000 employees across over 35 countries. In FY24, the company generated $5.1 billion in revenue. Genpact's ServiceNow practice aligns consulting and implementation programs to measurable business outcomes, combining process intelligence consulting with agentic AI implementation on the Now Platform. The practice reports 415 professionals, 1,107 certifications and a CSAT of 4.5, with North America accounting for 71 percent of revenue and clients. Offerings span GBS (S2P, HR and enterprise helpdesk), IT (ITSM, ITOM and ITAM) and industry solutions.

Strengths

Agentic ITOps blueprint: Genpact has codified an AI led, human controlled ITOps blueprint, combining Analyzer, Executor, Historian and Supervisor agents with an Agent Control Tower for correlation, triage and remediation. The model targets mean time to repair (MTTR) reduction via noise elimination, self healing runbooks and human-in-the-loop oversight. For U.S. enterprises modernizing ITSM or ITOM, this blueprint provides concrete roles for GenAI agents alongside SRE and L2/L3 teams, with traceability built into incident flows.

A2A integration: Genpact is advancing A2A patterns where ServiceNow agents orchestrate with Azure or Google Cloud agents for cross platform processes, such as claims and credit checks. For U.S. organizations running hybrid cloud estates, this creates a cohesive path to embed GenAI assisted decisioning without fragmenting control or audit trails.

Factory scale replatforming: The practice operationalizes a factory model for large scale replatforming on ServiceNow, including over 93 legacy applications consolidated onto MCO with approximately 81 active integrations. This capability is directly relevant to U.S. firms consolidating fragmented apps and custom tools into standard Now Platform modules. The approach shortens migration timelines, enforces core model alignment and reduces integration risk by industrializing mapping, testing and cutover.

Caution

Genpact's ServiceNow implementations reflect deep domain and AI led execution; however, it should recognize this as an opportunity to package reusable, governance ready blueprints. This would accelerate the adoption of Now Assist and agentic workflows across complex U.S. transformation programs.

Appendix

The ISG Provider Lens® 2026 – ServiceNow Ecosystem Partners study analyzes the relevant service providers in the U.S. market, based on a multi-phased research and analysis process and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of March 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

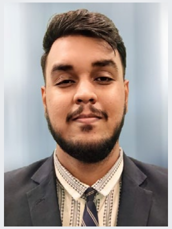
1. Definition of ServiceNow Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key 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

Lead Author

Dr. Tapati Bandopadhyay
Lead Analyst

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market.

With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.



Enterprise Context and Global Overview Analyst

Arnab Das
Research Analyst

Arnab is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens studies on Oil & Gas and ServiceNow respectively. He supports the lead analysts in the research process and authors the enterprise context and global summary reports with market trends and insights.

He carries out research delivery for both primary and secondary research capabilities. Arnab comes with 2 years of experience across business, technology and academic research and writing.

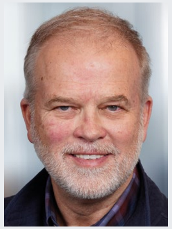
Study Sponsor

Heiko Henkes
Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens® (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts.

Henkes heads 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 known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

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 research director, principal analyst 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.

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.
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.

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ISG

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

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

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MARCH, 2026

REPORT: SERVICENOW ECOSYSTEM PARTNERS