

Customer Experience Management Buyers Guide

Software Provider and Product Assessment



EXECUTIVE
SUMMARY

***ISG** Research



Customer Experience Management

Enterprises consistently view customer experience (CX) as an essential component in ensuring continued growth and profitability. The strategies and tools used to improve CX, however, are immensely varied. Businesses usually relegate CX issues to tactical operations departments, where it is rarely the responsibility of one leader to govern and optimize the CX across every channel of interaction.

ISG Research defines Customer Experience Management as software that combines business applications to impact customer outcomes across departments. CXM is best defined as a suite of applications built on a common platform that facilitates an interdepartmental view of customer activity and provides mechanisms for controlling that activity.

In recent years, technology has evolved to allow for a more centralized approach to many CX issues. Enterprises are now able to use more integrated software and platforms that tie together customer relationship management (CRM) and contact center processes typically



This evolution of CX is bringing about a shift in how enterprises purchase and deploy technology related to customer activities and how software providers package products to meet the needs of the workforce.

dispersed across multiple parts of the organization. This can include marketing, sales, commerce, field service and locations where customers convene for purchases or services.

This evolution of CX is bringing about a shift in how enterprises purchase and deploy technology related to customer activities and how software providers package products to meet the needs of the workforce. There is an evolving synthesis of functions: a combination of systems for handling contact center interactions and those previously separate for proactively orchestrating interactions and influencing customer behavior towards desired business outcomes.

Some elements come from (and are primarily used by) the contact center, particularly interaction handling and engagement optimization. Others derive from marketing technology, like customer data platforms (CDPs) or journey management tools. The precise mix

of applications in a software provider's suite depends on the background expertise of the software provider. Whether a provider originates in marketing technology, contact center, CRM or data management deeply influences components that are front-and-center for that software provider. The divergence of origin points creates an imbalance of capabilities derived from the extreme variations in provider expertise and the primary users or buyers of the tools.



The evolution of CXM addresses the shortcomings of the decades-old CRM software category with its more departmental and application-centric approach. Instead, we see an approach that organizes based on the customer journey and the interactions a customer may have with the organization across any channel. That breadth of scope and expertise explains why the mix of components, users and use cases has been so diverse across CXM products. The broad outlines are clear: A CXM suite is a product family composed of applications collectively organized to optimize customer interactions, experiences and profitability.

From the point of view of the enterprise buyer, the most important criteria for selection should focus on three areas: First, how the software facilitates managing and measuring customer behavior across multiple stages of the customer lifecycle. Second, how well it presents senior leadership with a coherent picture of the customer base to understand direction and make plans or decisions. And third, how open it is to expansion laterally into

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It can be difficult for buyers to effectively compare similar or overlapping portfolios from providers that, in many cases, do not directly compete against one another.

adjacent software segments related to other CX departments. For example, if you are judging a marketing automation suite for CX, how well does it serve (or integrate into) contact center applications? Or, if you are judging contact center platforms, how integrable are the marketing, advertising, sales or IT applications?

It can be difficult for buyers to effectively compare similar or overlapping portfolios from providers that, in many cases, do not directly compete against one another. A tool set from a contact center provider will likely focus on communications, one from a marketing technology provider on audiences and analytics and one from an IT-centric company on service management or integration. A business buying tools for one or two of those use cases will need to understand how well they integrate with and support (or supplant) the tools used for all the other cases.

CXM systems should cover five core functional areas across departments. The first is interaction handling, covering the traditional voice-centric activities of contact centers and including contemporary digital customer contact channels. A CXM suite should also manage the data or context surrounding the interaction. In any customer journey, a contact or touchpoint is intimately influenced by what has happened in the past, either past (purchase histories) or the recent past (hopping from one channel to another in search of answers or results).

The second core area for CXM is resource management. “Resources” include people, as in the contact center agents who respond to customers or the knowledge workers who supply them with information. However, the resources most in need of management these days are



knowledge and data resources and digital content. The pressure to deploy AI technology is especially urgent in CXM. The specific tools and use cases most directly affected by AI are those built around automating (and anticipating) customer activity and are largely the domain of a CXM suite. A CXM suite could include elements akin to a CRM or CDP, a digital asset manager, a knowledge management system and various content creation tools.

Third, CXM should orchestrate those processes and enable users to optimize automation across departments and workflows that touch different components and the teams working with customers. Because CXM is knitting together (and replacing) isolated point applications, it needs an underlying platform that integrates its wide spread of tools and users. It needs to function across data silos and create workflow automations that deliver specific information and work where it is needed at the moment it is needed.

The development of applications based on artificial intelligence (AI) and machine learning (ML) fall into this category, including real-time agent guidance assistance and intelligent self-service engines. Other functions dependent on a strong platform include processing transactions, fulfilling service requests, segmenting customers into audiences, developing website offers and tracking customer behavior.

The fourth element to consider is the tool set's capabilities for providing insights and analysis to users across the enterprise, including reporting, visualizations and dashboards, and predictions and planning. A system that collects information about customers, interactions and behavior—and then analyzes it—should be able to present its findings in forms relevant to a spectrum of different users. Ground-level workers need awareness of the specifics around particular customers, but executives need overviews of performance, outcomes and revenue.

Every department involved in CX has a unique set of key performance indicators and relevant metrics. One of the great values of bringing all CX applications and tools into a single platform is that it establishes consistency and continuity around data collection and metrics. It makes visible the big picture that would otherwise be lost in departmental minutia. By 2027, most CXM suites will, by default, include components that combine analytics, AI applications and customer data integration.

The fifth and last core capability set is customer journey management. This is key to the further development of the entire category of software, as it turns the passive act of responding to service calls into a deliberate, organized effort at optimizing customer experiences and, through that, relationships. When an enterprise can map the journey or life





cycle, it can identify moments of influence used to drive added business or turn customers into advocates. Customer journey management contains software for orchestrating interactions, personalizing them to individual (or group) preferences and managing proactive communication efforts by marketing and sales teams. Customer success processes, normally seen as isolated post-sales matters, increasingly resemble this journey management component, and the technology is adapting accordingly.

Together, these five areas add up to an enterprise software of great utility and variety. CXM software is at the beginning of its development maturity, and it is rare to find a single offering that fits strongly into all five areas. Many software providers start out with an emphasis on their areas of origin and build out from there. Marketing technology software providers, for example, start with audience building and segmentation but often have little to do with interaction handling. On the flip side, contact center providers who excel at interactions often have very little capacity to manage journeys, knowledge or advanced analytics. Over time, we expect suites across the landscape to converge on these five areas through acquisition, partnership and organic development.

This research evaluates software providers in four of the five areas including AI and automation, analytics and resource management but excluding consideration of the interaction handling capabilities described in the first area, customer interaction. We evaluate the broad sweep of interaction handling tools in a separate set of Buyers Guides exclusively covering contact center systems.

The ISG Buyers Guide™ for CXM evaluates software providers and products based on support for AI and automation, analytics, customer journey management, interaction automation, knowledge management, marketing and sales support, and resource management.

To be included in this Buyers Guide, products must offer capabilities from three of the following areas: Resource Management, Automation, Analytics and Customer Journey Management. Separate Buyers Guides on Customer Journey Management and Knowledge Management are available to examine those software categories.

This research evaluates the following 29 software providers that offer products to address key elements of customer experience management as we define it: Adobe, Braze, CallMiner, CSG, eGain, Emplifi, Exotel, Freshworks, Gainsight, Genesys, Hubspot, Insider, Medallia, Microsoft, MoEngage, Netcore, Nextiva, NICE, Oracle, Qualtrics, Salesforce, SAP, SAS, ServiceNow, Sprinklr, SugarCRM, Verint, Zendesk and Zoho.



Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research



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methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

The ISG Buyers Guide™ for Customer Experience Management is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for CXM software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for CXM to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of CXM technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment time and



eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of CXM software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating CXM systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.



How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.



The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds Salesforce atop the list, followed by Verint and NICE. Providers that place in the top three of a category earn the designation of Leader. NICE and ServiceNow have done so in six categories; Salesforce in four; Verint in two; and Genesys, Oracle and Zendesk in one category.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the x and y axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Customer Experience Mgmt. Overall

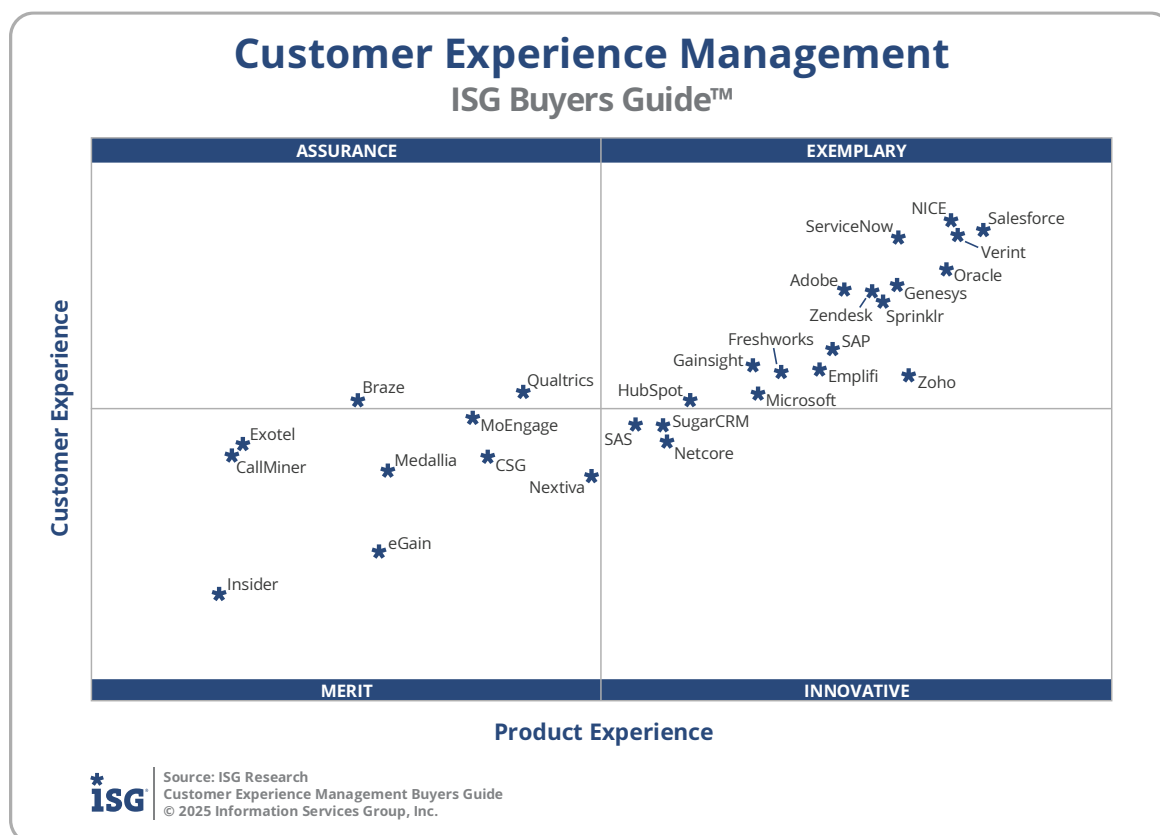
Providers	Grade	Performance
Salesforce	A-	Leader 81.4%
Verint	B++	Leader 79.9%
NICE	B++	Leader 79.2%
Oracle	B++	78.9%
ServiceNow	B++	76.1%
Sprinklr	B++	75.8%
Genesys	B++	75.6%
Adobe	B+	74.9%
Zoho	B+	74.4%
Zendesk	B+	73.7%
SAP	B+	73.2%
Emplifi	B+	70.8%
Freshworks	B+	69.7%
Gainsight	B+	68.9%
Microsoft	B	68.5%
HubSpot	B	65.8%
SugarCRM	B	64.4%
Netcore	B	63.7%
SAS	B	62.9%
Nextiva	B-	60.1%
Qualtrics	B-	59.1%
MoEngage	B-	57.9%
CSG	B-	56.5%
Braze	C++	54.5%
Medallia	C++	53.3%
eGain	C++	50.4%
Exotel	C+	49.0%
CallMiner	C+	47.9%
Insider	C+	44.8%



Source: ISG Research
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The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.



Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Adobe, Emplifi, Freshworks, Gainsight, Genesys, HubSpot, Microsoft, NICE, Oracle, Salesforce, SAP, ServiceNow, Sprinklr, Verint, Zendesk and Zoho.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: Netcore, SAS and SugarCRM.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: Braze and Qualtrics.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or



surpass the threshold for the other three categories. The providers rated Merit are: CallMiner, CSG, eGain, Exotel, Insider, Medallia, MoEngage and Nextiva.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise or for a specific process. Although there is a high degree of commonality in how enterprises handle CXM, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.



Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (15%), Capability (25%), Reliability (15%), Adaptability (10%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. Salesforce, Verint and NICE were designated Product Experience Leaders. While not a Leader, Oracle was also found to meet a broad range of enterprise product experience requirements.

Customer Experience Mgmt. Product Experience

Providers	Grade	Performance
Salesforce	B++	Leader 64.8%
Verint	B++	Leader 63.7%
NICE	B++	Leader 63.5%
Oracle	B++	63.3%
Zoho	B++	61.6%
ServiceNow	B++	61.4%
Genesys	B++	61.3%
Sprinklr	B++	60.7%
Zendesk	B++	60.3%
Adobe	B+	59.2%
SAP	B+	58.5%
Emplifi	B+	58.0%
Freshworks	B+	56.5%
Microsoft	B+	55.6%
Gainsight	B+	55.4%
HubSpot	B	52.9%
Netcore	B	52.2%
SugarCRM	B	52.1%
SAS	B	51.0%
Nextiva	B-	49.2%
Qualtrics	B-	46.6%
CSG	B-	45.3%
MoEngage	C++	44.7%
Medallia	C++	41.2%
eGain	C++	40.9%
Braze	C+	39.9%
Exotel	C+	35.3%
CallMiner	C+	35.0%
Insider	C	34.4%



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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider.

Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are NICE, Salesforce and Verint. These category leaders best communicate commitment and dedication to customer needs. While not a Leader, ServiceNow was also found to meet a broad range of enterprise customer experience requirements.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Customer Experience Mgmt. Customer Experience

Providers	Grade	Performance
NICE	A-	Leader 17.5%
Salesforce	A-	Leader 17.3%
Verint	A-	Leader 17.2%
ServiceNow	A-	17.1%
Oracle	A-	16.4%
Genesys	B++	16.1%
Adobe	B++	16.0%
Zendesk	B++	15.9%
Sprinklr	B++	15.7%
SAP	B+	14.8%
Gainsight	B+	14.4%
Emplifi	B+	14.3%
Freshworks	B+	14.2%
Zoho	B+	14.2%
Qualtrics	B+	13.8%
Microsoft	B+	13.8%
HubSpot	B	13.7%
Braze	B	13.6%
MoEngage	B	13.4%
SAS	B	13.1%
SugarCRM	B	13.1%
Netcore	B	12.9%
Exotel	B	12.7%
CallMiner	B	12.5%
CSG	B-	12.4%
Medallia	B-	12.1%
Nextiva	B-	12.0%
eGain	C++	10.3%
Insider	C+	9.4%



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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Customer Experience Management in 2025, a software provider must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue verified using independent sources, sell products and provide support on at least two continents and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the past 18 months.

To qualify for inclusion, software providers must include the support for at least three of these four categories:

- Resource management, including human or AI agents, data, product and customer knowledge.
- Automation, including workflows supporting customers across the life cycle, as well as AI and integrations.
- Analytics, including: contact center KPIs, marketing-related KPIs, what-if analyses, sentiment and brand analysis.
- Customer journey management, including orchestration, mapping, personalization and measurement.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer software suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant CXM products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.



Products Evaluated

Provider	Product Names	Version	Release Month/Year
Adobe	Adobe Experience Cloud Adobe Experience Platform	April 2025	April 2025
Braze	Braze Platform	April 2025	April 2025
CallMiner	CallMiner Eureka Platform	April 2025	April 2025
CSG	CSG Xponent	25.1	May 2025
eGain	Conversation Hub Knowledge Hub Analytics Hub	21 R. 21.20	February 2025
Emplifi	Emplifi Platform	April 2025	April 2025
Exotel	Ameyo Contact Center Exotel Voice Exotel Conversational AI	4.13.31-RN; 6.7.1-RN	April 2025
Freshworks	Freshdesk Omni Freshsales Freshmarketer	March 2025	March 2025
Gainsight	Gainsight Platform	6.45	May 2025
Genesys	Genesys Cloud CX	May 2025	May 2025
Hubspot	Hubspot Customer Platform	25.4	April 2025
Insider	Insider Platform	March 2025	March 2025
Medallia	Medallia Experience Cloud	2025.1 (e692)	March 2025
Microsoft	Dynamics 365 for Customer Engagement	9.2.25051.00154-Service Update 25051	May 2025
MoEngage	MoEngage Platform	April 2025	April 2025
Netcore	Netcore Cloud	2.0	May 2025
Nextiva	Nextiva Unified Customer Experience Management Platform	April 2025	April 2025



NICE	CXone Mpower	25.2	April 2025
Oracle	Oracle Cloud CX Platform	April 2025	April 2025
Qualtrics	Qualtrics XM Platform	May 2025	May 2025
Salesforce	Salesforce Customer 360 Service Cloud	Summer '25	May 2025
SAP	SAP Commerce Cloud SAP Sales Cloud SAP Marketing Cloud SAP Customer Data SAP Service Cloud SAP Emarsys SAP CX AI Toolkit	2504 (HFC03*)	April 2025
SAS	SAS Viya SAS Intelligent Decisioning SAS Customer Intelligence 360	2025.04	April 2025
ServiceNow	ServiceNow Customer Service Management	Yokohama	April 2025
Sprinklr	Sprinklr Unified CXM Platform	20.4 Spring Release	April 2025
SugarCRM	Sugar Serve Sugar Sell Sugar Market	25.1	April 2025
Verint	Verint Open Platform	2024R6 HFR12	May 2025
Zendesk	Zendesk for Customer Service Sunshine Platform	May 2025	May 2025
Zoho	Zoho One	March 2025	March 2025



Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as “Providers of Promise.”

Provider	Product	Revenue	Customers	Functionality
Birdeye	BirdAI	Yes	Yes	No
ChurnZero	ChurnZero Platform	Yes	Yes	No
Contentsquare	Contentsquare Platform	Yes	Yes	No
Fullstory	Fullstory Analytics	Yes	Yes	No
Sprout Social	Sprout	Yes	Yes	No
UXPressia	UXPressia Platform	No	Yes	No



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

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About ISG

ISG (Nasdaq: [III](#)) is a 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.