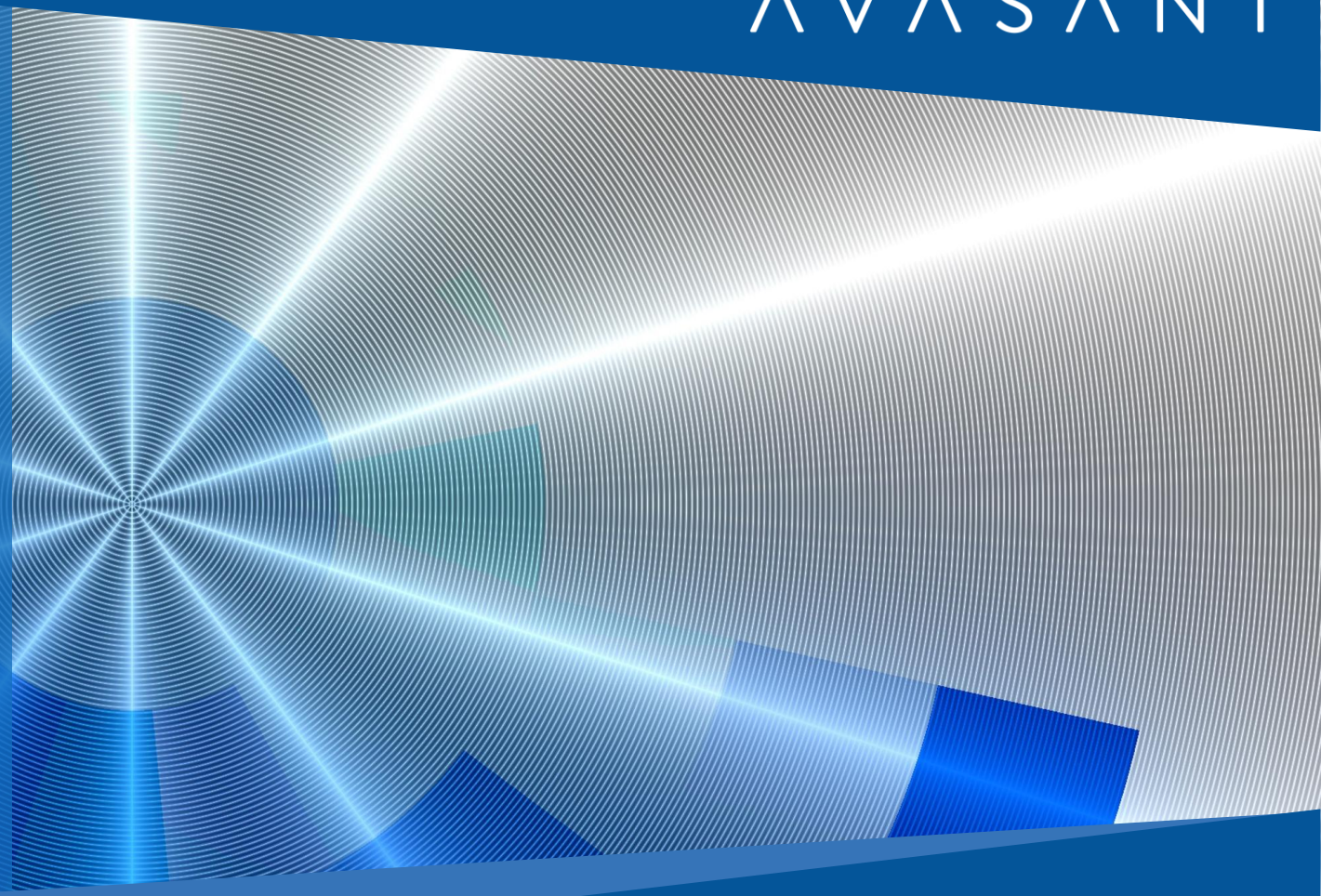
End-user Computing Services 2024-2025 Market Insights™ Excerpt

Transforming end-user computing services with generative AI and experience-driven pricing models

December 2024



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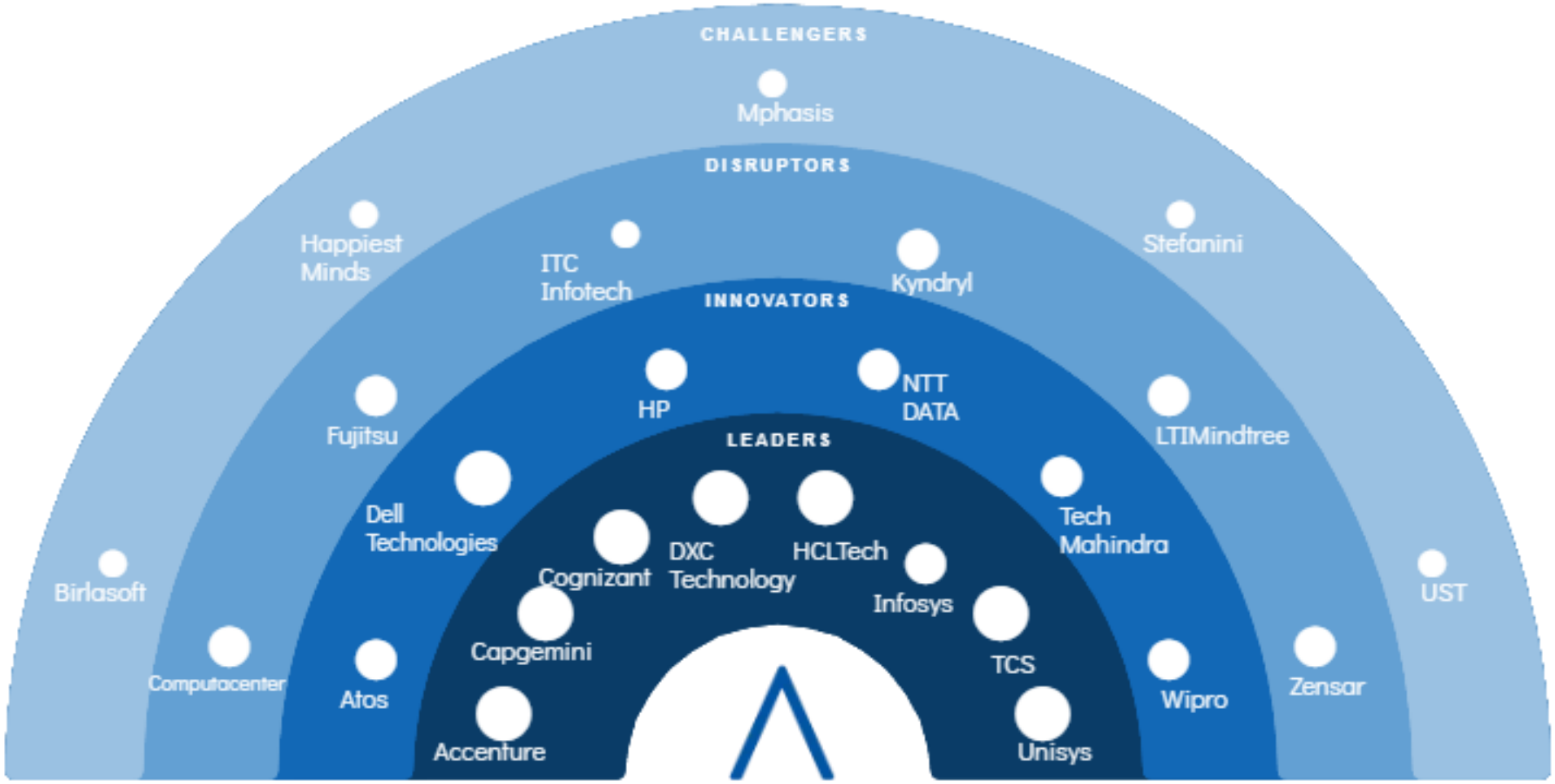
Key end-user computing services trends shaping the market

Enterprises are moving from on-premises to cloud workspaces	• Enterprises are increasingly transitioning from on-premises setups to cloud workspaces, driven by key benefits such as cost efficiency, enhanced security, scalability, and support for flexible work environments. • Around 70% of enterprises have adopted Azure Virtual Desktop (AVD) due to its seamless integration with the Microsoft ecosystem, which includes Microsoft 365, Microsoft Teams, and Azure Active Directory, and its pay-as-you-go model to optimize costs and scale resources based on demand.
BFSI, retail and CPG, and manufacturing industries contribute half of the revenue	• BFSI, retail and CPG, and manufacturing verticals account for around 50% of end-user computing services, with virtual workspaces and communication and collaboration being the most widely adopted solutions. • These industries embrace virtual workspaces to ensure secure access to critical applications and data. Additionally, they are integrating unified communication tools, such as messaging, video conferencing, and voice systems, to facilitate real-time collaboration across different branches and regions.
Enterprises are moving to XLA-based pricing, focusing on user experience	• Enterprises are moving away from SLA-based to XLA-based pricing models, which focus on user experience and outcomes rather than on technical performance alone. • They are developing experience-level indicators such as digital experience scores to track user sentiment, precognition to proactively resolve issues, channel shift to track user adoption of digital tools, and automation efficacy to automate tasks to optimize service delivery and user experience.
Generative AI use cases are on the rise across end-user computing services	• Enterprises are leveraging AI-powered PCs to improve user productivity by optimizing workflows, automating repetitive tasks, and providing intelligent assistance. They also leverage generative AI to enhance collaboration and communication with multilingual support and chat summarization features. • Additionally, they utilize generative AI for threat detection to strengthen endpoint security and deploy chatbots for end-user support services to resolve user queries faster.

Avasant recognizes 25 top-tier providers offering end-user computing services

Product maturity



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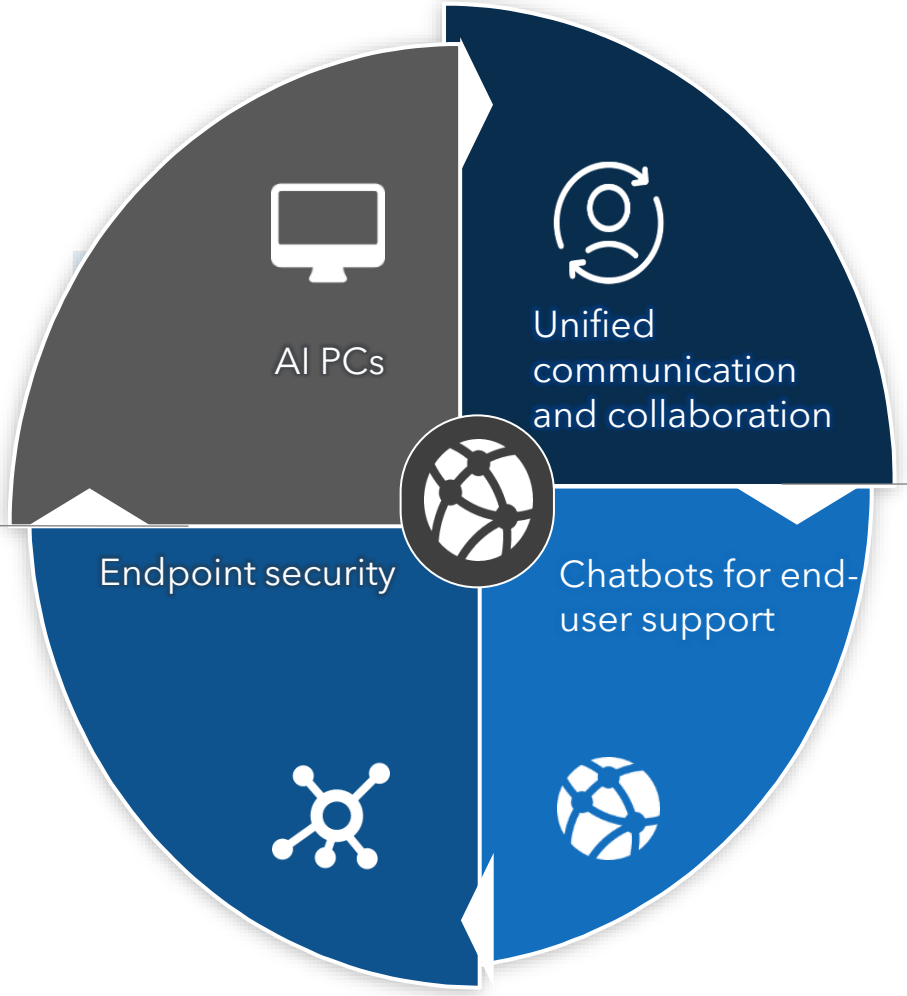
Enterprises are leveraging generative AI to enhance user experience and productivity

They are leveraging generative AI across diverse applications, including deploying AI-powered PCs to optimize performance, enhance user communication and collaboration, strengthen endpoint security, and provide chatbots for end-user support services.

American Airlines utilizes NVIDIA RTX-powered HP workstations, which can perform 10 times more computation than traditional PCs, to optimize its cargo management. This minimizes last-minute disruptions, maximizes cargo capacity, and cuts fuel costs.

Oregon State University integrated Microsoft 365 Copilot with Microsoft Sentinel and Microsoft Defender to resolve issues proactively. This reduced the university's threat response time from weeks to minutes.



Deutsche Telekom utilized Cisco's AI Assistant for Webex to generate messaging summaries, offering a concise overview of interactions within Webex spaces. This feature allows users to quickly identify and focus on the most relevant conversations.

Omnitrax partnered with Aisera to develop the Pronto bot for users to interact within webchats and Microsoft Teams. The bot enabled users to quickly resolve their queries, such as software provisioning and PC support. This achieved a 70% auto-resolution rate and saved over 10,000 hours.

Source: Avasant Research

Enterprises are shifting from service-level indicators to experience-level indicators to link user experience with business outcomes

Enterprises are using experience-level indicators to better understand user satisfaction, optimize service delivery, and align user experience with business outcomes, fostering continuous improvement and innovation.

XLA indicators	Description	Guidelines to improve XLA
Digital experience score	• This metric evaluates the quality of service across different phases, such as the pre-engagement and engagement phases, on a scale ranging from -100 to 100. • The score encompasses both device analytics and performance metrics.	Incorporate the Sentiment (Happiness) Index into the existing metrics to capture the human aspect of feedback, delivering a more holistic view of the user experience.
Precognition	• It tracks the number of hours saved by end users by taking proactive actions to prevent issues before they arise. • It reduces the reliance on user-initiated, reactive responses, improving efficiency and minimizing disruptions in the user experience.	Develop a persona-based approach, tracking user experience patterns for different user groups such as R&D and industries such as finance and healthcare.
Productivity application performance	• This metric evaluates the user's ease and effectiveness in accessing and using corporate productivity and collaboration applications. • It ensures applications perform smoothly with quick response times for an optimal user experience.	Provide persona-based device assignment and perform periodic checks for application performance, outdated drivers and patches, network latency, and timeout errors.
Usage of digital support channels	• This metric measures the adoption of digital support channels such as chat, chatbots, and self-service ticketing. • It compares the usage of digital channels with traditional support methods such as email and phone.	Deploy generative AI-powered virtual assistants for auto-resolution of issues, real-time translation, summarizing chats, and tracking real-time user sentiment.
Automation efficacy	• It measures the effectiveness of automation in improving service delivery and user experience by automating tasks such as ticket routing. • This reduces manual intervention, improves response time, and streamlines processes.	Integrate Microsoft 365 Copilot with external applications and create plugins to connect with third-party data, apps, services, and connectors.

Source: Avasant End-user Computing Services 2024–2025 RadarView Survey, June 2024–July 2024

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