

Customer Experience Services

An enterprise guide evaluating service providers
enabling enriched customer experiences



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In 2022, BPO had a record year, with notable growth in ER&D, industry-specific BPO and contact centers. The contact center/digital CX industry grew more than 44 percent. While this industry is clocking remarkable growth, certain trends have redefined the industry. With evolving enterprise requirements and KPIs and changing agent roles, the contact center industry is transforming into a holistic solution provider, ensuring a seamless and best-in-class customer experience. The industry has witnessed a seismic shift in how it works. For example, how the workforce operates today differs significantly from what it used to be. With the adoption of hybrid work culture now a norm, the workforce today is distributed. The contact center industry is undergoing technological maturity and increased adoption growth. For instance, AI is revolutionizing the industry by bringing in more mature and seamless experiences.

With changing and ever-growing customer expectations, the industry is posed with the significant challenge of continuously innovating and taking customer experience to the next level. Bringing the best of human knowledge and technology, expectations from this transformation have grown multi-fold. Enterprises are more focused on enriching customer experiences, hyper-personalizing them and enabling private and secure conversations. Companies are focused on a better return on investments, such as improved growth.

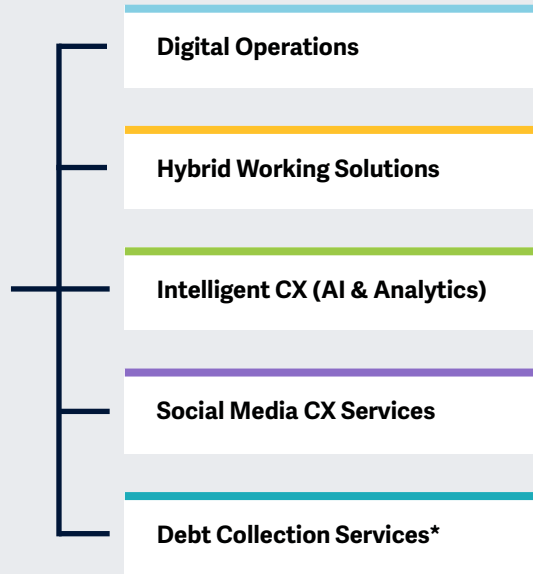
Given contact center industry dynamics, the ISG Provider Lens™ Customer Experience Services report will focus on evaluating service providers offering cutting-edge solutions and services in the industry.



The report focuses on critical pillars of **customer experience** that include **people, technology, process and data.**

Simplified Illustration Source: ISG 2023

*Only applicable for Brazil



The ISG Provider Lens™ - Customer Experience Services 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 different markets, including Global, U.S., Europe, Australia, and Brazil.

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.



Definition

For enterprises looking to outsource contact center services, the Digital Operations quadrant encompasses all fundamental tenets of customer experience services. As the horizons of customer experience services broaden, enterprises are looking to partner with providers offering a broad range of customer experience services. They seek to learn from providers that offer in-depth consulting services and exhibit domain, technical and industry vertical knowledge. It is pertinent for providers to bring mature technology to help enterprises as digital transformation is becoming core to all transformation journeys. With the right digital solutions and consulting services, enterprises can ensure that their customer experience strategies remain relevant and effective in an ever-changing digital landscape. Enterprise expectations from these engagements are far from mere implementation services. Key performance indicators (KPIs) are taking a sharp turn and growing beyond first call resolution and average handling time.

They are becoming more holistic because enterprises are keen to develop strategic relationships with providers that are better growth enablers.

To cater to the growing needs, providers in this space are evolving to become solution providers having a nuanced understanding of changing end-user expectations. They will also be expected to deeply understand the industry vertical, craft industry-specific solutions and enable faster go-to-market. This quadrant will assess service providers on other critical parameters such as right shoring, global delivery capability and technological solutions – IP and partnerships, industry-specific CX solutions, consulting services, transition services such as OCM, talent management and training capabilities.

Eligibility Criteria

1. Demonstrate strategy, innovation and vision for growth
2. Offer a broad range of **contact center services**
3. Offer **well-rounded consulting capabilities** that exhibit domain and industry knowledge
4. **Design long-term transformation roadmaps** – using any homegrown framework that articulates the roadmap
5. **Possess technological capabilities** that include cloud capabilities, automation, AI and omnichannel support
6. Offer multiple channel strategies and capabilities
7. Demonstrate **industry-specific solutions** (if any)
8. Articulate target markets and differentiators
9. **Ability to offer nearshore, onshore and offshore services** (delivery centers)
10. Offer effective **transition services** (organizational change management capability)
11. Exhibit **talent management** strategies
12. **Help enterprises achieve their ESG goals**
13. Have trained and skilled FTEs
14. **Referenceable case studies**



Hybrid Working Solutions

Definition

The contact center industry has undergone multifold changes in the past few years. From nearly 100 percent brick-and-mortar workplaces to supporting working from home, the industry finally seems to be settling on hybrid working strategies. In this quadrant, we assess service providers well-equipped to enable an efficient hybrid-work model for enterprises. The model combines on-premises and remote work, allowing employees to work in an office and from home. Giving increased flexibility to organizations worldwide, hybrid working has brought multiple benefits to enterprises, such as access to a larger pool of talent, improved employee morale, management of talent attrition and enhanced efficiency levels. Thus, service providers are required to bring relevant technologies and tools, such as cloud solutions, to offer the flexibility to ramp capacity up and down and enable work from home or office. Remote hiring, training, online employee engagement and collaboration tools are essential for this model. Enhanced and vast sets of training tools are essential for constantly upskilling employees.

With distributed workforce and, in some cases, BYOD becoming part and parcel of the hybrid working model (especially with gig employment), systems have become more vulnerable and susceptible to cybercrimes. Thus, having an improved and robust cybersecurity policy and posture is pertinent. In addition, tools and techniques such as gamification and other employee engagement tools are also essential to enable a hybrid working model.

Eligibility Criteria

1. Enable a hybrid working model
2. Demonstrate **technological implementations** (cloud contact center, omnichannel platforms, automation, agent experience and CX enablement)
3. Offer **talent management solutions** (ability to offer virtual onboarding, including interviews and training facilities)
4. Provide **cybersecurity** measures (facial recognition and other biometrics and instances of cybersecurity management in remote working conditions)
5. Offer effective **collaboration tools**, such as through gamification
6. Offer **workforce management services** (monitoring, supervising and training recommendations)
7. Demonstrate large-scale implementations
8. Offer **innovation hubs** to enable state-of-the-art infrastructure
9. **Have burstable capacity** – the ability to ramp workforce capacity up and down
10. Demonstrate referenceable case studies



Intelligent CX (AI & Analytics)

Definition

The transformation of contact centers is far from complete without AI and analytics. RPA is now table stakes, and enterprises want to enhance their automation capabilities. More enterprises are leaning toward advanced technologies to create an impact and deliver seamless CX services. AI and analytics play an integral role in digital transformation. The positive impact on agents and end customers is a measure of the successful implementation of AI and analytics. Enterprises are looking to partner with service providers that implement solutions, leverage existing data and draw meaningful outcomes—a key enabler of intelligence in contact centers.

In addition to bringing solutions, service providers must be able to define a data strategy and bring data and knowledge management tools. With these tools and strategies, providers must build interfaces to draw meaningful insights, enabling real-time agent and customer experience. With enterprises' growing maturity and appetite to utilize data and convert them into insights, analytics has become a differentiating factor for service providers.

Companies that can define a well-rounded data strategy and provide enterprises with real-time information visibility are well-positioned to gain a competitive advantage in the market.

Service providers in the Intelligent CX (AI & Analytics) quadrant will be assessed on their ability to offer robust AI and analytics capabilities such as AI-driven solutions, technology and partnerships, analytics, successful implementations and case studies. As generative AI gains traction, service providers are tasked with continuous improvements and their ability to stay ahead of the curve.

Eligibility Criteria

1. **Maintain AI and analytics advisory teams**
2. **Demonstrate technical expertise (certified professionals)**
3. **Offer a range of contact center intelligence solutions** that cover self-service virtual agents, real-time analytics and agent assist and post-call analysis
4. **Provide analytics services** such as speech analytics, text analytics, customer behavior prediction, predictive analytics and sentiment analysis
5. **Leverage AI and analytics to empower and enhance employee experience**
6. **Empower customers with AI-driven conversational self-service**
7. **Invest in generative AI models** such as ChatGPT and other digital assistants
8. **Help customers achieve business outcomes** such as on customer satisfaction score (CSAT), net promoter score (NPS), cost savings and revenue generation
9. **Offer a large partner ecosystem and proprietary solutions**
10. **Demonstrate referenceable case studies**



Social Media CX Services

Definition

Social media has become an important communication channel and a growth enabler for most enterprises. As multiple channels grow significantly, social media offers an effective way for businesses to connect with their customers and target audiences and promote their products and services. It provides a platform for companies to listen to customer feedback, respond to queries and complaints and build customer relationships. Agents can interact with multiple customers and resolve their issues simultaneously.

Companies are adopting various social media channels to offer customer support services, embracing technologies such as AI to monitor these channels continuously and offering personalized services by leveraging analytics solutions such as sentiment analysis. These channels also help companies garner immediate customer feedback, enabling them to take appropriate measures quickly and improve customer service. With customized advertisements, cross-selling and upselling have become more effective.

With the adoption of AI, social media channels can help enterprises with their marketing and sales processes significantly. With content growing on these channels, managing, moderating and effectively using content has become more pertinent. Content moderation is an important area of focus to ensure trust and safety services for brands.

Service providers are ramping up their social media services and adopting the necessary technologies to tap into the market rapidly. This quadrant assesses providers offering social media services with relevant technologies to provide seamless CX.

Eligibility Criteria

1. Provide **social media services**
2. Support **multiple social media channels**, including region-specific channels (if any)
3. Offer content moderation services to ensure **trust and safety**
4. Have trained employees (FTEs)
5. Actively **leverage AI and analytics to manage content**
6. Apply analytics solutions such as **sentiment analysis, voice of the customer (VoC) analysis and customer journey mapping solutions**
7. Offer **marketing and sales support**
8. Offer large-scale implementations
9. Help customers **achieve tangible business outcomes**
10. Showcase growth stories with improved KPIs
11. Offer a large partner ecosystem and proprietary solutions
12. Demonstrate **referenceable case studies**



Debt Collection Services

Definition

Due to the increased risk of credit and default, collection services are relevant in the Brazilian market to manage receivables and minimize losses. High volumes, complex requirements and the need for the right blend of technological enablers and human skills make collection services one of the most sought-after offerings of contact centers.

To improve collection services and ensure greater flexibility, scalability and lower costs, contact center providers are taking full advantage of the power of analytics tools and solutions based on artificial intelligence and machine learning. They are increasing customer satisfaction and recovery efficiency by investing in cloud computing and omnichannel support solutions.

Contact center providers are investing in new technologies to remain competitive in the market. New regulatory demands related to LGPD, IT security and cybersecurity requirements and the need to deliver high-quality CX through unified processes from the front and back offices have forced contact center providers to innovate.

This quadrant assesses contact center providers that offer collection and credit recovery solutions using multiple technologies, statistical models, data science, integration tools and accelerators to speed collection negotiations and improve customer experience.

Eligibility Criteria

1. **Support different stages of the collection cycle**, such as early collection, regular and late collection, legal formalities, write-off and selling portfolios
2. **Use relevant tools and technologies**, such as omnichannel platforms, CRM/ debt management solutions for collection and low-code/no-code collection strategy tool
3. **Support self-service negotiation portals** and intelligent IVR and the use of advanced analytics, AI and machine learning
4. **Demonstrate integration** with major originator banking systems, debt and financial systems and other ecosystem partners such as credit rating companies, skip tracing agencies and specialist law firms.
5. **Engage the workforce in the collection process**. Focus on humanized negotiations, training, intelligent routing, employee experience and customer care.



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study on Customer Experience Services 2023, we are introducing the following five quadrants:

Quadrant	Global	U.S.	Europe	Brazil	Australia
Digital Operations	✓	✓	✓	✓	✓
Hybrid Working Solutions	✓	✓	✓	✓	✓
Intelligent CX (AI & Analytics)	✓	✓	✓	✓	
Social Media CX Services	✓	✓	✓	✓	✓
Debt Collection Services				✓	



The research phase falls in the period between March and May 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in August 2023.

Milestones	Beginning	End
Survey Launch	March 30, 2023	
Survey Phase	March 30, 2023	May 05, 2023
Sneak Preview	July 2023	August 2023
Press Release & Publication	August 2023	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2023 research agenda

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.” The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com



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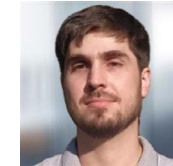
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ISG Provider Lens™ Advisors Involvement Program

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT).

The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Scott
Furlong

Partner



Jill
Stabler

Partner



Dee
Anthony

**Director –
Collaboration**



Gautam
Saha

Principal Consultant



Jarrod
Magill

**Director and Regional
Manager, NSW**



Himanshu
Chawla

Director



If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

[24]7.ai*	Capita*	Foundever*	Kainos*
Accenture*	Cognizant*	Genpact*	Konecta*
Acquire BPO*	Concentrix*	Grupo Acao*	LIQ*
Actionline*	Conduent*	Grupo Redebrasil*	Localcred
AeC*	Connvert*	Grupo Services*	Majorel*
Algar Tech*	CPM*	HCLTech	Merchant*
Almaviva*	CSU*	Hexaware*	Mindpearl*
Alorica*	Datacom*	HGS*	Mphasis*
ASTIA*	Datamatics*	Hitachi Vantara	Movate*
Atento*	DBM Contact Center	homeagent*	Mutant
Averbach*	EXL*	HVAR	NEO*
Bellinati Perez*	Firstsource*	IBM*	NTT Group*
Brasilcenter*	FIS*	Infosys*	Parla*
Callink*	Forrest Marketing Group*	Intervalor*	Paschoalotto*



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Pluris Midia*

ProbeCX*

Proxis*

ResultsCX

Serco*

Sercom*

Shapiro*

SoftMarketing

Sollo Brasil

Starhub*

Startek®*

Straive (SPi Global) *

SoluCX

Sutherland*

TaskUs

Tatho*

TCS*

Tech Mahindra*

Teleperformance*

Telstra*

TELUS International

Transcom*

TSA*

TTEC*

Unity4*

Voxline*

Webhelp*

Winover

Wipro*

WNS*

Zanc*



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 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 more than 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.

For more information, visit isg-one.com.





MARCH, 2023

REPORT: CUSTOMER EXPERIENCE SERVICES