



***ISG** Provider Lens™

2021

Contact Center – Customer
Experience Services 2021

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, 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; technology 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 1,300 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 www.isg-one.com.



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Definition

The ISG Provider Lens™ quadrant report on Contact Center — Customer Experience Services focuses on outsourcing services and the associated aspects of enhancing customer experience (CX). Providers are assessed based on their service offerings, delivery centers, language capabilities, full-time equivalents (FTEs) and digital transformation elements such as consulting, artificial intelligence (AI) and analytics capabilities. Contact center service providers use technologies and practices such as design thinking, omnichannel support, cloud offerings, analytics and automation to offer an end-to-end CX.

As buyer demands have changed drastically in the last 12 months, enterprises are now keen to explore technological transformation and get the CX strategy right to ensure high-quality services and improve employee experience, which can directly impact CX. As the buyer side matures, the supply side is also required to bring a variety of capabilities to address changing buying behaviors. Advanced technologies, best practices and newer operating models are needed to help enterprises get their CX strategy right. As CX becomes a priority, contact centers play a critical role in shaping it.

This study on Contact Center — Customer Experience Services is aimed at understanding enterprise requirements and provider capabilities to meet their demands.

The ISG Provider Lens™ study offers the following to IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- A perspective on different markets, including global, the U.S., Brazil, Australia, Europe and the U.K.

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 new engagements.

Quadrants Research

As part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants on Contact Center – Customer Experience Services:

Simplified illustration



Source: ISG 2021

Digital Operations (Geographic Coverage: Global, U.S., Brazil, Australia, Europe and the U.K.)

Contact center CX services include outsourcing services that are directed toward enhancing the end-user experience. This quadrant covers outsourcing services with brick-and-mortar business models and end-to-end engagement and managed services. Also, with increased focus on enhancing CX, enterprises are juggling between finding the right partner and right digital solutions. Thus, contact center consulting services are evolving, with the changing nature of client engagements and expectations. Considering the end-user expectations, proliferation of channels, an organization's current infrastructure and increased usage of digital technologies, contact center service providers design the transformation roadmap for enterprise clients. Service providers leverage industry experience, research, vertical expertise, and nuances and benchmarks to define a client's transformation roadmap to support technology adoption, enable tangible business outcomes and ensure return on investment (ROI). Providers in this space have in-depth experience and conducts extensive research to understand the industry and changing customer behaviors. They also have the vertical knowledge to accommodate the nuances of each industry sector and a nearshore or onshore presence to have a stronger understanding of the geographic culture. In addition, they offer digital advisory services to help clients embrace technology.

This quadrant assesses each provider's capabilities, including its geographical footprint, workforce, languages supported, pricing models, consulting capabilities and digital technology capabilities.

Eligibility criteria:

- Ability to offer contact center services
- Ability to serve clients across different channels
- Ability to bring in digital capabilities such as automation, AI, cloud solutions and omnichannel
- Ability to offer nearshore, onshore and/or offshore services
- Ability to bring in deep domain expertise in this domain
- Trained FTEs
- Participants must offer contact center consulting services and advise clients in this space
- Ability to demonstrate domain and vertical expertise with industry-specific solutions
- Participants must provide technology advisory services
- Ability to exhibit design thinking and customer journey mapping capabilities
- Participants must provide frameworks to define the transformation roadmap
- Strong partnerships and in-house transformation capabilities
- Consulting workforce
- Ability to offer change management services
- Ability to demonstrate referenceable transformation case studies

Work-from-Home CX Services

With the onset of COVID-19 and associated disruptions, industries took a drastic turn toward work-from-home models. Even the most highly regulated industries had to embrace work-from-home services. Over time, industries have recognized that various levels of this model are here to stay, and this factor has shed light on the possibilities of a hybrid model, which is the most feasible solution for business continuity, as resilience is an essential requirement at present. Embracing a hybrid model and preparing for unforeseen circumstances such as a pandemic will help providers demonstrate a highly resilient business model, instilling trust among their clients. From hiring, onboarding, training, technological implementations and delivery, everything has been virtualized in the past year. To enable a work-from-home model for a large workforce, companies adopted new technologies and talent management tools and programs. With changing work environment, cybersecurity requirements are becoming a high priority. The new hybrid working model drives the adoption of the latest and updated security measures, as they are highly critical to enable successful work-from-home models.

This quadrant assesses a provider's capability to offer work-from-home services, including infrastructure, technology and reliable cybersecurity measures.

Eligibility criteria:

- Ability to enable work-from-home infrastructure
- Ability to offer remote workforce management facilities
- Ability to offer virtual onboarding, including interviews and training facilities
- Improved cybersecurity measures
- Collaboration tools
- Scale of implementations
- Ability to offer technological solutions such as homegrown platforms/partnership platforms
- Innovation
- Burstable capacity

AI and Analytics

AI and analytics are important capabilities that are required in the current situation to deliver seamless CX services. Implementations in this space help companies drive meaningful and empathetic conversations with end users and have a significant impact on business outcomes. As a growing requirement in this industry, AI and analytics will fundamentally change the way customer services are delivered. This quadrant assesses providers with AI and analytics capabilities in terms of solution offerings, partnerships, implementations, innovations delivered and business outcomes.

Eligibility criteria:

- Ability to maintain AI and analytics advisory teams
- Technical expertise
- Ability to provide AI bots, including conversational AI, digital assistants, etc.
- Analytics services such as speech analytics, text analytics, customer behavior prediction, predictive analytics and sentiment analysis
- Ability to demonstrate successful implementations
- Scale of implementations
- Ability to help customers achieve business outcomes such as customer satisfaction scores (CSAT), net promoter scores (NPS), cost savings and revenue generation

- Partnership ecosystem or proprietary solutions
- Ability to demonstrate referenceable case studies

Social Media CX

Social media services are slowly gaining traction. Over time, social media has become an important channel of communication for most enterprises. With the customer buying process making a gradual shift and millennials preferring channels such as Facebook and Twitter, social media is gaining traction. Also, resolving issues is faster through social media channels, with no waiting time. Companies are adopting various social media channels to offer customer support services, embracing technologies such as AI to continuously monitor these channels, and offering personalized services by leveraging analytics such as sentiment analysis. These platforms have also helped enterprises garner immediate feedback from customers, thereby enabling enterprises to quickly take appropriate measures and improve customer service. With the adoption of AI, these platforms can help enterprises with their marketing and sales processes significantly. Service providers are ramping up social media services and adopting the necessary technology to rapidly tap into this market.

This quadrant assesses providers offering social media services with relevant technologies to provide seamless customer experiences.

Eligibility criteria:

- Ability to provide social media services
- Content management
- Trained FTEs
- Digital technologies such as AI implementations to manage content
- Applying analytics such as sentiment analysis and VOC
- Ability to offer marketing and sales support
- Scale of implementations
- Ability to help customers achieve business outcomes such as CSAT, NPS, cost savings and revenue generation
- Partnership ecosystem or proprietary solutions
- Ability to demonstrate referenceable case studies

Quadrants by Region

| Quadrants | Global | U.S. | Europe & U.K. | Brazil | Australia |
|-------------------------|--------|------|---------------|--------|-----------|
| Digital Operations | √ | √ | √ | √ | √ |
| Work-from-Home Services | √ | √ | √ | √ | √ |
| AI & Analytics | √ | | | √ | |
| Social Media CX | √ | √ | √ | √ | √ |

Archetype Report

In this report, we identify and classify the typical buyers of contact center customer experience (CX) services. As CX gains prominence, buyer behavior also changes drastically. With changing requirements, supply side landscape and offerings are also seeing a dramatic shift. We have identified four major segments of buyers, which are as follows:

- **AUTOMATION EMBRACERS:** These clients are still low on the digital maturity curve, but are seeking to embark on an automation journey. FTEs will continue to play an important role, and channel adoption has matured to chatbots that go beyond regular voice, email and text options. Buyers in this archetype have made digital a priority and are seeking the right shoring mix. Cost savings continue to be a priority; hence, these enterprises leverage on automation to reduce overhead costs.
- **DIGITAL CONNOISSEURS:** These clients are digitally more mature or have made digital their top priority. They have explored multiple channels and automation for their operations. Familiar with technology and its implications, enterprises in this archetype are planning to scale digital transformation (and automation) to have a larger impact on CX. They have leveraged multiple channels to enable better connectivity and communication.
- **CX EVANGELISTS:** For these clients, transformation is the highest priority. Driving superior CX by leveraging technology-driven insights is the prime focus. These buyers are seeking to leverage analytics services to bring about improvements at every stage of the customer service lifecycle. Bringing highly skilled and domain experts as agents is critical for these buyers. Their transformation goal is long term, strategic, and avoids point solutions or quick fixes.
- **WORK-FROM-HOME BUYERS:** Clients in this archetype are looking to adopt work-from-home models completely or take the hybrid operating model approach. In either case, service providers must offer robust work-from-home capability. Clients seek training, qualified skillsets and agents, and technological capabilities that enable work-from-home infrastructure. Long-term cost savings, business resiliency and tapping into the talent pool are the major objectives of clients in this archetype.

Schedule

The research phase falls in the period between **April 2021 and September 2021**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **September 2021**.

| Milestones | Beginning | End |
|-------------------|------------------|--------------|
| Launch | April 26, 2021 | |
| Survey phase | April 26, 2021 | May 26, 2021 |
| Sneak previews | August, 2021 | |
| Press release | September, 2021 | |

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2021 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.

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

| | | |
|-----------------------------|-----------------------|------------------------|
| 24-7 Intouch | FirstSource | Sykes |
| 247.AI | Genpact | TechMahindra |
| Acquire BPO | Grupo Services | Teleperformance |
| Actionline | Hexaware | Telesul |
| AEC | HGS Global | TELUS International |
| ALERT BRASIL CONTACT CENTER | Home Agent | TMKT |
| ALGAR TECNOLOGIA | Infosys | Transcom |
| ALMAVIVA DO BRASIL | iQor | TSA |
| Alorica | Kainos | TTEC |
| Atento | Konecta | Unity4 |
| Beepo | LIQ | Vikstar |
| BrasilCenter | Merchant | VOXLINE Contact Center |
| BTCC Conexao cliente | MindPearl | VXI Global Solutions |
| CALLINK CALL CENTER | MOTIVA CONTACT CENTER | Webhelp |
| Capita | NeoBPO | WinOver Call Center |
| Cognizant | OneLink | Wipro |
| Concentrix | Parla Contact Center | WNS |
| Conduent | Pluris Midia | |
| Conduit Global | Plusoft | |
| Connvert | Premiere Response | |
| CPM | ProbeBPO | |
| CSS Corp | Sercom | |
| CSU | Shapiro | |
| Datamatics | Sitel | |
| Datacom | Soft Marketing | |
| DBM Contact Center | StarTek | |
| EXL | Sutherland | |

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Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.

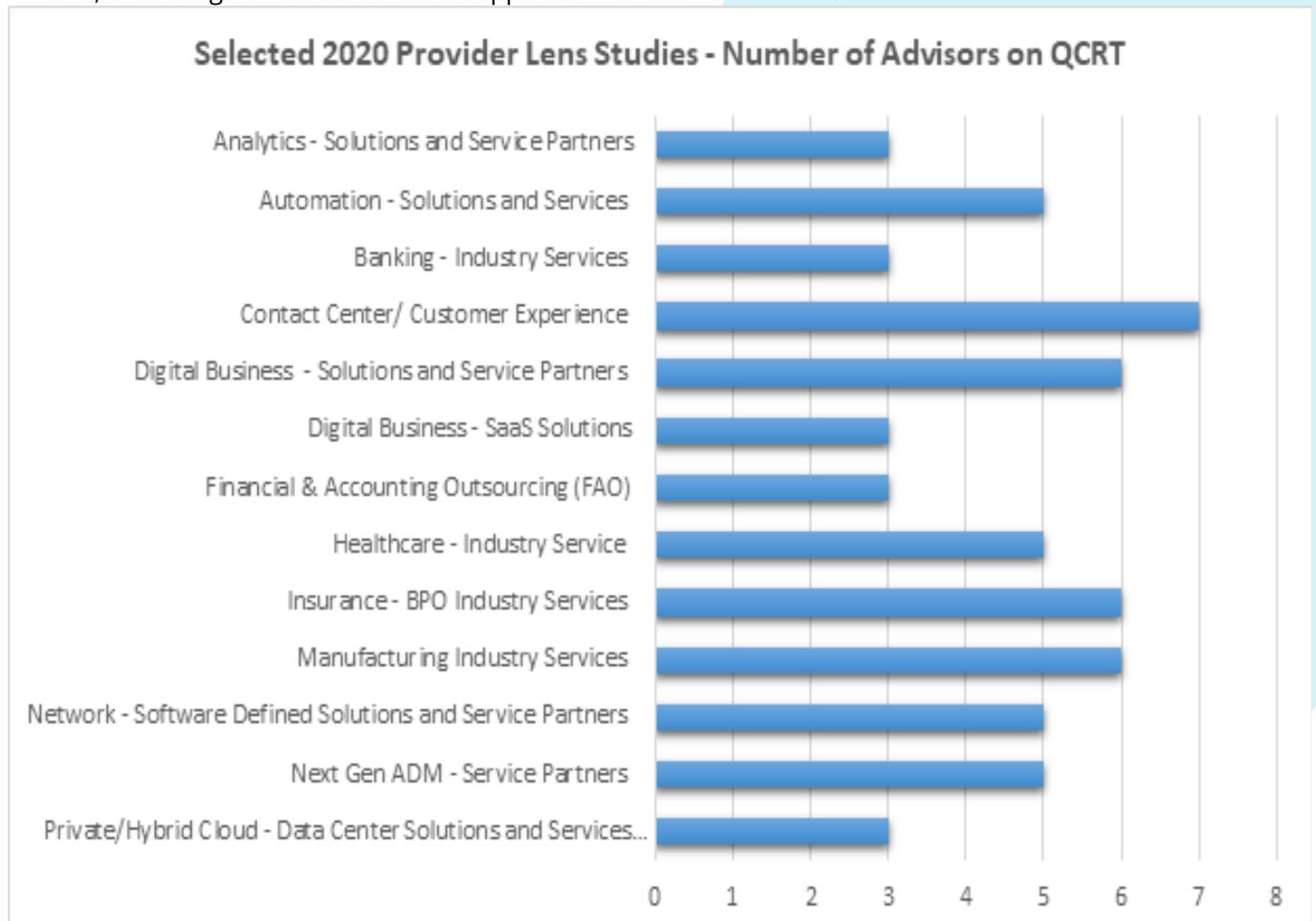
ISG Provider Lens QCRT Program Description for Brochures

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 & 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:

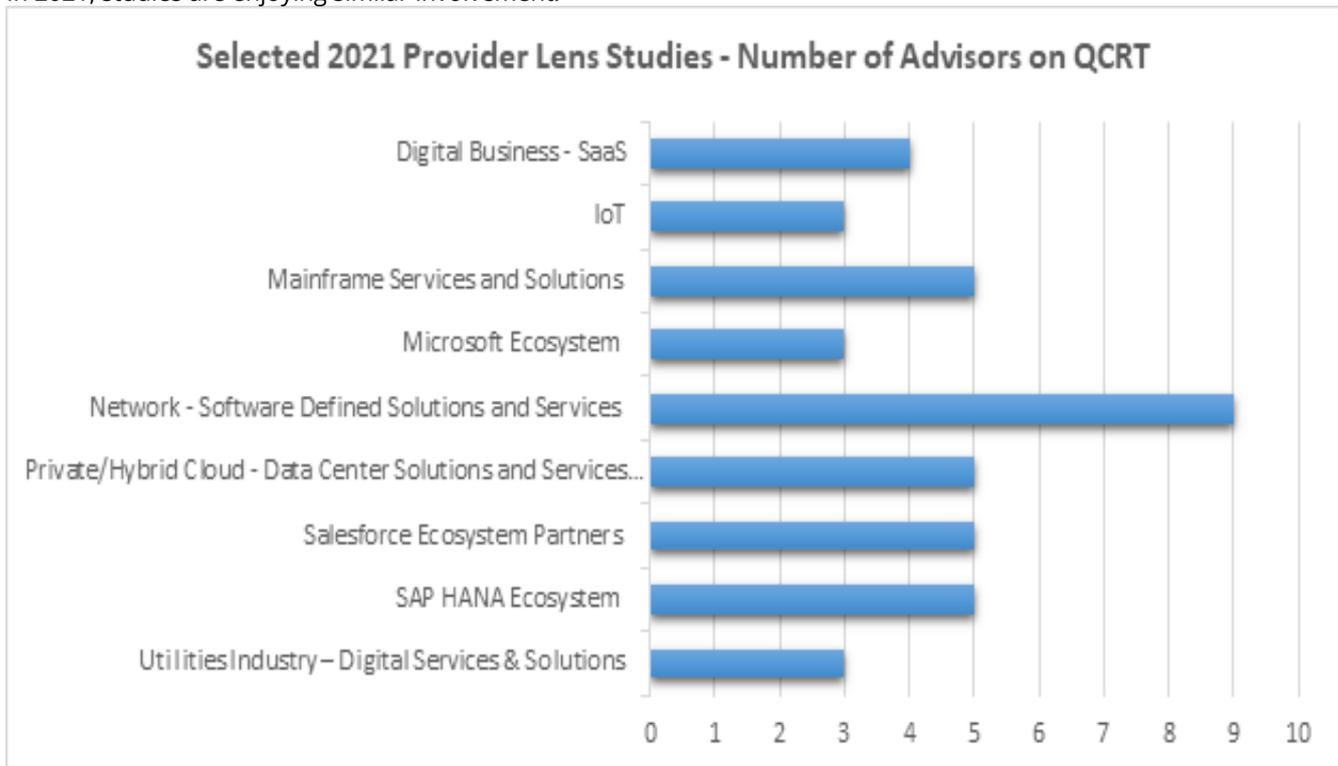
- help define and validate quadrants and questionnaires
- advise on service providers inclusion and participate in briefing calls
- give their perspectives on service provider ratings and review report drafts

In 2020, on average three ISG advisors supported Provider Lens studies.



Source: ISG Research

In 2021, studies are enjoying similar involvement.



Source: ISG Research

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study



Jarrod Magill
Director, Business Operations



Wayne Butterfield
Director, Automation



Scott Furlong
Partner, Business Operations



Dr Linda's
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