# ISG Provider Lens™

## 2020

## Contact Center — Customer Experience 2020

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![ISG Provider Lens logo]

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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 the customer experience. While assessing providers, it considers 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 are using technologies and practices such as design thinking, omnichannel support, cloud offerings, analytics and automation to offer an end-to-end customer experience (CX).

In light of the COVID-19 situation, the enforcement of remote working and increased shift towards digital communication have accentuated the importance of customer service. Enterprises are looking to serve their customers through digital channels while social distancing measures are place. Contact centers take center stage and will play a more critical role in helping enterprises drive customer experience.

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 IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segments

- Focus on different markets, including Global, U.S., U.K. + Europe, Brazil and Australia

The study serves as an important decision-making basis for positioning and go-to-market considerations. ISG advisors and enterprise customers also use information from these reports to evaluate their current and potential new service provider relationships.

# Quadrant Research

The ISG Provider Lens™ study on the topic "Contact Center — Customer Experience" will contain the following three quadrants:

| Contact Center - Customer Experience 2020 | | |
|---|---|---|
| Contact Center Services | | Contact Center Solutions |
| Consulting Services | | Contact Center as a Service (CCaaS) |
| Digital Operations | | |
| Middle-market | Large-market | |

Source: ISG 2020

## Contact Center — Consulting Services

Contact center consulting services are evolving as the nature of client engagements and expectations are changing. Keeping in mind 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 ROI.

Providers in this space have experience in this field and have conducted extensive research to understand the industry and changing customer behavior. They also have the vertical knowledge to accommodate the nuances, have a nearshore or onshore presence to have a stronger grasp of the geographic culture, and offer digital advisory services to help clients embrace technology.

**Eligibility Criteria**

- Offer contact center consulting services and advise clients in this space
- Demonstrate domain and vertical expertise with industry-specific solutions
- Provide technology advisory services
- Exhibit design thinking, customer journey mapping capabilities
- Provide frameworks to define the transformation roadmap
- Partnerships and in-house transformation capabilities
- Consulting workforce
- Offer change management services
- Investments in research and benchmarks
- Demonstrate referenceable transformation case studies

# Contact Center — Digital Operations Middle-market and Large-market

Contact center customer experience services cover outsourcing services that are directed towards enhancing the end-user experience. This quadrant covers traditional outsourcing services with brick-and-mortar business models and end-to-end engagement and managed services. It assesses each provider's capabilities, including its geographical footprint, workforce, languages supported, pricing models and digital technology capabilities.

**Eligibility Criteria**

- Offer contact center services
- Ability to serve clients across different channels
- Bring in digital capabilities such as automation, AI, cloud solutions, omnichannel
- Analytics capabilities and partnerships
- Offer nearshore, onshore and/or offshore services
- Bring in deep domain expertise in this domain
- Demonstrate referenceable case studies

# Contact Center — Contact Center as a Service (CCaaS)

With the growing prominence of cloud adoption, enterprise business functions are demanding functionality from technology stacks. Contact center as a service is one such solution that enables enterprises to run a virtual contact center using cloud software to support scalability, flexibility and savings in overhead IT costs. This cloud offering provides the required capabilities for routing inbound customer interactions along with multichannel functionalities that not only simplify business processes but also help deliver a high-quality customer experience.

This quadrant assesses a vendor's cloud solution that includes omnichannel platforms, customer experience platforms and other cloud solutions for contact centers.

**Eligibility Criteria**

- Support integration with various client communication channels and enterprise applications (for e.g., CRM system for customer data)
- Ability to offer custom-built solutions with self-service capabilities
- Demonstrate experience in automated call distribution, interactive voice response (IVR) and intelligent call routing (ICR) to deliver an enhanced customer experience
- Offer personalized customer support across the web, phone, email, chat and social media
- Exhibit experience in speech/voice analytics, real-time monitoring and workforce management to measure contact center experience and enable smarter decision making
- Ability to showcase capability to connect several call centers at various locations and manage via one centrally managed portal
- Demonstrate out-of-the-box capabilities around cloud deployment, thereby reducing costs by allowing for better planning and staffing decisions

# Quadrants by Region

| Quadrants | Global | U.S. | U.K. + Europe | Brazil | Australia |
|---|---|---|---|---|---|
| Contact Center — Consulting Services | Overview | √ | √ | √ | √ |
| Contact Center — Digital Operations Middle-market and Large-market | Overview | √ | √ | √ | √ |
| Contact Center — Contact Center as a Service (CCaaS) | √ | | | | |

**Note:** We have highlighted some regions that do not have a quadrant report. The data for these regions is being collected for the Candidate Provider Qualification program.

# Archetype Report

In this report, ISG identifies and classifies the typical buyers of contact center services. As part of this exercise, four major buyers have been identified as follows:

Simplified illustration

| Customer services buyers | Peak season buyers | Intelligent automation seekers | Digital enthusiasts |
|---|---|---|---|

Source: ISG 2020

- **Customer services buyers:** Buyers that typically opt for managed services and seek the necessary services with a basic level of automation.

- **Peak season buyers:** Buyers that look for providers offering cost effectiveness through a virtual solution with an established work-from-home model that provides flexibility and a solution for a resource crunch if required

- **Intelligent automation seekers:** Matured outsourcers that are gradually implementing virtual agents and looking for cognitive partnerships

- **Digital enthusiasts:** Advanced buyers that focus on domain-specific consulting strategies with innovative approaches such as design thinking and consider building capabilities around omnichannel and the use of cloud to drive increased efficiencies

# Schedule

The research phase falls in the period between **May and August 2020**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **September 2020**.

| Milestones | Beginning | End |
|---|---|---|
| Launch | May 14, 2020 | |
| Survey Phase | May 14, 2020 | June 05, 2020 |
| Sneak Preview | August 2020 | |
| Press release | September 2020 | |

Please refer to the link below to view/download the ISG Provider Lens™ 2020 research agenda :
https://isg-one.com/docs/default-source/default-document-library/ipl-annual-plan-2020.pdf

**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 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 to produce ISG Provider Lens reports.

These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. The submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

# Contacts for this study

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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.

# Partial list of companies invited for the survey

**Are you in the list or do you see your company as a 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 Customer | CALLINK CALL CENTER | Fuze |
| 24-7 Intouch | Calltower | GCC CONTACT CENTER |
| 8x8 | Capgemini | Genesys |
| Accenture | Capita | Genpact |
| ACC-Premier Response | CenturyLink | Global Response |
| ACTIONLINE | CGI | Granada |
| Advanced Customer Service (ACS) | Cisco | GRUPO PROVIDER |
| AEC | Cognizant | GRUPO KONECTA |
| Aegis | Concentrix | GRUPO SERVICES |
| ALERT BRASIL CONTACT CENTER | Conduent | HCL |
| ALGAR TECNOLOGIA | Conduit Global | Hexaware |
| ALMAVIVA DO BRASIL | Contax Groupo | Hgs |
| Alorica | Content Guru | inContact |
| Altitude Software | CSS Corp | Infogain |
| Apecco | CSU | Infosys |
| Apex america | CTIS | Infosys BPO |
| Arise | Datamark | INTELECTO CONTACT CENTER |
| Arvato | Datamatics | Interactive Intelligence |
| ASK! CIA. NACIONAL DE CALL CEN-TER | DATAMÉTRICA | INTERVALOR |
| Aspect | Dell | Intrado |
| Aspect Software | Dialpad | iQor |
| Atento | DXC | KAINOS |
| Avaya | ELO CONTACT CENTER | Knoah Solutions |
| BRASILCENTER | emtelco | LIQ |
| Broadsoft | Evolve IP | LiveOps (now Serenova) |
| BTCC Conexao cliente | EXL Services | Masergy |
| BullsEye Telecom | Firstsource | Mattersight |
| CAI | Five9 | Minacs |
| callflex | FLEX | Mitel MiCloud Connect |

Momentum Telecom

MOTIVA CONTACT CENTER

NEOBPO

NetFortris

Nice

NICE inContact

NTT DATA

Odigo

Olos

Orange

PARLA!

PASCHOALOTTO

Premiere Response

PROXIS

Puzzel

Qualfon

SERCOM

Serenova

Shapiro Shaik Defries

signupto

Sitel

StarTek

Sutherland

Sykes

Taldesk

TCS

Tech Mahindra

Teleperformance

Teletech

Telia

TELUS International

Telvista

TMKT

Total IP

TPx Communications

Transcom

Ubiquity

URANET

Usan

VEGANET

Verizon

VERMONT

VIKSTAR

Vocalcom

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