ISG Provider Lens™

Contact Center - Customer Experience Services

Global 2020

A research report comparing provider strengths, challenges and competitive differentiators

Quadrant Report

Customized report courtesy of:

Infosys®

September 2020

About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2020 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The lead author for this report is Namratha Dharshan. The co-authors are Praveen Nair and Bharti Nagraj. The editor is Ambrosia Sabrina and Stephen Lawson. The research analyst is Bharti Nagraj and the data analyst is Kankaiah Yasareni. The quality and consistency advisors are Dr. Linda Delbridge, Scott Furlong, Jarrod Magill and Wayne Butterfield.

ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under ISG Provider Lens™.

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.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.

EXECUTIVE SUMMARY

Changing Contact Center Dynamics and Covid Impact

The lockdown in several regions due to the pandemic has led to service disruptions across many industries. Every industry has had its own set of challenges. The travel industry, in particular, has been experiencing high call volumes because of the sudden restrictions on movement. Insurance is also reeling under the effects with higher claim settlements, while retail has faced a dip in call volumes. The impact of the pandemic thus varies significantly from industry to industry.

The contact center space is facing the following challenges:

- Many companies have experienced more than 20 minutes in wait/resolution time — a significant increase from 18 seconds.
- Some have warned its consumers of long wait times.
- Many consumers have been asked to call after 48 hours.

The COVID-19 crisis has brought a dramatic shift in the buying/communication patterns of end users, and this change is likely to be irreversible. The use of non-voice channels has increased, and consumers have turned toward digital channels in this social distancing era.

Expectations of an improved customer experience and a seamless shift between channels have increased multifold. Only a few companies have succeeded in delivering an omni-channel experience, while many others are continuing with basic channels. Brands are challenged to deliver the best customer experience with more personalization to ensure that brand loyalty does not shift and customer retention remains high.

Figure 1 – Impact of COVID on contact centers and future of communication

Voice calls will see a drastic decline but will continue to serve as an important medium of communication, especially to resolve complex queries.

Working from home is the new norm. Lesser regulated industries will continue with the work-from-home set up or move to a hybrid model. This will help expand the talent pool.

The adoption of **digital channels** will increase significantly. With the increased channel proliferation, channels such as WhatsApp and social media are gaining traction.

Cloud contact centers are a necessity. With the impact of COVID-19 in this space, the adoption of cloud contact centers will be fast tracked to enable seamless connectivity.

Personalization is the need of the hour. Enterprises can truly differentiate themselves by providing personalization backed by analytics that empowers the agent.

The increased adoption of **chat bots/conversational AI** to drive connectivity and handle most level 1 and level 2 queries during the pandemic was a game changer.

Source: ISG Research 2020

Trends that are shaping the contact center industry post COVID-19

With the rise of new working models and technologies, companies are still adapting and evaluating new ways of working. "Pandemic-accelerated digital transformation" may sound cliched, but enterprises have been accelerating their digital transformation journey. As most companies are trying to figure out their optimal ways of working, the following global trends highlight the future of the contact center industry and the direction it is taking.

Shift in operating model: The pandemic has forced organizations to opt for completely new working models that would allow nearly all agents to work remotely. Traditionally, contact center agents have been working from secure facilities and were seated with hundreds of other agents with immediate access to their supervisors. However, with the new work-from-home facility, the dynamics have shifted with a complete change in environment. Many organizations are rethinking their geographic or facility expansion strategy. At the same time, there are concerns about connectivity issues and background noise that must still be addressed by most organizations. Significant investments have already been made to resolve some of these challenges, allowing many organizations to reap numerous benefits such as cost savings, access to talent, flexibility and higher productivity.

There are going to be challenges in adapting to this model. However, with technology evolving rapidly to support the work-from-home setup, a healthy mix of brick-and-mortar and remote working models is expected to emerge.

Beefing up security: As contact center employees are moving away from secure facilities and desktops, some agents are following the bring-your-own-device (BYOD) model. As a result, security has taken precedence. Several technologies are evolving and are being embraced to support the work-from-home facility. Companies are adopting facial recognition, auto screen lock, voice biometrics and robust use of VPN, screen monitoring, data discovery tools and other technologies to strengthen security controls. Artificial intelligence (AI) is a game changer and will be highly leveraged to bring the latest security solutions to agents.

Bearing in mind that the contact center industry has been prone to breaches, and with the sudden shift to the work-from-home model, systems have become more vulnerable than ever. Enterprises should thus take utmost care while addressing security concerns and provide frequent and extensive training for agents to make them aware of security breaches and the importance of following protocols.

Evolution of cloud contact centers: During a crisis, enterprises face a new set of challenges, especially while delivering highly personalized services seamlessly across channels. They are forced to rethink their technology strategy. Even legacy-heavy enterprises are making cloud platforms a priority. Those that have already adopted cloud contact centers have quickly implemented the work-from-home setup and are ensuring minimal disruption while making this transition. With the benefits of remote working, there is a push to adopt this setup on a long-term basis. Some of the benefits include productivity gains from employees, cost optimization and flexibility to tap into a larger pool of talent. Thus, to enable better business outcomes, contact centers are looking to accelerate their move to cloud solutions.

Technological advancements have significantly changed the way customer service is being delivered. Cloud contact center solutions are embedded with a multitude of technologies and deliver considerable business benefits to contact centers. Omnichannel enablement has been made considerably easier, and enterprises that leverage technology to deliver a better customer experience will be able to clearly differentiate themselves in this space. Analytics and single-screen management functionalities have enabled agents to deliver highly personalized services, thus ensuring high customer satisfaction. With a range of benefits offered by cloud contact centers, more enterprises are moving to cloud platforms and are taking full advantage of the available technology stack, including AI and machine learning (ML) for redefining personalization. These solutions also come with a suite of workforce management capabilities that empower supervisors with information about their teams, making them more effective in terms of managing agents, coaching them and providing live training. With workforce management, agents are fed with timely, high-quality feedback that allows them to seek opportunities for training and improvement.

With such functionalities embedded into one package, the cloud contact center solution is highly suitable for enterprises that want to deliver a high-quality customer experience, thanks to its advanced technologies and ability to integrate seamlessly and talk to existing systems.

Channel proliferation increasing exponentially: With the announcement of lockdowns across the world and the immediate requirement for a remote working practice, none of the industries were prepared to embrace this sudden change. Call volumes, wait times and call abandonment rates increased significantly. Bandwidth challenges in the home environment have resulted in frustration among customers; long waiting hours culminated in calls getting disconnected while talking to advisors. This has induced a significant shift to asynchronous channels such as emails, social and async messaging wherein customers can communicate their issue and receive a response later without the need to wait. Some software vendors are reporting a 300 percent increase in the use of these channels vs. the traditional voice system.

In the past, millennials have led in the adoption of digital channels. This in turn has resulted in immense pressure on omnichannel connectivity and seamless experiences. However, the pandemic has proved that channel adoption is generation agnostic. Every member of a household is being forced to turn to digital channels, such as for buying essential items. With this change in end-user behavior, enterprises are now required to ensure that their customers have enough choices and are not limited to voice channels.

Rise of intelligent contact centers: Automation has seen a sharp spike in use during the pandemic. When agents were being shifted to the remote working setup, many enterprises leveraged chatbots to serve their customers for basic query resolution. Digitally native entities, especially fintech and insurtech companies, experienced minimal or no disruption due to their early adoption of flexible working models, cloud technologies and automation. Companies that adopted automation and leaned on conversational AI or bots to resolve numerous level 1 and level 2 queries had a great advantage. With automation becoming a necessity, most contact centers are actively looking to scale this capability and turn to newer technologies such as conversational AI, digital/virtual assistants, chatbots, etc. As bots are maturing and becoming smarter, to provide a more humanlike experience, agents will become more specialized to handle complex queries.

Analytics to drive empathetic conversations: An exceptional customer experience is enabled by true employee experience. If the agent is not empowered with information, it is nearly impossible to start the call without asking for basic information like names and phone numbers. With AI and analytics, an agent can now get complete background information to have more relevant, contextual, proactive and meaningful conversations with end users. Speech analytics, text analytics, sentiment analytics, customer behavior prediction, persona-based interactions, etc. are enabling more meaningful conversations.

Talent management and development as the next essential step: Agents are being pushed to adapt to new ways of working. They will be required to unlearn certain protocols that were more appropriate for the brick-and-mortar environment and pick up new protocols that are suitable for a remote working arrangement. This has become essential as companies are seeking to accelerate digital adoption. With the rapid implementation of automation, agents must keenly look into reskilling for handling more sophisticated calls or queries. With newer skills, they will play an important role in retaining customers. Investing in training and agent development programs, including security training and education, will be highly critical for their development. Gamification in recent times has gained popularity. Employees are highly engaged and maintain a healthy competition, which affects their productivity and motivation levels. With the shift to the work-from-home model, the adoption of robust collaboration tools is on the rise to enable peer interactions and agent-supervisor interactions.

Enterprises have identified that long-term remote working could lead to fatigue and lower motivation levels. Keeping employees engaged will be a challenge for most companies. Investments are being made in programs to address this concern. They are leveraging external agencies to ensure agent well-being and create a brick-and-mortar-type environment to keep active conversations going.

Revisiting BCP: Organizations did not have a business continuity plan (BCP) that was pandemic proof. It has become essential for them to revisit their existing BCPs that can enable nearly a 100 percent secure work-from-home environment and adapt to emergency situations such as the current pandemic.

Companies are looking at long-term business resiliency plans. The COVID-19 crisis will bring several “new normal” practices to this industry, especially because companies have been fairly conservative in providing the work-from-home option. They are now reevaluating numerous options, one of which involves revisiting and improving existing BCPs to address such situations with priority. In the case of outsourced engagements, companies should work with their service providers to ensure business resiliency.

Introduction

Definition

Contact center services have evolved into customer experience services. Organizations are now taking a holistic approach toward customer services and how they are being delivered. Operating models have changed and shifted from mere full-time employee (FTE)-based models; shoring mix requirements have evolved; digital technologies have become table stakes and converting data into insights is the need of the hour. Channel proliferation and the demand for immediate responses have significantly increased during the crisis. Requirements for an omnichannel strategy and a seamless customer experience have always existed but have now increased exponentially.

Given the growing needs and changing landscape of customer service, service providers in this space are evaluated based on the different offerings they bring to the client's table to address modern customer experience requirements. Some of the key tenets of modern-day contact center services are as follows:

Consulting services: With the growing complexity of contact center services, consulting services are becoming more important. Keeping in mind the end-user expectations and proliferation of channels, along with an organization's current infrastructure and increased usage of digital technologies, contact center service providers design the transformation roadmap for enterprise clients. Apart from their industry experience, research and vertical expertise, service providers apply design thinking principles and leverage industry benchmarks to define a client's transformation roadmap to support technology adoption, enable tangible business outcomes and ensure return on investment (ROI).

Services offered: Services have evolved from mere customer care and voice calls to multiple channels and brand support. Key performance indicators (KPIs) for measuring success are not limited to first call resolution (FCR) and average handle time (AHT). They may also include cost savings, upsell and cross-sell opportunity creation, revenue generation, customer satisfaction (CSAT) scores and net promoter scores (NPS). Social media services such as content moderation

Definition (cont.)

are gaining traction and becoming an integral part of marketing and selling for every brand. In all, services can include inbound and outbound calls and activities such as customer support activities, collections, sales, product support, telemarketing, recruitment and staffing, helpdesk and others.

Delivery competency: This area primarily covers employee strength, geographic presence, delivery centers, the shoring mix offered, languages supported and pricing models among other aspects.

Talent development: Talent is the most critical aspect of contact center services. Trainings, employee engagement programs, career development plans and flexible working options are important for grooming and developing talent.

Digital technologies: As digital gains more importance, technologies such as automation have become table stakes. Technologies such as cloud contact centers, automation, omnichannel platforms, AI/ML and advanced analytics are critical factors that influence an enterprise's digital transformation journey.

Definition (cont.)

Scope of the Report

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
- Focus on different markets, including global, U.S, U.K., Europe and Brazil

This study serves as the basis for important decision-making pertaining to 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.

For this reason, ISG's report on Contact Center Services – Customer Experience is composed of multiple quadrants covering the spectrum of services that an enterprise client requires.

Simplified illustration

Source: ISG 2020

Definition (cont.)

The quadrant descriptions are as follows:

Contact Center Customer Experience — Digital Operations

Based on a limited set of parameters, such as FTEs, delivery centers and language capability, the contact center industry has evolved by leaps and bounds. With the changing customer expectations and mounting pressure for an improved customer experience, contact centers are now measured on multiple factors such as talent, automation, partnerships, scale of operations, omnichannel capability and implementation, AI/ML and analytics services. With the COVID-19 situation, work-from-home capabilities, infrastructure and security have also become important parameters.

AI & Analytics

AI has a significant impact on the customer experience industry. Humans and machines are coming together to deliver seamless customer experiences. Bots are able to mimic humans and take over a large chunk of customer queries without human intervention. Over time, machines are learning and improving significantly. Humans are now freed up to handle more complex queries. Data analytics is enabling and empowering humans with insights that help agents to be better informed and drive empathetic conversations. Multiple solutions that embed ML, speech analytics, sentiment analytics and other such technologies are driving informed and enhanced customer experiences, thus bearing a significant impact on metrics such as reduced AHT, increased FCR, better CSAT scores, cost savings and revenue generation opportunities. AI and analytics have opened up numerous opportunities for customers. This quadrant assesses AI and analytics capabilities, including solutions and partnerships, level of implementations, scale of implementations, innovation, business outcomes and impact.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "Leaders" among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "Product Challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market Challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the "leaders." Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the "rising stars" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "rising stars" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Contact Center - Customer Experience Services - Quadrant Provider Listing 1 of 1

	Digital Operations	AI & Analytics
Alorica	Leader	Market Challenger
Atento	Product Challenger	Product Challenger
Capita	Market Challenger	Market Challenger
Cognizant	Product Challenger	Leader
Concentrix	Leader	Market Challenger
Conduent	Leader	Leader
CSS Corp	Product Challenger	Leader
EXL	Product Challenger	Product Challenger
Genpact	Product Challenger	Product Challenger
Hexaware	Product Challenger	Product Challenger
HGS	Leader	Leader

	Digital Operations	AI & Analytics
Infosys	Market Challenger	Product Challenger
Shapiro	Contender	Not in
Sitel Group	Leader	Leader
Startek	Market Challenger	Contender
Sutherland	Leader	Leader
TechM	Product Challenger	Product Challenger
Teleperformance	Leader	Leader
Transcom	Rising Star	Market Challenger
TTEC	Leader	Leader
Wipro	Leader	Product Challenger
WNS	Product Challenger	Rising Star

Contact Center - Customer Experience Services Quadrant

ENTERPRISE CONTEXT

Digital Operations

This report is relevant to enterprises across all industries globally that are evaluating contact center providers. In this quadrant report, ISG lays out the current market positioning of global contact center digital operations players delivering exceptional customer experiences and how they address key enterprise challenges in the region.

ISG observes that increasing digital engagement capabilities by leveraging technology has gained precedence in the global contact center marketplace. Providers have accentuated their digital focus with transformative changes such as increased cloud adoption and integration of artificial intelligence, along with big data and analytics, to drive customer experiences. Enhancing self-service tools that will answer transactional issues, and utilizing agents' skills for more complex tasks, is helping to bring down costs for enterprises. Organizations are increasing their investments toward securing their work-at-home solutions, client feedback solutions, digital assistants and workforce coaching. Organizations are committed to decreasing customer effort through personalization and omnichannel services and improving efficiency by improving their efforts to drive KPI's such as CSAT and NPS.

ISG has also seen an increased focus on using the gig economy to enable contact centers with diverse talent across industries, along with growing interest among providers in improving their addressable market by penetrating the disruptive vertical segments.

Business strategy and industry leaders should read this report to understand the global delivery and vertical capabilities of the providers in the marketplace. This report also gives insights on the service provider's expertise, technology and innovation-led solutions. The report also differentiates providers based on how they modernize their offerings for improved customer satisfaction and loyalty, increased process efficiency and rapid response to changing market dynamics.

IT and technology leaders should read this report to understand how contact center service providers are integrating multiple technologies into their offerings and how those providers' technical capabilities square with the rest of the market.

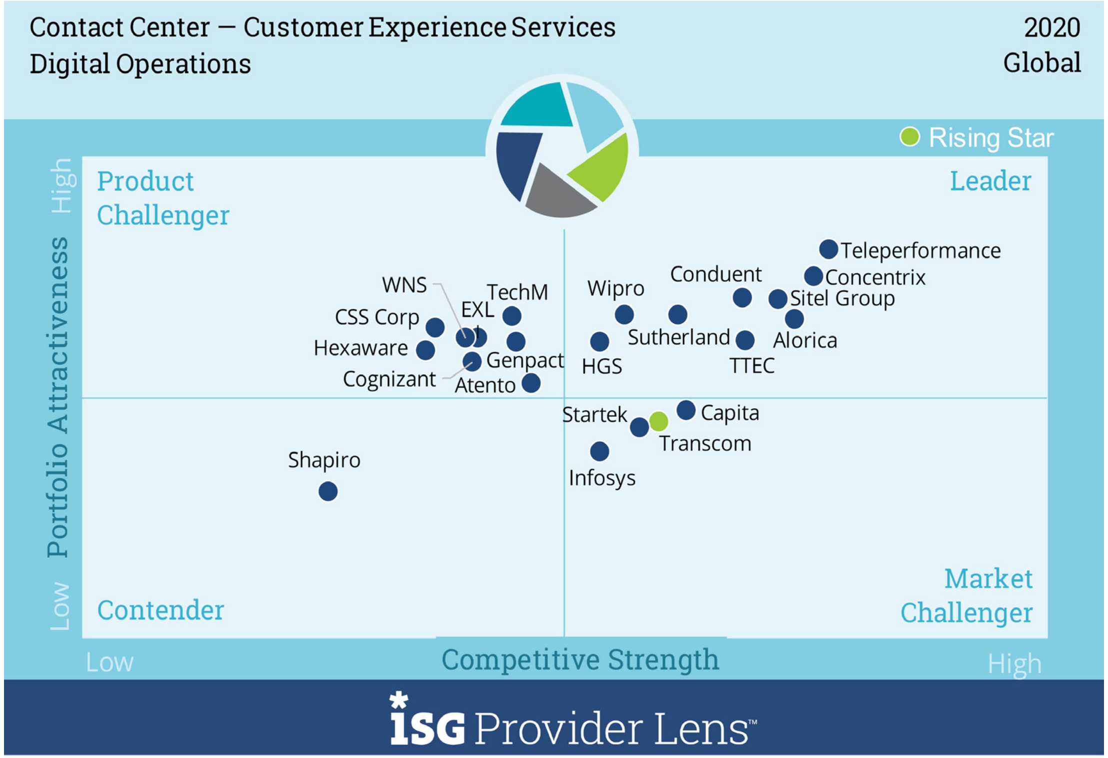
Digital transformation professionals should read this report to understand how providers of contact center services are enhancing their digital transformation initiatives for improved CX and how they compare with one another.

Security leaders should read this report to understand the measures taken by providers to secure data, prevent fraud and address security concerns with shifting market dynamics.

DIGITAL OPERATIONS

Definition

This quadrant measures service provider capability based on the key tenets of contact center operations, such as end-to-end contact center services, talent development and management, global landscape and the ability to provide onshore, nearshore and offshore services. Digital technology offerings such as automation, AI/ML, analytics services, omnichannel, work-from-home solutions, security and compliance are also considered a part of this quadrant evaluation. With the changing landscape, strategic consulting capabilities are considered as well. All these aspects are important to delivering customer experience services, and providers in this space are measured based on each of these parameters and other factors that highly influence their market presence and ability to deliver services.



Source: ISG Research 2020

DIGITAL OPERATIONS

Eligibility Criteria

- Ability of service provider to offer contact center consulting services and advise clients in this space
- Demonstration of domain and vertical expertise with industry-specific solutions
- Design thinking and customer journey mapping capabilities
- Frameworks to define the transformation roadmap
- Partnerships and in-house transformation capabilities
- Change management services
- Investments in research and benchmarks
- Contact center services
- Ability to serve clients across different channels
- Digital capabilities such as automation, AI, cloud solutions and omnichannel
- Analytics capabilities and partnerships
- Nearshore, onshore and/or offshore services
- Ability to bring in deep domain expertise in this domain
- Ability to demonstrate referenceable case studies

Observations

- Teleperformance and Concentrix continue to lead the global contact center operations market with their deep domain experience, technological solutions, extensive global delivery network and large workforces.
- Sitel Group is named as a Leader with its extensive investments in improving agent experience, thereby delivering strong KPIs for its clients.
- Alorica and TTEC bring in a combination of scale of operations and key partnership developments, along with improved penetration into disruptive industry verticals, making them leaders in this space.
- Conduent and Sutherland are Leaders with a reasonable global footprint coupled with technology and vertical expertise.
- HGS and Wipro have entered this market as Leaders with improved digital offering capabilities and for their ability to demonstrate case studies with measurable business outcomes.
- Transcom was identified as the Rising Star with its aggressive growth plans, investments in innovation and growing digital capabilities.

MARKET CHALLENGER: INFOSYS

Overview

Infosys is an emerging contact center player with a strong global delivery footprint and a wide portfolio of customer service offerings across the value chain. Headquartered in India, the company has close to 6,000 employees handling over 60 million interactions annually. With over 15 technology alliance partners and its continuous effort in transforming customer service engagements, Infosys is positioned as a Market Challenger in the global contact center operations space.

Caution

Infosys recently penetrated the contact center operations market and is gradually establishing a global presence. However, the company should aggressively grow and innovate to stay competitive in this space.

Strengths

Established global operations: Though an emerging player in this space, Infosys has a widely established scale of operations with 32 delivery centers spread across globally. It provide support in over 30 languages and has a wide range of CX services, including social media services. Also, with its acquisition of Ireland-based contact center Eishtec, the company onboarded 1,400 employees and strengthened its U.K. and Ireland footprint in addition to enhancing its social media offerings. Overall, Infosys has a strong strategy and vision to scale its CX services.

Localization remains a prime strategy: As part of scaling its operations, Infosys is continuing to drive its localization strategy. Focused on four key markets, it is looking to build onshore capabilities in the U.S., Brazil, U.K. and EMEA, and Australia. With the acquisition of Eishtec, the company has already expanded significantly into the U.K. and Ireland.

Digital Pentagon as the foundation for transformation: Infosys Digital Pentagon is based on the five levers of experience, insights, innovate, accelerate and assure. This approach is designed to drive a holistic transformation, encompassing channel strategy, automation, analytics, platforms, business KPIs, etc. The framework helps clients to be more resilient by enhancing their existing operating models, improving digital competencies and setting up a future-ready workforce.

2020 ISG Provider Lens™ Market Challenger

Infosys is gaining traction in the global contact center operations market and has increased its R&D and workforce-led investments with recent alliances. The company is ramping up its efforts in enhancing and developing its customer experience and contact center offerings.

ENTERPRISE CONTEXT

AI & Analytics

This report is relevant to enterprises across all industries around the globe that are evaluating contact center providers, especially for leveraging their AI and analytics services. In this quadrant report, ISG lays out the current global market positioning of contact center providers with advanced AI and analytics offerings and how they address the key challenges enterprises face in the region.

During the COVID-19 pandemic, ISG observes an increasing preference toward digital channels by customers to quickly resolve their queries. Enterprises are simultaneously looking to engage with providers that can offer conversational artificial intelligence (AI) or bot solutions at scale to reduce the average hold times and enable agents to handle complex queries. In addition to the AI offerings, these providers offer a broad range of analytics services such as sentiment analytics across major customer touchpoints to improve customer service. Enterprises must take advantage of these analytics services and empower their agents with the right set of data to drive contextual and personalized conversations with the customers.

ISG sees providers also deploying AI solutions such as facial recognition, along with traditional services such as VPN, to enhance security measures in their work-from-home setup.

IT leaders should read this report to better understand the strength and improvement areas of these providers regarding their AI and analytics offerings. The report also helps them to analyze multiple offerings given by providers and select the right kind of solutions that align well with their business needs.

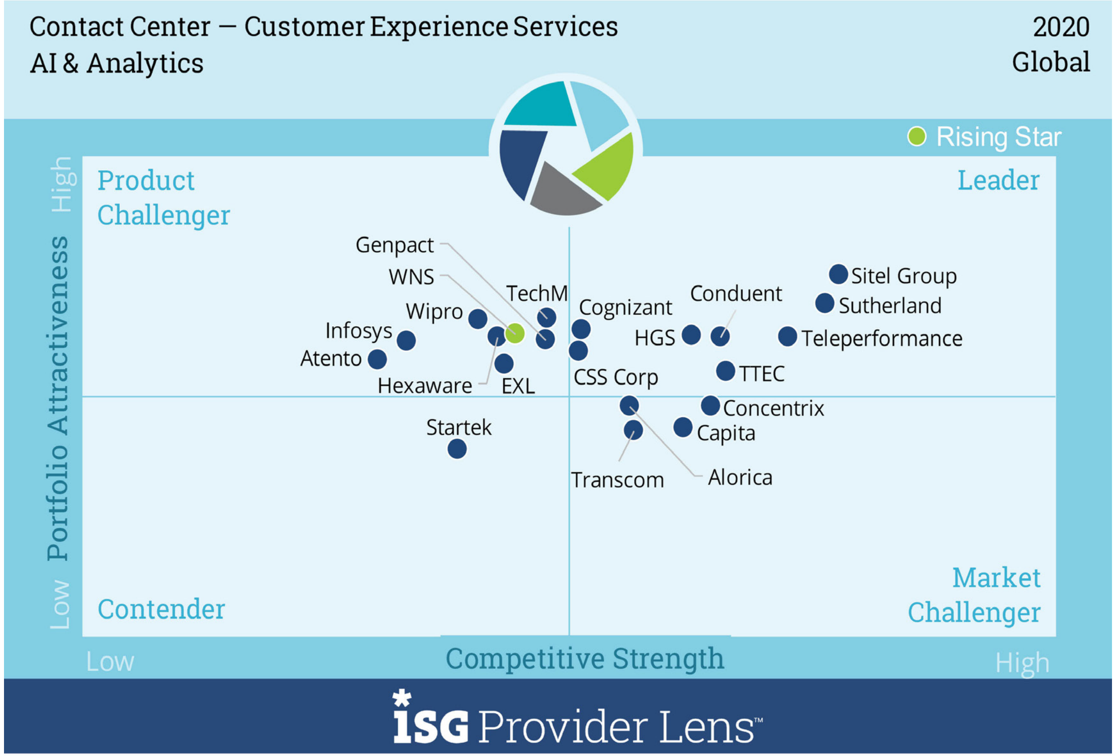
Vertical leaders should read this report to understand the industry-specific solutions offered by these providers backed by AI and analytics technologies.

Digital transformation leaders should read this report to understand the broad range of AI and analytics solutions offered by providers and how they are implementing these solutions at scale to realize the desired outcome.

AI & ANALYTICS

Definition

AI and analytics are important capabilities that are required in today's era to deliver seamless customer experience 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, innovation delivered and business outcomes.



Source: ISG Research 2020

AI & ANALYTICS

Eligibility Criteria

- Ability to maintain AI and analytics advisory teams
- Technical expertise
- Ability to provide AI bots — conversational AI, digital assistants, etc.
- Analytics services — speech analytics, text analytics, customer behavior prediction, predictive analytics, sentiment analysis
- Ability to demonstrate successful implementations
- Scale of implementations
- Ability to help customers achieve business outcomes such as CSAT, NPS scores, cost savings and revenue generation
- Partnership ecosystem or proprietary solutions
- Ability to demonstrate referenceable case studies

Observations

- Sitel Group leads the pack in the AI and analytics space with its innovative solutions and effective use of speech analytics to drive more empathetic conversations, making a significant impact on customer experience.
- Sutherland puts skin in the game with its innovative pricing models and significant automation and analytics implementations.
- Conduent and Teleperformance are longstanding players in this industry. They bring in scale of operations, vast automation and analytics capabilities through extensive partnership ecosystems. With sheer breadth of offerings and implementations, they stand as leaders in this quadrant.
- HGS brings a healthy mix of voice and digital channels. With mature social media offerings and expertise in managing social media content, the company leads by helping clients manage their brand reputation and address customer queries effectively.

AI & ANALYTICS

Observations (cont.)

- CSS Corp entered this space as a leader for its extensive use and deployment of AI and ML. It implements automation at scale, offers risk-sharing pricing models and delivers high-level insights with impressive case studies that demonstrate tangible outcomes.
- TTEC has been named as a leader with its digital-led investments and unified offerings that deliver end-to-end customer experiences.
- Cognizant has numerous case studies with AI deployments. It deploys speech, text and sentiment analytics to deliver a seamless customer experience.
- WNS is chosen as a Rising Star in this space for its ability to expand its digital capabilities by leveraging its strategic partnerships, global delivery network and vast industry experience.

PRODUCT CHALLENGER: INFOSYS

Overview

Infosys is an emerging provider of contact center services with more than 5,000 employees catering to a global client base of 71 firms through 32 delivery locations. It handles more than 60 million complex interactions annually and has a growing ecosystem of partner solutions. The company leverages its Digital Pentagon framework, automation and AI capabilities to drive digital transformation for clients. Infosys is a Product Challenger in this quadrant for its global presence and continued focus on expanding onshore capabilities through organic and inorganic growth.

Strengths

Infosys Cortex2 for driving enhanced CX: This AI-based modular platform addresses the critical pieces of the customer journey, drives more value and offers an improved customer experience. It assists in gathering insights across all interaction channels. The intelligence is then leveraged to redefine customer engagements by enabling quicker decision-making, providing quality conversations and delivering increased KPIs for clients.

Delivering amplified learning through Lex: Infosys has made a critical investment to empower agents and enable customer experience transformation through its cloud-based Lex platform. With more than 20,000 learning resources, 2,600 modules and over 200 offline and online courses, the platform offer a plethora of skilling and reskilling opportunities to agents. The company also leverages its innovation centers, knowledge portal and TMNA academy to drive continuous learning for employees.

Automation and AI: Infosys leveraged its Cortex2 platform to transform customer operations for one of its telecommunication clients. To enable this, it implemented AI in the pre-hire evaluation, employed real-world scenario-based training, and used customized insights to drive value and improve customer interactions.

Caution

Infosys' analytics capabilities are relatively less mature when compared to other players in this space. To improve its competencies, the company should focus on deploying analytics capabilities at scale in transformation case studies and on bringing better business outcomes to clients.

2020 ISG Provider Lens™ Product Challenger

Infosys is committed towards assisting clients in their digital transformation journey to enhance the overall CX. With its recent acquisitions, strategic partnerships and improved capabilities to bring newer technologies to market, the company is an emerging player in this space.

Methodology

METHODOLOGY

The research study “2020 ISG Provider Lens™ Contact Center - Customer Experience Services” analyses the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Contact Center - Customer Experience Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Use of ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

Namratha Dharshan, Author

Director of Research and Principal Analyst

Namratha Dharshan brings more than 16 years of extensive research experience to lead the delivery and operations of the program called ISG Provider Lens™ that is designed to deliver research on service provider intelligence. She heads a team of analysts and is responsible for delivery of research reports for the Provider Lens™ program. Additionally, she is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO and horizontals like customer experience in contact centres and finance and accounting services. She has also authored vertical focused reports for insurance. Namratha has authored several research papers on topics such as Omnichannel, PCI in Customer Experience – BPO Contact Centers, Digital transformation in BPO, Automation in the areas of BPO.

Praveen Nair, Co-Author

Team Leader

Praveen is a lead analyst with ISG Research, with a focus on market and industry research across emerging technologies. He is responsible for authoring thought papers on trends in the BFSI industry with a focus on impact of emerging technologies on businesses. Praveen authors ongoing ISG Momentum Insight research reports, IPL study and thought leadership white papers. He is responsible for giving actionable insights through his research and analysis in bringing technology and business together along with identifying revenue driving opportunities.

Authors and Editors

Bharti Nagraj, Co-Author

Team Leader

Bharti Nagraj is currently part of the Workshops team that falls under the Momentum Provider Services division. In her current role, she is responsible for workshop requests, understanding the scope, setting right expectations with the consultant and managing the internal delivery timelines. She has also worked on the Insurance BPO and Contact center quadrant and archetype studies. Bharti has been part of many consulting engagements in areas of account profiling, captive research, competitive intelligence and others. She provides key insights to our consultants and help them close the engagement successfully.

Jan Erik Aase, Editor

Director, Principal Analyst and Global Head – ISG Provider Lens/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™ Report: Contact Center - Customer Experience Services
September 2020

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 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 1,300 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.