*isG Provider Lens™

Contact Center - Customer Experience Services

Global 2021

A research report comparing provider strengths, challenges and competitive differentiators

Quadrant Report

September 2021

About this Report

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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 May 2021, 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.

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EXECUTIVE SUMMARY

Contact Center Industry Landscape Post-Covid

Post-pandemic, several changes happened that had an impact on businesses in some way or other. Some of the changes, however, were irreversible. On the other hand, end consumer buying behavior saw dramatic shifts and businesses are scaling to adapt to these changes.

As the contact center industry rapidly evolves to address the consumers of the future and their needs, businesses are beginning to realize the need for newer technologies and operating models. Accelerating transformation has become a priority item for all businesses. A lot has changed in the 18 months since the pandemic struck. There are new trends that are redefining this industry.

Figure 1

INDUSTRY TRENDS	TECHNOLOGICAL TRENDS	AGENT/ CUSTOMER EXPERIENCE
Outsourcing witnesses growth	Rise in asynchronous message	Analytics is the new survival of the fittest
End-to-end outsourcing from high-tech industries redefining outsourcing standards	Conversational AI adoption sees growth	People programs are more important than ever
Industry-specific BPO is gaining traction	Cloud contact center is inevitable	Embracing a hybrid working model – defining new norms
Brands turn to social media for growth	Stringent security measures are the new mandate	

Industry Trends

Outsourcing witnesses growth

Outsourcing activity in the BPO space is consistently growing. BPO annual contract value (ACV) was up 48 percent in the first half of 2021 versus 1H20. When the pandemic struck, contact center customer care faced many disruptions. Due to lack of preparedness, some enterprise captives struggled to move to a work-from-home model while balancing the customer queries at the same time. Given the situation, enterprises also realized the need for technology and the importance of disrupting the traditional business model by going digital. Besides, with the changing buyer behavior and the increase in digital, the skillsets required for an agent are also evolving. Thus, many enterprises are looking to outsource and leverage partnerships to accelerate their transformation journey.

High-tech industries redefining outsourcing standards

There is an uptake in outsourcing, particularly among the digital native companies, especially insurtech, fintech, and healthtech industries. Being asset-light and maintaining lean operational structures, technological adoption is the highest priority among these companies. The companies are also looking at outsourcing a large part of the functions, to reap the benefits of outsourcing from day one, while the businesses focus on their core operations.

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Industry-specific BPO is gaining traction

Every industry has nuances attached to it that are distinctly different from the others. Understanding the depth of any industry, applying the learnings, and enabling agents with the right set of data and insights so their conversations with end customers are contextual, personalized, enriching and informed, means delivering true customer experience. One of the points of scepticism that has made most enterprises reluctant to outsource critical functions is whether the service providers would understand business nuances. However, service providers are making investments to strengthen their industry-specific offerings and are actively leveraging what they've learned, by applying analytics to help agents deliver more contextual conversations. With growth and investments occurring, the industry is witnessing a growth in industry-specific BPO sourcing.

Brands turn to social media for growth opportunities

Social media become a more important channel of communication during the pandemic, and post-pandemic. With lockdowns and social distancing norms, customers are leveraging this platform for customer service, complaints, purchases, sales, etc. Brands are increasingly turning to social media to tap into new customers and to manage their existing customers. Social media is acting as one of the key channels for sales and marketing because it makes it easier for companies to reach out to masses effortlessly and quickly. While social media has deep advantages, it also comes with its own set of challenges. Brands have to be extremely agile to manage these channels because brand damage can occur at the same speed at which you can build a business. Content moderation, community management, web crawling and scanning have become extremely important, and companies are required to stay on top of this 24/7.
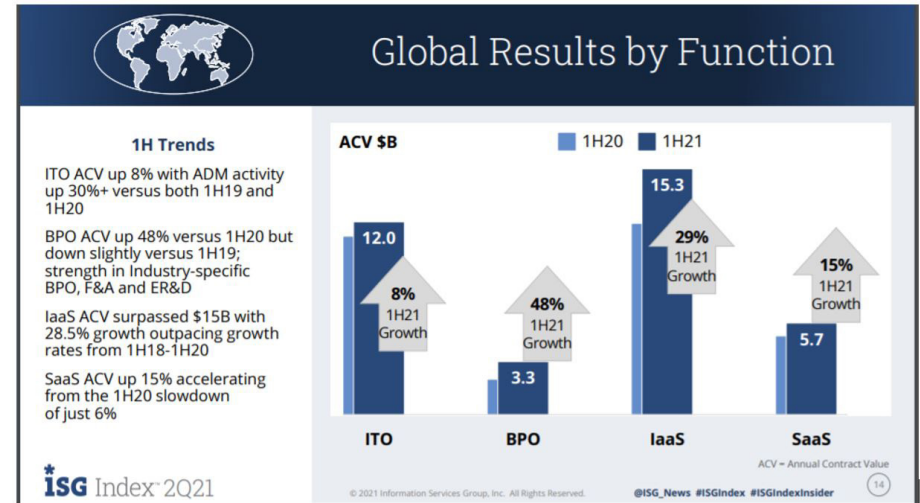
Figure 2

Figure 3

Technological Trends

Rise in the adoption of asynchronous messaging

Asynchronous messaging saw an uptick in usage post-pandemic: Customers turned to digital channels to defeat queues and waiting times. Queries were of all kinds, some that needed immediate attention, and others that could wait if customers received a response to their queries. For these reasons and more, asynchronous messaging worked well. Though agents work sequentially on this in the background, agents can productively resolve more queries, and unlike live chat, one doesn't have to leave customers frustrated. For customers, on the other hand, it becomes a matter of convenience because they could use the chat service at their convenience and pick up threads from where they left off even if they respond hours later.

Conversational AI sees more adoption

Conversational AI has been in the market for some years. However, the adoption rate has dramatically increased in the last 12 months. The solutions in the market are maturing, and with more enterprises realizing the potential a bot can bring, companies are ready to embrace and explore this technology to its fullest.

With low code/no code becoming more prevalent, conversational AI deployment has become easier for companies and employees, even if they lack technical know-how. With the growing importance around industry-specific solutions, conversational AI is no exception. Some of these solutions come preloaded with industry nuances that give companies faster go-to-market with their solution. With the deployment of such industry-specific bots, the bots are rapidly maturing and are able to solve more

complex queries. Over time, integrating these solutions so the bots can talk to the internal systems has drastically improved, thus making it easier for companies to deploy solutions.

Cloud contact center is inevitable

With the growth in cloud-based platforms, the market is witnessing a phenomenal trend. Adoption of a cloud contact center is inevitable because the benefits are well known. Taking it to the next level are the service providers, which are significantly expanding their partnerships with cloud platform companies or are investing in developing proprietary solutions to help clients accelerate their transformation and effectively address business continuity.

Security can be the biggest inhibitor if not done right

It was a challenge for most enterprises to accept work-from-home, but given the pandemic situation most enterprises did not have a choice. However, as the work-from-home model has successfully worked for most companies, the question of securely sustaining operations with disparate working models is the burning question for most of them. However, the technology and solutions in this space are evolving beyond multifactor authentication and secure networks. Companies are introducing video analytics, voice biometrics, facial recognition, geolocation and other embedded security solutions to continue monitoring their agents on a real-time basis and to instil strict protocols to ensure security.

Agent Experience Trends

Analytics is the survival of the fittest

Analytics is a game changer for customer experience. Empowering companies with the right set of information at the right time will help them achieve desired business outcomes. This begins with employee experience and, if agents are not empowered with the right information, it can be detrimental to customer success in the long run. With millions of interactions across numerous agents, companies must leverage this data to turn it into meaningful conversations.

Innovation in the space of employee engagement

Burnout is real. The work-from-home environment comes with its own set of advantages and disadvantages. Brick-and-mortar contact delivery centers have always provided a vibrant atmosphere for employees. With daily huddles, team meetings and fun activities, the environment in brick-and-mortar facilities was different. However, in a work-from-home environment, some of these social aspects are missing and companies are working hard to create an engaging atmosphere for agents. Focusing on innovative people programs has become more important, to ensure that employees are motivated and stay productive.

While businesses may not entirely adopt work-from-home, they will not return entirely to the office, either. The hybrid working model is here to stay permanently for several reasons. As businesses adapt and embrace the new working model, companies are getting innovative in finding solutions to make this new working model highly effective

for both employees and customers. Service providers in this industry are coming up with creative solutions like engagement hubs that provide state-of-the-art infrastructure to enable employees to strike the right balance between office and home. These platforms provide opportunities for employees to engage with other team members, with facilities for training, team meetings and fun activities. On the other hand, companies are also investing in innovative virtual platforms that provide opportunities for employees to engage virtually. Ultimately, happy agents lead to happy customers.

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Introduction

Simplified illustration

Contact Center Customer Experience Services			
Digital Operations	Work From Home Services	AI & Analytics	Social Media CX Services

Source: ISG 2021

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 (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 their CX strategy right, to ensure high-quality services and improve the employee experience. This transformation can directly impact CX. As the buyer side matures, the supply side is also required to bring a variety of capabilities that address changing buying behaviors. Advanced

Definition (cont.)

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 2021 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, Asia, 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.

Scope of the Report

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

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 in each quadrant and each region. The criteria of evaluation used are detailed in the introduction to each quadrant.

Digital Operations: 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, end-to-end engagement and managed services. Providers in this space have in-depth experience and conduct 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, digital technology capabilities, company size and capabilities and plans for the future.

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

Definition (cont.)

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, business outcomes, company size and capabilities, and plans for the future.

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

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 increasing in importance. Also, resolving issues is faster through social media channels, with no waiting time, than issue resolution was by traditional means. 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.

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

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

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Contact Center - Customer Experience Services - Quadrant Provider Listing 1 of 3

	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
[24]7.ai	Product Challenger	Leader	Product Challenger	Product Challenger
Alorica	Leader	Market Challenger	Leader	Leader
Atento	Leader	Product Challenger	Leader	Market Challenger
Capita	Market Challenger	Market Challenger	Market Challenger	Contender
Cognizant	Product Challenger	Leader	Product Challenger	Leader
Concentrix	Leader	Leader	Leader	Leader
Conduent	Leader	Leader	Leader	Market Challenger
CSS Corp	Product Challenger	Leader	Product Challenger	Leader
Datamatics	Contender	Product Challenger	Contender	Product Challenger
EXL	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Firstsource	Market Challenger	Product Challenger	Market Challenger	Contender

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Contact Center - Customer Experience Services - Quadrant Provider Listing 2 of 3

	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Genpact	● Product Challenger	● Product Challenger	● Product Challenger	● Leader
Hexaware	● Product Challenger	● Product Challenger	● Product Challenger	● Product Challenger
HGS	● Leader	● Leader	● Leader	● Leader
Infosys	● Rising Star	● Rising Star	● Product Challenger	● Product Challenger
Majorel	● Market Challenger	● Market Challenger	● Market Challenger	● Market Challenger
Mphasis	● Contender	● Contender	● Contender	● Contender
Shapiro	● Contender	● Contender	● Contender	● Contender
Sitel Group®	● Leader	● Leader	● Leader	● Leader
Startek	● Market Challenger	● Product Challenger	● Rising Star	● Rising Star
Straive (SPi Global)	● Contender	● Contender	● Contender	● Contender
Sutherland	● Leader	● Leader	● Leader	● Leader

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Contact Center - Customer Experience Services - Quadrant Provider Listing 3 of 3

	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Tech Mahindra	● Product Challenger	● Product Challenger	● Product Challenger	● Rising Star
Teleperformance	● Leader	● Leader	● Leader	● Leader
Transcom	● Market Challenger	● Market Challenger	● Leader	● Market Challenger
TTEC	● Leader	● Leader	● Leader	● Product Challenger
Webhelp	● Leader	● Market Challenger	● Market Challenger	● Product Challenger
Wipro	● Leader	● Product Challenger	● Product Challenger	● Market Challenger
WNS	● Product Challenger	● Rising Star	● Product Challenger	● Leader

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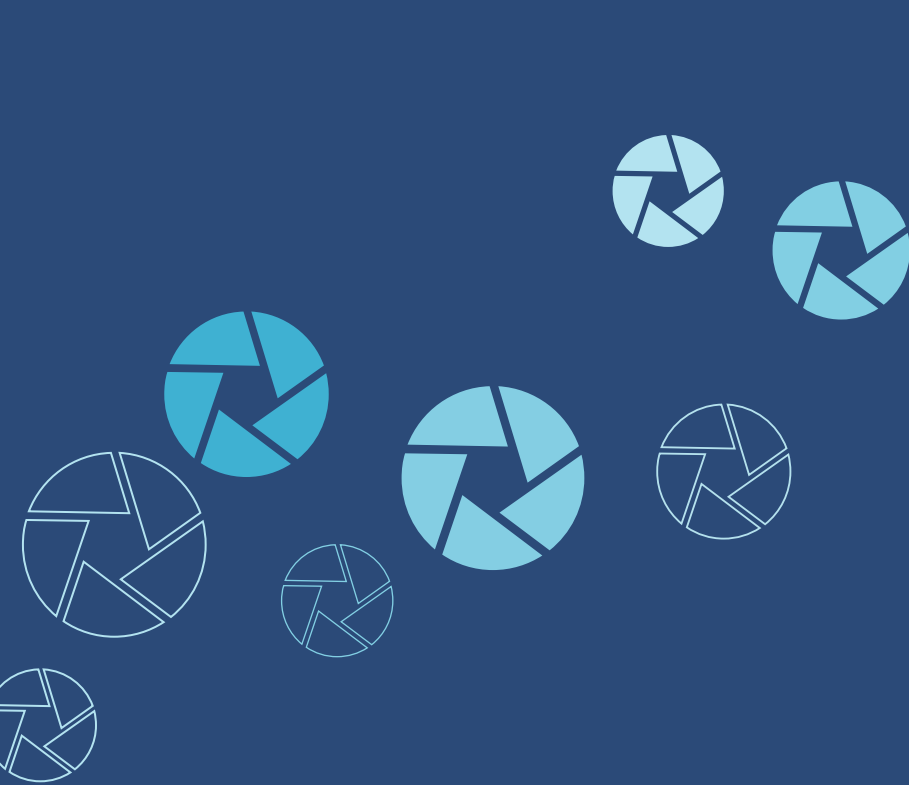
Contact Center - Customer Experience Services Quadrants

ENTERPRISE CONTEXT

Digital Operations

This report is relevant to global enterprises across industries for evaluating the digital operations services of contact center providers. In this quadrant report, ISG highlights the current market positioning of global providers of contact center digital operations, delivering exceptional customer experiences and how they address key enterprise challenges.

Globally, enterprises are experiencing high abandon rates, decrease in productive hours and subpar service levels due to the pandemic, and hence a decline in revenues, and are at a higher risk of losing loyal customers. Some of them are experiencing significant business fluctuations, particularly during peak hours, leading to increased number of errors and impacting client key performance indicators (KPIs). Enterprises are seeking to improve operational efficiencies in back-office functions, deliver consistent reporting of key business metrics and strengthen their overall customer experience.

ISG has noted that enterprises want to speed the process of digitalization of contact centers, with the pandemic still having an impact on how they conduct their operations. They are looking to optimize the number of agent interactions and reduce average handling time that has an impact on annual expenses. Enterprises are looking at sustained improvements in customer satisfaction (CSAT) through omnichannel routing and optimization. There has been an increase in investments on solutions that have AI-based self-service capabilities and on the ones that provide enhanced security frameworks.

ISG sees that most of the services providers have deployed centers of excellence to map end-to-end customer journey, and have identified pain points through process redesign. They have deployed robotics and optical character recognition (OCR)-based solutions to help enterprises read and transcribe data. Also, service providers have developed business continuity plans to ensure that queries are handled in an efficient and customer-friendly way, while limiting the time and effort needed from IT. Another key observation is that strategic partnerships with platform providers have been an important part of the roadmap for the service providers.

IT and technology leaders should read this report to understand how contact center service providers are integrating multiple technologies into their offerings and how the technical capabilities of a provider can be compared with that offered by its competitors in the market.

Digital transformation professionals should read this report to understand how providers of contact center services are enhancing their digital operations for improved customer experience (CX) and how they can be compared with one another.

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 expertise, technology and innovation-led solutions of the service providers. It also differentiates providers based on how they modernize their offerings for improved CSAT and loyalty, increased process efficiency and rapid response to changing market dynamics.

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DIGITAL OPERATIONS

Definition

Contact Center Customer Experience services include outsourcing customer care services that are directed toward enhancing the end-user experience. This quadrant covers contact center services offered, business operating models, end-to-end engagement and managed services. With increased focus on enhancing CX, enterprises are juggling between finding the right partner and finding the right digital solutions. Thus, contact center consulting services are evolving with the changing nature of client engagements and expectations. Considering the end-user expectations, the 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, 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 conduct extensive research to understand the industry and changing customer behaviors.

Contact Center - Customer Experience Services
Digital Operations

2021
Global
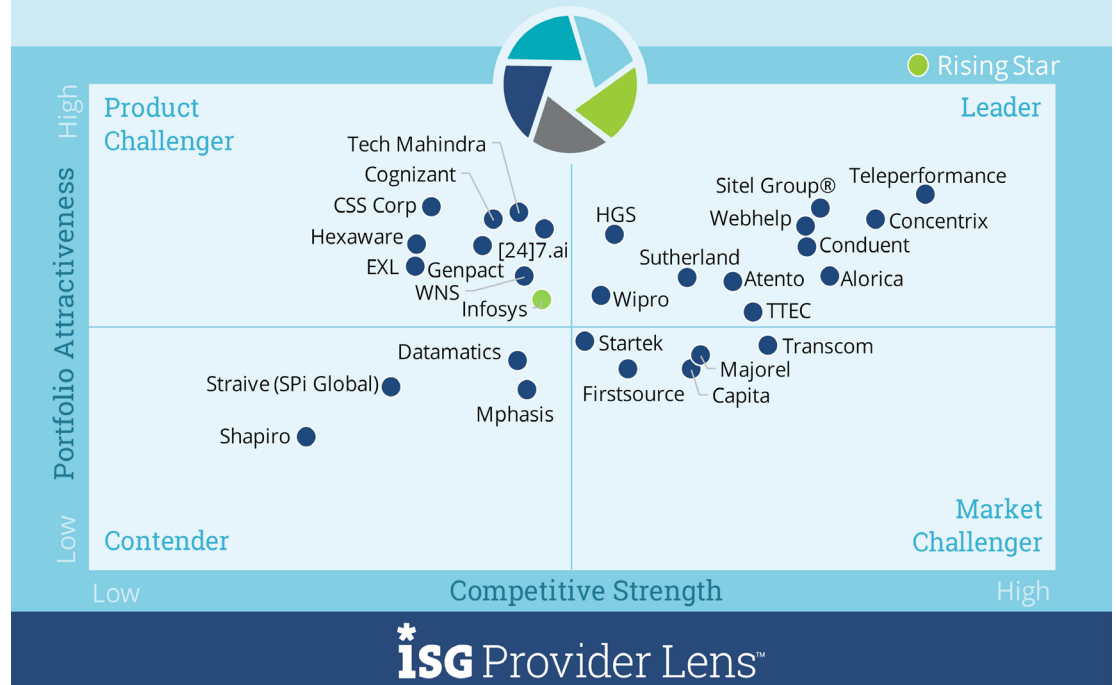
Source: ISG Research 2021

DIGITAL OPERATIONS

Definition (Cont.)

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 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

DIGITAL OPERATIONS

Eligibility Criteria (cont.)

- Nearshore, onshore, and/or offshore services

- Ability to bring in deep domain expertise

- Ability to demonstrate referenceable case studies

Observations

- **Teleperformance** continues to maintain its leadership position in this market, despite the intensifying competition, with the end-to-end capability it brings, along with a scale of operations unmatched by others in this space.

- **Concentrix** is another global leader on this map that is continuing to maintain its leadership position with its scale of operations and enhanced digital capability. The company's continue investment in expanding its portfolio, particularly in digital and employee programs, makes it a Leader.

- **Sitel Group®** has a strong vision to grow extensively in this market. Its recent investments in expanding its footprint and capabilities, backed by recent launches of its solutions, make it a Leader in this space.

- **Webhelp** makes its first entry into ISG Provider Lens™ quadrant and earns its position as a Leader because of its broad capabilities. Although most focused on the European market, Webhelp has laid down strategies to expand and strengthen its footprint in other geographies.

DIGITAL OPERATIONS

Observations (cont.)

- **Conduent** and **Alorica** continue to show up as leaders in this space year after year. With a strong foothold in the U.S., one of the key markets for contact center outsourcing, they each have a strong market share.

- **TTEC** is named a Leader in this quadrant for its scale of operations and its highly diversified, platform driven, digital portfolio. TTEC is another conglomerate in this space that has broad capabilities addressing people, process and technology

- **Atento** has emerged as a Leader in the Digital Operations quadrant with strong capabilities in providing contact center services. Atento is a leader in the Latin American market and holds significant market share globally.

- **Sutherland**, an established leader in the U.S., with a good global delivery presence, has differentiated itself well in this highly competitive industry. From clearly defining its target market and digital capabilities to differentiated pricing models, Sutherland has carved a niche.

- **HGS** is another standing Leader in this quadrant, with global operations broadly spread between the U.S. and the U.K. With operations reasonably spread globally, HGS also specializes in specific vertical capabilities such as healthcare.

- **Wipro**, an established BPO player with strong offerings, is named a Leader in this space for its scale and market share. Wipro has a very broad portfolio and vast technology ecosystem.

- **Infosys (Rising Star)** is growing quickly and has many clients engaged through its flexible pricing models.

RISING STAR: INFOSYS

Overview

With the acquisition of Eishtec, an Ireland-based contact center company, Infosys set its foot in the contact industry. Infosys has more than 6,500 employees, 32 delivery centers, and supports more than 90 clients in over 30 languages. As the company continues to invest and grow its services in the CX space, Infosys is chosen as a Rising Star in the digital operations quadrant for contact center services.

Strengths

Flexible pricing models: Infosys offers various pricing models, making it easy for clients to engage and reap the benefits. The hybrid model has been chosen by 60 percent of customers, with "Pay only for what you use" being the second-most popular option. With an approach to flexible pricing models, Infosys has built a highly progressive commercial model.

Promising growth rate: Infosys has bagged 21 deals in the last 12 months, of which five are large wins. Its client base grew to 90, and its revenue is expected to grow by 42 percent in 2021. As a recent entrant, Infosys has an impressive growth rate and aggressive growth.

Infosys Cortex modular services: As a company, Infosys houses various capabilities and proprietary solutions that can be leveraged across service lines and industries. To align it to CX services, Infosys launched Cortex, a microservice, building-blocks based platform that brings the best of all the solutions into one platform, addressing automation, analytics, user experience, agent experience, hiring and training.

Caution

Infosys is doing well in building its portfolio of services. However, investing in expanding its portfolio will be a continued focus area for Infosys to further build its CX practice.

2021 ISG Provider Lens™ Rising Star

For a recent entrant into the market, Infosys has a promising portfolio and a healthy growth rate. If the company continues to maintain its growth, Infosys will be one of the strong competitors in this market.

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ENTERPRISE CONTEXT

AI and Analytics

This report is relevant to global enterprises across industries for evaluating the AI and Analytics services of contact center providers. In this quadrant report, ISG highlights the current market positioning of global providers of contact center AI and analytics, delivering exceptional customer experiences and how they address key enterprise challenges globally.

With the COVID-19 pandemic, enterprises are looking at implementing fully operational omnichannel solutions for their customers. They want to engage with providers that offer chatbots and use conversational AI to handle increasing interactions across multiple channels, to reduce average handling time and enable agents to deal with complex queries. In addition to AI capabilities, enterprises are looking for deep analytics to understand customer sentiment and derive insights from speech and text data mining. Such solutions will enable enterprises to efficiently monitor agents' performance and have an in-depth understanding of sentiments toward their brands.

ISG notes that providers are investing in developing solutions that can be deployed across multilingual channels to understand first interaction resolution drivers, provide sentiment analysis and identify areas where digital solutions can reduce customer efforts. They are looking at driving efficiencies by implementing omnichannel analytics and voice to text agent analytics. Service providers are deploying advanced AI solutions that support the automation of complex self-service transactions, together with

intelligent chatbots with human-centric automation to help agents seamlessly handle digital agent escalations.

IT and technology leaders should read this report to better understand the strengths of these providers and the areas that need improvement regarding their AI and analytics offerings. The report also helps them to analyze the multiple offerings of the providers and select the solutions that align with their business needs.

Digital transformation professionals should read this report to understand the broad range of AI and analytics solutions offered by providers and how they implement these solutions, at scale, to realize the desired outcomes.

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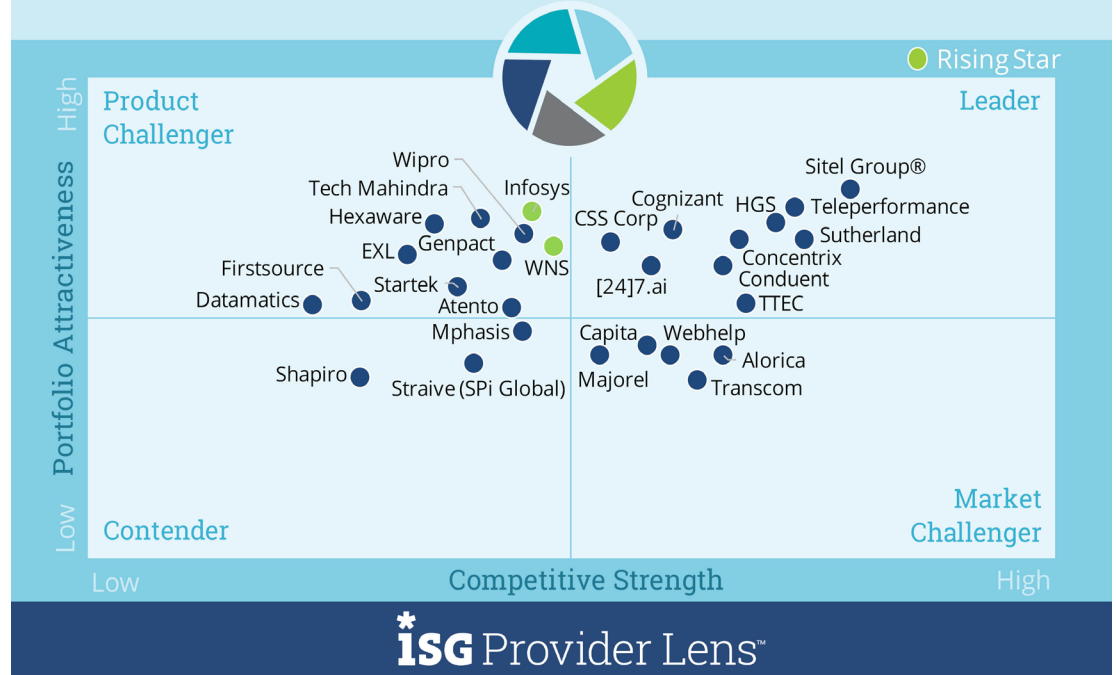
AI & ANALYTICS

Definition

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.

Contact Center - Customer Experience Services
AI & Analytics

2021
Global

Portfolio Attractiveness (High / Low)

Competitive Strength (Low / High)

Product Challenger

Leader

Contender

Market Challenger

Rising Star

Wipro
Tech Mahindra
Hexaware
EXL
Genpact
Firstsource
Startek
Datamatics
Atento
Mphasis
Shapiro
Straive (SPi Global)
Infosys
WNS
CSS Corp
Cognizant
HGS
Sitel Group®
Teleperformance
Sutherland
Concentrix
Conduent
[24]7.ai
TTEC
Capita
Webhelp
Majorel
Alorica
Transcom

Source: ISG Research 2021

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AI & ANALYTICS

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

Observations

- Sitel Group® leads in this quadrant with its highly differentiated AI and analytics offering. Sitel Group® has a well-developed automation ecosystem, with partnerships and proprietary solutions. Importantly, the company has made significant progress in implementing these solutions and delivering measurable results.

- Teleperformance has made significant investments in expanding its portfolio. The company is named a Leader for its suite of proprietary solutions that it has developed, with some of them being industry specific, demonstrating a high degree of domain expertise.

- Cognizant has modular solutions and a large, skilled team, a combination that enables it to satisfy a wide range of client requirements.

- Sutherland has always taken a digital-first approach. The company has been continuously focusing on developing its AI and analytics capability. Strong offerings, outcome-based pricing and successful implementations move this company into a leadership position in this quadrant.

- Concentrix and TTEC are named leaders in this quadrant because they have strong portfolios of solutions that are infused with AI and analytics.

AI & ANALYTICS

Observations (cont.)

- HGS has mature automation and analytics offerings. The company has demonstrated several case studies with implementations of AI and analytics helping clients with digital transformation.

- Conduent's continued focus and investments have led to it to build strong AI and analytics offerings. With its widely expanded partnership ecosystem, the company has a defined approach to help clients with these technology implementations.

- [24]7.ai, as the name suggests, has a developed AI portfolio, and the breadth of offerings led the company to be selected as a qualified Leader in this quadrant. Conversational AI being its most significant and prominent offering, the company also has other AI-based offerings that address both agent experience and customer experience.

- CSS Corp qualifies as a Leader in this quadrant for a second year in a row. The company made further progress with the launch of its proprietary solution, featuring AI, analytics and its automation-led approach, which has differentiated CSS Corp from other vendors.

- Infosys and WNS have been designated as Rising Stars for this quadrant. Infosys is winning new customers by bringing together a wide range of internal solutions and partner capabilities. WNS is gaining traction in the market with its EXPiRiUS solution and has several useful bots.

RISING STAR: INFOSYS

Overview

Infosys has introduced AI Cortex, an AI solution designed to extract, understand and provide insights and recommendations on the mountains of data collected by customer care centers. It has helped reimagine customer care operations by providing better communication, smarter and faster decision-making and delivering value at scale. Infosys has more than 90 clients and nearly 1,000 transition and transformation projects undertaken.

Strengths

Infosys Cortex – an integrated CX solution: By applying a building-blocks-based approach, Infosys Cortex is an AI-driven modular solution developed by incorporating best-of-breed technologies and partnerships. Embedded with AI and analytics, this solution is crafted to solve the CX transformation journey by addressing customer experience, agent experience and deep analytics. The solution is also integrated with a learning module. With the launch of Infosys Cortex, Infosys has made significant progress in the CX space.

Broad partnership landscape: Infosys has more than 15 partnerships supporting its CX practice. In addition, Infosys also leverages its other transformation solutions such as Infosys Live Enterprise, Infosys Cobalt and Infosys Applied AI to build its Cortex solution. Because the company is aggressively investing to grow its CX practice, Infosys is at an advantage, with an established partner ecosystem in the background.

Multiple implementations of AI solutions: Infosys has shown significant growth in the last 12 months and has bagged several CX clients. The company demonstrated and showcased various case studies where sentiment analytics, predictive analytics, intent prediction, chatbot implementation and many more solutions were applied, enabling clients with desired business outcomes. Infosys has also applied AI to automate most processes of hiring and training.

Caution

Infosys has a strong AI and analytics capabilities; however, the company is still investing in expanding its overall CX portfolio, so it can cater to clients of all types of maturity.

2021 ISG Provider Lens™ Rising Star

Infosys is a Rising Star that is making a substantial effort to provide world class AI and analytic services. The offerings continue to improve and with continued development of its AI and analytics offerings, Infosys may move it into the Leader category.

ENTERPRISE CONTEXT

Work from Home Services

This report is relevant to global enterprises across industries for evaluating Work from Home Services of contact center providers. In this quadrant report, ISG highlights the current market positioning of global providers of contact center work from services, delivering exceptional customer experiences, and how they address key enterprise challenges.

With the pandemic, global enterprises have an immediate need to diversify their operating footprint for business continuity, and are looking for guidance to migrate to the virtual environment, including effectively communicating brand identity to their agents to be conveyed to customers. This includes maintaining high levels of customer service in a highly secure environment and building business resilience. The ultimate need seems to be customer-centric multilingual support with best-in-class service.

ISG observes that service providers are introducing new and innovative cloudshoring solutions to deliver a virtual operating model for managing business continuity, agility and scalability. These solutions are designed to offer a socially rich working environment for remote interaction with talent management capabilities, including talent acquisition, learning, working, feedback, training and personal development. Service providers are focused on developing and deploying AI-based hiring solutions to help enterprises improve the hiring process. They have deployed best-in-class security monitoring technology and fraud detection practices in compliance with global regulations and data privacy policies; this includes workstation and network security, which includes

fully encrypted voice over Internet Protocol (VoIP), virtual desktop security and secure virtual private network (VPN). In certain cases, they have deployed bring your own device (BYOD) software to ensure that an agent's device is meeting the security and technical requirements of an enterprise.

IT and technology leaders should read this report to understand how contact center service providers are integrating multiple technologies into their offerings to enable a virtual workforce, and how the technical capabilities of a provider can be compared with that of its competitors in the market.

Digital transformation professionals should read this report to understand how providers of contact center services are enhancing their digital transformation initiatives for an agile, scalable and secure work from home environment and how they can be compared with one another.

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 a service provider's expertise, technology and innovation-led solutions. It also differentiates providers based on the way they modernize their offerings for improved customer satisfaction and loyalty, increased process efficiency and rapid response to changing market dynamics.

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WORK-FROM-HOME CX SERVICES

Definition

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 the 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, which are highly critical to enabling successful work-from-home models.

Contact Center - Customer Experience Services
Work From Home Services

2021
Global
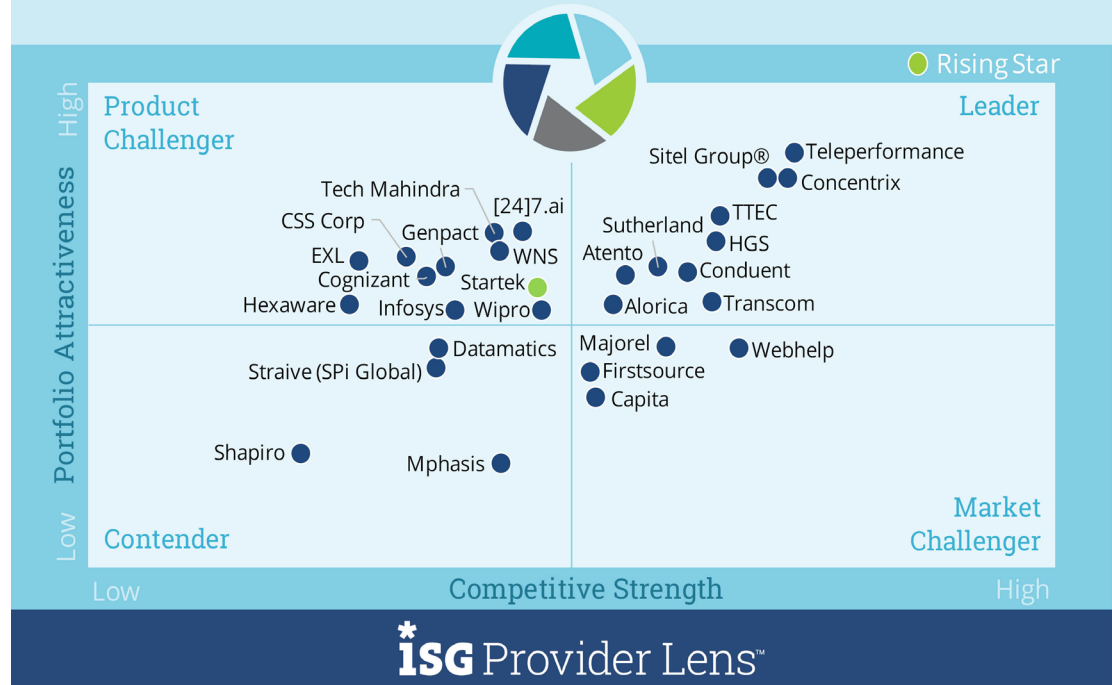
Source: ISG Research 2021

WORK-FROM-HOME CX SERVICES

Definition (Cont.)

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
- Enhanced cybersecurity measures
- Collaboration tools
- Scale of implementations
- Ability to offer technological solutions such as homegrown platforms/partnership platforms
- Innovation
- Burstable capacity

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WORK-FROM-HOME CX SERVICES

Observations

- **Teleperformance** achieves the leadership position for its holistic work-from-home solutions that include Cloud Campus plus its vision, security, people programs and technology.

- **Concentrix** is named a Leader for its highly developed work-from-home solutions. The company leveraged its existing work-from-home program to further enhance it to meet the new standards of work-from-home.

- **Sitel Group®** is a clear leader in this space with its recently launched MAXhubs, beefed up security and other programs.

- **TTEC and Conduent** have always had robust work-from-home solutions that include training, cloud platforms and security. With the onset of COVID, these companies have further invested to enhance their work-from-home portfolios and have made it into the Leader's quadrant.

- **HGS** launched its Engagement Hubs to embrace the hybrid working model alongside stringent security measures. The company's

investment to build an infrastructure that accommodates a new working model has led to its leadership position in this quadrant.

- **Sutherland** leverages its AI and automation capabilities for hiring talent and recently launched a robust security solution to empower businesses with a secure solution. Sutherland is named a Leader in this quadrant.

- **Alorica and Atento** are also named Leaders for their established work-from-home solutions. These companies leveraged their preexisting work-from-home models and know-how to ramp up the hybrid working model.

- **TTEC** has a scalable cloud-based platform, offers gainsharing pricing models and has a program to enable rapid to work-from-home transformation.

- **Startek** is introduced as a Rising Star in this quadrant because the company is looking to significantly expand and strengthen its work-from-home portfolio while they launch their cloud campus.

ENTERPRISE CONTEXT

Social Media CX Services

This report is relevant to global enterprises across industries for evaluating the social media CX services of contact center providers. In this quadrant report, ISG highlights the current market positioning of global providers of contact center social media CX, delivering exceptional customer experiences and how they address key enterprise challenges.

ISG notes that enterprises are looking at strategic methods to respond to customer queries and concerns, not only through social media channels such as Twitter, Facebook and Instagram, but also through other digital channels such as messaging apps, online reviews and chat. These channels offer a combination of customer service and public relations. They also enable personalization and mass communication, are context-sensitive and encompasses both local and corporate points of view. Enterprises are focused on mitigating any negative sentiment and creating a positive brand image for their products/services. They are looking to utilize social analytics to garner deep insights about the market and strengthen their market position.

ISG has observed that service providers are offering tailored social media intelligence solutions, based on real-time monitoring of digital content through social media listening, enabled by the deployment of dedicated hubs. In these hubs, providers are using social analytics on quantitative and qualitative data integrated from internal and external sources to deliver critical business insights for enterprise clients. In addition, they are leveraging partnerships with third-party platforms, particularly for providing social media analytics solutions. The "as-a-Service" model is gaining traction in this space.

IT and technology leaders should read this report to better understand the strength of the providers and the areas of that need improvement regarding their social media CX offerings. The report also helps enterprises analyze multiple offerings of the providers and select the solutions that align with their business needs.

Digital transformation professionals should read this report to understand the broad range of social media CX solutions offered by providers and how they are implementing these solutions, at scale, to realize the desired outcomes.

Vertical leaders should read this report to understand the industry-specific solutions, backed by social media technologies and partners, offered by these providers.
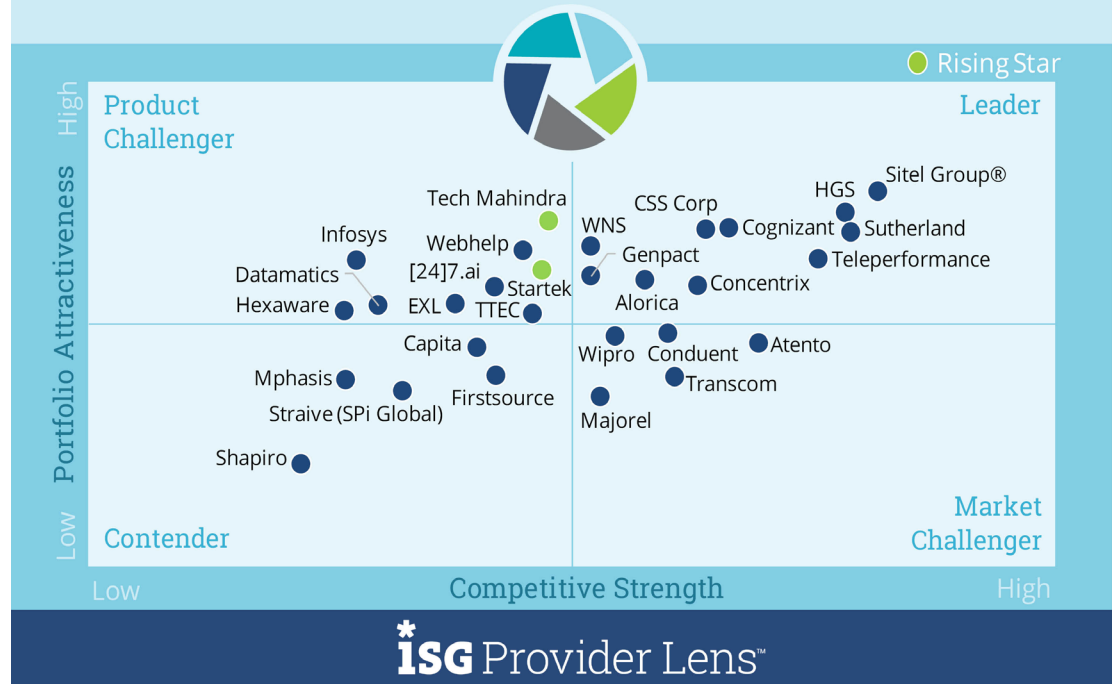
SOCIAL MEDIA CX SERVICES

Definition

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 such channels as Facebook and Twitter, social media is gaining traction. Resolving issues through social media channels is faster than with other methods, 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 such analytics as sentiment analysis. These platforms have also helped enterprises garner immediate feedback from customers, thereby enabling the enterprises to quickly take appropriate measures and improve customer service. With the adoption of AI, these platforms can significantly help enterprises with their marketing and sales processes. Service providers are ramping up social media services and adopting the necessary technologies to rapidly tap into this market.

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

Contact Center - Customer Experience Services
Social Media CX Services

2021
Global

Source: ISG Research 2021

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SOCIAL MEDIA CX SERVICES

Eligibility Criteria

- Ability to provide social media services

- Content management

- FTEs that are trained in social media

- Digital technologies to manage content locally, and on the internet

- Applying sentiment analysis, VOC and other analytics

- 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

Observations

- **Sitel Group®** has established social media offerings that are infused with technology and real-time monitoring to help brands with their social media strategy. With successful implementations, Sitel Group® is a chosen Leader in this quadrant.

- **HGS** entered the market with social media offerings early in the game. HGS's social media team is growing consistently and, with its social media center of excellence, skilled talent and a proprietary social media solution, HGS is named a Leader.

- **Sutherland's** end-to-end portfolio of social media services, mature AI, analytics solutions and award-winning social media case studies led to its leadership position in the Social Media CX quadrant.

- **Cognizant's** wide partnership ecosystem, established AI driven solutions that cater to social media services, a strong team of social media experts and commitment to protect and help brands, are several reasons that have contributed to Cognizant's leadership position.

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SOCIAL MEDIA CX SERVICES

Observations (cont.)

- **Genpact** has highly differentiated end-to-end social media services that span sales, marketing, lead generation, community management and customer care.

- **Teleperformance** is a Leader in this space because the company has a strong social media consulting portfolio, coupled with an established social media team and delivery centers for real-time social media monitoring that ensures brand protection and growth.

- **Alorica** has established social media services and, particularly, content moderation services that blend both humans and technology to deliver desired results for enterprises. Its strong capability in this space has influenced its positioning as a Leader in this quadrant.

- **Conduent** is named a Leader in this quadrant for its established, high technology driven, social media offerings.

- **Concentrix** launched its social media offering more than a decade ago and its offerings and solutions have significantly evolved over time to help brands effectively manage their social media.

- **CSS Corp's** leadership position in this quadrant is highly influenced by its analytics-led social media offering. Across channels and using various tools, the company has an established social media practice.

- **WNS** marked its entry into the Leader's quadrant for its significant investments in broadening its social media capability and implementations

- **Startek and Tech Mahindra (TechM)** are named Rising Stars for offering social media services and managing brands using their proprietary, highly automation led solutions.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 Contact Center - Customer Experience Services, Global" analyzes 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 2021 Contact Center - Customer Experience Services, Global market

2. Use of questionnaire-based surveys of service providers/vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & 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

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ISG Provider Lens™ | Quadrant Report
September 2021

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