ISG Provider Lens™

Customer Experience Services

Digital Operations

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Infosys® BPM

QUADRANT REPORT | SEPTEMBER 2023 | GLOBAL

Table of Contents

Report Author: Namratha Dharshan

Despite economic headwinds, Customer Experience continues to be a key priority for organizations that ties closely with their organization's strategic goals.

State of the industry

The growth of CX services has been phenomenal in the last couple of years, which reflects its growing importance among enterprises and their drive to ensure the best and most seamless experience for customers, with the intent of winning and retaining them. Enterprises are leaning on managed services partners to help them drive and transform their CX functions.

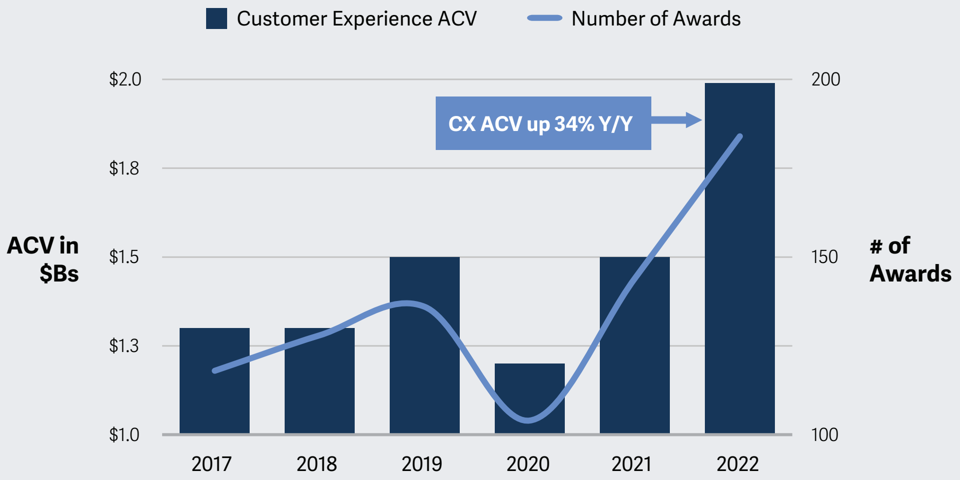
Contact Center CX Managed Services Growth

The contact center market generated over $2 billion in annual contract value (ACV) in 2022, an increase of 34 percent YoY. The number of contracts awarded in 2022 was high by around 30 percent over the previous year.

ISG has noted that a majority of executives worldwide consider CX as a top strategic priority that is off limits to cost optimization efforts. The global ISG Buyer Behavior Study, which included a survey involving more than 250 senior executives, found that 48 percent of respondents consider CX of prime importance in their organization's strategic direction, and 53 percent expressed an intent to completely protect CX from the cost optimization programs adopted. Despite the economic headwinds, CX continues to be a top priority that must align with an organization's broader strategic goals.

However, in our latest buyer behavior research, we see enterprises in customer-centric industries such as retail, banking and healthcare showing a significant gap between CX performance and business performance — reflecting that a top corporate strategic priority is falling short of internal expectations. Part of the gap exists because of the changing landscape of the global CCCX market, where traditional approaches to contact centers is seeing a disruption.

Enterprises Are Addressing the CX Gap with Managed Services



Source: ISG, 2023; CX managed services awards with > $5M Annual Contract Value (ACV)

Providing the best CX requires a fine balance between people and technology, and if organizations do not realize the importance of doing so, they will continue to fall short of achieving a successful CX strategy. Under these circumstances, enterprises will continue to invest in CX and be rigorous in choosing providers that can address this gap.

Complexity of the CX environment driving growth in consulting engagements

The complexity of designing a customer-centric approach has increased manifold, which is driving the need to take a consultative approach to designing an enterprise's CX strategy, involving people, processes, data and technologies. Enterprises are leaning on CX service providers to have a holistic understanding of changing customer expectations, conduct an in-depth assessment of an enterprise's digital maturity, bring in the best practices and even understand the industry nuances to deliver tailored solutions that enable a quick go-to-market strategy.

Pricing evolution

In today's market conditions and uncertainties, enterprises face the challenge of finding a balance between investing in CX and optimizing costs. They depend on their partners to bring in innovative pricing compositions that include outcome-based pricing and commercial structures such as the gain-share model to drive business values and outcomes.

The need for right shoring

Businesses have been through a rude shock, facing disruption due to the pandemic and the war in Europe. This also led to the increased prevalence of work-from-home or hybrid working models. Enterprises are facing challenges on several fronts, where balancing business continuity and cost optimization and managing and retaining talent have become a priority. In this environment, right shoring has been increasingly gaining traction, where companies want a fine balance between onshore, nearshore and offshore centers.

48 percent of respondents cite CX as extremely important to their **organization's strategic direction.**

Under the ISG Provider Lens™ Customer Experience Services study, we observed that apart from cities in India, such as Coimbatore, Indore and Jaipur, Bulgaria, Poland, Egypt, South Africa and Mexico are some of the other prominent locations that are emerging as delivery centers in the CX space.

Increased investments in industry-specific solutions

During Q1 23, industry-specific BPO services surpassed $1 billion in ACV for the second time in history. This reflects CX providers increasingly recognizing the need to invest in developing solutions that go a level deeper and address industry-specific requirements, which is a key enabler in providing highly contextual and personalized services.

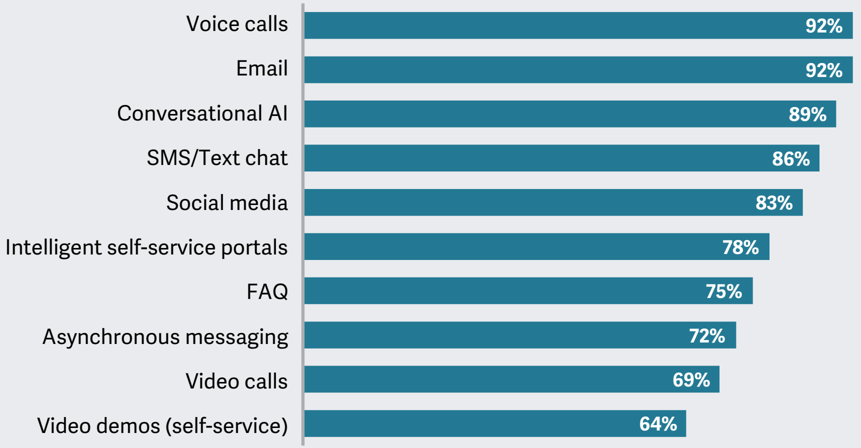
The rise of digital channels

Voice calls continue to reign the customer service industry. Despite the growth in AI adoption and with generative AI taking technology to the next level, voice calls will continue to hold a position as one of the preferred channels for complex tasks and, most importantly, play a crucial role as a key CX differentiator for enterprises. There is a significant rise in the adoption of conversational AI, where around 90 percent of service providers have begun using it as a key option for their customers. Social media has become another key channel; more than 80 percent of service providers are harnessing this channel to reach their clients. As the number of channels increases, providing a seamless experience across channels and taking an omnichannel approach will take center stage.

The growing importance of AI and analytics, especially in boosting agent experience (AX)

AI is here to stay and has already made significant inroads, especially in the customer service industry. With the advent of generative AI, the technology is scaling to new heights. These technologies are important and being leveraged not only in the area of CX, but also being recognized as equally important to improve AX through the use of AI-based tools. Enough has been spoken about leveraging AI to enhance CX, but the direct correlation between enhancing AX and improved CX can no longer

Channel Adoption Patterns



Source: N=36, ISG Provider Lens Customer Experience Services Research be overlooked. While organizations are focused on building a highly customer-centric business, the foundation lies in having a good agent experience, which explains this area gaining a huge focus. While enterprises are leveraging technologies such as conversational AI and intelligent IVR as customer-facing tools, both enterprises and CX providers realize the need to boost AX. To this end, adoption and innovation in this space are changing dramatically.

While many enterprises have large volumes of data, many are still grappling with the twin challenges of structuring and monetizing data. Investments in data analytics are growing as the importance, use cases, and benefits are taking shape. Data analytics is becoming table stakes as opposed to being a value addition in any deal structure. It acts as a differentiator for enterprises in their engagements with their service partners; enterprises can effectively measure the ROI with the use of data analytics and, most importantly, empower agents with insightful data.

In addition, the use of data analytics is also enabling data monetization and the establishment of data ecosystems that improve data sharing and foster new revenue streams.

The hype around generative AI

It is the most talked about technology today. But what does it mean to the CX industry? Generative AI — even though it is in its nascent stages — has a huge potential to disrupt CX. It can have positive implications for this industry, as evinced from the number of use cases already identified and the number of POCs in place. Some of the use cases include call summary and smart agent assist, further empowering FAQ/self-service, live translation, conversational AI and content moderation/ management. However, since the concept is relatively new, many aspects related to security need to be ironed out, with guardrails defined, for its effective and safe use.

Top 3 Agent Experience AI Technologies

More than 70 percent of the service providers see their clients actively leveraging AI-based knowledge management.

More than 60 percent of the service providers are deploying intent recognition for their clients.

Nearly 60 percent of the service providers see the use of smart agent assist among their clients.

Top 4 Analytics applications

79 percent of service providers are actively deploying sentiment analytics for clients.

72 percent of service providers are actively deploying speech analytics for clients.

Over 65 percent of service providers are actively deploying text analytics for clients.

Over 60 percent of service providers are implementing predictive analytics for clients.

n=29 Source: ISG Provider Lens Contact Center Research

These are exciting times for the CX industry. While it is a known fact that customer expectations are dramatically changing, the advent of advanced technologies can play a crucial role in enabling organizations to meet the exponential demands of customers.

> With changing and growing customer expectations, the market faces the significant challenge of continuously innovating and redefining CX for newer heights.

Provider Positioning

Page 1 of 3

	Digital Operations	Hybrid Working Solutions	Intelligent CX (AI & Analytics)	Social Media CX Services
[24]7.ai	Product Challenger	Product Challenger	Product Challenger	Contender
Alorica	Leader	Leader	Market Challenger	Product Challenger
Atento	Leader	Leader	Leader	Product Challenger
Cognizant	Product Challenger	Product Challenger	Product Challenger	Leader
Concentrix	Leader	Leader	Leader	Market Challenger
Conduent	Leader	Leader	Leader	Product Challenger
Datamatics	Product Challenger	Contender	Product Challenger	Product Challenger
EXL	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Firstsource	Market Challenger	Contender	Product Challenger	Contender
Foundever™	Leader	Leader	Leader	Leader
Genpact	Product Challenger	Leader	Leader	Leader

Provider Positioning

	Digital Operations	Hybrid Working Solutions	Intelligent CX (AI & Analytics)	Social Media CX Services
HCLTech	Market Challenger	Market Challenger	Not In	Market Challenger
Hexaware	Product Challenger	Product Challenger	Rising Star ★	Rising Star ★
HGS	Product Challenger	Leader	Leader	Leader
Infosys	Rising Star ★	Product Challenger	Product Challenger	Product Challenger
Movate	Product Challenger	Rising Star ★	Leader	Leader
Mphasis	Contender	Contender	Contender	Contender
Shapiro	Not In	Contender	Not In	Not In
Startek®	Market Challenger	Product Challenger	Product Challenger	Leader
Straive	Contender	Contender	Product Challenger	Contender
Sutherland	Leader	Leader	Leader	Leader
TaskUs	Market Challenger	Not In	Not In	Contender

Provider Positioning

Page 3 of 3

	Digital Operations	Hybrid Working Solutions	Intelligent CX (AI & Analytics)	Social Media CX Services
TCS	Market Challenger	Contender	Product Challenger	Product Challenger
Tech Mahindra	Leader	Product Challenger	Product Challenger	Leader
Teleperformance	Leader	Leader	Leader	Leader
Transcom	Leader	Leader	Market Challenger	Product Challenger
TTEC	Leader	Leader	Product Challenger	Market Challenger
Webhelp	Leader	Market Challenger	Contender	Market Challenger
Wipro	Market Challenger	Product Challenger	Market Challenger	Market Challenger
WNS	Leader	Leader	Leader	Leader
Xceedance	Contender	Not In	Not In	Not In
yoummday	Not In	Product Challenger	Not In	Not In

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

- **Digital Operations**
- **Hybrid Working Solutions**
- **Intelligent CX (AI & Analytics)**
- **Social Media CX Services**

Simplified Illustration Source: ISG 2023

Definition

In 2022, BPO had a record year, with notable growth in ER&D, industry-specific BPO and contact centers. The contact center/digital CX industry grew more than 44 percent. While this industry is clocking remarkable growth, certain trends have redefined the industry.

With evolving enterprise requirements and KPIs and changing agent roles, the contact center industry is transforming into a holistic solution provider, ensuring a seamless and best-in-class customer experience. The industry has witnessed a seismic shift in how it works. For example, how the workforce operates today differs significantly from what it used to be. With the adoption of hybrid work culture now a norm, the workforce today is distributed. The contact center industry is undergoing technological maturity and increased adoption growth. For instance, AI is revolutionizing the industry by bringing in more mature and seamless experiences.

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

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

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following four quadrants for services/ solutions: Digital Operations, Hybrid Working Solutions, Intelligent CX (AI & Analytics) and Social Media CX Services.

This ISG Provider Lens™ study offers IT decision makers the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the Global market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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. 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).

Provider Classifications: Quadrant Key

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.

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.

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 a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

★ **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 means 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.

Digital Operations

Who Should Read This Section

This report is relevant to global enterprises across industries for evaluating providers of digital operations services for contact centers.

In this quadrant report, ISG highlights the current market positioning of global providers of contact center digital operations services that help deliver exceptional CX and how they address key enterprise challenges.

This report is essential reading for the various stakeholders of the CX industry. It provides valuable insights into the ongoing transformations of the digital age, customer demands and industry dynamics. The report emphasizes the rising importance of the CX function and highlights the increasing relevance of digital competency, omnichannel strategy and the use of AI to enhance CX.

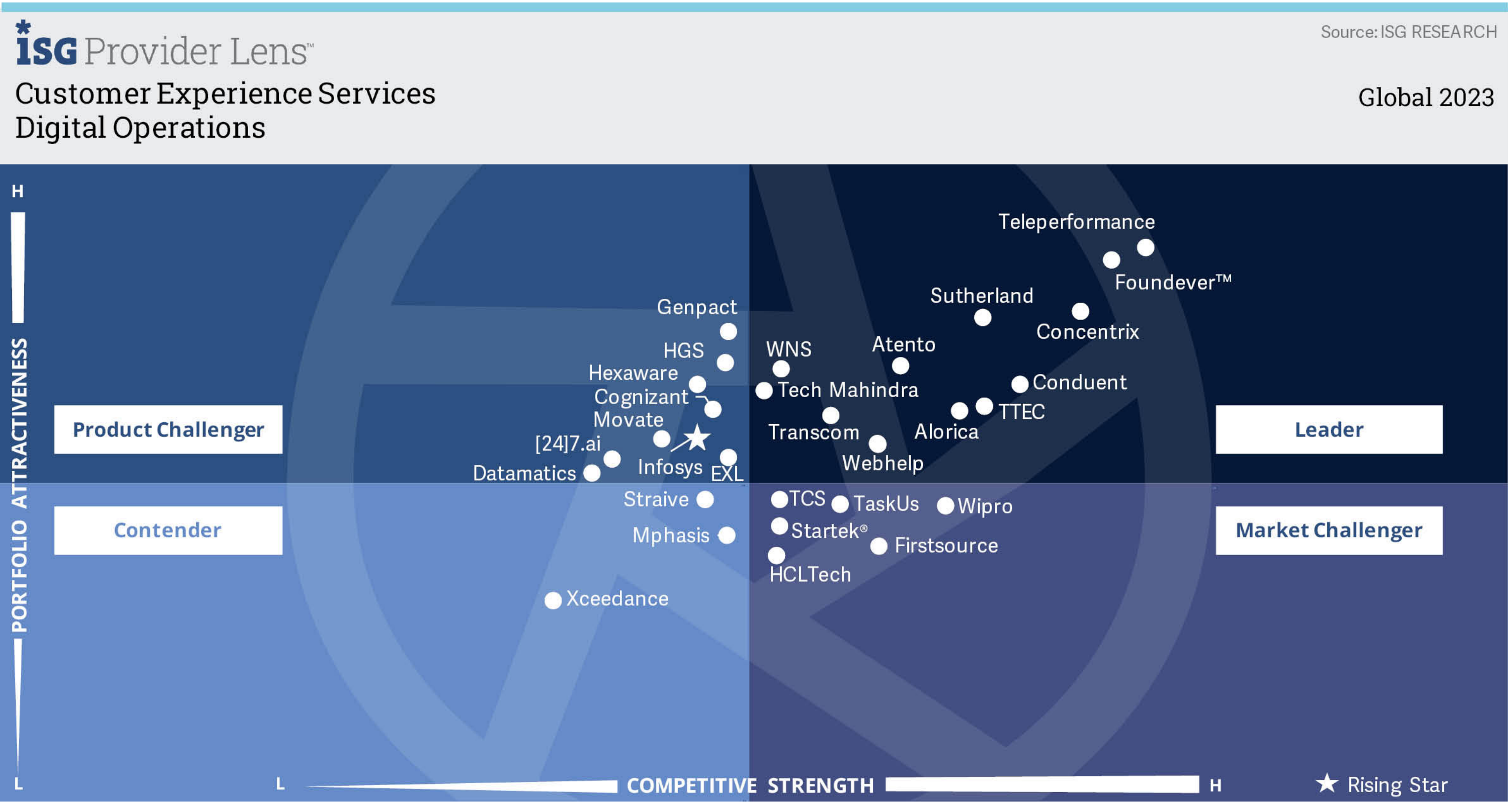
The report also stresses the importance of data-driven insights, organizational change management capabilities and the ability to partner with enterprises to help them achieve ESG goals such as reducing carbon footprint and promoting diversity. It provides the latest insights on the evolving role of the CX function and the integration of digital technologies. Technology Consultants can leverage this information to provide better guidance to their clients and help them navigate their transformation journey successfully.

Strategy professionals should read this report to understand global providers' capabilities and solutions, including their modernization efforts for improved CSAT scores and loyalty.

Digital professionals should read this report to understand and compare the providers of contact center services enhancing digital operations to improve CX.

Technology professionals should read this report to gain insights on contact center service providers leveraging multiple technologies and also compare their technical capabilities.

Contact center professionals should read this report to enhance their understanding of contact center operations, leading to improved service delivery, enhanced workplace and improved industry standards.



The Digital Operations quadrant covers end-to-end contact center CX outsourcing services, assessing providers that **offer CX-related services, including digital technologies,** consultation, implementation, managed services and many operating models.

Namratha Dharshan

Definition

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

They are becoming more holistic because enterprises are keen to develop strategic relationships with providers that are better growth enablers. To cater to the growing needs, providers in this space are evolving to become solution providers having a nuanced understanding of changing end-user expectations. They will also be expected to deeply understand the industry vertical, craft industry-specific solutions and enable faster go-to-market.

This quadrant will assess service providers on other critical parameters such as right shoring, global delivery capability and technological solutions – IP and partnerships, industry-specific CX solutions, consulting services, transition services such as OCM, talent management and training capabilities.

Eligibility Criteria

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

Observations

With the ongoing transformations of this digital age, customer demands and industry dynamics are reshaping the way CX services are being delivered, leading to a new stature of the CX function across businesses. Providers supporting enterprises requiring CX services need to consider multiple facets of service delivery. Since digital transformation is not a destination but a journey, providers are expected to have a strong consulting portfolio and help clients envision their transformation journey. This quadrant also assesses service providers on their digital competency, omnichannel strategy and ability to leverage AI to augment CX.

The concept of CX has evolved, and data has become central to its transformation. The ability to leverage data to derive valuable insights that can enhance CX and AX and finally fuel business growth has become an important measure of a successful transformation. Enabling these changes is not the end of the journey, but helping enterprises undergo the journey as they wade through related changes is important; providers, therefore, must have organizational change management capabilities. Furthermore, as ESG takes center stage, providers are partnering with enterprises to help them achieve their ESG goals, for instance, reduced carbon footprint and conformity with the diversity quotient.

Thus, providers are investing substantially in enhancing their offerings and capabilities. In 2023, the digital operations market is experiencing unprecedented growth, and the competition for a Leader position in this space has become intense.

From the 56 companies assessed for this study, 30 have qualified for this quadrant, with 12 being Leaders and one a Rising Star.

Alorica

Alorica consistently leads the industry with its automation methodologies and investments in next-gen offerings such as Alorica IQ, a digital foundry. Its commitment to automation and advanced solutions has been building its position as an industry leader year after year.

Atento

Atento utilizes innovation in CX to enable personalization, self-service and excellence in customer care. It leverages intelligence and automation to deliver integrated solutions across customer touchpoints, covering front-office and back-office processes.

CONCENTRIX

Concentrix offers the broad Concentrix Experience Platform (XP), integrating various tools to optimize customer interactions, track data and provide efficient support. The merger with Webhelp has enhanced Concentrix's global presence and expanded its CX services.

Conduent

Conduent is expanding its client base and delivery reach through diversification efforts. It serves both government and commercial clients, offering transaction processing, automation, and analytics.

foundever

Foundever™ has a strong global footprint, spanning over 45 countries. It continues to be a Leader owing to continued investments in virtual delivery platforms, including the EverConnect global communication and engagement platform.

SUTHERLAND

Sutherland takes an innovative approach to client engagement by combining human insight, process engineering and applied AI. Its Digital and Human CXM operations reflect its longstanding conviction that CX encompasses every touchpoint.

Tech Mahindra

Tech Mahindra enables innovative and customer-centric digital experiences (DX), fostering equality, future readiness and value creation. With the NXT.NOW™ framework, it enhances human-centric experiences, along with a strong portfolio of companies.

Teleperformance

Teleperformance is an established Leader in the Digital Operations quadrant. It leverages CRM platforms, knowledge management systems, automation tools, AI and chatbots to enhance its digital customer service capabilities.

Transcom

Transcom uses its Digital CX Advisory offering to maximize the benefits for its clients with digital solutions. It is focused on both innovations and on expanding business in new geographies.

TTEC

TTEC is named a Leader in this quadrant for its scale of operations and its highly diverse, platform-driven digital portfolio. Its offerings include cloud-based technology and automation solutions that enable seamless CX and enhance EX.

Webhelp

Webhelp combines advanced technology, data-driven insights and skilled professionals to optimize customer digital journey. Its digital operations encompass a wide range of services, including customer support, technical assistance, social media management and digital sales support.

WNS

WNS provides WNS TRAC, a consolidated suite of comprehensive, next-gen technology solutions for managing complex business processes for its clients across industries.

Infosys

Infosys (Rising Star) powers businesses with its DX service, delivering integrated and personalized CX journeys. It develops human-centric digital platforms for enhancing CX.

Infosys

Rising Star

"Infosys is named a rising star for its ability to bring years of domain expertise and translating these into superior CX through well-architected digital solutions."

Namratha Dharshan

Overview

Infosys is headquartered in Bengaluru, India and operates in 54 countries. It has more than 343,200 employees across 247 global offices. In FY23 the company generated $18.2 billion in revenue, with Financial Services as its largest segment. Infosys designs holistic solutions that can evolve to respond to emerging allied and adjacent problems — whether it is a partnership to design a new UX or modernize the core or prototype a new digital offering, it takes a holistic view of clients' transformation journey, find the allied problems that need solving and help them navigate their transformation more purposefully from that point onward.

Strengths

Infosys Equinox Studio: Infosys Equinox Studio, part of the Equinox suite, empowers businesses to effortlessly manage advanced e-commerce experiences, achieving up to 90% reduction in time-to-market via a cloud-native platform with minimal coding for highly personalized customer interactions.

Infosys' innovations and strategic delivery: Infosys' Cortex remains a versatile full stack, customizable contact center solution. The cloud-based Infosys Digital Operations Management (IDOM) system enhances end-to-end operations. Strategically located delivery centers enable efficient right shoring of operations for language-specific client needs and cost-effectiveness.

Enhanced telecom experiences: Infosys and ServiceNow have launched the Live Operations Platform to boost CX for telecom providers. This platform integrates with both legacy and digital environments. In addition, Infosys Cobalt helps to reduce time-to-market and operational costs while improving service quality.

Transforming enterprises with AI and automation: Infosys and IBM unveil the Centre of AI and Automation, offering cost-effective solutions for boosting productivity. It leverages Infosys Topaz, Infosys' generative AI platform, with over 12,000 use cases and more than 150 pre-trained models to streamline operations, design AI apps and elevate CX.

Caution

Infosys' digital CX offerings include proprietary platform-led solutions. While the solutions demonstrate and address key tenets of CX, the ability to leverage its partner ecosystem is critical for Infosys to offer a holistic solution to its clients.

Appendix

The ISG Provider Lens 2023 – Customer Experience Services research study 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.

Lead Author:
Namratha Darshan

Editor:
Ipshita Sengupta, Dona George

Research Analyst:
Sandya Kattimani

Data Analyst:
Sibasis Panigrahy

Consultant Advisors:
Dee Anthony, Gautam Saha

Project Manager:
Abhilash M V

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 August 2023, 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 study was divided into the following steps:

1. Definition of 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 & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Author

Namratha Dharshan
Director of Research and Principal Analyst

Namratha Dharshan brings nearly 18 years of extensive research experience to lead the ISG Provider Lens™ BPO and Industry vertical program that includes more than 15 different reports and is designed to deliver research on service provider intelligence. As part of her role, she heads a team of analysts and is responsible for delivery of research reports for the Provider Lens™ program. Namratha is also a principal analyst and is responsible for authoring thought leadership papers and service provider intelligence reports in the areas of BPO, focused on customer experience and contact center services.

She has also authored other horizontal service line reports like finance and accounting and vertical-focused reports for insurance. Her research focuses specifically on the customer experience as it relates to digital transformation, omnichannel, analytics, AI and automation.

Research Analyst

Sandya Kattimani
Senior Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation.

She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other Ad hoc business research assignments.

IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

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 partner 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™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

SEPTEMBER, 2023

REPORT: CUSTOMER EXPERIENCE SERVICES