

Contact Center— Customer Experience Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

Transcom



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Executive Summary

Report Author: Namratha Dharshan

Technology helps address talent challenges by enhancing customer experience.

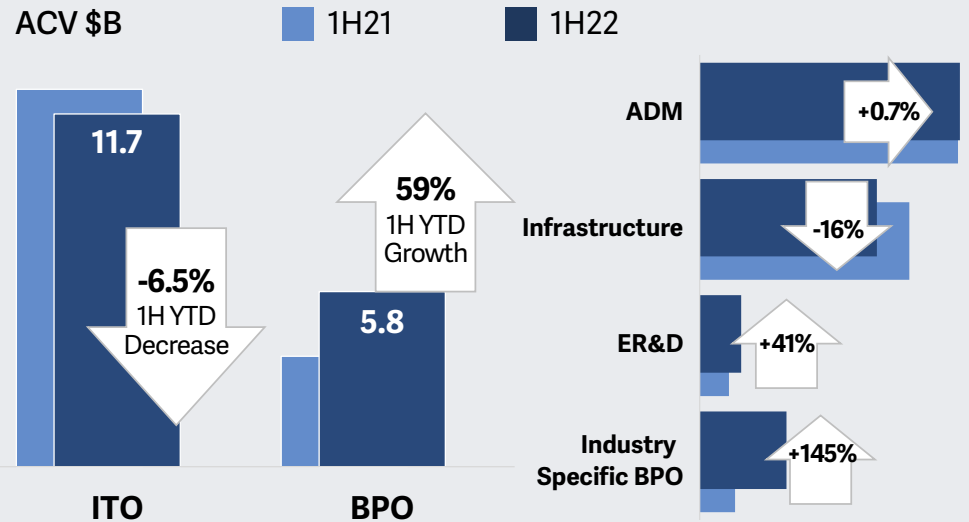
There is a strong and growing market for managed services BPO. The industry achieved one of the best first half-year levels ever, with nearly \$6 billion in annual contract value (ACV). This represents a nearly 59 percent increase year-on-year (please refer to Figure 1). The lion's share of this growth was driven by the Americas and Europe, the Middle East and Africa. In addition, industry-specific BPO saw huge market traction and doubled its ACV year-on-year. Engineering research and development (ER&D) also contributed heavily to the growth of BPO managed services in the first half of 2022.

The contact center also contributed to the significant growth of managed services BPO. Post pandemic, the need for digital customer experience (CX) rose and led to a surge in activity in this space. CX is an essential focus area for all enterprises, and the growing importance is creating a stronger-than-ever market demand. Enterprises of all types are also transitioning captive operations to external services providers for transformation.

CX trends

There are several trends that are shaping the contact center industry. However, we have identified the top three trends that are impacting and redefining the industry and changing the way companies are operating.

Figure 1: Global Managed Services Trends



ACV – Annual Contract Value



CX is a **strategic priority** for all enterprises

Seismic shift in the delivery model

The contact center industry has always witnessed a high churn. However, in the past eight to 12 months, the industry has experienced unprecedented attrition challenges.

According to the ISG Index, the worst is behind us, as attrition rates peaked in 2021. However, attrition still remains one of the top challenges for the industry.

Attracting and retaining talent has become more difficult now, and lack of skill sets is further accentuating this challenge. Also, the skill set requirement has dramatically changed over the years, and agents are now required to have new skill sets, with the advent of technologies. For instance, if background knowledge about the tools and their usage was a requirement few years ago, now the requirement has shifted to effective usage of these tools to drive decision-making.

Flexible working conditions is a key driver for attracting and retaining talent. The contact center industry is innovating in this space. Providers that have introduced flexible working conditions are experiencing reduced attrition numbers, increased productivity rates and high employee satisfaction.

Service providers are taking multiple measures to enable remote or hybrid working, which are as follows:

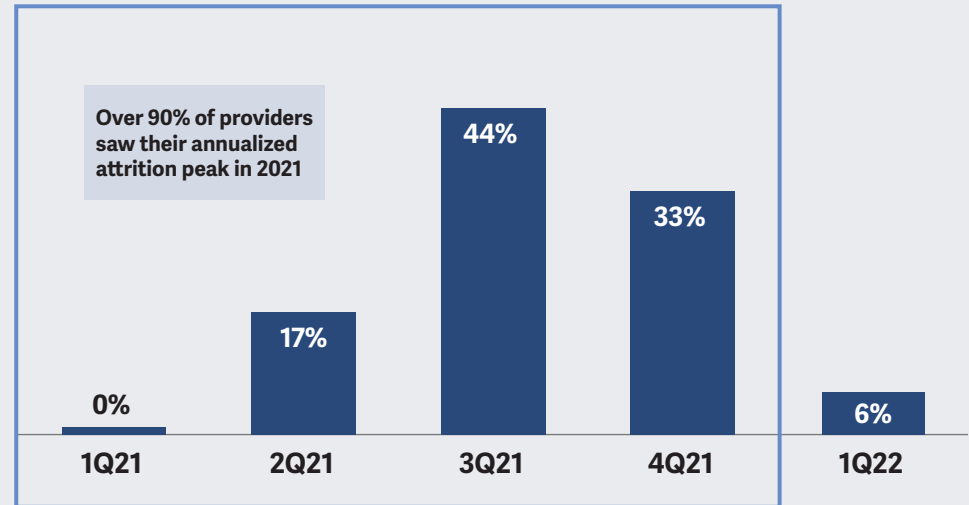
- Providers are introducing small satellite offices called “hubs,” across multiple locations. They typically have state-of-the-art infrastructure that can be leveraged by agents who live closer to these hubs. Not only are these offices enabling collaboration and engagement, but they can also be leveraged by agents if their work-from-home infrastructure is unable to support contingencies such as internet downtime.



Executive Summary

- Currently, providers are also actively leveraging technologies such as AI and cloud platforms to drive hiring and training. Companies have introduced extensive learning platforms that are either developed in-house or in partnerships with universities to enable training, reskilling and upskilling.
- In some cases, providers are leveraging AI to drive sentiment analysis so they can check the employee pulse and tackle attrition proactively.
- Companies are also investing significantly in employee engagement platforms that can enable remote engagements. An example is gamification, which has proven to be highly successful in keeping employees engaged.
- Many providers are making significant investments in introducing tools and platforms to help employees engage virtually. Some companies are actively exploring the metaverse to create a collaborative environment.
- With remote working, boundaries are now expanded, and companies are focusing on attracting skilled talent. Several companies that we spoke to in our research have adopted a GigCX employment model. This has not only helped companies tap into talent but also enables 24-hour support and effectively address seasonal demands.
- To service clients, many companies are also investing in setting up nearshore centers in locations such as Jamaica, Peru, Honduras, South Africa and Malaysia.

Figure 2: In What Quarter Did Providers Hit Their Attrition Peak?



Source: ISG, 2022; Annualized analysis based on normalization of publicly reported data for a group of ITO providers



Executive Summary

The future state of delivery is still uncertain in scenarios where significant investments are being made to find alternate delivery models. There is no single solution that can address all the challenges. Working from the physical office has its own benefits and drawbacks. However, working virtually has its own set of challenges. ISG believes that the industry is increasingly likely to adopt hybrid working conditions as it brings together the best of both worlds.

Technological advancements that are redefining the industry

Technology has played a crucial role in shaping the CX industry in the past couple of years. For a long time, most enterprises were heavily investing in robotic process automation (RPA). However, post pandemic, digital transformation accelerated.

Advancements in technology and adoption have grown rapidly and exponentially.

- AI has made significant inroads into the contact center industry. Whether leveraging a bot to serve a customer or improve agent experience, AI will soon become a minimum requirement in this industry.
- Enterprises are seeking and adopting a cloud-first approach. The pandemic removed all doubt that the cloud is essential to enable hybrid working. Enterprises are now aware that it is the best contingency plan in terms of business continuity.
- As remote working takes center stage, security has become a necessity. Security protocols, policies and procedures, training, effective implementation, monitoring and analyzing have become crucial. Voice biometrics, facial recognition, auto desktop lock, video proctoring and VPN are some of the technologies that help secure work-from-home environments.
- Companies have begun to identify use cases for the metaverse. We believe that with the advent of this technology, the CX industry will experience a seismic shift in engagement – whether client engagement or employee engagement.
- Analytics is essential to redefine processes. Without analytics, CX will be limited to customer service and engagement as opposed to creating a more holistic experience. Predictive analytics, sentiment analytics, speech analytics, speed to text, text analytics, intent analytics and skill routing are some of the popular techniques that help companies empower agents and enable contextual conversations.

- Another key offering that has gained significant traction in the industry is social media services. Several industry verticals are adopting social media as a channel of communication. Customer support and engagement services are being delivered effectively through social channels. Most companies are also leveraging content moderation services to protect client information. They are using AI and analytics to predict customer sentiments, moderate content and manage their product portfolio order to build their brands.

CX is a priority and essential business driver for all enterprises.





Provider Positioning

Page 1 of 3

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





Provider Positioning

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	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Genpact	Rising Star ★	Leader	Rising Star ★	Leader
Hexaware	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
HGS	Leader	Leader	Leader	Leader
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Majorel	Market Challenger	Market Challenger	Market Challenger	Contender
Movate	Product Challenger	Leader	Product Challenger	Leader
Mphasis	Contender	Contender	Contender	Contender
Shapiro	Contender	Not In	Contender	Not In
Sitel Group®	Leader	Leader	Leader	Leader
Startek®	Product Challenger	Product Challenger	Leader	Leader



Provider Positioning

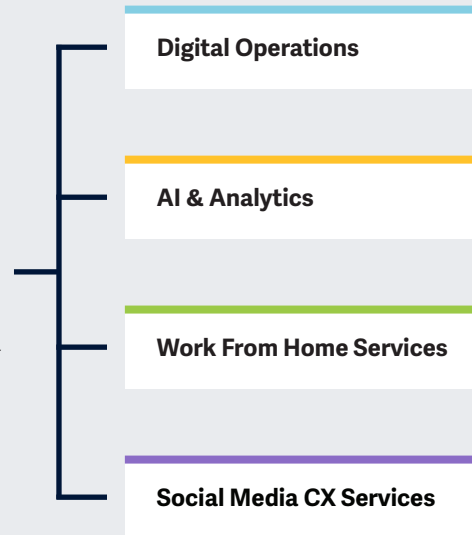
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	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Straive (SPi Global)	Contender	Product Challenger	Contender	Contender
Sutherland	Leader	Leader	Product Challenger	Leader
TCS	Product Challenger	Product Challenger	Market Challenger	Product Challenger
Tech Mahindra	Leader	Rising Star ★	Product Challenger	Leader
Teleperformance	Leader	Leader	Leader	Leader
Transcom	Leader	Market Challenger	Leader	Product Challenger
TTEC	Leader	Leader	Leader	Market Challenger
Webhelp	Leader	Market Challenger	Market Challenger	Product Challenger
Wipro	Market Challenger	Product Challenger	Product Challenger	Market Challenger
WNS	Product Challenger	Leader	Product Challenger	Leader



This study focuses on the areas ISG perceives as **most critical** in 2022 for Contact Center – Customer Experience Services.

Simplified Illustration Source: ISG 2022



Definition

The ISG Provider Lens™ quadrant report on Contact Center – Customer Experience Services focuses on contact center outsourcing services and the associated aspects of enhancing customer experience (CX). Because enterprise needs have significantly changed in the last couple of years, we assess providers based on their service offerings, global and regional footprint, delivery centers and models, language capabilities, FTEs, people management and development programs, work-from-home capabilities and digital transformation elements such as consulting, AI, cloud contact center and analytics capabilities. Contact center service providers use a range of technologies and practices, such as design thinking, omnichannel support, cloud offerings, analytics and automation, to offer end-to-end, seamless CX.

Over the last couple of years, enterprises and their demands have changed considerably. Enterprises are seeking newer technologies as CX is gaining more importance. While the demands on the buyer side are increasing, the supply side is posed with newer challenges, such as staffing and retention. Furthermore, as employees are getting back to offices after the pandemic peak, there are many employees seeking flexible working conditions. Thus, providers are looking to find a balance with new hybrid working models. On the other hand, with uncertainty looming in the industry, whether it is due to the pandemic, geopolitical situations or talent shortages, innovation at every stage has become highly essential to address the current requirements. This study will focus on evaluating the new requirements of organizations, the and associated industry challenges and the measures that they are taking, both on the demand and supply sides.



This study on Contact Center – Customer Experience Services aims at understanding enterprises' requirements and providers' capabilities to meet those requirements.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following four quadrants: Digital Operations, AI and Analytics, Work From Home Services and Social Media CX Services. This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant contact center – customer experience services providers
- A differentiated positioning of providers by segments
- Focus on regional 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 contact center customer experience services 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 more than 5,000 employees or revenue above US\$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 Challenger, Market Challenger and Contender), and the providers

are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believes have 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.

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.

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.

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

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 (CX) and how they address key enterprise challenges.

In 2022 and beyond, contact center automation will accelerate. Hence, it is essential for companies to implement best practices or risk falling behind the competition. Technological advances in robotic process automation (RPA), AI and machine learning (ML) are changing the way customer service is delivered. The complexity of engagements is changing due to high expectations from end users and evolving user behavior.

As a result, the contact center of the future is not a siloed, multichannel call center but an omnichannel contact center that provides a 360-degree view of the entire customer journey.

Investing in automation to drive a customer-centric contact center journey creates a perfect balance between bot work and humans, allowing agents to handle more complex queries. As part of the digital transformation process, it is important to integrate new channels with other enterprise systems to deliver great digital experiences.



Digital transformation professionals should read this report to understand how providers of contact center services are enhancing their digital operations to improve CX and how they compare to each other.



Business strategy and industry leaders should read this report to understand the global delivery and vertical capabilities of providers in this market. The report gives insights into the expertise, technology, and innovation-led solutions of providers. Their differentiation is based on how they modernize their offerings for improved CSAT and loyalty.

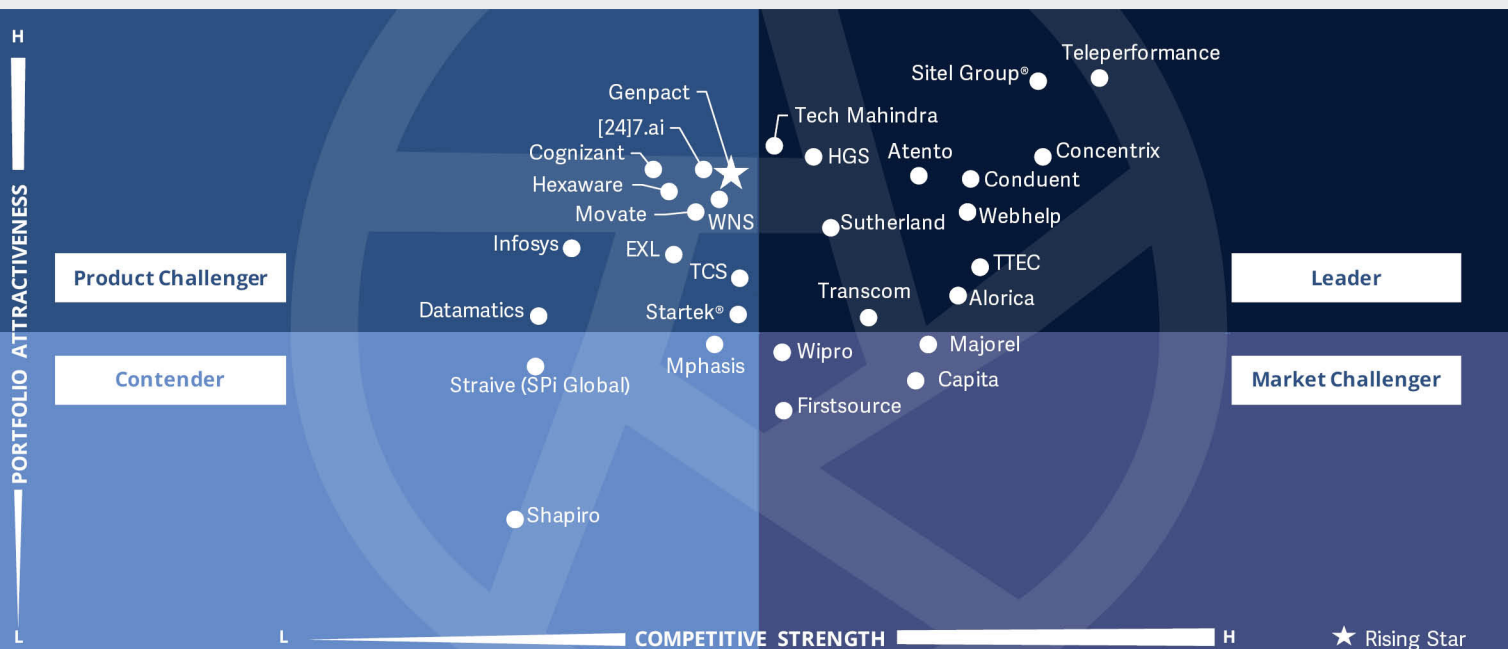


IT and technology leaders should read this report to understand how contact center service providers are integrating multiple technologies into their offerings and how the technical capabilities of a provider can be compared with those offered by its competitors.



Contact center professionals should read this report to strengthen their knowledge regarding contact center operations that will help them improve the service delivery, enhance the workplace quality of life and strengthen the standards of the contact center industry.





The Digital Operations quadrant encompasses contact center CX outsourcing services focused on **end-to-end engagement and managed services**.

This quadrant assesses providers' capabilities to offer end-to-end services, including **technologies, consulting, implementation, managed services and shoring models**.

Namratha Dharshan



Definition

Contact center CX services include outsourcing services that are directed toward enhancing the end-user experience. With an increased focus on enhancing CX and evolving requirements, enterprises are juggling between finding the right partner and the right digital solutions. As the complexity of engagements is changing due to higher expectations from end users and evolving user behavior, contact center service providers are heavily investing in consulting to help enterprises with their transformation roadmap.

Providers in this space have in-depth experience and conduct extensive research to understand the industry and changing customer behavior. 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 regional culture. In addition to this, they offer digital advisory services to help clients embrace new technologies.

Eligibility Criteria

1. Offer a **range of contact center services**
2. Ability to serve clients across **different channels**
3. Ability to bring in digital capabilities such as **automation, AI, cloud solutions and omnichannel support**
4. In-depth **expertise in this domain**
5. Ability to demonstrate domain and vertical expertise with **industry-specific solutions**
6. Ability to offer **nearshore, onshore and/or offshore services** (delivery centers)
7. Must provide technology advisory services, with a **focus on CX consulting and benchmarking**
8. Ability to exhibit **design thinking and customer journey mapping** capabilities
9. Must provide **frameworks to define the transformation** roadmap
10. Ability to **offer change management** services
11. Ability to demonstrate **referenceable case studies**
12. **Talent management** (staffing, attrition, retention and training)



Observations

By 2022, most enterprises have begun and are in various stages of digital transformation and have already reaped the benefits, including increased customer satisfaction, an enhanced user experience, a more collaborative work environment and a more efficient operation. The pandemic has created more demanding customers, and businesses are more focused on CX than ever. To achieve their most pressing CX objectives, enterprises are looking to transform their digital operations and are turning to providers that can bring a combination of expert advisory and consulting services, deep domain experience and strong vertical knowledge, in addition to a reliable shoring strategy that can ensure successful service delivery. Global providers of CX services are stepping up with targeted digital operations offerings.

They are making significant investments to improve offerings, and many are acquiring companies with complementary capabilities to enhance their own. This year, the digital operations space is gaining more traction than ever, and the competition for Leadership positions in this quadrant has become intense.

Of the 79 companies assessed for this study, 30 qualified for this quadrant. Twelve are Leaders and one is a Rising Star.

Alorica

Alorica has earned a leadership position in the digital operations quadrant for its strategic investments and partnerships. It is evolving its leadership team to meet future challenges and develop thoughtful new solutions.

Atento

Atento is once again a Leader in the digital operations quadrant. The company's innovation hub, internal solutions and digital offerings are its major differentiators in the digital operations space.

Concentrix

Once again garnering a Leader position in the digital operations quadrant, **Concentrix** is making thoughtful acquisitions and investments into developing, growing and strengthening its already robust capabilities.

Conduent

An aggressive growth strategy marked by robust expansion plans, enhanced partnerships and deepened relationships with clients helps establish **Conduent** as a Leader in the digital operations area.



HGS continued innovation backed by strong technology, people and domain expertise help the company stand out in this space and earn it a Leader badge in this quadrant.

Sitel Group®

Sitel Group® demonstrates clear leadership qualities in the digital operations category, with offerings geared to customer demands and investments in growth-enhancing activities. The company has emerged as a Leader in this quadrant.



With its strong consulting practice and robust digital capabilities, **Sutherland** has earned a leadership position in this year's digital operations quadrant for another consecutive year.



Digital Operations

Tech Mahindra

With an extensive array of resources and capabilities to service digitally savvy clients, **Tech Mahindra** has emerged as a Leader in this year's digital operations quadrant.

Teleperformance

Teleperformance is an established Leader in the digital operations quadrant. With its vertical approach, it exhibits impressive capabilities and strong financial growth.

Transcom

Advanced digital capabilities and an aggressive strategy to grow its geographic footprint, with the addition of 25 new delivery locations, help establish **Transcom** as a Leader in the digital operations quadrant.

TTEC

TTEC's wide array of CX service offerings and focus on innovation make it a Leader in the digital operations space. The firm offers a strong CXaaS platform and a differentiated approach.



Webhelp's recent acquisitions to expand its operations and enhance its capabilities, its robust consulting practice and variety of digital solutions make the company a Leader in this quadrant.



Genpact's value-delivering co-innovation partnerships with clients, investments and its Cora platform make it a Rising Star in this year's digital operations quadrant.





"Undeterred by competition, Transcom is making steady investments and progress in this space."

Namratha Dharshan

Transcom

Overview

Transcom is headquartered in Stockholm, Sweden, and operates in 26 countries. The firm has more than 31,500 CX specialists in 76 global sites to support customers. The company generated revenues of \$735 million in 2021 and has more than 300 clients globally. It has been active in this industry for 25 years.

Strengths

Steady growth in digital deployments:

Transcom is on a promising digital growth path. It offers T:Universe, a full suite of proprietary and third-party solutions as well as T:Labs, its hub for rapid digital innovation and experimentation with its clients. The firm has more than 3,000 digital deployments globally, with eight to 15 digital solutions deployed per client and three to five digital innovation solutions deployed per client, on average, to enhance customer, agent and client experience.

Advanced digital capabilities:

Transcom has made significant progress in bringing its broad capabilities together to enhance its digital portfolio, especially on the advisory front. The CX Digital Advisory supports clients' digital transformations.

Geographic strategy: Transcom added 25 new delivery locations in 2021 and early 2022 to support growth. The company continues to maintain its nearshore delivery and is significantly expanding in Europe and the Americas. Transcom's recent acquisition of City Connect allows it to grow within the German market, which is a strategic priority for the company.

Caution

Most industry providers have significant offshore capabilities with centers in Philippines and India. Transcom is largely nearshore-focused, but growing centers in these geographies might be an added advantage for Transcom for a right-shoring approach.





AI & Analytics

Who Should Read This

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 CX and how they address key enterprise challenges globally.

With digital innovation, whether or not driven by the pandemic, AI has become an important aspect in many business operations. AI and analytics are boosting productivity, delivering new products and services, accentuating corporate values, addressing supply chain issues and fueling new start-ups.

Through RPA, speech analytics, and other AI-enabled technologies, many traditional contact center solutions are evolving at an unprecedented pace.

Natural language processing (NLP), an AI tool that transcribes and assesses customer conversations to draw contextual meaning, has improved the agent screen notification. However, as speech analytics evolves, many other use cases will emerge. Automating quality monitoring scorecards, giving agents real-time coaching, and predicting customer behavior are excellent examples that can rapidly enhance CX further.



IT and technology leaders should read this report to better understand the strengths of providers in the AI and analytics space and the areas that need improvement. The report also helps them 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 the providers.



Business strategy and industry leaders should read this report to understand the global delivery and vertical capabilities of 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 scores and loyalty.



***ISG Provider Lens™**
Contact Center - Customer Experience Services
AI & Analytics

Source: ISG RESEARCH

Global 2022



This quadrant assesses providers with AI and analytics capabilities in terms of their **solution offerings, partnerships, implementations, innovations delivered and business outcomes.**

Namratha Dharshan



Definition

As transformation needs increase, more enterprises are turning toward advanced technologies to create an impact and deliver seamless CX services. AI and analytics play an integral role in digital transformation. The advancements in AI and analytics implementation, use cases and adoption are proving beneficial for both customers and agents. Agent experience is equally important as CX, and the implementation of AI and analytics in this space will help companies drive meaningful and empathetic conversations with end users and have a significant impact on business outcomes.

Eligibility Criteria

1. Ability to maintain **AI and analytics advisory** teams
2. **Technical expertise** (certified professionals)
3. Ability to **provide AI bots**, including conversational AI and digital assistants
4. **Analytics services** such as speech analytics, text analytics, customer behavior prediction, predictive analytics and sentiment analysis
5. **Scale** of implementations
6. **Ability to help customers achieve business outcomes** such as customer satisfaction score (CSAT), net promoter score (NPS), cost savings and revenue generation
7. **Partner** ecosystem or **proprietary solutions**
8. Ability to demonstrate **referenceable case studies**



Observations

AI and analytics have become essential tools that enable optimal CX. They can give companies the ability to identify and subsequently divide customers into segments based on their behaviors, enable a more in-depth understanding of motivations and needs, and deliver actionable insights to inform decisions that affect customer service delivery, productivity, employee satisfaction and more. AI and analytics can help organizations create and deliver targeted, personalized and remarkable experiences to their customers and reduce costs. These technologies can support agents in their daily interactions, as well as help with retention and training, elevating the overall agent experience. The leading global providers in this space bring a combination of AI bots, strong AI and analytics advisory teams and consultancies, a robust partner ecosystem

paired with in-house solutions, and a proven ability to help enterprises reach their business objectives. Providers that have achieved Leader status in this quadrant come to market with outstanding solutions, demonstrated successes and a strong understanding of the current and future outlook for these technologies.

Of the 79 companies assessed for this study, 29 qualified for this quadrant. Eleven providers are Leaders and one is a Rising Star.

[24]7.ai

AI is a core strength for [24]7.ai, which has once again garnered a leadership position in the CX services study. [24]7.ai offers sophisticated conversational AI solutions, a differentiator for the company.



With its large team of data, analytics and AI consultants, as well as its noteworthy Cognizant Neuro™ solution, **Cognizant** has earned a leadership position in the AI and analytics quadrant.

Conduent

Meeting client demands for analytics services, offering innovative solutions and focusing on expanding existing partnerships helped **Conduent** gain a leadership position in this year's AI and analytics quadrant.



Genpact brings to market extensive analytics expertise and capabilities, its excellent Genpact Cora platform and performs experience-led transformations, along with augmented intelligence. These combine to make the company a Leader in this quadrant.



HGS is a Leader in this quadrant, offering an array of differentiated analytics services including the introduction of HGS PULSE, a contact center analytics platform, and continued focus on innovating in the space of AI by enhancing the agent and customer experiences.





Movate has emerged as a Leader for the third year in a row, with well-developed AI-powered offerings and analytics designed to help its customers glean real value from their data.

Sitel Group®

Sitel Group® has emerged as a top Leader in this quadrant for another consecutive year. The company offers extensive, sophisticated analytics and AI to clients and demonstrates customer successes through case studies.



With consistent focus on developing and enhancing its AI and analytics capabilities, **Sutherland** is ranked as a Leader for this quadrant. Sutherland also focuses on strategic co-development partnerships to expand capabilities.

Teleperformance

A mature and prolific player in the CX arena, **Teleperformance** brings to market a wide variety of innovative and forward-thinking offerings. This strengthens the company's leadership position in this quadrant.

TTEC

With its comprehensive range of analytics solutions, sophisticated Humanify® Insights platform and a strong partner ecosystem, **TTEC** once again is a Leader in the AI and analytics quadrant.

WNS

With its robust CX practice, extensive array of partnerships in this space and newly launched data, analytics and AI practice, **WNS** has secured a leadership position in this year's AI and analytics quadrant.



A Rising Star in the 2022 AI and analytics quadrant, **Tech Mahindra** has grown its CX practice substantially over the past two years and continues to make investments to boost its AI-based offerings.





Work From Home Services

Work From Home Services

Who Should Read This

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-home services, and how they address key enterprise challenges.

With a hybrid work environment, contact center agents can continue to work remotely, or they can return to the office, whichever suits them the best. It creates the perfect balance between in-office and remote work. As contact centers try to decide the best way to return to the office, and even in the times that follow, the demand for hybrid contact center solutions is expected to increase.

With constantly improving unified communications, remote workers have become a permanent part of the contact center environment. Using collaboration tools, contact center agents can be mobile and have access to real-time analytics and customer context.

As companies embrace the hybrid model, they invest in technologies to simplify their business model and build employee trust. They use cloud-based modern technologies and talent management tools to ensure seamless client and employee experiences. Remote and hybrid working environments increase the importance of cybersecurity for ensuring the security aspect of work.



Digital 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 to each other.



Business strategy and industry leaders should read this report to understand the global delivery and vertical capabilities of providers in this market. The report gives insights into the expertise, technology, and innovation-led solutions of providers. Their differentiation is based on how they modernize their offerings for improved CSAT and loyalty.



Technology professionals should read this report to understand how contact center service providers are integrating multiple technologies into their offerings to enable a virtual/hybrid workforce, and how the technical capabilities of a provider can be compared with those of its competitors.



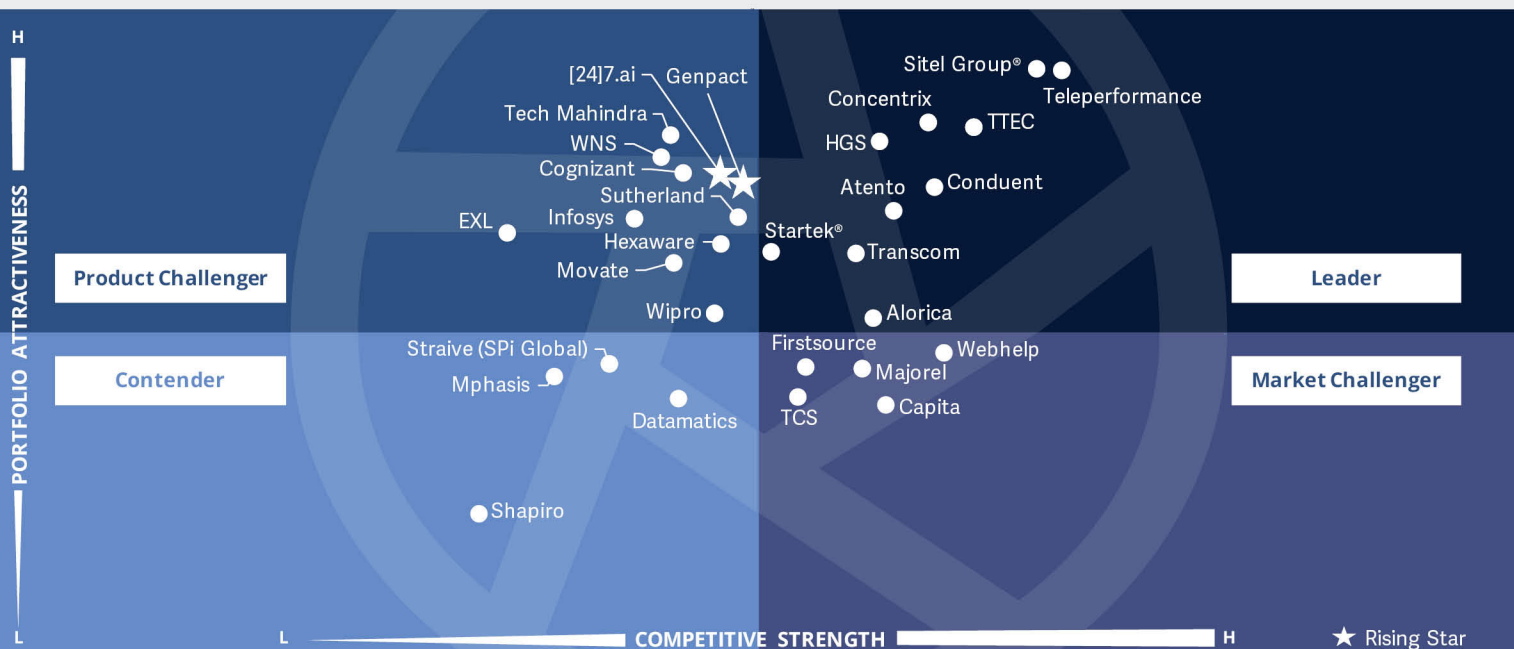
Contact center professionals should read this report to strengthen their knowledge regarding contact center operation that will help them improve the service delivery, enhance the workplace quality of life and strengthen the standards of the contact center industry.



***ISG Provider Lens™**
Contact Center - Customer Experience Services
Work From Home Services

Source: ISG RESEARCH

Global 2022



This quadrant assesses a provider's capability to offer work-from-home services, along with **infrastructure, technologies and reliable cybersecurity measures.**

Namratha Dharshan



Work From Home Services

Definition

Work from home has become an inherent delivery model even for the most highly regulated industries. Hybrid working models and flexible working options were being explored a couple of years ago, but in the current scenario, the work-from-home model is an essential factor for talent acquisition and retention, by introducing new delivery models and productivity improvement. With all the uncertainties that this industry has faced, work from home has proven to be the most feasible solution for business continuity.

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 and training employees to technological implementations and service delivery, everything has been

virtualized in the past year. To enable a work-from-home model for a large workforce, companies adopted modern technologies and talent management tools and programs. With changing work environments, cybersecurity requirements are becoming a high priority. The new hybrid working approach drives adoption of the latest and updated security measures, as they are critical to enable a successful work-from-home model.

Eligibility Criteria

1. Ability to **enable work-from-home** infrastructure
2. Ability to offer **remote workforce management** facilities
3. **Technological implementations** (cloud contact center, omnichannel platforms, automation, agent experience and CX enablement)
4. **Talent management** solutions (ability to offer virtual onboarding, including interviews and training facilities)
5. Improved **cybersecurity measures** (facial recognition and other biometrics)
6. Ability to offer effective **collaboration tools**
7. **Workforce management** (monitoring, training, and gamification)
8. **Scale** of implementations
9. Ability to offer technological solutions such as **homegrown platforms/partnership platforms**
10. **Innovation**
11. **Burstable capacity**



Work From Home Services

Observations

The COVID-19 pandemic disrupted the work environment globally, as organizations worldwide were mandated shift employees to a remote work model, with only essential workers allowed to perform work functions from an outside office. This disruption prompted permanent changes in how organizations expect their employees to work. Some variations of a hybrid model that enables employees to work onsite part time and in a physical office when necessary, or completely remote model, will persist. During the pandemic, many employees enjoyed the benefits of working from home and now are demanding more flexible options, or they may seek employment opportunities elsewhere with organizations that will offer remote working conditions.

Enterprises of all types were forced to change their policies, procedures and philosophies to enable a hybrid or remote work model. They have had to revamp and change a myriad of human resources functions, including onboarding and hiring, training and professional development, and monitoring. These businesses continue to turn to external providers with technological capabilities to support both HR and employees, secure sensitive data and employee information, facilitate collaboration, and maintain a positive employee and agent experience while assuring productivity at the same time.

The Leaders in the Work From Home Services quadrant offer innovative products and solutions with superior capabilities, infrastructure and technologies to help organizations achieve strategic goals.

Leaders in this quadrant demonstrate proven successes with meeting current and future work-from-home objectives.

Of the 79 companies assessed for this study, 30 qualified for this quadrant. There are 10 Leaders and two Rising Stars.

Alorica

Alorica uses a combination of people, process and technology for its Alorica Anywhere solution and is a Leader in this quadrant. The firm focuses on agent empowerment and includes ample security provisions.

Atento

With its established and newly redesigned Atento@Home solution, **Atento** has gained a leadership position in this year's Work From Home services quadrant. The company's Virtual Hub model enables centralized management of remote resources.

Concentrix

Providing ample security assurance to clients via its SecureCX™ platform along with its innovative talent crowdsourcing Solv gig platform has helped **Concentrix** earn a leadership position in this year's quadrant.

Conduent

Optimizing delivery and strengthening its talent acquisition organization have helped **Conduent** earn a Leadership position in the Work From Home quadrant for this year's study for another year.



HGS has made strategic investments to bolster its work-from-home solutions. Its two innovative offerings, HGS Work Cloud™ and HGS Work@ Home, have earned the firm a leadership position in this year's quadrant.



Work From Home Services

Sitel Group®

With a firm foothold in the Leader's quadrant, **Sitel Group®** consistently develops, enhances and delivers stellar offerings to customers in the work-from-home realm. The company also offers a talent management system enabled by proprietary solutions and partnerships.



A Rising Star in the previous year's study, **StarTek®** continues to build out its well-thought-out work-from-home offerings and invest in talent management, moving this company into a Leader position in this year's quadrant.

Teleperformance

Grabbing a top leadership spot in this year's Work From Home quadrant for the third year in a row, **Teleperformance** has a strong CX practice, robust offerings and efficient security solutions for work-from-home environments.

Transcom

Transcom is a Leader in this year's Work From Home quadrant, bringing to market a series of excellent proprietary solutions, using a COPC-certified model to monitor and manage agents and opening its first work-from-home hub.

TTEC

TTEC is a mature CX solutions provider that offers an innovative AI-enabled omnichannel approach to talent acquisition and a managed SRW solution, earning the firm a Leader designation in Work From Home Services category.

[24]7.ai

[24]7.ai offers a unique combination of virtual training, assorted security measures and a strong focus on compliance, earning it a Rising Star position in this year's Work From Home Services quadrant.



Genpact is one of the Rising Stars this year in the Work From Home quadrant. The company integrates AI into the hiring process and employee engagement and offers continuous professional development capabilities.





"With its hubs and in-house solutions, Transcom offers an effective infrastructure for remote working."

Namratha Dharshan

Transcom

Overview

Transcom is headquartered in Stockholm, Sweden, and operates in 26 countries. The firm has more than 31,500 CX specialists in 76 global sites to support customers. Transcom delivers CX services to consumer brands across verticals in 33 languages. The company has a global and growing footprint.

Strengths

Proprietary solutions: Transcom has introduced series of solutions, including T:Digital Recruitment, T:Perform, T:Anywhere and others to create a holistic work-from-home platform, covering recruitment, coaching, training, employee engagement and agent well-being.

WAH Hubs: Transcom opened its first work-from-home hub in the Philippines, which will serve as a "drop-in workspace" for employees working from home. The company is gradually building more hubs to enable a hybrid working model.

Performance and quality

management: Transcom uses a COPC-certified model to monitor, manage and incentivize agents. The company has its own platform to support overall program health. T:Perform is a single platform for employee engagement with a 360-degree view of quality, performance, attendance, knowledge, coaching and communication management.

Caution

Transcom has a range of solutions to support remote working. It is unclear on how these solutions come together to address the entire employee management lifecycle.





Social Media CX Services

Who Should Read This

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 and how they address key enterprise challenges.

Customers want their CX to be seamless across multiple channels. The omnichannel approach allows customers to shop on websites, use apps, talk to live chat agents and engage in social media activities all from a single window.

Brands have started to realize the changing perspective of consumers about the use of social media. Social media is now becoming a crucial part of the unified communication system.

Brands are focusing on enhancing responsiveness and expediency of social media service. In particular, two-way social media conversations are gaining traction in the contact center space.

Some companies have progressed further by making two-way conversations public. Thus, potential customers can see how the company solved a problem. As a result, it has been easy to demonstrate brand intelligence and care when it comes to resolving customer issues.



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 those of its competitors.



Business strategy and industry leaders should read this report to understand the global delivery and vertical capabilities of providers in this market. The report gives insights into the expertise, technology, and innovation-led solutions of providers. Their differentiation is based on how they modernize their offerings for improved CSAT and loyalty.

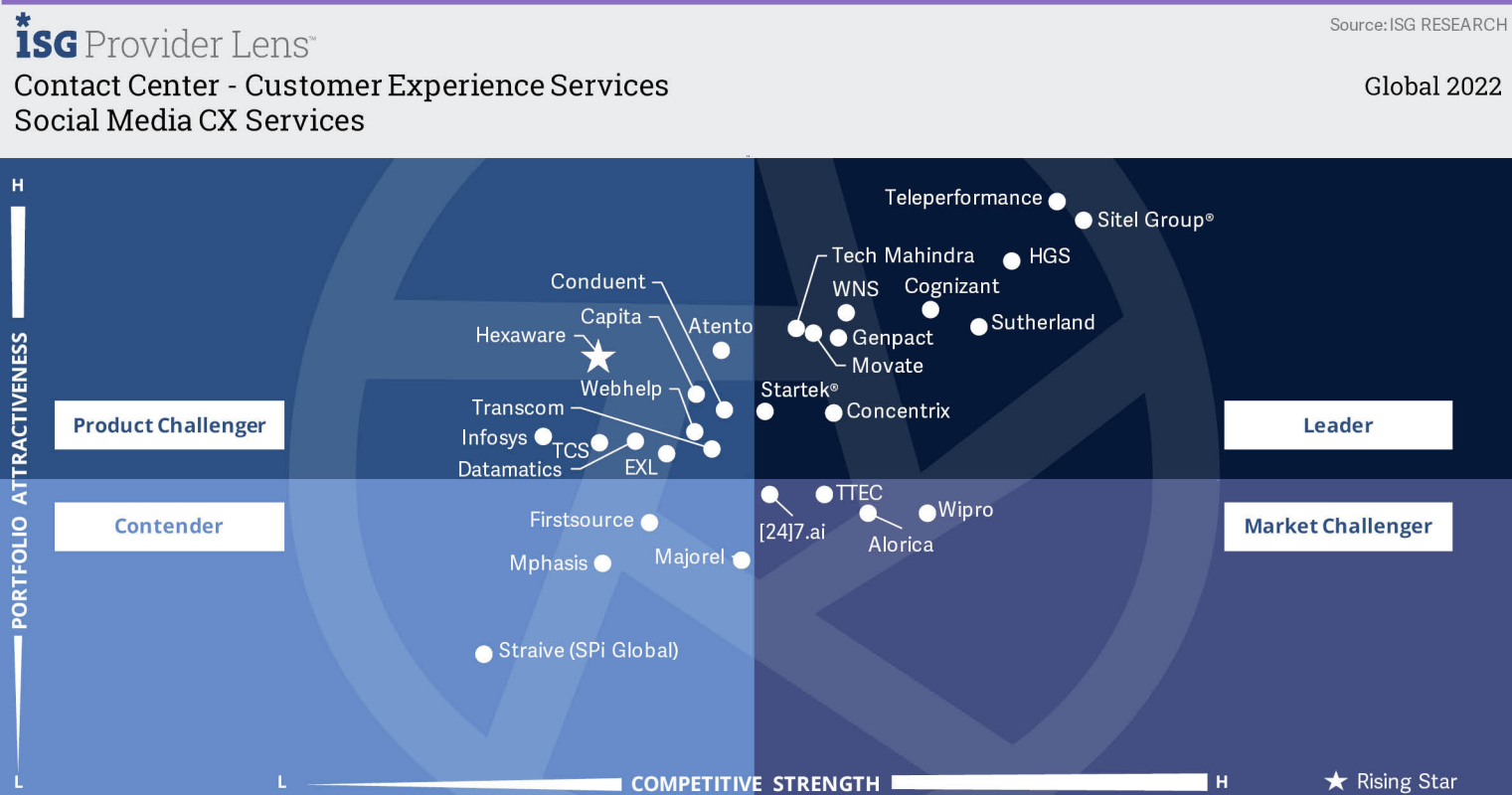


Digital transformation professionals should read this report to understand how providers of contact center services are enhancing their digital operations to improve CX and how they can be compared with each other.



Contact center professionals should read this report to strengthen their knowledge of contact center operations that will help them improve the service delivery, enhance the workplace quality of life and strengthen the standards of the contact center industry.





This quadrant assesses providers offering **social media services** with relevant technologies to provide seamless CX.

Namratha Dharshan



Social Media CX Services

Definition

Over time, social media has become an important communication channel for most enterprises. Many people use social media for activities like ordering food, shopping and online payments, and millennials spend significant time using channels such as Facebook, Instagram, TikTok and Twitter. Furthermore, resolving customer queries and issues is faster through social media channels, with no waiting time. Agents can interact with multiple customers and can be effective in resolving customer issues simultaneously.

Companies are adopting various social media channels to offer customer support services, are embracing technologies such as AI to continuously monitor these channels and are offering personalized services by leveraging analytics solutions such as sentiment analysis.

These channels also help companies garner immediate feedback from customers, which enables them to quickly take appropriate measures and improve their customer service.

With customized advertisements, cross-selling and upselling have become more effective. With the adoption of AI, social media channels can help enterprises with their marketing and sales processes significantly. Service providers are ramping up their social media services and adopting necessary technologies to rapidly tap into the market.

Eligibility Criteria

1. Ability to provide **social media services**
2. **Content management**
3. Trained full-time equivalents (**FTEs**)
4. Implementation of **digital technologies** such as AI to manage content
5. Ability to apply **analytics solutions** such as sentiment analysis and voice of the customer (VoC) analysis
6. Ability to offer **marketing and sales support**
7. **Scale** of implementations
8. Ability to help customers **achieve business outcomes** such as customer satisfaction (CSAT), good net promoter scores (NPS), cost savings and revenue generation
9. **Partnership** ecosystem or **proprietary** solutions
10. Ability to demonstrate **referenceable case studies**



Social Media CX Services

Observations

YouTube, Tik Tok and other social media services have become increasingly popular. Social media has become ubiquitous, used by a majority of adults. It is growing in importance in everyday life as a means of communication and interaction, self-expression, and a source of news and information. Social media content is created and consumed at an impressive rate. Companies of all types and sizes and across all verticals use social media for promotion and marketing. They also leverage social media channels to grow their brands, provide customer support and expand, develop and nurture their relationships with their followers.

Enterprises are well-aware of the power and value of social media and devote considerable resources to developing their social media presence and providing relevant content to showcase their capabilities, advertise their offerings and

engage with customers. Companies are turning to providers to help them gain maximum value from their social media activities with technologies such as AI to give them the ability to monitor their channels, analytics to help them gain actionable insights on customer behavior and sentiment, and provide personalized services.

The companies that emerged as Leaders in this year's social media CX services quadrant have demonstrated success providing social media services to enterprises. They typically offer sophisticated analytics solutions and digital technologies, including AI, and may use a blend of proprietary and partner solutions to help customers achieve objectives.

Of the 79 companies assessed for this study, 29 qualified for this quadrant. There are 11 Leaders and one Rising star.



Cognizant is once again a Leader in the social media CX services quadrant. It has shown steady growth and has an experienced team, extensive capabilities and comprehensive social media offerings.

Concentrix

With its centers of excellence and extensive range of services, **Concentrix** is a Leader in the social media CX services space. The provider also offers an excellent trust and safety services offering.



A Leader in the social media services quadrant, **Genpact** brings to the global market a robust portfolio of social media services, more than 10,000 social media experts, and innovation and incubation centers.



HGS has a well-defined social media services portfolio coupled with technological solutions. The company successfully demonstrates customer success in applying social media analytics techniques, which helps the firm stand out as a Leader in this quadrant.



Using a variety of social media automation techniques that incorporate analytics and AI, and with its strategic investments designed to enhance capabilities, **Movate** has emerged as a Leader in this quadrant.



Social Media CX Services

Sitel Group®

Once again a clear Leader in the social media CX services quadrant, **Sitel Group®** offers end-to-end social media capabilities and an ecosystem to help customers with strategy, tools and expertise.

STARTEK

With its LISA digital cloud-based platform that includes social care listening and triage, content moderation, and more, **Startek®** has emerged as a Leader in the Social Media CX Services quadrant.

SUTHERLAND

Sutherland established its full-service social media practice over a decade ago, and it has grown to encompass a wide array of services. The firm is once again a Leader in this quadrant.

Tech Mahindra

Tech Mahindra was a Rising Star in the 2021 study but has moved into the Leader position this year. The firm offers SOCIO, a real-time AI-enabled CX management social media platform and has made many strategic acquisitions to bolster its capabilities.

Teleperformance

Teleperformance is a strong player in the CX field and a Leader in this quadrant. The firm has grown its social media services revenue and client base substantially year-on-year and is now exploring the use of the metaverse.

WNS

With its comprehensive product suite, analytics-driven social media platform and strong social media practice, **WNS** is a Leader in this quadrant. The firm is making investments in growing its social media analytics.

HEXWARE

Hexaware is this year's Rising Star in the social media CX services space. With its growing solutions and focus on content management, it has the potential to strengthen its position in the coming years.





Appendix

Methodology & Team

The ISG Provider Lens™ 2022 – Contact Center – 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 Dharshan

Editors:

Sajina B, Grant Gross,
Peggy Bresnick Kendler

Research Analyst:

Sandya Kattimani

Data Analyst:

Sibasis Panigrahy

Consultant Advisors:

Scott Furlong, Dee Anthony

Project Manager:

Abhilash M V

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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 September 2022, 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 Contact Center – Customer Experience Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & 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 & Editor Biographies

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, which includes market trends and insights.



Author & Editor Biographies



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.



About Our Company & Research

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.

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.





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