ISG Provider Lens™

2022

Contact Center — Customer Experience Services 2022

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including 75 of the top 100 enterprises in the world, 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; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006 and based in Stamford, Connecticut, ISG employs more than 1,300 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.

Table of Contents

Introduction

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.

The ISG Provider Lens™ study offers the following to IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segments

- A perspective on different markets, including global, U.S., Brazil, Australia, Singapore & Malaysia and Europe & U.K.

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

Quadrant Research

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

Simplified illustration

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

Source: ISG 2022
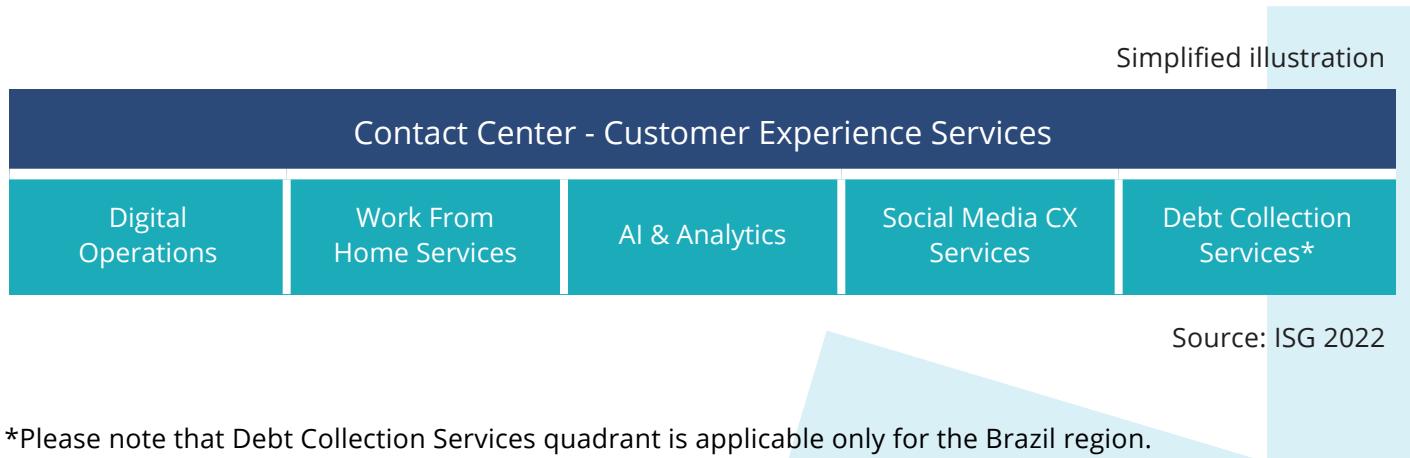
*Please note that Debt Collection Services quadrant is applicable only for the Brazil region.

Digital Operations

Contact center CX services include outsourcing services that are directed toward enhancing the end-user experience. This quadrant covers contact center CX outsourcing services focused on end-to-end engagement and managed services. Furthermore, 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. Service providers leverage their industry experience, research, vertical expertise, and nuances and benchmarks to define a client's transformation roadmap to support technology adoption, enable tangible business outcomes and ensure ROI.

Providers in this space have 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.

This quadrant assesses each provider's capabilities to offer end-to-end services such as technologies, consulting, implementation and managed services along with the proper shoring models, security and business continuity plans.

Eligibility criteria:

- Offer a range of contact center services

- Ability to serve clients across different channels

- Ability to bring in digital capabilities such as automation, AI, cloud solutions and omnichannel support

- In-depth expertise in this domain

- Ability to demonstrate domain and vertical expertise with industry-specific solutions

- Ability to offer nearshore, onshore and/or offshore services (delivery centers)

- Must provide technology advisory services, with a focus on CX consulting and benchmarking

- Ability to exhibit design thinking and customer journey mapping capabilities

- Must provide frameworks to define the transformation roadmap

- Ability to offer change management services

- Ability to demonstrate referenceable case studies

- Talent management (staffing, attrition, retention and training)

Work From Home Services

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, 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.

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

Eligibility criteria:

- Ability to enable work-from-home infrastructure

- Ability to offer remote workforce management facilities

- Technological implementations (cloud contact center, omnichannel platforms, automation, agent experience and CX enablement)

- Talent management solutions (ability to offer virtual onboarding, including interviews and training facilities)

- Improved cybersecurity measures (facial recognition and other biometrics)

- Ability to offer effective collaboration tools

- Workforce management (monitoring, training and gamification)

- Scale of implementations

- Ability to offer technological solutions such as homegrown platforms/partnership platforms

- Innovation

- Burstable capacity

AI & Analytics

As transformation needs are increasing, more enterprises are leaning 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. This quadrant assesses providers with AI and analytics capabilities in terms of their solution offerings, partnerships, implementations, innovations delivered and business outcomes.

Eligibility criteria:

- Ability to maintain AI and analytics advisory teams

- Technical expertise (certified professionals)

- Ability to provide AI bots, including conversational AI and digital assistants

- Analytics services such as speech analytics, text analytics, customer behavior prediction, predictive analytics and sentiment analysis

- Scale of implementations

- Ability to help customers achieve business outcomes such as customer satisfaction score (CSAT), Net Promoter Score (NPS), cost savings and revenue generation

- Partner ecosystem or proprietary solutions

- Ability to demonstrate referenceable case studies

Social Media CX Services

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.

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

Eligibility criteria:

- Ability to provide social media services

- Content management

- Trained full-time equivalents (FTEs)

- Implementation of digital technologies such as AI to manage content

- Ability to apply analytics solutions such as sentiment analysis and voice of the customer (VoC) analysis

- Ability to offer marketing and sales support

- Scale of implementations

- Ability to help customers achieve business outcomes such as customer satisfaction (CSAT), good Net Promoter Scores (NPS), cost savings and revenue generation

- Partnership ecosystem or proprietary solutions

- Ability to demonstrate referenceable case studies

Debt Collection Services

Collection-related services are highly important for Brazilian contact centers. The high volumes, the complex requirements, and the need for the right blend of technological enablers and human skills make collection services one of the most sought-after offerings of contact centers.

Cloud computing, omnichannel support, analytical tools and AI- and machine-learning-powered solutions enable scalability and flexibility, and thus, cost savings. On the other hand, new regulatory demands related to LGPD , requirements for IT security and cybersecurity and the need to deliver high-quality CX through unified processes from the front and back offices force contact center providers to invest in new technologies and innovate to remain competitive in the market.

This quadrant assesses service providers' collection solutions , including their technical landscape, integration tools, accelerators and organizational aspects and constraints.

Eligibility criteria:

- Ability to support collection-related requirements of different sectors, such as financial institutions, automotive, telecom, insurance, retail, education and utility services like energy and water

- Ability to support different stages of the collection cycle, such as early collection, regular collection, late collection, legal formalities, write-off and selling portfolios

- Ability to demonstrate the fitness of the technical landscape, including omnichannel platforms, proprietary or acquired CRM/debt management solutions for collection, and low-code/no-code collection strategy tools, such as risk-scoring platforms and collateral management tools

- Ability to support self-service negotiation portals and intelligent IVR and the use of advanced analytics, AI and machine learning

- Ability to demonstrate integration scenarios with the originators' core banking systems, debt systems and financial systems to guarantee the smooth uploading of portfolios, and the integration with payment providers (such as Pix, Boleto , credit cards and more), skip tracing agencies, credit risk and rating agencies, and lawyers and law firms

- Ability to engage the human workforce intelligently in the collection process, with a focus on humanized negotiations, training, intelligent routing, employee experience management and customer care, mindfulness and rehabilitation scenarios

Quadrants by Region

Quadrants	Global	U.S.	Europe & U.K.	Brazil	Australia	Singapore & Malaysia
Digital Operations	✓	✓	✓	✓	✓	✓
Work From Home Services	✓	✓	✓	✓	✓	✓
AI & Analytics	✓			✓		
Social Media CX Services	✓	✓	✓	✓	✓	✓
Debt Collection Services				✓		

Archetype Report

In this report, we identify and classify the typical buyers of contact center customer experience services. As CX gains prominence, buyer behavior also changes drastically. With changing requirements, the supply-side landscape and offerings are also changing. We have identified four major segments of buyers, which are summarized below.

- **AUTOMATION EMBRACERS:** These clients are still low on the digital maturity curve but are seeking to embark on an automation journey. FTEs will continue to play an important role, and channel adoption has matured to chatbots that go beyond regular voice, email and text options. Buyers in this archetype have made digitalization a priority and are seeking the right shoring mix. Cost savings continue to be a priority, so these enterprises leverage automation to reduce overhead costs.

- **DIGITAL CONNOISSEURS:** These clients are digitally more mature than Automation Embracers, or have made digitalization their top priority. They have explored multiple channels and automation for their operations. Familiar with technologies and related implications, the enterprises in this archetype are planning to scale digital transformation (and automation) to have a larger impact on CX. They have leveraged multiple channels to enable better connectivity and communication.

- **CX EVANGELISTS:** For these clients, customer experience transformation is the highest priority. Driving superior CX by leveraging technology-driven insights is their prime focus. These buyers are seeking to leverage analytics services to bring about improvements at every stage of the customer service lifecycle. Bringing in highly skilled domain experts as agents is critical for these buyers. Their transformation goal is long term and strategic, and they avoid point solutions and quick fixes.

- **WORK-FROM-HOME BUYERS:** Clients in this archetype are looking to adopt the work-from-home model completely or consider the hybrid operating model. In either case, service providers must offer robust work-from-home capabilities. These clients seek training, qualified skill sets and agents and technological capabilities that enable work-from-home infrastructure. Long-term cost savings, business resiliency and tapping into the talent pool are the major objectives of the clients in this archetype.

Schedule

The research phase falls in the period between **April and September 2022**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **September 2022**.

Milestones	Beginning	End
Launch	April 21, 2022	
Survey phase	April 21, 2022	May 31, 2022
Sneak previews	August 2022	
Press release	September 2022	

Please refer to the link to view/download the ISG Provider Lens™ 2022 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer". The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.
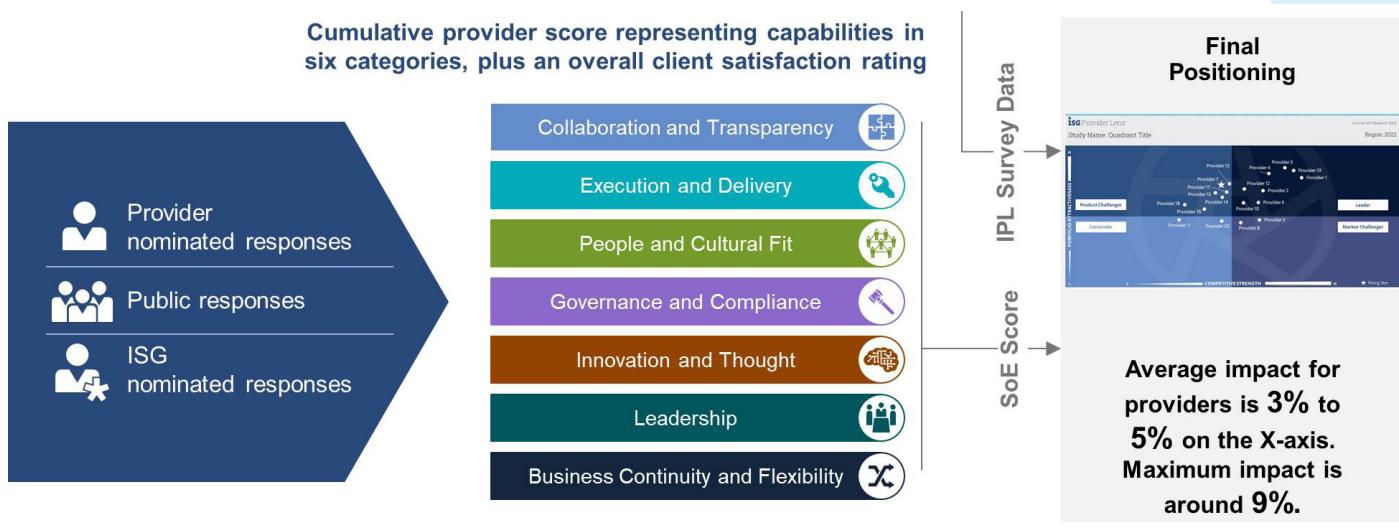
Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: Star@isg-one.com

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

24-7 Intouch	EXL	StarTek
247.AI	FirstSource	Sutherland
Acquire BPO	Genpact	Sykes
Actionline	Grupo Services	Tech Mahindra
AEC	Hexaware	Teleperformance
Alert Brasil	HGS Global	Telstra
Algar Tecnologia	Home Agent	Telesul
AlmavivA do Brasil	Infosys	TELUS International
Alorica	iQor	TMKT
Atento	Kainos	Transcom
Beepo	Konecta	TSA
BrasilCenter	LIQ	TTEC
BTCC Conexao cliente	Merchant	Unity4
Callink	MindPearl	Vikstar
Capita	Motiva Contact Centers	Voxline Contact Center
Cognizant	NeoBPO	VXI Global Solutions
Concentrix	OneLink	Webhelp
Conduent	Parla Contact Center	WinOver Call Center
Conduit Global	Pluris Midia	Wipro
Connvert	Plusoft	WNS
CPM	Premiere Response	
CSS	ProbeCX	
CSU	Sercom	
Datamatics	Shapiro	
Datacom	Sitel	
DBM Contact Center	Soft Marketing	

Contacts for this study

Kenn Walters
Lead Analyst – U.S., Europe & U.K., Archetype

Phil Harpur
Principal Analyst & Co-Author – Australia and Singapore & Malaysia

Namratha Dharshan
Lead Analyst - Global

Sandya Kattimani
Enterprise Content and Global Overview Analyst

Florian Scheibmayer
Lead Analyst - Brazil

Angelia Kho
Regional Support Analyst, APAC

Craig Baty
Lead Analyst – Australia and Singapore & Malaysia

Abhilash M V
Global Project Manager

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.

ISG Provider Lens QCRT Program Description

ISG Provider Lens TM offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures that each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires

- Advise on service providers' inclusion and participate in briefing calls

- Give their perspectives on service provider ratings and review report drafts

The ISG Provider Lens™ QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study

Dee Anthony
Director - Collaboration

Scott Furlong
Partner

Dr. Linda Delbridge
Director, Business Development
Automation