ISG Provider Lens™

Contact Center - Customer Experience Services

Digital Operations

U.S. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

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About this Report

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

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

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ISG Provider Lens™

ISG Provider Lens™

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

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EXECUTIVE SUMMARY

Changing Contact Center Dynamics and Covid Impact

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

The contact center space is facing the following challenges:

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

The COVID-19 crisis has brought a dramatic shift in the buying/communication patterns of end users, and this change is likely to be irreversible. The use of non-voice channels has increased, and consumers have turned toward digital channels in this social distancing era. Consumers' expectations of an improved customer experience and a seamless shift between channels have increased multifold. Only a few companies have succeeded in delivering an omnichannel experience, while many others are continuing with basic channels. Brands are challenged to deliver the best customer experience with more personalization to ensure that brand loyalty does not shift and customer retention remains high.

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

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

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

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

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

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

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

Source: ISG Research 2020

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

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

Connected workforce driving efficiency: The contact center industry in the U.S is turning its attention toward hiring remote agents and curbing the increased attrition rates. The transition to a remote working model will require major adjustments for agents and supervisors who earlier were comfortable working together under one roof. Workforces that are used to meeting and obtaining feedback in person will battle with the loss of face-to-face interaction that comes with a remote work environment. Employee health is gaining more importance, as disconnected workforces will lead to increased attrition, poor customer satisfaction or both. Organizations are investing in real-time performance dashboards that create a direct connect from leadership down to their agents. Features and tools that are being embedded in this include automated coaching for performance improvements, sentiment scoring, analytics with points where the agent needs to improve and gamification with performance comparisons and customized avatars keeping agents motivated and focused.

Additionally, expanded proficiency in English and the growing Spanish-speaking population have turned Latin America into an increasingly attractive outsourcing opportunity for call centers among U.S. companies. The growth is driven largely by the demand to merge pan-Latin American projects and to assist clients in high-cost locations. Guatemala, Honduras and Costa Rica have seemed to draw popularity with increased outsourcing projects.

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

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

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

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

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

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

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

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

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

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

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

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

Enterprises have identified that long-term remote working could lead to fatigue and lower motivation levels. Keeping employees engaged will be a challenge for most companies.

Investments are being made in programs to address this concern. They are leveraging external agencies to ensure agent well-being and create an experience similar to a brick-and-mortar environment to keep active conversations going.

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

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

Introduction

Definition

Contact center services have evolved into customer experience services. Organizations are now taking a holistic approach to customer services and how they are being delivered. Operating models have expanded beyond solely using full-time employees (FTEs). Shoring mix requirements also have evolved; digital technologies have become table stakes, and converting data into insights has become the need of the hour. Channel proliferation and demand for immediate responses have significantly increased during the crisis. Requirements for an omnichannel strategy and a seamless customer experience have always existed but have now increased exponentially.

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

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

Services offered: Services have evolved from mere customer care and voice calls to multiple channels and brand support. Key performance indicators (KPIs) for measuring success are not limited to first call resolution (FCR) and average handle time (AHT). They are more inclined toward cost savings, upsell and cross-sell opportunity creation, revenue generation, customer satisfaction (CSAT) scores and net promoter scores (NPS). Social media services such as content moderation are gaining traction and becoming an integral part of marketing and sales for every brand. Services include inbound and outbound calls and activities such as customer support activities,

Definition (cont.)

collections, sales, product support, telemarketing, recruitment and staffing, helpdesk and a host of other services.

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

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

Digital technologies: With digital gaining prominence, technologies such as automation have become table stakes. Technologies such as cloud contact centers, automation, omnichannel platforms, AI, ML and advanced analytics are critical factors that influence an enterprise's digital transformation.

Scope of the Study

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on the U.S. market

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

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

Definition (cont.)

The quadrants descriptions are as follows:

Contact Center Customer Experience — Digital Operations

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

Provider Classifications

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

Leader

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

Product Challenger

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

Market Challenger

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

Contender

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

Provider Classifications (cont.)

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

Rising Star

"Rising Stars" are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

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

	Digital Operations
Alorica	Leader
Atento	Product Challenger
Cognizant	Product Challenger
Concentrix	Leader
Conduent	Leader
CSS Corp	Product Challenger
EXL	Product Challenger
Genpact	Product Challenger
Hexaware	Rising Star
HGS	Leader
Infosys	Market Challenger

	Digital Operations
Premiere Response	Contender
Shapiro	Contender
Sitel Group	Leader
Startek	Product Challenger
Sutherland	Leader
TechM	Rising Star
Teleperformance	Leader
Transcom	Market Challenger
TTEC	Leader
Wipro	Leader

Contact Center - Customer Experience Services Quadrants

ENTERPRISE CONTEXT

Digital Operations

The report is relevant to enterprises across all industries in the U.S. that are evaluating providers of contact center services, such as omnichannel services, work-at-home solutions, self-service capabilities to help deliver customer experiences across their client interaction journey.

The U.S has remained to be a dominant marketplace with most of the leading contact center players headquartered in this region. In this quadrant report, ISG lays out the current market positioning of contact center providers in the U.S., and how they interact with key challenges and deliver exceptional customer experiences in the region. These providers are adept at reducing cost, improving NPS and increasing CSAT scores.

ISG believes that the vast majority of enterprises, of all sizes and across all industries, contact centers have become an important part of a successful business plan, essential for offering the best possible customer experience (CX) to the people with whom you do business. Effective customer engagement remains to be the top priority of all the providers in this region. The providers have enhanced their offering portfolio with key strategic partnerships and acquisitions. ISG has witnessed the growing importance of contact centers and how the approach of the providers combined with technology has changed over the years including newer operating models, refined agent training, enhanced customer services and improving insights into their customers’ behavior and needs.

Business strategy leaders should read this report to better understand the relative strengths and weaknesses of contact center providers as well as how these providers are reacting to the uncertain times with shifting operating models and ensuring business continuity.

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

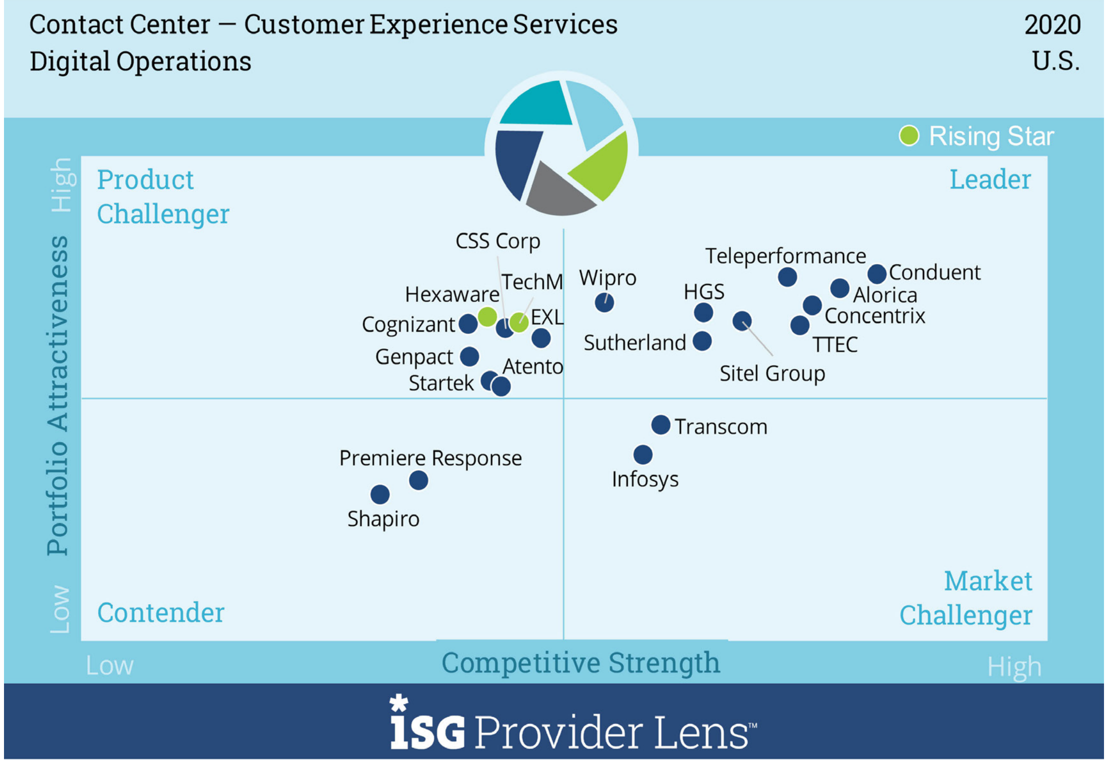
Security leaders should read this report to see how service providers address the significant challenges of data and workplace security by leveraging tools to enable their on-prem and remote workforce.

IT leaders with this report will gain an understanding of how providers are integrating contact center solutions into their enterprise’s customer relationship management (CRM) strategy.

DIGITAL OPERATIONS

Definition

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



Source: ISG Research 2020

DIGITAL OPERATIONS

Eligibility Criteria

- Demonstrate ability to offer contact center consulting services and advise clients in this space
- Demonstrate domain and vertical expertise with industry-specific solutions
- Exhibit design thinking and customer journey mapping capabilities
- Provide frameworks to define the transformation roadmap
- Display partnerships and in-house transformation capabilities
- Offer change management services
- Make investments in research and benchmarks
- Offer contact center services
- Serve clients across different channels
- Bring in digital capabilities such as automation, AI, cloud solutions and omnichannel
- Exhibit analytics capabilities and partnerships
- Offer nearshore, onshore and/or offshore services
- Bring in deep domain expertise in this domain
- Demonstrate referenceable case studies

DIGITAL OPERATIONS

Observations

- Conduent and Alorica lead the market with a strong domestic footprint, along with large workforces in the region.
- Teleperformance has been identified as a leader with its flexible and scalable delivery models, along with a good mix of onshore and offshore capabilities.
- Concentrix and TTEC are leaders with strong KPI-driven metrics to deliver client experiences, combined with digital consulting capabilities.
- Sitel Group and HGS are leaders with their established presence, experience in delivering services and extensive partnerships.
- Sutherland and Wipro emerged as leaders with their innovation-led approach and an ability to showcase digital transformation capabilities for clients.
- TechM has been identified as a Rising Star with its robust future roadmap, along with recent investments in technology and acquisitions to deliver improved client experiences.
- Hexaware is named a Rising Star as the player has shown an impressive growth rate in the US and is expanding its client base expeditiously.

RISING STAR: HEXAWARE

Overview

Hexaware has been rapidly evolving and expanding its presence in the U.S. contact center market for delivering enhanced customer experience management services to its clients. Headquartered in India, the company has a total employee headcount of over 3,700 for managing close to 41 million calls and 12 million emails and chats annually in more than 15 languages. Going by its defined strategy of "automate, cloudify and transform CX", Hexaware has always taken the automate-first approach to bring in higher efficiencies and productivity gains and deliver an enhanced customer experience. It is identified as a Rising Star for its global presence, differentiated automation and analytics offerings, and defined market strategies.

Strengths

Automation as the differentiator: Going by its business strategy of "automate everything", Hexaware's automation offerings and solutions are its key differentiator. The company has an established partnership ecosystem to deliver automation solutions to its clients. In a partnership with Mobiquity, it offers digital transformation strategies and solutions that best fit client requirements.

Skin in the game: Hexaware brings in domain experience and automation expertise to define its contracts. Its confidence in achieving business outcomes through automation makes it lean towards outcome-based pricing or gain-sharing model to draft contracts.

Promising growth in U.S.: Hexaware is growing aggressively in the U.S. and is continuing to invest in enhancing its digital channels in collaboration with partners, thereby helping clients achieve refined outcomes. Its go-to-market approach, backed by the Smart Advisor solution to accelerate the transformation journey, has helped the company to substantially expand its client portfolio.

Caution

Hexaware's digital capabilities are still maturing, and a higher application of analytics services will be essential to further enhance the customer experience.

2020 ISG Provider Lens™ Rising Star

Hexaware's business strategy and target market are clearly defined. The company has achieved significant automation goals coupled with good business outcomes in this space.

Methodology

METHODOLOGY

The research study, "ISG Provider Lens™ 2020 – Contact Center - Customer Experience Services" analyzes the relevant software vendors/service providers in the U.S. market, based on a multiphase research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

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

Authors and Editors

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Director of Research and Principal Analyst

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

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Team Leader

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

Jan Erik Aase, Editor

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

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

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September 2020

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