iSG Provider Lens™

Customer
Experience
Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

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Executive Summary

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

State of the industry

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

Contact Center CX Managed Services Growth

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

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

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

Enterprises Are Addressing the CX Gap with Managed Services
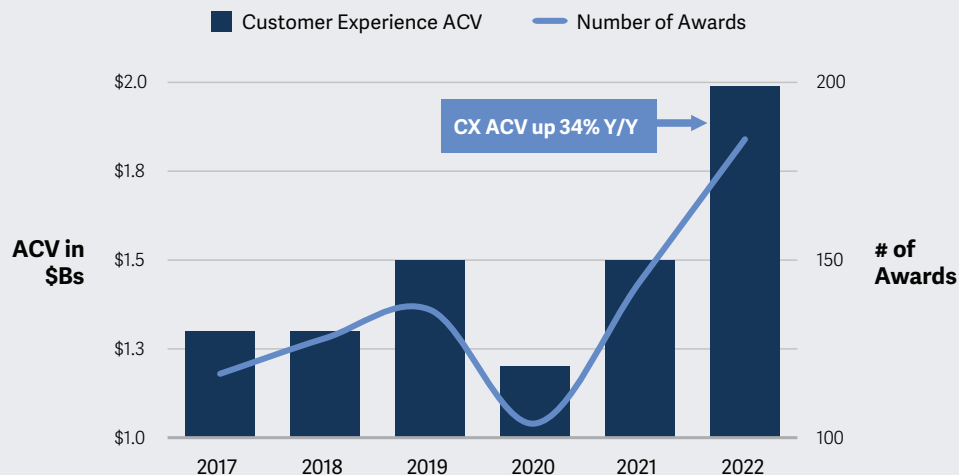
Source: ISG, 2023; CX managed services awards with > $5M Annual Contract Value (ACV)

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

Complexity of the CX environment driving growth in consulting engagements

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

Pricing evolution

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

The need for right shoring

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

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

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

Increased investments in industry-specific solutions

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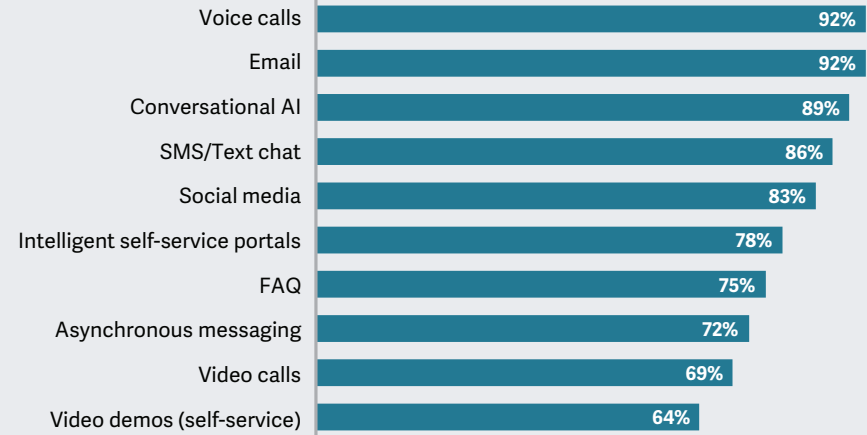
The rise of digital channels

Voice calls continue to reign the customer service industry. Despite the growth in AI adoption and with generative AI taking technology to the next level, voice calls will continue to hold a position as one of the preferred channels for complex tasks and, most importantly, play a crucial role

as a key CX differentiator for enterprises. There is a significant rise in the adoption of conversational AI, where around 90 percent of service providers have begun using it as a key option for their customers. Social media has become another key channel; more than 80 percent of service providers are harnessing this channel to reach their clients. As the number of channels increases, providing a seamless experience across channels and taking an omnichannel approach will take center stage.

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

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

Channel Adoption Patterns

Channel	Adoption
Voice calls	92%
Email	92%
Conversational AI	89%
SMS/Text chat	86%
Social media	83%
Intelligent self-service portals	78%
FAQ	75%
Asynchronous messaging	72%
Video calls	69%
Video demos (self-service)	64%

Source: N=36, ISG Provider Lens Customer Experience Services Research

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

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

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

The hype around generative AI

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

Top 3 Agent Experience AI Technologies

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

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

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

Top 4 Analytics applications

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

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

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

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

n=29 Source: ISG Provider Lens Contact Center Research

Executive Summary

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

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

Provider Positioning

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

Provider Positioning

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

Provider Positioning

Provider Positioning

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

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

Simplified Illustration Source: ISG 2023

Digital Operations

Hybrid Working Solutions

Intelligent CX (AI & Analytics)

Social Media CX Services

Definition

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

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

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

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

Scope of the Report

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

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

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

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

Provider Classifications

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

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

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

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

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

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

★ **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.

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

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

Digital Operations

Digital Operations

Who Should Read This Section

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

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

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

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

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

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

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

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

ISG Provider Lens™
Source: ISG RESEARCH

Customer Experience Services
Digital Operations

Global 2023

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PORTFOLIO ATTRACTIVENESS

Teleperformance

Foundever™

Sutherland

Concentrix

Genpact

HGS

Hexaware

Cognizant

Movate

WNS

Atento

Tech Mahindra

Conduent

TTEC

Product Challenger

Transcom

Alorica

[24]7.ai

Datamatics

Infosys

EXL

Webhelp

Leader

Straive

TCS

TaskUs

Wipro

Contender

Mphasis

Startek®

Firstsource

Market Challenger

HCLTech

Xceedance

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COMPETITIVE STRENGTH

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★ Rising Star

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

Namratha Dharshan

Digital Operations

Definition

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

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

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

Eligibility Criteria

1. Demonstrate **strategy, innovation and vision** for growth

2. Offer a **broad range** of contact center services

3. Offer well-rounded **consulting capabilities** that exhibit domain and industry knowledge

4. Design **long-term transformation road maps** – using any homegrown framework that articulates the road map

5. **Possess technological capabilities** that include cloud capabilities, automation, AI and omnichannel support

6. **Offer multiple channel** strategies and capabilities

7. Demonstrate **industry-specific** solutions (if any)

8. Articulate target markets and differentiators

9. Ability to offer **nearshore, onshore and offshore services** (delivery centers)

10. Offer effective **transition services** (organizational change management capability)

11. Exhibit **talent management** strategies

12. Help enterprises achieve their ESG goals

13. Have trained and **skilled FTEs**

14. **Referenceable case studies**

Observations

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

The concept of CX has evolved, and data has become central to its transformation. The ability to leverage data to derive valuable insights that can enhance CX and AX and finally fuel business growth has become an important measure of a successful transformation. Enabling these changes is not the end of the journey, but helping enterprises undergo the journey as they wade through related

changes is important; providers, therefore, must have organizational change management capabilities. Furthermore, as ESG takes center stage, providers are partnering with enterprises to help them achieve their ESG goals, for instance, reduced carbon footprint and conformity with the diversity quotient.

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

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

Alorica

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

Atento

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

CONCENTRIX™

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

Conduent

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

foundever™

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

SUTHERLAND®

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

Tech Mahindra

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

Teleperformance

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

Transcom

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

TTEC

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

Webhelp

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

WNS

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

Infosys

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

Hybrid Working Solutions

Hybrid Working Solutions

Who Should Read This Section

This report is relevant to global enterprises across industries for evaluating providers of hybrid working solutions for contact center providers.

In this quadrant report, ISG highlights the current market positioning of global providers of contact center hybrid working solutions and how they address key enterprise challenges.

The report provides insights on the shift to remote work, the adoption of cloud-based operations and the growing importance of digital self-service solutions. The report also highlights the need for an omnichannel approach, leveraging AI-powered self-service options, building remote workforces, and utilizing new technologies for optimized hybrid work.

The provision of flexible working conditions and support mechanisms to enhance agent experience (AX) are essential to attracting and retaining talent. Within the contact center industry, there is a notable drive for innovation.

Service providers that have implemented flexible working conditions, agent support and wellness programs are witnessing positive outcomes, including reduced attrition rates, improved productivity and high staff retention.

The importance of call recording and speech analytics is increasing, enabling compliance efforts, customer satisfaction analysis, sentiment analysis and real-time agent support. AI is facilitating personalized and scalable automation and enhancing the digital experience (DX) of customers and agents.

Digital professionals should read this report to understand how contact center service providers enhance their digital transformation initiatives to ensure a secure work-from-home environment.

Technology professionals should read this report to understand how contact center providers integrate technologies for virtual/hybrid workforces and how they can be compared by their technical capabilities.

Strategy professionals should read this report to understand global providers' capabilities, expertise and innovative solutions, including their modernization efforts for improved CSAT scores.
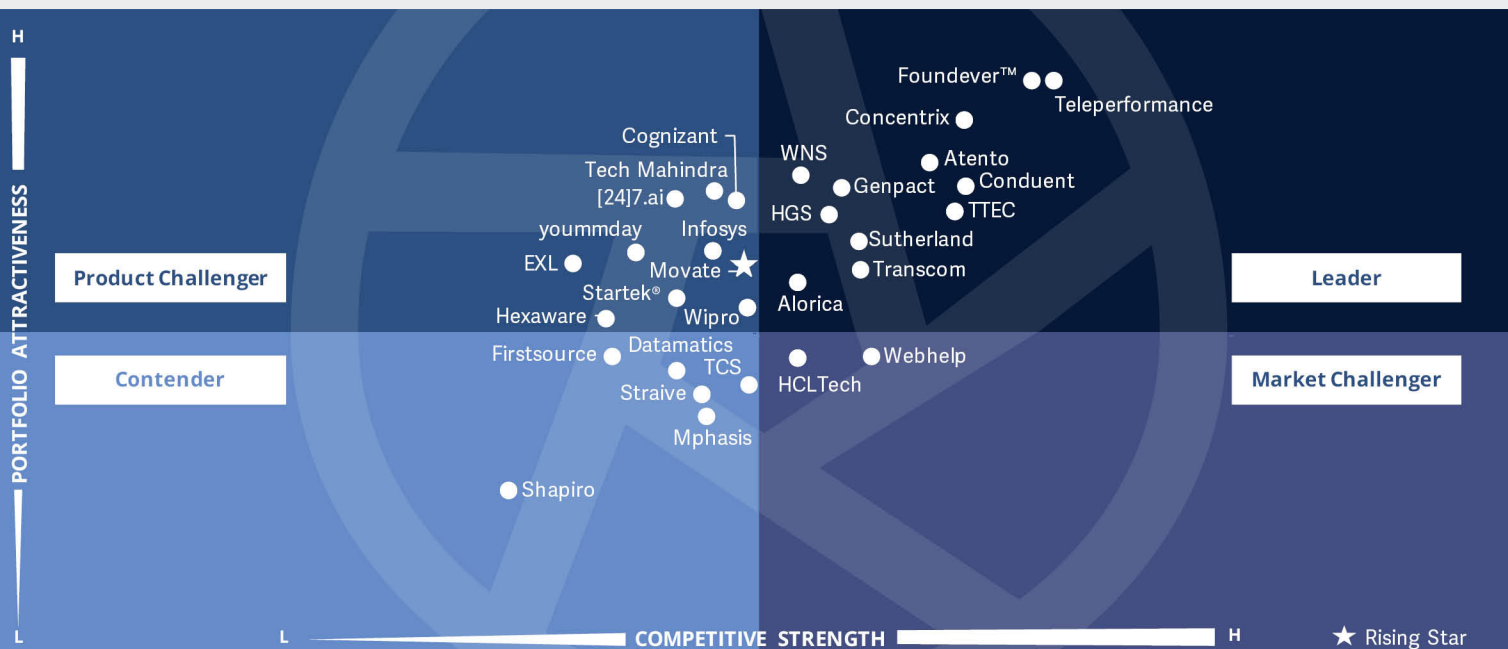
Contact center professionals should read this report to enhance their knowledge of contact center operations, leading to improved service delivery, enhanced workplace and improved industry standards.

ISG Provider Lens™

Customer Experience Services Hybrid Working Solutions

Global 2023

PORTFOLIO ATTRACTIVENESS

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Foundever™

Teleperformance

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Product Challenger

Startek®

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Contender

Firstsource   Datamatics

TCS   Webhelp

Straive   HCLTech

Mphasis

Leader

Market Challenger

Shapiro

L

L   COMPETITIVE STRENGTH   H

★ Rising Star

This quadrant evaluates providers that offer **hybrid working solutions and services,** with a focus on infrastructure and solution delivery. They leverage cutting-edge technologies and prioritize secure operations, while delivering engaging and satisfying EX.

Namratha Dharshan

Definition

The contact center industry has undergone multifold changes in the past few years. From nearly 100 percent brick-and-mortar workplaces to supporting working from home, the industry finally seems to be settling on hybrid working strategies. In this quadrant, we assess service providers well-equipped to enable an efficient hybrid-work model for enterprises. The model combines on-premises and remote work, allowing employees to work in an office and from home. Giving increased flexibility to organizations worldwide, hybrid working has brought multiple benefits to enterprises, such as access to a larger pool of talent, improved employee morale, management of talent attrition and enhanced efficiency levels. Thus, service providers are required to bring relevant technologies and tools, such as cloud solutions, to offer the flexibility to ramp capacity up and down and enable work from home or office.

Remote hiring, training, online employee engagement and collaboration tools are essential for this model. Enhanced and vast sets of training tools are essential for constantly upskilling employees.

With distributed workforce and, in some cases, BYOD becoming part and parcel of the hybrid working model (especially with gig employment), systems have become more vulnerable and susceptible to cybercrimes. Thus, having an improved and robust cybersecurity policy and posture is pertinent. In addition, tools and techniques such as gamification and other employee engagement tools are also essential to enable a hybrid working model.

Eligibility Criteria

1. Enable a hybrid working model

2. Demonstrate **technological implementations** (cloud contact center, omnichannel platforms, automation, agent experience and CX enablement)

3. Offer **talent management solutions** (ability to offer virtual onboarding, including interviews and training facilities)

4. **Provide cybersecurity measures** (facial recognition and other biometrics and instances of cybersecurity management in remote working conditions)

5. Offer effective **collaboration tools**, such as through gamification

6. Offer **workforce management services** (monitoring, supervising and training recommendations)

7. Demonstrate **large-scale implementations**

8. Offer **innovation** hubs to enable state-of-the-art infrastructure

9. **Have burstable capacity** – the ability to ramp workforce capacity up and down

10. Demonstrate **referenceable case studies**

Observations

The pandemic prompted a shift to remote work for contact center agents, with a focus on cloud-based operations and digital self-service solutions. While some companies are returning to the office, many are adopting a hybrid work model, collaborating with employees to find feasible work patterns. This indicates that the preference for remote and hybrid work is a long-term plan. In this environment, contact centers need to adopt an omnichannel approach, leverage AI-powered self-service options, build remote workforces and utilize new technologies to optimize work-from-home setups.

The provision of flexible working conditions and support mechanisms to enhance AX is essential to attracting and retaining talent. Within the contact center industry, there is a notable drive for innovation. Service providers that have implemented flexible working conditions, along with agent support and wellness programs, are witnessing positive outcomes, including reduced attrition rates, improved productivity and high staff retention levels.

The importance of call recording and speech analytics is increasing, enabling compliance efforts, customer satisfaction analysis, sentiment analysis and real-time agent support. AI is facilitating personalized and scalable automation and enhancing the digital experience (DX) of customers and agents. By understanding and embracing these trends, contact centers can adapt to the changing landscape, improve customer engagements and enhance operational efficiency.

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

Alorica

Alorica continues as a Leader in the Hybrid Working Solutions quadrant with its years of experience in managing work-from-home and gig workforces backed by technology.

Atento

Atento's commitment to this CCCX industry through investments and innovations has made it a Leader in the Hybrid Working Solutions quadrant.

Conduent

Conduent's proven track record in managing a remote workforce and offering digital solutions as enablers have positioned it as a Leader in the Hybrid Working Solutions quadrant.

CONCENTRIX

Concentrix is one of the long-standing players in this market and has pioneered various employee engagement solutions, including supporting gig workforces and offering work-from-home solutions, which positions it as a Leader in this quadrant.

foundever

Foundever™ continues to enjoy its position as a Leader in the Hybrid Working Solutions quadrant for its robust offerings, well-defined security solutions and employee engagement programs.

Genpact has found a place among the Leaders in the Hybrid Working Solutions quadrant for its innovations in this space and for its holistic solution, addressing both EX and CX.

hgs

HGS stands as a Leader in the Hybrid Working Solutions quadrant with its innovative solutions and because of its ability to leverage AI for performance management.

SUTHERLAND

Sutherland's digital posture, AI-leveraged solutions and highly automated processes make it a Leader in the Hybrid Working Solutions quadrant.

Teleperformance

Teleperformance's continuous investment in developing innovative solutions and programs positions it as a Leader in this quadrant.

Transcom

Transcom leaps into the Hybrid Working Solutions Leader's quadrant for its broad range of solutions that are important for this space and brings in years of experience in managing workforces remotely.

TTEC

TTEC stands as a Leader in the Hybrid Working Solutions quadrant for its continued focus on expansion programs and gig enablement and comprehensive learning solutions

WNS

WNS has made it to the Leader's quadrant for Hybrid Working Solutions for the host of solutions it offers to address the entire value chain of hybrid working.

movate

Movate's gig workforce offering, backed by comprehensive technology support, well-defined workforce management and ability to offer differentiated pricing, positions it as a Rising Star in this quadrant

Genpact

Leader

"Genpact has leveraged its widespread digital competency in building cutting-edge solutions to support employees with their multiple requirements and create successful hybrid working environments."

Namratha Dharshan

Overview

Genpact is headquartered in New York, U.S. and operates in 35 countries. It has more than 118,900 employees across 90 global offices. In FY22 the company generated $4.3 billion in revenue, with Banking and Insurance as its largest segment. Genpact's Enterprise360 is a transformative solution that takes a holistic and digital-driven approach to managing EX within organizations. By recognizing the significance of an engaged and satisfied workforce, Genpact helps businesses create a work environment that fosters productivity, collaboration and overall employee well-being.

Strengths

Innovation to enhance EX: Amber, Genpact's AI-based culture bot and a part of the Enterprise360 platform, undertakes sentiment analysis to enable HR leaders and C-suite executives to proactively help employees that are unhappy. Genpact has seen measurable success with the deployment of Amber, including reduced attrition.

Genome platform to enable talent development: Genpact leverages its Genome learning and development platform for talent development. With the ability to facilitate training for employees across over 70 different skills and nearly 100,000 assets, it is a differentiating tool for the company.

Enterprise360 for end-to-end digital EX: Enterprise360 is a holistic platform that includes several modules addressing critical parts of operations where 400 KPIs and 9,000 processes are baked into the solution. It provides a single pane of glass view, making it easy for enterprises to consume and manage a hybrid work environment. Enterprise360 is embedded with AI and reflects Genpact's rich experience in this industry and thought leadership. This solution stands as a key differentiator for Genpact and demonstrates its strong understanding of this market.

Caution

Genpact's clients expect it to better articulate the benefits of solutions and help them to optimize the use of the developed solutions for operational efficiencies and effective resource utilization. It is critical for the company to demonstrate successful use cases for each of its solutions for the understanding of its clients.

Intelligent CX
(AI & Analytics)

Intelligent CX (AI & Analytics)

Who Should Read This Section

This report is relevant to global enterprises across industries for evaluating providers of AI and analytics services for contact centers.

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

This report holds valuable insights for contact center professionals, business leaders and decision-makers. It highlights the transformative impact of AI and analytics in the contact center industry, including the evolution of contact center solutions driven by technologies such as RPA, speech analytics and NLP. Professionals in the contact center space can gain knowledge on how these technologies enhance productivity, CX and real-time coaching.

For business leaders and enterprises, the report showcases the exponential growth and innovation in AI and analytics. It emphasizes the importance of leveraging these technologies to make a positive impact, internally and externally, with opportunities for personalization, efficiency and intelligent conversations. Overall, this report serves as a valuable resource for understanding the potential of AI and analytics in contact center operations and driving business growth.

Digital 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, for desired outcomes.

Strategy professionals should read this report to gain insights into global providers' capabilities, expertise, innovation-led solutions and differentiation through modernization efforts for enhanced CSAT scores.
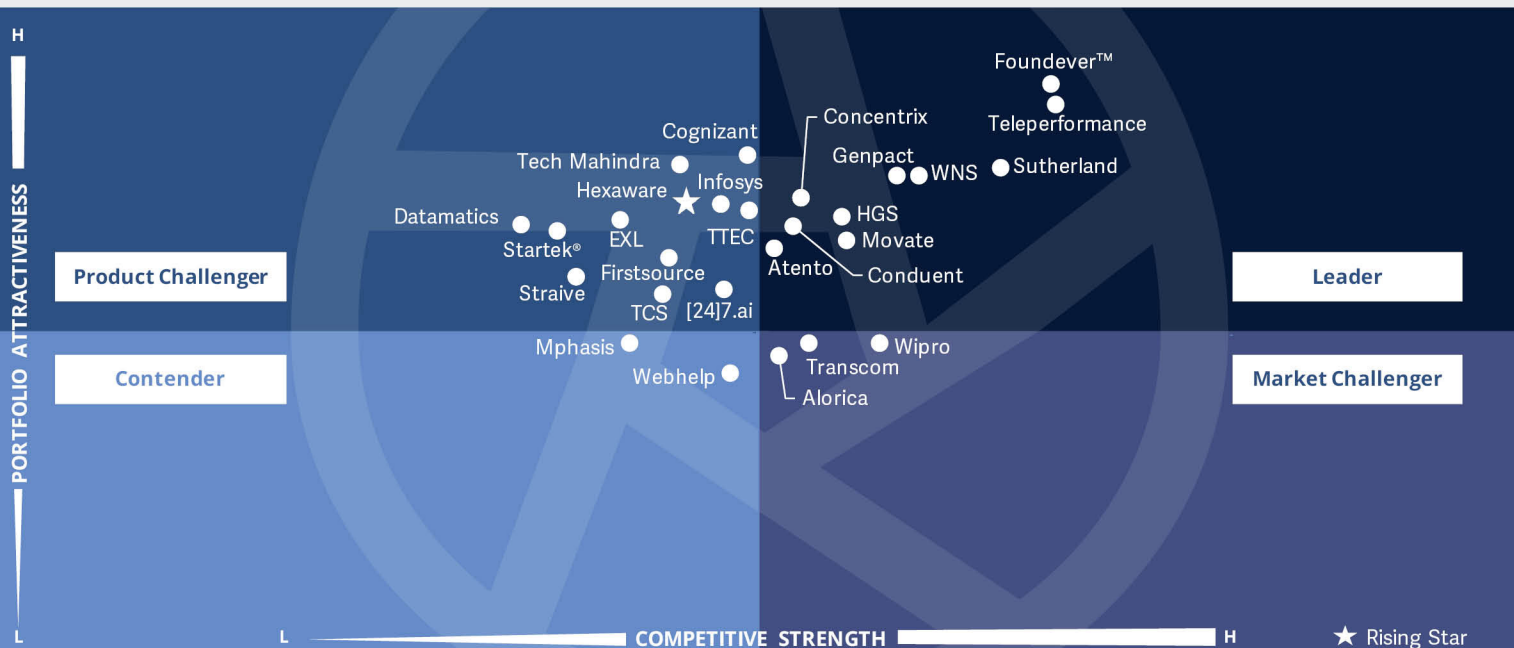
Technology professionals should read this report to understand providers' strengths and areas for improvement in the AI and analytics space.

Vertical leaders should read this report to understand industry-specific solutions backed by technologies using AI and analytics offered by various providers.

ISG Provider Lens™

Customer Experience Services
Intelligent CX (AI & Analytics)

Source: ISG RESEARCH

Global 2023

PORTFOLIO ATTRACTIVENESS

H

L

Product Challenger

Contender

Cognizant
Tech Mahindra
Hexaware   Infosys
Datamatics
Startek®   EXL   TTEC
          Firstsource
Straive
          TCS   [24]7.ai
Mphasis
     Webhelp

Concentrix   Foundever™
          Teleperformance
Genpact   WNS   Sutherland
          HGS
          Movate
Atento   Conduent

Leader

Wipro
Transcom
Alorica

Market Challenger

L   COMPETITIVE STRENGTH   H

★ Rising Star

This quadrant assesses
providers **with AI and
analytics capabilities**
in the context of their
solution offerings,
partnerships,
implementations and
innovations delivered
to enterprises to
enable them to obtain
the desired business
outcomes.

Namratha Dharshan

Intelligent CX (AI & Analytics)

Definition

The transformation of contact centers is far from complete without AI and analytics. RPA is now table stakes, and enterprises want to enhance their automation capabilities. 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 positive impact on agents and end customers is a measure of the successful implementation of AI and analytics. Enterprises are looking to partner with service providers that implement solutions, leverage existing data and draw meaningful outcomes – a key enabler of intelligence in contact centers.

In addition to bringing solutions, service providers must be able to define a data strategy and bring data and knowledge management tools. With these tools and strategies, providers must build interfaces to draw meaningful insights, enabling real-time agent and customer experience. With enterprises' growing maturity and appetite to utilize data and convert them into insights, analytics has become a differentiating factor for service providers.

Companies that can define a well-rounded data strategy and provide enterprises with real-time information visibility are well-positioned to gain a competitive advantage in the market.

Service providers in the Intelligent CX (AI & Analytics) quadrant will be assessed on their ability to offer robust AI and analytics capabilities such as AI-driven solutions, technology and partnerships, analytics, successful implementations and case studies. As generative AI gains traction, service providers are tasked with continuous improvements and their ability to stay ahead of the curve.

Eligibility Criteria

1. Maintain **AI and analytics** advisory teams

2. **Demonstrate technical expertise** (certified professionals)

3. Offer a range of **contact center intelligence solutions** that cover self-service virtual agents, realtime analytics and agent assist and post-call analysis

4. **Provide analytics services** such as speech analytics, text analytics, customer behavior prediction, predictive analytics and sentiment analysis

5. Leverage AI and analytics to **empower and enhance employee experience**

6. **Empower customers with AI-driven conversational selfservice**

7. **Invest in generative AI models** such as ChatGPT and other digital assistants

8. **Help customers achieve business outcomes** such as on customer satisfaction score (CSAT), net promoter score (NPS), cost savings and revenue generation

9. **Offer a large partner ecosystem and proprietary solutions**

10. Demonstrate referenceable case studies

Intelligent CX (AI & Analytics)

Observations

AI and analytics are the most talked about topics, and the growth and innovation in this space have been exponential. Today AI and analytics are being leveraged by companies to have a positive impact, both within an organization and on the outside. With the advent of generative AI, the opportunities to bring about advantages such as personalization, efficiencies, agent empowerment, contextual conversations and intelligent conversations have further expanded. Analytics, in the meanwhile, compliments and accelerates an enterprise's ability to acquire new customers, retain existing customers, increase loyalty and help deliver the highest CX.

Although technological advancements and related use cases are high in this industry, enterprises are struggling to stay apace with the rapid changes. In addition, they are also struggling with the challenges of embarking on the journey of implementations or scaling the same to experience the actual RoI.

To address enterprise needs, service providers in this space are upping their AI game with acquisitions or bolstering their solutions to cater to changing needs. They are focusing heavily on consulting, especially related to automation, to determine a client's maturity and appetite for new technologies. Providers in this quadrant are assessed for their AI and analytics solutions, both proprietary and the ones offered through partnerships; implementations and value delivered; growth fostered; innovative and visionary capabilities; pace and scale of implementations; and their ability to help enterprises achieve the actual value of a transformation.

From the 56 companies assessed for this study, 29 have qualified for this quadrant, with 10 being Leaders and one a Rising Star.

Atento

Atento finds itself in a leadership position by demonstrating its progress in building and implementing AI and analytics solutions. It focuses on delivering value-added, multichannel, next-generation solutions with significant AI and automation driving the solutions.

CONCENTRIX

Concentrix offers the Concentrix Insights Platform (CIP), which is a cutting-edge cloud-based data platform that eliminates data silos, enabling businesses to extract valuable insights to rapidly accrue business value.

Conduent

Conduent's continued investments in this highly competitive market have helped it to maintain its Leader status. Its AI conversation platform called Dara which is a virtual agent that assists in the completion of routine tasks, resulting in convenient customer experiences.

foundever

Foundever™ has conquered this space with its highly differentiated offerings, but more importantly, because of its proven expertise provided at scale.

Genpact has made significant progress in expanding its AI and analytics portfolio, coupled with efficient implementations that have earned it the leadership position.

HGS has made a mark for itself as a Leader in this quadrant with its widespread digital offering such as Agent X that is equipped with AI and analytics solutions and it addresses all aspects of CX.

Movate, as a Leader in the quadrant, continues to disrupt this space with its differentiated offering and pricing. It is continuing to invest in emerging technologies such as AI including generative AI, chatbots and cloud-based platforms that can automate processes.

Sutherland's digital portfolio and robust analytics capabilities have moved it ahead on the leader curve. It has developed proprietary, AI-based products and platforms using robust IPs and automation.

Teleperformance

Teleperformance finds a place among the Leaders for the scale it offers, alongside its capabilities and vision. Together, they help the company stay ahead of the curve in this space.

WNS' perseverance to deliver superior CX, leveraging AI and analytics, has earned it a position as a Leader in this quadrant. WNS has an intelligent, customized and ethical approach to leveraging generative AI to transform enterprises.

Hexaware's continued investments and commitment in this space have made it a Rising Star in this quadrant. It provides business intelligence & analytics services that help enterprises understand current trends and predict the future accurately.

Leader

"Genpact offers comprehensive AI-based solutions and has proven expertise in deploying AI and analytics to help improve outcomes for its clients."

Namratha Dharshan

Genpact

Overview

Genpact is headquartered in New York, U.S. and operates in 35 countries. It has more than 118,900 employees across 90 global offices. In FY22 the company generated $4.3 billion in revenue, with Banking and Insurance as its largest segment. It operates through three segments: Banking, Capital Markets, and Insurance (BCMI); Consumer Goods, Retail, Life Sciences, and Healthcare (CGRLH); and High Tech, Manufacturing, and Services (HMS). It provides insights on building an adaptive workforce with the right technology infrastructure and operating model, and also highlight the future of hybrid work in its publications.

Strengths

Established partner system for go-to-market strategies: Genpact has effectively leveraged its well-established partner network that includes prominent players such as Redpoint, Uniphore, Kore.ai, Amazon Connect and Verint to develop CX accelerators. It has also developed joint go-to-market strategies with companies such as Amazon and Genesys.

Dipping toes into generative AI: Genpact is currently exploring ChatGPT and is actively piloting solutions to determine product features, seek coding assistance and decide on the next best action, among other steps. The company is looking to build accelerators that can integrate with ChatGPT and build solutions based on large language models (LLMs). Potential solutions that could come into play include LLM-based voice of customer (VoC) survey analysis, theme mining and customer call notes.

Expansion of AI-based CORA platform: Genpact continues to invest in expanding the capabilities of its proprietary platform solution, CORA. The CORA suite of solutions includes features such as the CORA command center, CX analytics solutions, agent performance management and CORA customer segmentation 360. Genpact has more than 3,000 successful implementations of one or more of the CORA solutions across its clients.

Caution

As the company is expanding its technological capabilities and building solutions, clients opine that it must focus on actively leveraging its technically qualified resources to ensure better governance and compliance.

Social Media CX Services

Who Should Read This Section

This report is relevant to global enterprises across industries for evaluating providers of social media CX services for contact center providers.

In this quadrant report, ISG highlights the current market positioning of global providers of contact center social media CX services and how they address key enterprise challenges.

This report is recommended for businesses and enterprises that are interested in improving CX on social media platforms. It provides insights into social media CX services that encompass various solutions aimed at enhancing customer interactions, optimizing social media presence and building strong brand relationships. These services include monitoring and listening to customer feedback, engaging with customers, creating compelling content, running targeted advertising campaigns, analyzing performance and providing customer support.

The report highlights the growing popularity and use of social media platforms such as YouTube and TikTok for communication, self-expression and access to news and information. It emphasizes how enterprises across industries leverage social media for marketing, brand recognition, customer support and building relationships with existing and potential followers.

Technology professionals should read this report to assess social media CX providers' strengths and areas for improvement and select suitable solutions for their business needs.

Digital professionals should read this report to gain insights into providers' diverse range of social media CX solutions and scalable implementation strategies for achieving desired outcomes.
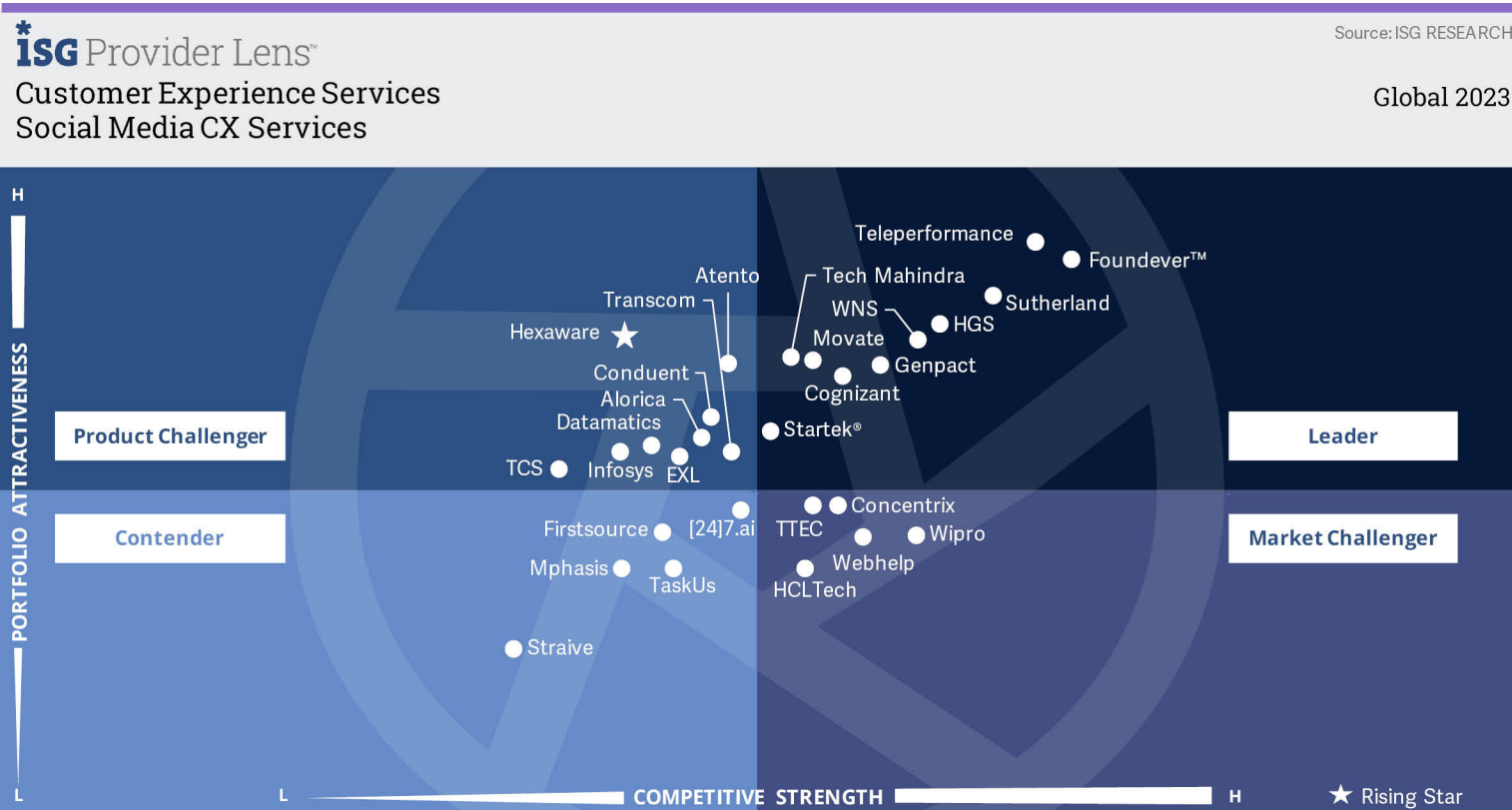
Strategy professionals should read this report to understand the industry-specific solutions offered by providers, supported by social media technologies and partnerships.

Social media managers and marketing professionals should read this report to understand the increasing significance of social media channels as vital communication and marketing platforms for enterprises.

ISG Provider Lens™
Customer Experience Services
Social Media CX Services

Source: ISG RESEARCH

Global 2023

PORTFOLIO ATTRACTIVENESS

COMPETITIVE STRENGTH

H

L

L — H

Product Challenger

Contender

Leader

Market Challenger

★ Rising Star

Teleperformance
Foundever™
Atento
Tech Mahindra
Sutherland
Transcom
WNS
HGS
Hexaware ★
Movate
Conduent
Genpact
Alorica
Cognizant
Datamatics
TCS
Startek®
Infosys
EXL
Concentrix
Firstsource
[24]7.ai
TTEC
Wipro
Mphasis
Webhelp
TaskUs
HCLTech
Straive

This quadrant assesses providers that offer advanced and secure **social media CX services** and technologies. The services are designed for easy integration and to enhance CX across all **social media channels.**

Namratha Dharshan

Social Media CX Services

Definition

Social media has become an important communication channel and a growth enabler for most enterprises. As multiple channels grow significantly, social media offers an effective way for businesses to connect with their customers and target audiences and promote their products and services. It provides a platform for companies to listen to customer feedback, respond to queries and complaints and build customer relationships. Agents can interact with multiple customers and resolve their issues simultaneously.

Companies are adopting various social media channels to offer customer support services, embracing technologies such as AI to monitor these channels continuously and offering personalized services by leveraging analytics solutions such as sentiment analysis. These channels also help companies garner immediate customer feedback, enabling them to take appropriate measures quickly and improve 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. With content growing on these channels, managing, moderating and effectively using content has become more pertinent. Content moderation is an important area of focus to ensure trust and safety services for brands.

Service providers are ramping up their social media services and adopting the necessary technologies to tap into the market rapidly. This quadrant assesses providers offering social media services with relevant technologies to provide seamless CX.

Eligibility Criteria

1. Provide **social media services**

2. Support **multiple social media channels**, including region-specific channels (if any)

3. Offer content moderation services to ensure **trust and safety**

4. Have trained employees (FTEs)

5. Actively **leverage AI and analytics to manage content**

6. Apply analytics solutions such **as sentiment analysis, voice of the customer (VoC) analysis and customer journey mapping solutions**

7. **Offer marketing and sales support**

8. Offer large-scale implementations

9. Help customers **achieve tangible business outcomes**

10. **Showcase growth stories** with improved KPIs

11. **Offer a large partner ecosystem** and proprietary solutions

12. Demonstrate **referenceable case studies**

Observations

Social media CX services encompass a range of solutions aimed at improving CX on social media platforms. These services include monitoring and heeding customer feedback, engaging with customers, creating compelling content, running targeted advertising campaigns, analyzing performance and providing customer support. By leveraging these services, businesses can optimize their social media presence, enhance customer interactions and build strong brand relationships.

Social media platforms such as YouTube and TikTok have experienced a surge in popularity and are being widely used for communication, self-expression and for accessing news and information. Companies across industries leverage social media for marketing, brand recognition, customer support, and relationship-building with their existing and potential customers.

Enterprises are increasingly recognizing the importance of social media and investing resources to establish a strong presence and deliver relevant content.

Enterprises seek assistance from providers that use technologies such as AI and analytics to monitor channels, gain insights on customer behavior, manage negative sentiments, manage communities and offer personalized services. The leading companies in social media CX services demonstrate success by providing advanced analytics; digital technologies, including AI; and a combination of proprietary and partner solutions to help enterprises achieve their objectives.

From the 56 companies assessed for this study, 30 have qualified for this quadrant with 10 being Leaders and one a Rising Star.

cognizant

Cognizant excels as a leader in social media CX services due to its wide partner ecosystem, AI-driven solutions, expert team and commitment to brand protection. Its Big Decision modular platform includes social intelligence for VOC analysis and many other tools

foundever

Foundever™ offers robust solutions and expertise in customer engagement, analytics and social media strategies, providing noteworthy experiences for their clients. It provides world-class technology, automation, platforms and solutions, including their Social Media Care", "Boost Your Social", "Crisis Management".

Genpact offers social media monitoring services, leveraging partnerships and proprietary solutions. Using its STRANDS methodology, it consistently identifies relevant and actionable social media content.

hgs

HGS' end-to-end solution includes a team for engaging social media brand ambassadors, AI-driven filtering and analytics, options for crisis management, and a customizable social media management platform for enhanced customer engagement, thus making it a Leader.

Social Media CX Services

Movate's AI-led approach includes efficiently handling complex and critical tasks by combining technology with human intervention. It is enabling brands to leverage social media in demand gen activities by creating a real-time, always-available monitoring and notification system.

Startek® has positioned itself as a Leader in the Social Media CX Services quadrant by leveraging LISA, its digital cloud-based platform. LISA includes a range of features, including social care listening, triage and content moderation.

Sutherland offers strong social media CX services and has leveraged its digital capabilities to build a strong offering and, in doing so, has qualified as a Leader in this quadrant. It has dedicated social media resources include customer care agents, content moderators,

Tech Mahindra continues to enjoy its Leader position in this Social Media CX Services quadrant for its SOCIO platform, consulting capabilities and comprehensive offering.

Teleperformance

Teleperformance has a robust social media portfolio, thought leadership and a comprehensive range of digital solutions, making it a Leader in this quadrant. It provides a broad set of social media solutions designed to resolve issues and improve journeys

WNS stays strong as a Leader in the Social Media CX Services quadrant for its portfolio of services, broad solution ecosystem, innovation and use of analytics.

Hexaware (Rising Star) is recognized for its social media command center, improvised trust and safety offering, and vast partner ecosystem.

Genpact

"Genpact's holistic solution portfolio for its clients includes consulting, proprietary solutions, a partner ecosystem, digital capabilities and a vast pool of talent."

Namratha Dharshan

Overview

Genpact is headquartered in New York, U.S. and operates in 35 countries. It has more than 118,900 employees across 90 global offices. In FY22 the company generated $4.3 billion in revenue, with Banking and Insurance as its largest segment. Genpact assists businesses in implementing successful social media campaigns to expand their reach and drive conversions. The services involve a range of activities, such as crafting compelling ad content, identifying target demographics, optimizing ad placements and analyzing campaign performance. Genpact, therefore, helps clients maximize the impact of their social media marketing to achieve the desired goals.

Strengths

Trust and safety services for social media partners: For over nine years, Genpact has been offering comprehensive trust and safety services to social media partners worldwide. With deep domain expertise, advanced technologies, knowledge of predictive intelligence, and a skilled workforce, it has been building scalable social media solutions.

Innovative capabilities: Genpact offers a 360-degree solution that acts on millions of content pieces, protects users from harmful intent and implements policy changes. With differentiated functionalities such as an advisory council; a global command center; and an AI bot, Stargen, it ensures effective operations.

In addition to its strong suite of proprietary solutions, Genpact liaises with partners such as Verint, Uniphore and CallMiner to deliver analytics services.

Significant impact on social media value chain: Genpact prioritizes scaling and addressing the growing needs of the evolving social media space. Its impact across the social media value chain includes actioning over 300 million pieces of content, addressing critical issues such as suicide prevention related to live content and managing safety across nine billion user accounts. It also averts harmful viral posts, implements policy changes and generates significant savings, making its contribution invaluable.

Caution

Genpact has a promising portfolio of social media CX services and a robust team. However, clients expect it to bring in more visibility and facilitate the monitoring of processes and procedures, and enable the effective use of technically adept resources.

Appendix

The ISG Provider Lens 2023 – Customer Experience Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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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 August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Customer Experience Services market

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

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

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

5. Use of Star of Excellence CX-Data

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

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

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

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.

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

For more information, visit isg-one.com.

ISG Provider Lens™