ISG Provider Lens™

Contact Center–Customer Experience Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

foundever™

QUADRANT REPORT | OCTOBER 2024 | GLOBAL

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ISG research indicates that cost savings are the primary driver for outsourcing to a provider

State of the industry

Overall BPO growth, which includes customer experience and other back-office operations, remained flat at $5.6 billion in the first half of 2024 compared to 1H2023. Interestingly, the number of awards – 457 – was higher in 1H2024 than the 403 in 2023. This is a strong indicator that the demand in the market is intact. However, deal sizes have been reduced.

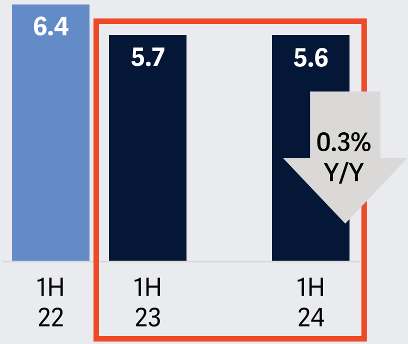
In the customer experience segment, the ACV of $1.2 billion in 1H223 was reduced to $0.8 billion in 1H24. However, similar to the overall BPO trend, although there was a decline in ACV, the number of awards was higher in 1H2024 compared to 1H2023.

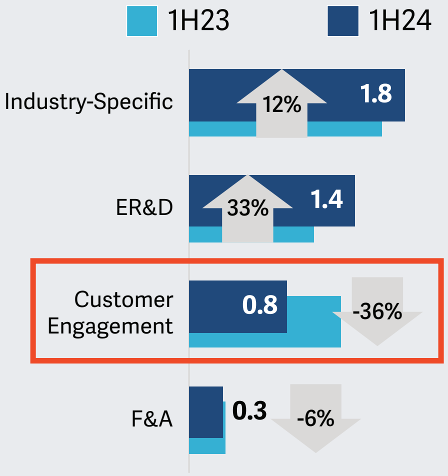
Cost optimization is a key priority and a top driver for outsourcing. Companies are looking to optimize costs and increase process efficiencies by scaling their automation. These are some of the key factors influencing the size of the deals.

In 2022 and early 2023, the BPO industry experienced unprecedented growth across most service lines, including customer experience. However, with demand slowing and numbers returning to pre-pandemic levels, service providers are now facing margin pressures. On one hand, clients are seeking greater cost optimization and to balance the top and bottom lines, providers are responding by significantly slowing down hiring and other discretionary spending.

Managed Services: BPO Results

ACV $B – Annual Contract Value





Source: ISG Index

Technological advancements driving a paradigm shift in CX engagements.

The nature of Customer Experience (CX) engagements has evolved significantly beyond traditional labor arbitrage and involves a high degree of technical infusion. On the enterprise side, it is no longer the business units that get involved, but there is vested interest and involvement from the CIO/ CTO to drive tech modernization. Modern CX engagements now encompass technical, people and process requirements, prompting service providers to invest heavily in developing proprietary intellectual property or expanding their partner ecosystems to meet diverse technological needs.

The technology stack has undergone substantial changes at every level, influencing the CX landscape. IT-BPO integration was spoken about earlier but is seeing a gradual uptake. This shift highlights a trend where service providers are leveraging advanced technologies and comprehensive solutions to meet the complex demands of contemporary CX engagements.

This evolution underscores the growing importance of integrated solutions that blend technology, workforce expertise and optimized processes. Providers are aggressively developing innovative intellectual property and forging strategic partnerships to gain a competitive edge and offer more holistic and effective CX solutions to their clients. Leading developments in different categories are summarized below.

- **Cloud:** There is a surge in enterprises seeking to shift from on-premises to cloud, helping companies address their omnichannel challenges and hybrid working.

Partners in play include cloud contact center (CCaaS) providers such as Genesys Cloud, NICE, Amazon Connect and others.

- **Workforce management/workforce optimization (WFM/WFO):** Clients are seeking an integrated and comprehensive workforce management tool that will help them with end-to-end workforce requirements such as optimization, management and other engagements.

Partners at play include Verint, CallMiner, NICE and others.

- **AI:** Implementations of CX tools or channels such as conversational AI, especially with the emergence of GenAI, conversational AI has gained significant traction.

The prominent partner in this space is Kore.ai.

- **GenAI:** The emergence of generative AI has also led service providers to expand their partnerships with the leading hyperscalers and other model hubs.

Prominent hyperscaler partners include AWS, Google, Microsoft and other partners such as OpenAI and Hugging Face.

- **Analytics:** As data becomes a critical lever for producing insights directly impacting CX and agent experience (AX), knowledge management, data engineering and data visualization tools take center stage.

Some of the prominent partners in this space are Tableau, Power BI, Pegasystems and others.

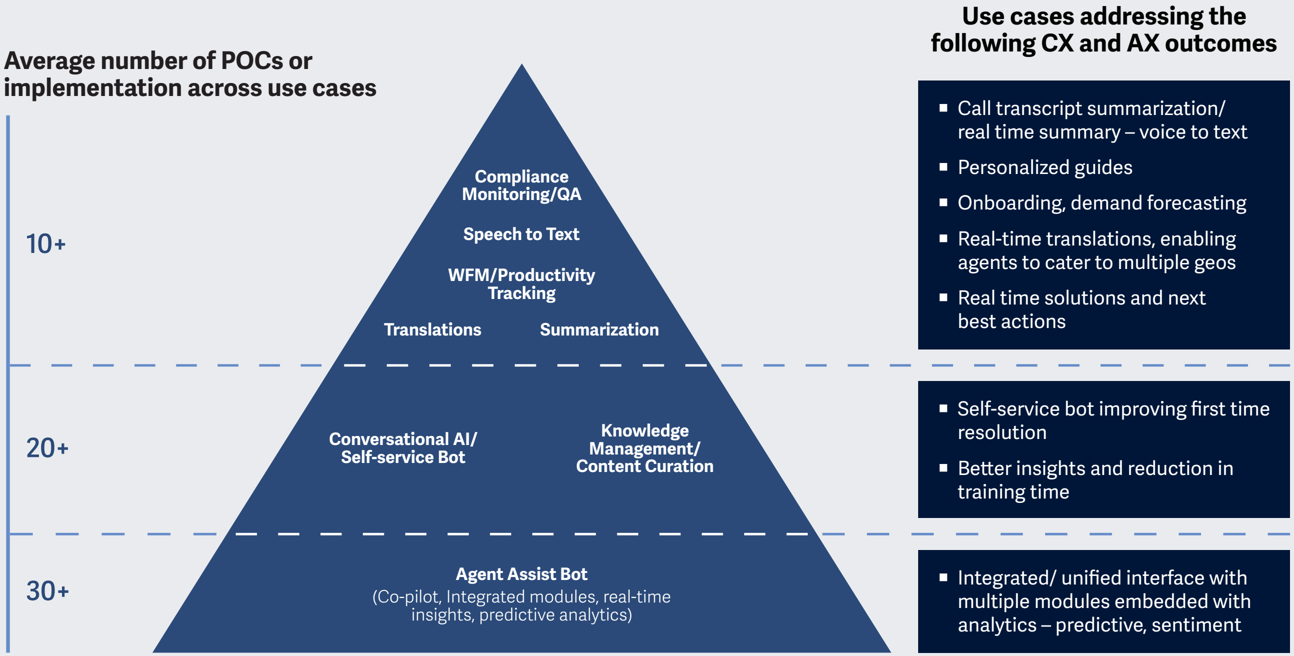
The partners' ecosystem named is not exhaustive and several other ecosystems are not covered. Only the most prominent and growing partnerships in this market have been covered here.

GenAI: A Catalyst for Enhanced Customer and Agent Experience (AX)

Nearly half of the organizations said the biggest priority in their AI strategy is to build use cases that improve customer experience, according to our 2024 AI Buyer Behavior Study. The contact center industry is marching forward for GenAI adoption and the numerous use cases being developed in this space are either in mature proof of concept stages or, in some cases, have been implemented. As mentioned in the previous section, service providers are expanding and investing in newer partnerships to build enterprise-grade GenAI solutions.

The image below illustrates the various identified use cases and their increasing significance. These are among the most popular GenAI applications, many of which directly enhance agent experience and outcomes. Key improvements include reduced training time, lower average handling time (AHT), higher first call resolution (FCR), decreased error rates and improved CSAT and employee satisfaction (ESAT).

Growing importance of GenAI use cases



Source: ISG Provider Lens Contact Center Study – RFI responses

On average, service providers are either in the PoC or implementation stage for approximately 12 percent to 15 percent of their total clients.

(Numbers are based on the responses received from more than 30 service providers. These are indicative and not actual representations of the market)

Essential Skills for CX Agents to Drive Customer-Centric Innovation

With each level of automation introduced into contact center processes, the role of the agent has evolved significantly. As these roles and related skill set requirements have shifted, providers are increasingly investing in advanced tools and technologies to deliver highly relevant and quality training to their employees, which aims to ensure that agents are well-equipped to handle complex issues. Adopting AI has been a pivotal development in the learning and development arena. Using AI, companies can now curate training content that not only aligns with industry standards but also caters to the specific needs of agents based on their transaction or call history. This personalized approach to training ensures that agents receive targeted learning experiences, which are crucial for addressing individual skill gaps and enhancing overall performance.

Focusing on continuous learning and adaptation is crucial for maintaining competitive advantage and delivering exceptional customer experiences. With GenAI coming into play, the skill set requirements will further shift and the agent role will evolve toward specialization. Based on our research and provider conversations, the following are some of the emerging skills in the contact center industry that will define the agent of the future.

AI and analytics are the topics that are most talked about and the growth and innovation in this space have been exponential. Today, companies leverage AI and analytics to have a positive impact, both within an organization and on the outside. With the advent of generative AI (GenAI), the opportunities to bring about advantages such as personalization, efficiencies, agent empowerment, contextual conversations and intelligent conversations have further expanded.

ISG research indicates that **cost savings are the primary driver** for outsourcing to a provider

Using analytics, meanwhile, complements 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 ahead with the rapid changes. They are also struggling with the challenges of embarking on implementations or scaling them to experience the actual positive 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 automation-related, to determine a client's maturity and appetite for new technologies. Providers in this report 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.

As GenAI takes prominence in the world of customer experience and with promising outcomes, enterprises are increasing their expectations for productivity and efficiency gains. Enterprises are keen to explore and are open to investing in GenAI.

Evolving role of an agent

Brand Advocates

These agents bring highly specialized knowledge about a brand, product or vertical. Their in-depth knowledge about the vertical or a product will help them deliver highly personalized services and able to better interpret the customer problems. They are able to proactively identify revenue generating opportunities

Experience Creators

These agents are highly invested in creating superior customer experiences. They are cross-domain experts and can deliver support customers proactively by effectively leveraging technology.

Innovators

Agents in this domain are cross domain experts and in addition, bring deep technical knowledge. They are invested in continuous improvements by contributing new ideas, process improvements and technology.

Escalation Handlers

These agents are highly experienced, well-versed with domain knowledge. They have the necessary technical knowledge but most importantly they are 'out-of-the-box thinkers' with highly creative and decision-making skills who can go the extra mile to ensure customer satisfaction

Change Agents

These agents are change makers or drivers. With the number of changes taking place both on the knowledge and technical front, these agents are driving changes and helping the agent community to help them adapt to new strategies, tools and practices.

Data Experts

These agents are experts in managing data and are also domain experts. They are able to leverage the data and derive meaningful insights. Most importantly, these agents are leveraging the data to create solutions that will help agents deliver seamless customer experiences

Provider Positioning

	Digital Operations	Intelligent Agent Experience	Intelligent CX (AI & Analytics)
[24]7.ai	Product Challenger	Product Challenger	Product Challenger
Alorica	Market Challenger	Market Challenger	Market Challenger
Atento	Leader	Leader	Product Challenger
Cognizant	Product Challenger	Leader	Leader
Concentrix	Leader	Product Challenger	Product Challenger
Conduent	Leader	Market Challenger	Market Challenger
Datamatics	Product Challenger	Contender	Product Challenger
EXL	Product Challenger	Product Challenger	Product Challenger
Firstsource	Product Challenger	Rising Star ★	Product Challenger
Foundever®	Leader	Leader	Leader
Genpact	Leader	Leader	Leader

Provider Positioning

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	Digital Operations	Intelligent Agent Experience	Intelligent CX (AI & Analytics)
HCLTech	Product Challenger	Product Challenger	Market Challenger
Hexaware	Product Challenger	Product Challenger	Rising Star ★
HGS	Leader	Leader	Leader
IGT Solutions	Rising Star ★	Product Challenger	Product Challenger
Infosys	Product Challenger	Product Challenger	Product Challenger
Movate	Product Challenger	Leader	Leader
Mphasis	Market Challenger	Contender	Contender
Quantiphi	Contender	Not In	Not In
ResultsCX	Product Challenger	Product Challenger	Market Challenger
Startek®	Product Challenger	Rising Star ★	Product Challenger
Sutherland	Leader	Leader	Leader

Provider Positioning

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	Digital Operations	Intelligent Agent Experience	Intelligent CX (AI & Analytics)
TaskUs	Market Challenger	Product Challenger	Market Challenger
TCS	Market Challenger	Market Challenger	Product Challenger
Tech Mahindra	Leader	Product Challenger	Product Challenger
Teleperformance	Leader	Leader	Leader
Transcom	Leader	Leader	Leader
TTEC	Leader	Product Challenger	Leader
Wipro	Market Challenger	Product Challenger	Product Challenger
WNS	Leader	Leader	Leader
Xceedance	Contender	Contender	Contender
yoummday	Contender	Not In	Not In

Customer experience transformation, **multidimensional approach to CX transformation** relies on key catalysts such as **people, process, data and technology**.

- **Digital Operations**
- **Intelligent Agent Experience**
- **Intelligent CX (AI & Analytics)**

Simplified Illustration Source: ISG 2024

Definition

Amid profound shifts, delivering exceptional CX demands a multidimensional approach to holistic transformation. Swift advancements in technology, evolving workplace dynamics and escalating end-user demands exert considerable pressure on enterprises, compelling them to reassess their operational frameworks, adapt with agility, address growing security challenges and navigate various other factors. These factors drive constant evolution in the contact center industry, prompting enterprises to regularly reassess strategies and implement technological changes to foster growth. Enterprises are actively seeking strategic partnerships that will help them successfully maneuver through this evolving landscape.

To adapt to changes, service providers are taking progressive steps by investing in and expanding their portfolio of solutions and capabilities. They are advancing beyond traditional boundaries and expanding capabilities to address the entire spectrum of contact center services, necessitating the development of technological expertise and a skilled workforce. As GenAI rapidly advances, it is poised to significantly disrupt the industry, leading to a proliferation of use cases. We believe people, process, data and technology will be key transformation catalysts and quintessential for successful implementation. Thus, it is pertinent for providers to have robust knowledge and know-how and foster greater agility. From helping enterprises redesign their operating models to redefining KPIs and outcomes, service providers are expected to engage in more strategic conversations.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/ solutions: Digital Operations, Intelligent Agent Experience and Intelligent CX (AI & Analytics).

This ISG Provider Lens™ study offers IT-decision makers:

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

This ISG Provider Lens™ study offers IT-decision makers: 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 provider.

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

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

Provider Classifications: Quadrant Key

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

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

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

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

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Digital Operations

Who Should Read This Section

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

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

The report offers a detailed assessment of providers offering contact center digital operation services globally, evaluating their ability to deliver end-to-end solutions. It highlights key areas such as consulting services, industry expertise, technological capabilities and digital competency. The report provides enterprises with insights into the importance of the CX, the integration of omnichannel strategies and the use of AI to enhance CX. It also underscores the significance of a well-defined maturity assessment framework and the ability to design tailored solutions, showcasing service providers' technological capabilities, contact center infrastructure, delivery models and innovative pricing strategies. The report also covers the importance of digital infrastructure, talent management and the providers' vision and strategic initiatives, such as investments in proprietary solutions and thought leadership, and their ability to achieve ESG goals through data-driven insights and strategic partnerships.

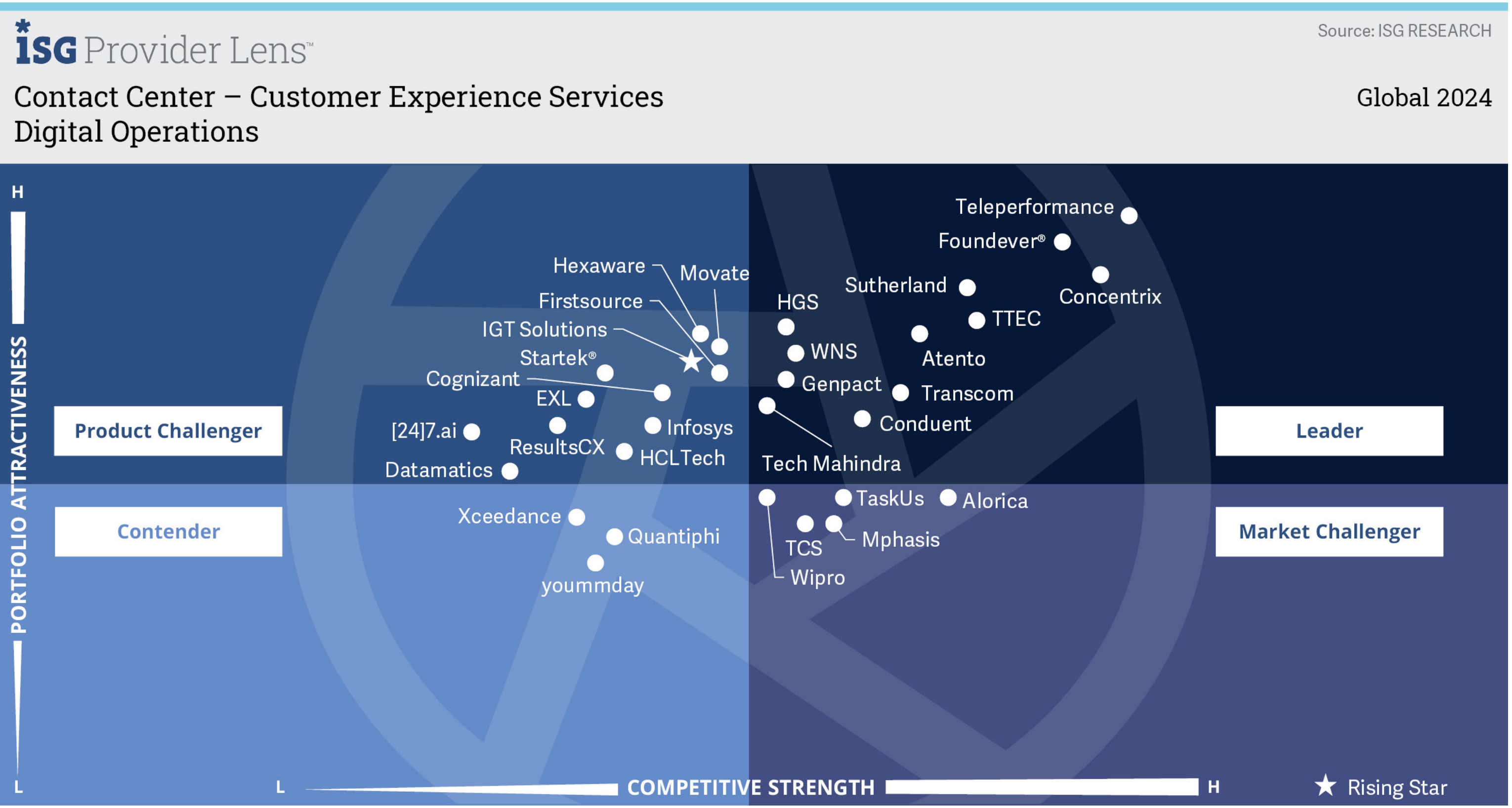
Providers are navigating digital transformation, addressing customer demands and implementing effective strategies in the evolving contact center landscape.

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

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 understand how contact center service providers leverage multiple technologies and compare their technical capabilities.

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



The Digital Operations quadrant evaluates comprehensive **contact center CX outsourcing services**, assessing providers on their offerings in digital technologies, consulting, implementation, managed services and various operating models.

Namratha Dharshan, Hemangi Patel

Definition

The Digital Operations quadrant assesses service providers' broad capabilities to address the end-to-end value chain of contact center services. It starts with understanding their consulting services, domain knowledge, industry expertise and technology know-how. Service providers must demonstrate their ability to assess clients' maturity through their maturity assessment framework. It is crucial to showcase their ability to design and deliver tailored solutions that include optimal operating models, demonstrating the length and breadth of their technological capabilities, the contact center infrastructure they offer and their delivery models and innovative pricing strategies. Digital infrastructure is a critical element in accessing service providers' capabilities. This assessment encompasses digital technology proficiency and integrates multiple dimensions to define successful business outcomes, which will serve as a key measure to help clients achieve their ESG goals.

Talent is another crucial topic; companies are actively building talent capabilities that include onboarding, training, employee engagement and retention programs. They are actively using digital technologies such as AI and analytics to manage the talent landscape within organizations.

Service providers' vision and vested interest to grow in this industry are crucial. Strategic initiatives such as investments in proprietary solutions, successful partnerships, mergers and acquisitions, innovation centers or CoEs and thought leadership play pivotal roles in their growth trajectory.

Eligibility Criteria

1. **Demonstrate strategic vision and investments** to build service providers capabilities or portfolio of solutions
2. **Offer consultation** backed by domain expertise, industry leadership and maturity assessment frameworks
3. **Provide essential contact center infrastructure** to enable agents and customers with multichannel/ omnichannel capabilities and industry solutions
4. **Bring various digital capabilities** such as AI, analytics, GenAI, cloud and security
5. **Have talent onboarding and training** approaches, employee well-being programs and talent retention strategies in place
6. Focus on delivery centers, **right shoring models**, innovation, pricing models, **employee engagement models** (GigCX or contracting models) and hybrid working strategies

Observations

As digital transformation continues to evolve, customer demands and market dynamics are reshaping service delivery across businesses. Providers must focus on several key aspects to stay relevant: strong consulting portfolios to guide clients through their transformation journeys, robust digital competencies and effective omnichannel strategies. The ability to use data for actionable insights that enhance customer and employee experiences is crucial. Providers also need organizational change management (OCM) capabilities to support enterprises through these ongoing changes. With environmental, social and governance (ESG) considerations gaining prominence, partnering with businesses to achieve goals such as reduced carbon footprints and improved diversity metrics has become important.

In 2024, exceptional CX will be driven by integrating emerging technologies. Omnichannel communication will ensure seamless service across digital channels such as social media, email and chat. Automation, AI and ML will play significant roles in streamlining support, enhancing agent performance and boosting operational efficiency. The rise of distributed and remote workforces will necessitate flexible, cloud-based platforms to accommodate evolving customer and operational needs. The role of agents will shift toward managing complex issues and utilizing multiple channels effectively, while advanced AI and analytics will improve CX measurement and service quality.

Thus, providers are investing substantially in enhancing their offerings and capabilities. In 2024 the digital operations market will experience unprecedented growth, and the competition for a leadership position in this space has become intense.

From the 36 companies assessed for this study, 32 qualified for this quadrant, with 12 being Leaders and one Rising Star.

Atento

Atento is a qualified leader in digital operations for its comprehensive CX services, a strong presence in the LATAM market and commitment to AI advancements while investing in geographical expansion and strategic alliances.

CONCENTRIX

Concentrix, following its Webhelp acquisition, has achieved extensive global reach, serving over 2,000 clients. Its balanced geographical footprint and broad capabilities, including digital services, solidify its leadership position in the market quadrant.

Conduent

Conduent maintains its leadership position in digital operations with mature CX services, a robust digital portfolio of solutions, deep public sector penetration with specific government solutions and a strong healthcare presence.

foundever

Foundever® boasts a strong global presence across more than 45 countries and is investing further to bolster its global footprint, especially in APAC and EMEA. Further, Foundever is a leader for its robust CX service offerings backed by exemplary domain knowledge.

genpact

Genpact made its entry as a leader in this quadrant for its renewed focus on CX strategy, helping its clients realize the return on total experience (ROTX) by measuring the effectiveness of the entire CX ecosystem, in addition to its robust portfolio of services.

HGS

HGS is a leader for its focus on higher personalization. HGS has adopted a vertical strategy to meet the evolving customer requirements across the value chain of a vertical and offer custom solutions addressing quick and proactive service delivery.

SUTHERLAND

Sutherland is strengthening its end-to-end capabilities to support enterprise clients across the value chain. It has consistently focused on organic and inorganic growth approaches such as acquisition, partnerships and geographic expansion to offer high-value CX services.

Tech Mahindra

Tech Mahindra, a leader in Digital Operations, continues to make a strategic alliance with Atento, offering GenAI-powered business transformation solutions and expanding its market presence in the U.S., Europe and LATAM.

Teleperformance

Teleperformance dominates the market with its recent acquisition of Majorel, significantly expanding operations and introducing new offerings for end-to-end CX transformation.

Transcom

Transcom offers strong CX advisory services through strategic consulting and advanced analytics backed by T:Labs, an innovation hub that drives new technologies to enhance service delivery and customer support, making it a strong competitor in this space.

TTEC

TTEC's focus on proprietary solutions, partnerships and innovation centers drives continuous improvement and growth in digital operations, reinforcing its commitment to advancing customer experience.

WNS

WNS earns its leadership position in the digital operations quadrant for its mature CX offerings, bringing the knowledge of back office and front office operations alongside a robust digital portfolio and its vertical specialization.

IGT Solutions

Rising Star **IGT Solutions'** deep domain expertise and extensive range of intellectual property solutions and accelerators tailored to the travel and leisure industry are key highlights and differentiating factors in its success.

Foundever®

Leader

"Foundever is strongly focused on proprietary solutions and a mature consulting framework, demonstrating its deep domain knowledge and strategic technology partnerships, strengthening its digital operations and positioning itself as a leader in the market."

Namratha Dharshan, Hemangi Patel

Overview

Foundever® (formerly Sitel Group) is headquartered in Luxembourg. It has more than 170,000 employees across over 180 offices in 45 countries. In FY23 the company generated over $4.0 billion in revenue. With more than 30 years of experience delivering exceptional BPO services, Foundever supports more than 60 languages and over 9 million customer conversations every day across 45 countries. Its commitment to continuous improvement and strategic investments in digital capabilities position it as a leader in delivering high-quality, scalable and efficient operational solutions.

Strengths

Focus on intellectual property solutions: Foundever is advancing its proprietary solution portfolio through expertise in technology, digital transformation, analytics and operations, which is supported by a global network of innovation centers. Collaborations with leading technology firms bolster its capabilities in technology, healthcare, financial services/fintech and startup brands.

Customer-focused consulting approach: Through the Success Program, Foundever helps customers transform their business and CX with benchmarking, insights and consultative journey design. The program tackles operational challenges, assesses technology and KPI ecosystems and designs and implements solutions to achieve business outcomes. Foundever supports through consulting strengths which include customer journey mapping, workflow design, process optimization, technology architecture design, revenue operations optimization, learning needs analysis, digital transformation and risk management.

Expanding global footprint: In 2023, Foundever expanded globally with new locations in Turkey, Peru, Madagascar, South Africa and Malaysia and established new hubs in Turkey, Peru, the Philippines, Egypt, Greece, Portugal, Spain, Germany, Brazil, Colombia and the U.K. The hubs support hybrid delivery models focused on engagement and the future work landscape. Further expansions are planned across the Americas, EMEA and APAC in 2024.

Caution

While Foundever has expansive digital solutions, the company must also focus on investing in training employees in technical domains such as programming and cloud computing. This will help the company with technological integrations of its solutions and significantly improve its diverse talent pool.

Intelligent Agent Experience

Who Should Read This Section

This report is relevant to global enterprises across industries that evaluate intelligent agent experience providers for contact centers.

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

The report assesses agent experience as a key factor impacting CX, highlighting the need for the proper infrastructure and programs to ensure successful interactions. It covers both technological and non-technological dimensions. Providers focus on technological advancements such as unified communications and AI-based agent assistance enabling real-time support and insights to enhance efficiency and decision-making. They also offer tools such as automated interaction summaries and performance monitoring to improve productivity.

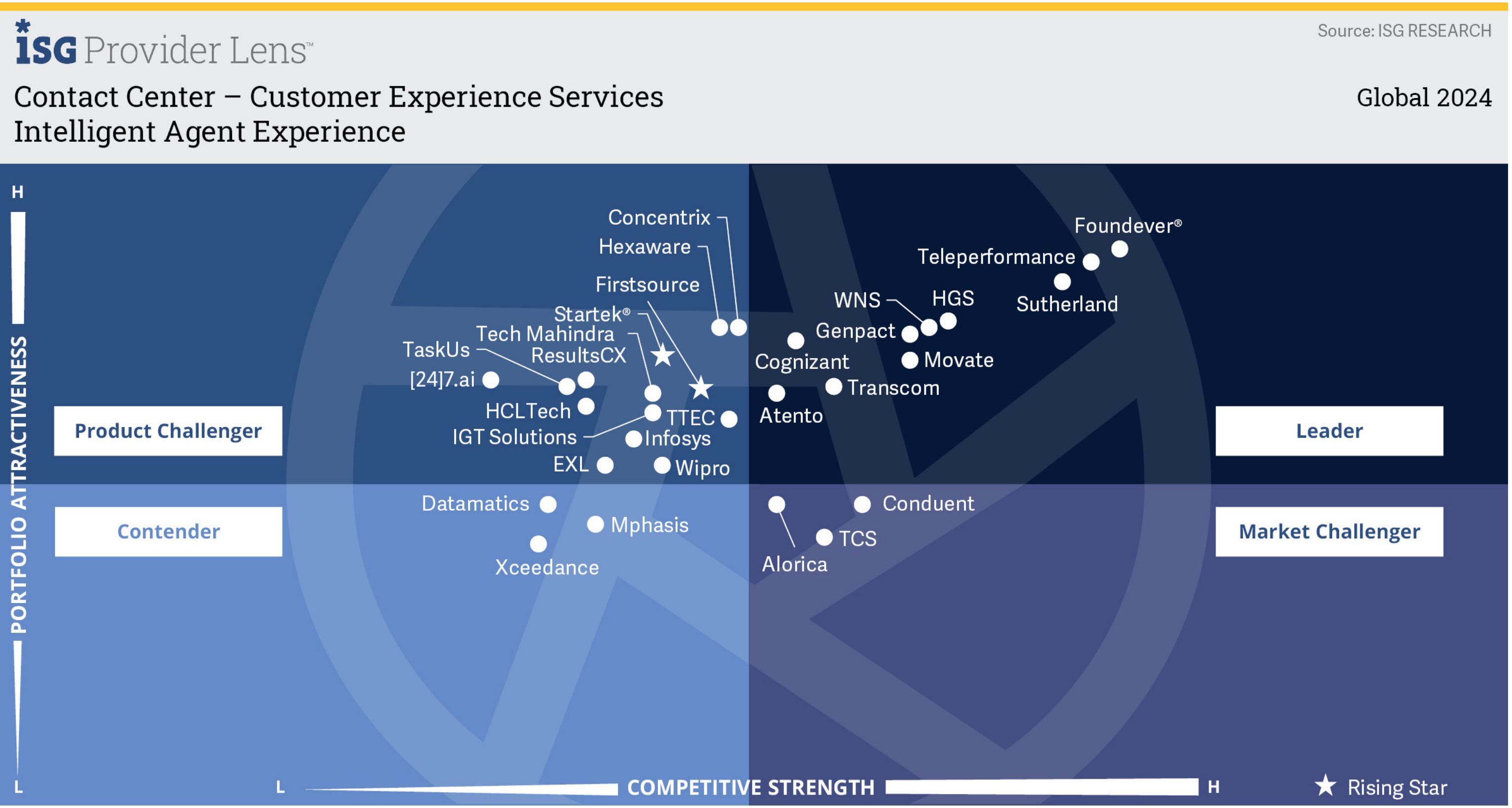
Non-technological aspects include the importance of a supportive work environment, comprehensive training, continuous feedback mechanisms and career development opportunities to reduce turnover rates. By fostering a positive agent experience through effective talent management and innovative technologies, businesses can drive superior CX, enhance employee satisfaction and improve performance and retention within contact centers.

Digital professionals should read this report to understand how a supportive work environment, training and innovative technologies enhance agent experience and improve customer service.

Contact center professionals should read this report to gain insights on market trends, best practices and technologies that can help improve agent performance and digital operations, boosting CX.

Procurement Professionals should read this report to gain insights on creating a positive agent experience, focusing on training, feedback and career development to reduce turnover and boost engagement.

Technology professionals should read this report to gain insights into how contact center providers use AI and unified communications to boost agent performance and improve customer interactions.



This quadrant examines providers' capabilities in **enhancing agent experiences**, focusing on their offerings in training, support, engagement and technology integration to improve agent performance and satisfaction.

Namratha Dharshan, Hemangi Patel

Definition

Agent experience directly correlates to CX; ensuring agents have the necessary infrastructure and programs is pivotal for successful CX. It encompasses two dimensions: the technological aspect and the non-technological aspect. Technology has revolutionized and demonstrated proven techniques to enhance AX. Unified communications enable a single interface, allowing interactions across channels. AI-based agent assistance provides real-time support to agents, empowering them with knowledge and insights to make informed choices and decisions. Implementing automated interaction summaries can alleviate burdens and improve efficiency with real-time performance monitoring and analytics, which helps supervisors and agents effectively manage a challenging situation. Gamification fosters a healthy culture of employee engagement and various analytic techniques that positively impact the agent experience.

The other aspect of agent experience revolves more around the non-technological element, such as training curriculum, empowerment, supportive work environments, continuous feedback mechanisms, work-life balance, career development opportunities, programs to upskill employees and effective collaboration methods.

The current state of agent experience in contact centers reveals challenges such as high turnover rates and increasing complexities in customer queries. The demanding nature of contact center jobs leads to burnout, stress-related health issues and employee turnover. With AX becoming an essential measure of success, tools such as analytics and reporting tools, collaboration tools, technologies and best practices are proven to foster loyalty, drive superior CX, and improve performance and satisfaction.

Eligibility Criteria

1. Have structured programs in place, including **career development programs**, training curriculums, tools such as gamification for effective employee engagement, security training and education
2. Bring tools and technologies for real-time quality monitoring and workforce management, including **remote work management and knowledge management**
3. **Use AI and analytics** to enhance agent experience, including AI-driven assistance, unified desktops and various types of analytics (speech, text, predictive and sentiment) for personalized conversations
4. Have case studies with metrics, such as **AHT, ESAT and FCR**, that drive measurable outcomes, including enhanced productivity, quality deliveries, and improved satisfaction and engagements

Observations

With digital transformation, AX in contact centers is increasingly becoming important as it directly impacts customer satisfaction, loyalty and overall business success. Contact centers emphasize elevating AX by introducing the right tools and technologies, including helping enhance agents' on-the-job performance and overall career development. Transformational technologies such as AI, GenAI analytics and automation are playing a significant role in enhancing AX. Contact centers have introduced various tools such as agent assist tools, unified agent desktop solutions and workforce management solutions, allowing human agents to focus on more complex and nuanced customer interactions while eliminating repetitive tasks.

Providing flexible working conditions and an accurate feedback mechanism supported with necessary learning and development programs to enhance AX is essential to attracting and retaining talent. Service providers have introduced productivity modules that track efficiency and suggest AI-based learning modules and gamification tools that can upskill agents. Flexible working conditions, agent support and wellness programs are achieving positive outcomes, including reduced attrition rates, improved productivity and high staff retention levels. By understanding and embracing these trends, contact centers can adapt to the changing landscape, improve agent experiences and enhance operational efficiency.

From the 36 companies assessed for this study, 30 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

Atento

Atento's AI solutions in contact centers significantly improve operational efficiency, customer satisfaction and agent productivity, positioning it as a leader in this quadrant.

cognizant

Cognizant excels in offering industry-specific solutions. It integrates AI-driven virtual assistants to enhance agent experience and customer satisfaction. Strategic partnerships with hyperscalers support these capabilities, strengthening its leadership position.

foundever™

Foundever® has effectively deployed GenAI to enhance agent experience to boosting productivity and performance, minimizing repetitive tasks and delivering a more natural, conversational experience, strengthening its market position.

genpact

Genpact is a leader in the contact center analytics market and is at the forefront of using AI and analytics to transform the industry.

HGS

HGS has established itself as a leader with its extensive digital offerings, including Agent X and HGS PULSE, a contact center analytics software designed to improve the AX.

movate™

Movate has strongly focused on elevating agent experience throughout their lifecycle by introducing frameworks and solutions, including Movate EDGE framework, the COEUS solution and Movate Edison, a cloud-based solution, to elevate agent performance.

SUTHERLAND

Sutherland has built a robust ecosystem of AI and analytics driven like CX360 to enhance the agent experience, making them a leader in this space.

Teleperformance

Teleperformance has an unmatchable agent experience portfolio, further enhanced by GenAI, which makes it a strong leader in this quadrant.

Transcom

Transcom is a leader in its advanced AI solutions, which feature auto-pilot and co-pilot functionality for decision-making and data analytics to enhance the agent experience. Similarly, Cognizant's Experience Center, partnered with Genesys Cloud uses critical analytics to improve AX, positioning Cognizant as a leader in this quadrant.

WNS leverages GenAI and NLP-based bots to empower agents with curated information, enhancing their performance and predictive analytics capabilities, positioning itself as a leader in this quadrant.

Firstsource is positioned as a Rising Star due to its impactful FirstSenseAI platform, which enhances AX with personalized interactions, instant insights and supportive lifecycle management, thereby boosting customer loyalty and satisfaction.

Startek® has emerged as a Rising Star in this quadrant due to its capabilities in utilizing AI technologies for agent assistance, on-demand training and gamification modules. Its knowledge management platform supports a well-rounded agent experience.

Foundever®

Leader

"Foundever brings advanced AI-enabled co-pilots and auto-pilots, AI-driven learning and development (L&D) initiatives and flexible hybrid delivery to its agents. It also adopts a comprehensive approach to improve AX to drive operational excellence."

Namratha Dharshan, Hemangi Patel

Overview

Foundever® (formerly Sitel Group) is headquartered in Luxembourg. It has more than 170,000 employees across over 180 offices in 45 countries. In FY23 the company generated over $4.0 billion in revenue. At Foundever, agent experience capability is centered around empowering agents with the tools and support they need to excel. The comprehensive training programs, the right blend of co-pilots, auto-agent and AI-driven insights enhance agent performance and satisfaction. The capability to pull in the right resources from virtual-centric and hybrid delivery models differentiates it in solving dynamic CX needs and enhances AX.

Strengths

GenAI-based copilot and auto-agents: Foundever uses GenAI with copilot and auto-agent models to bolster agent capabilities. Copilots aid human agents by offering contextual support, automating tasks and streamlining onboarding. Auto-agents handle customer interactions, autonomously managing tasks while continuously learning under human supervision for optimized performance.

L&D development initiatives: In 2023, Foundever delivered over 730,000 hours of skills training via its MyAcademy and EmpowerCenter platforms. It introduced self-led, AI-based training and coaching for CX in a hybrid model, boosting productivity and engagement. Insights from these initiatives helped identify gaps, track progress and adjust training. A partnership with Zenarate enhanced agent capabilities through AI simulation training.

Powerful analytical capabilities: Agents need the ability to extract in-depth insights from structured and unstructured data across all customer interactions to deliver CX. The Foundever Analytics platform provides real-time access to customer data insights, enhancing agent productivity and enabling them to anticipate future customer behavior for proactive responses.

Caution

While Foundever has built compelling agent experience offerings, its clients expect the company to enhance its implementations to expand its talent pipeline, manage attrition and intensify coaching for its agents specifically focused on cultural fit and business requirements.

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 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.

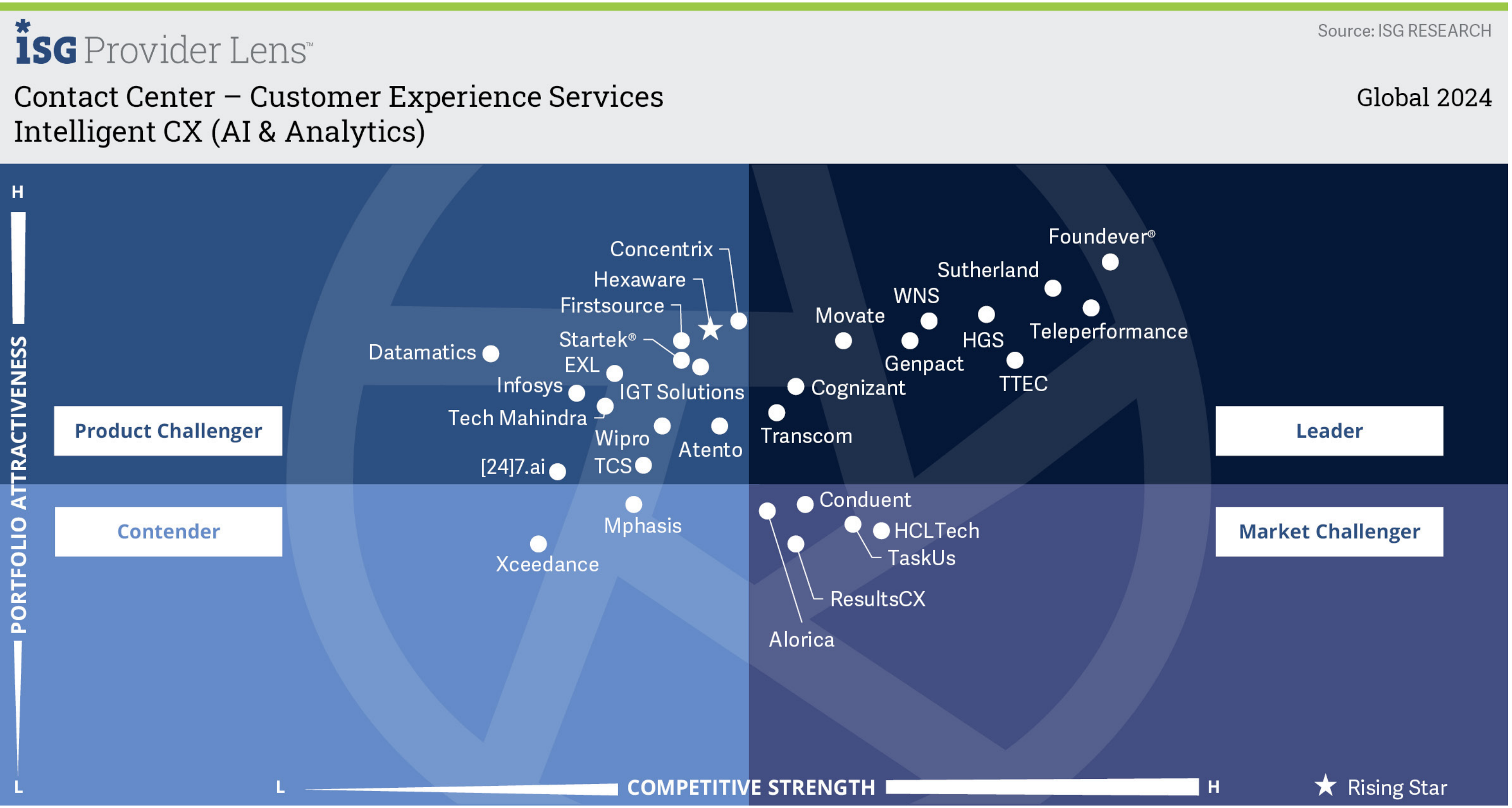
The report showcases the exponential growth and innovation in AI and analytics for business leaders and enterprises. Enterprises are leveraging these technologies to positively impact internally and externally, with opportunities for personalization, efficiency and intelligent conversations. This report underscores the potential of AI and analytics in contact center operations, driving business growth.

Digital professionals should read this report to understand how AI and analytics enhance internal operations and customer interactions through better personalization and efficiency.

Strategy professionals should read this report to discover how AI and analytics, including RPA, speech analytics and NLP, transform productivity, CX and real-time coaching.

Vertical leaders should read this report to learn about providers that offer industry-specific solutions backed by technologies such as AI and analytics.

Technology professionals should read this report to learn about the latest trends, best practices and challenges in implementing AI and analytics in contact centers.



This quadrant evaluates providers on their capabilities in **delivering AI and analytics** solutions, focusing on offerings, strategic partnerships, implementations and innovations and how these factors help enterprises achieve their business outcomes.

Namratha Dharshan, Hemangi Patel

Definition

Contact center transformation is heavily reliant on AI and analytics technologies. AI and analytics play a pivotal role in enhancing operational efficiency, improving productivity and achieving better customer satisfaction. AI has many applications that provide significant competitive advantages for service providers in this domain, enabling them to deliver superior CX.

With the ability to augment an agent by analyzing vast amounts of customer data in real time, AI-powered systems enable valuable insights into customer preferences, past interactions and potential pain points. AI-driven tools such as sentiment analytics and voice recognition enable contact centers to gauge customer sentiments and emotions. All of these tools can help companies understand customer behavior in depth. Analytics plays a significant role in redefining CX. It prepares agents to deliver superior CX and helps companies with the cross-selling and upselling opportunities that allow them to retain customers and grow their business. Moreover, having all information and behavioral patterns help companies proactively adjust their strategies, products and services to cater to changing customer needs and stay ahead of the competition.

Given the growth and potential use cases of GenAI, the technology has immense capability to transform the contact center industry. AI-powered algorithms with the potential to analyze vast amounts of data, study patterns and offer informed suggestions, alongside linguistic capabilities, will simplify customer service. Developers can further enhance conversational AI platforms to provide contextual conversations.

Eligibility Criteria

1. **Offer advisory services** with automation maturity and benchmarking assessments, backed by a qualified consulting team to help enterprises with their AI journey
2. Have AI and analytics technology applications, partnerships and homegrown solutions, investments in **GenAI and future strategies**
3. **Possess certified AI professionals** and training and curriculum partners
4. **Demonstrate effective data strategies and frameworks** and analytics implementations such as sentiment analytics, VoC, speech or text analytics, homegrown tools and solutions, and partnerships
5. Have case studies that demonstrate measurable business outcomes such as revenue generation, customer retention and definition of KPIs **such as CSAT and churn rate**

Observations

In today's fast-paced digital landscape, CX in contact centers has become a critical business differentiator. As customer expectations continue to rise, companies are increasingly leveraging advanced technologies, including AI and analytics, alongside strategic advisory services to enhance the quality of their customer interactions. With the advent of GenAI, the opportunities for personalization, efficiency, agent empowerment, contextual interactions and intelligent conversations have further expanded. Meanwhile, analytics complements and accelerates an enterprise's ability to acquire new customers, retain existing ones, increase loyalty and deliver superior CX.

Even with significant technological advancements, enterprises often struggle with adopting and implementing AI to achieve ROI. This underscores the importance of strategy consulting, where experts guide them in implementing and optimizing AI technologies to enhance customer interactions.

Transformation frameworks and maturity self-assessment tools enable contact centers to systematically improve their operations, ensuring continuous advancement and alignment with industry best practices. Providers in this space are assessed based on their proprietary AI, analytics solutions, partnerships, implementation success, delivered value, growth initiatives and innovative and visionary capabilities. These factors collectively help enterprises achieve the true value of a transformative approach.

From the 36 companies assessed for this study, 30 qualified for this quadrant, with 10 being Leaders and one Rising Star.

cognizant

Cognizant stands out in the customer experience quadrant through its consumer-focused, end-to-end digital business transformation services, including its Customer 360 solution and automation capabilities, which drive exceptional CX.

foundever

Foundever® has continued to be a leader in this space with its highly differentiated CX-centric intellectual property products and offerings. However, more importantly, its ability to showcase the scale of CX-centric use case deployment is very high.

genpact

Genpact's AI-led CX approach to addressing evolving customer needs and delivering superior experiences, supported by a strong team of experts and continuous focus on innovation, including numerous AI and ML patents, positions it as a leader in this quadrant.

HGS

HGS' key strength is its ability to design a modular CX portfolio supported by consulting and transformation services enabling the company to identify specific pain points and deliver a superior CX.

movate

Movate continues to invest in emerging technologies such as AI, GenAI, chatbots and cloud-based platforms to enhance CX. Its GenAI platform, Movate Athena, is designed to improve customer interactions with its modular and outcome-focused approach.

SUTHERLAND

Sutherland's digital portfolio and advanced analytics continue to be key pillars for delivering CX. The company leads in this space by offering customer-centric proprietary AI-driven products and platforms utilizing intellectual property and automation capabilities.

Teleperformance

Teleperformance's robust partnership ecosystem and proprietary solutions support deployment at scale. With GenAI advancements such as TP GenAI, Teleperformance continues to deliver advanced, digitally powered business services, helping customers streamline their operations.

Transcom

Transcom's capability around automated translation, including advanced AI real-time voice and text translation service and conversational AI bots for more personalized CX, especially for European customers, is highly impressive, making it a leader in this market.

TTEC

TTEC has significantly focused on expanding portfolio capabilities, combining AI technology offerings, partnerships and proprietary intellectual property to provide clients with future roadmaps for achieving business outcomes.

WNS

WNS' advanced analytical capabilities, including cross-channel analytics, interaction analytics, loyalty analytics and others, along with enhanced digital capabilities to deliver exceptional CX, have positioned it as a leader in the quadrant.

HEXAWARE

Hexaware has emerged as a Rising Star due to its comprehensive CX assessment framework, ability to leverage GenAI for automating conversations, and its Tensai solution for automation, which enhances CX streamline workflows for customers.

Foundever®

Leader

"Foundever prioritizes customer experience with a strong AI-led solution portfolio and deployment capabilities, cutting-edge digital capabilities and strategic partnerships. Focus on these areas position Foundever as a leader in this market."

Namratha Dharshan, Hemangi Patel

Overview

Foundever® (formerly Sitel Group) is headquartered in Luxembourg. It has more than 170,000 employees across over 180 offices in 45 countries. In FY23 the company generated more than $4.0 billion in revenue. With over 30 years of experience, Foundever excels in delivering innovative, digitally integrated solutions. From interaction analytics to conversational AI, the company has consistently created substantial, lasting value for brands by improving speed-to-delivery, revenue generation, cost efficiency and CX across various business metrics.

Strengths

Strong portfolio and deployment capabilities: Foundever offers various GenAI solutions developed in-house and effectively deployed in client environments. Its strength is creating customized intellectual property solutions through an in-house R&D team and strategic technology partnerships, enhancing GenAI implementation capabilities.

Partnerships to strengthen CX portfolio: Strategic partnerships with Cognigy and Sprinklr have strengthened Foundever CX portfolio. The collaboration with Cognigy focuses on advancing conversational solutions for contact center digital transformation, while the partnership with Sprinklr enhances CX across digital channels. These initiatives improve customer journeys, reduce costs and deliver rapid ROI.

In 2023, Foundever also announced partnerships with Genesys, KMS Lighthouse and Zenarate to expand its tech capabilities further.

Digital capabilities to enhance CX delivery: To boost CX delivery, Foundever has established centers of excellence with more than 700 process and customer interaction experts, over 800 data experts, more than 900 digital experts and over 1,200 learning experts. These CoEs design, develop and deliver integrated solutions for over 800 clients, tailoring solutions to client needs and optimizing quality, efficiency and revenue growth.

Caution

With a strong CX portfolio of solutions in sectors such as BFSI, technology, manufacturing, telecom and media, Foundever® can easily expand learning from these sectors to other targeted ones and widen the portfolio of offerings.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till September 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Contact Center – Customer Experience Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Sales/Marketing

▼ **Least satisfied**
Legal/Compliance

Region

▲ **Most satisfied**
Australia/New Zealand

▼ **Least satisfied**
Central/South America

Industry

▲ **Most satisfied**
Telecom and media

▼ **Least satisfied**
Public sector

Industry Average CX Score

80.9

▲ Highest CX: 95.0
▼ Lowest CX: 62.7

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = [334]

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	20.3%
Offshore	20.5%

Appendix

The ISG Provider Lens 2024 – Contact Center – Customer Experience Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

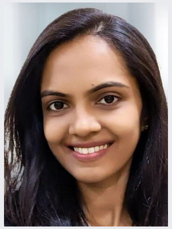
1. Definition of Contact Center – Customer Experience Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge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

Study Sponsor and Author

Namratha Dharshan
Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens™ program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens™ program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report 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. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.



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Hemangi has more than 10 years of experience in the field of strategy research and consulting space especially within ICT sector. She has proven her excellence in delivering projects, that include quality analysis, extensive primary and secondary research, market entry and go-to-market strategy, competitive benchmarking and company analysis, and opportunity assessment.

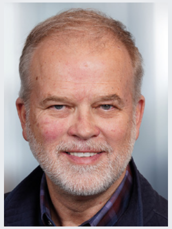
Here at ISG, Hemangi leads research activities for service provider intelligence report in the areas of BPO focused on customer experience and contact center services. Hemangi holds her bachelor's degree in commerce from Mumbai University and MSc in economics from Symbiosis International University, Pune.

Research Analyst

Sandya Kattimani
Senior Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other Ad hoc business research assignments.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

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

ISG Provider Lens™

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

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

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ISG

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

Founded in 2006, and based in Stamford, Conn., ISG employs 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™

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