ISG Provider Lens™

Contact Center - Customer Experience Services

October 2021

A discussion on global market trends, unique trends in each region, strengths of leading service providers, and the people in enterprises that should read the Contact Center - Customer Experience Services ISG Provider Lens™ reports.

Global Summary Report

Reprinted courtesy of

tsa

About this Report

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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 June 2021 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 lead author for this report is Dr. Kenn Walters. The editors are Ipshita Sengupta and Ambrosia Sabrina. The research analysts are Venkatesh B, Sandya Kattimani the data analyst is Sibasis Panigraphy. The Quality and Consistency Advisors are Dr. Linda Delbridge, Dee Anthony and Scott Furlong

ᴉsɢ Provider Lens™

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

For more information about our studies, please email ISGLens@isg-one.com, call +1.203.454.3900, or visit ISG Provider Lens™ under ISG Provider Lens™.

ᴉsɢ 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.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900 or visit research.isg-one.com.

imagine your future®

ᴉsɢ Provider Lens™

EXECUTIVE SUMMARY

GLOBAL MARKET TRENDS

ISG sees several common trends across regions and industries:

Human-Centered AI enables an empathetic service approach

The importance of artificial intelligence (AI) in meeting even minimum customer expectations is undeniable in 2021. AI's ability to handle routine customer requests and interactions positions human agents to take on more complex engagements. As AI has matured and leaders have adopted a mindful approach toward its role in the workplace, it's become clear that AI is destined to enable humans to do better work, not replace them. CX professionals recognize the importance of AI in driving a positive customer experience and operational efficiency via the contact center, but organizations still struggle with deploying AI in truly transformational ways.

Voice technology is going to play a significant role in eCommerce

Voice technology is evolving and having an impact on many spheres, including eCommerce. They are virtual assistants that can help customers to find products online using voice search and make their shopping process easier. Brands will greatly invest in this customer engagement trend to make their products and shopping experiences available on a broader platform like kiosk screens. Video call centers allows agent to communicate better with customers.

Rise in personalized Customer Self-Service Solutions

As customers turn to ecommerce and remote support, web-based self-service will also rise. This translates into an increased need for accessible, up to date and even personalized online self-service options in 2021. Customers increasingly expect to achieve their goals without needing to connect to support, using only the tools available on the website. This means that chatbots, customer portals and knowledge bases are all part of a major customer service trend in 2021.

Using Omnichannel contact center solution to enable agent and customer success

With the during pandemic lockdowns, many companies shifted to an increased online presence to maintain business operation continuity. As the point of contact between customers and brands, contact centers must meet the customer expectation of a seamless, personalized experience across phone and digital channels. This means that an omnichannel strategy is no longer an option, but a must. Companies must give their contact center agents access to a robust, unified, and integrated omnichannel platform.

ISG Provider Lens™

imagine your future® 1

Such a platform must enable agents to manage customer interactions from a single interface with access to all customer interaction history across all channels.

The shift to a work-from-home model

Companies wanting to improve their customer experience are now looking to the at home agent model, in part due to the characteristics of at-home agents. This new trend demands that contact centers offer the necessary support to guarantee agent success and prevent burnout while maintaining business continuity. To ensure agent productivity, contact centers must first equip agents with reliable technology and access to the same features, whether they work remotely or onsite.

Real time insights with contact center analytics

In 2021, there will be an increased demand and adoption of contact center analytics solutions. Through advanced analytics, contact centers will be able to improve agent and customer experience (AE/CX) by using insights from voice and text data. By using data from these customer interactions, businesses will use solutions such as VoiceBase Speech analytics, AI, and natural processing language (NLP) to get insights such as Average Handling Time (AHT), First Call Resolution (FCR), tone, and sentiments, among others. These insights are then used in making data-driven decisions to improve efficiency and increase ROI in businesses.

ISG Provider Lens™

imagine your future®   2

UNIQUE GEOGRAPHY TRENDS

Contact Center Outsourcing (CCO) services market experience the high growth in the offshore segment

The Contact Center Outsourcing (CCO) Services Market in Latin America experienced high growth in the offshore segment, while the domestic business was negatively affected by the regional economic crisis. The United States consolidated as the main market for offshoring, while Latam-shore activities grew driven by Latin America companies looking to reduce costs while improving their customer experience. Increased English proficiency and an ever-growing population of Spanish speakers to the north are just two factors that have turned Latin America into an increasingly attractive destination for Call Centers among U.S. and Canadian companies. The agents in Latin American call centers can offer customer services in both English and Spanish, making it easier for businesses to cater quality customer service to their customers across the world.

European companies prefer to outsource contact center services to providers

The European call center and BPO market provides an outsourcing destination for English-speaking and multilingual needs. While mature outsourcing markets in the UK and Ireland lead the way for English-speaking support, Central and Eastern European countries are gaining market share across the region. Cost reduction remains an important reason for European companies to outsource contact centre activities to providers abroad. Prices in nearshore countries are rising, especially within the European Union. This makes service providers in these countries less price competitive than offshore service providers.

Australian clients use their services offshore

Australian contact centers, of which 70 to 75% are in-house and the rest outsourced. Outsourcing is on the rise, however, the growth area of outsourcing since COVID-19 is onshore, as offshore destinations have struggled to mobilise their workforce under lockdown. The recent COVID-19 crisis has further highlighted that Australia has a great need for digital infrastructure to improve connectivity for remote and rural areas. Hence, edge data centers are becoming more viable options for Australian vendors, especially start-ups. The last five years has seen some big changes to the Australian contact center landscape, as the majority of vendors have either gone through some form of M&A activity or gone out of business.

Brazilian contact centers are increasingly deploying AI-powered chatbots

Brazil's call center and business process outsourcing (BPO) market is among the most mature and experienced in Latin America, it is continuously evolving. Enterprises in Brazil are looking for contact center providers that can offer advanced services such as chat bots and artificial intelligence-powered systems. While Brazilian companies are looking for intelligent interactive voice response systems, chat bots, and AI-powered contact centers, the country has a shortage of trained and experienced workers in data science, statistics, and AI programming.

ISG Provider Lens™

imagine your future® 3

GLOBAL LEADERS

DIGITAL WORKPLACE OF THE FUTURE

This year's Digital Workplace of the Future study assesses 149 providers across nineteen quadrants (varies by region) and five regions. Of the 149 providers evaluated, 21 providers are Rising Stars for multiple quadrants across regions.

STRENGTH OF THE LEADERS

Moving to the Cloud: The cloud communications is a standard for most growing service providers including call centers. It covers effective communications for partners in business, employees, and customers. Cloud-based contact centers are network-based services in which a provider owns and operates the call center technology. They then provide the services remotely to businesses, usually through a subscription model. This model can dramatically reduce costs and increase revenues as expensive investments in hardware are no longer a requirement. Migration to the cloud also facilitates remote working and can store data at a lower cost without physical servers.

Adoption of Contact Center Analytics: Contact Center service providers turn to contact center solutions to manage their customer interactions, including sales and customer service. Hence, they have started using analytics that can mine recorded interactions to surface the intelligence essential for building effective cost containment and customer service strategies in order to improve the customer experience. It allows to identify areas of improvement in agent performance, employee engagement, hiring, and workflows and processes. This can help them to increase customer retention while decreasing customer churn.

Empowering Contact Center by introducing advanced service methods: Contact centers have been going through a change for some time. The days of fielding quick and simple calls are in the past. Self-service has put the customer in charge of their experience, leaving call centers tasked with facing only the most complex and difficult calls. Service providers are empowering their customers by providing self-service tools like AI-powered solution, Automation tools, Smarter chatbots which help to reduce the workload at call centers. With the right self-service mix, businesses of all sizes can reserve more complex tasks (or higher-value interactions) for their agents to care for — and capitalize on technology to handle the rest.

Ensuring the data and security of the customers - Given the importance placed by consumers on data security and privacy, call centers have found it necessary to keep up with the times, especially when it comes to maintaining the highest standards of data security and privacy. Contact center service providers looking to ensure compliance with the PCI DSS and provides critical recommendations on new technologies and processes for securing payment card data. There are other security protocols like HIPAA (Medical Data) and SOC2 Compliance that could be put in place to add another level of security to the mix.

ISG Provider Lens™

imagine your future®

LEADER BOARD ACROSS QUADRANTS AND GEOGRAPHIES

COMMON LEADERS IDENTIFIED ACROSS GEOGRAPHIES FOR CONTACT CENTER - CUSTOMER EXPERIENCE SERVICES

KEY

- ● Global
- ● US
- ● Europe and UK
- ● Brazil
- ● Australia

Service Provider	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
[24]7.ai		●(Global) ●(US)		
Acquire BPO	●(Australia)			
AeC	●(Brazil)	●(Brazil)	●(Brazil)	
Algar Tech	●(Brazil)	●(Brazil)		
AlmavivA	●(Brazil)	●(Brazil)		
Alorica	●(Global) ●(US)		●(Global) ●(US)	●(Global) ●(US)
Atento	●(Global) ●(US) ●(Europe) ●(Brazil)	●(Europe) ●(Brazil)	●(Global) ●(US) ●(Europe) ●(Brazil)	●(Global) ●(US) ●(Brazil)
Capita	●(Europe)	●(Europe)	●(Europe)	●(Europe)
Cognizant		●(Global) ●(US)		●(Global) ●(US)
Concentrix	●(Global) ●(US) ●(Europe) ●(Australia)	●(Global) ●(US)	●(Global) ●(US) ●(Europe) ●(Australia)	●(Global)

LEADER BOARD ACROSS QUADRANTS AND GEOGRAPHIES

COMMON LEADERS IDENTIFIED ACROSS GEOGRAPHIES FOR CONTACT CENTER - CUSTOMER EXPERIENCE SERVICES

KEY

- 🔵 Global
- 🔵 US
- 🟠 Europe and UK
- 🟣 Brazil
- 🟢 Australia

Service Provider	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Conduent	🔵 🔵 🟠	🔵 🔵 🟠	🔵 🔵	🔵
Connvert	🟣	🟣		🟣
CSS Corp		🔵 🔵		🔵 🔵
Datacom	🟢		🟢	🟢
Firstsource	🟠	🟠	🟠	🟠
Genpact				🔵
HGS	🔵 🔵	🔵 🔵	🔵 🔵 🟠	🔵 🔵 🟠
homeagent			🟣	
Konecta	🟣	🟣		
Majorel		🟠	🟠	🟠

LEADER BOARD ACROSS QUADRANTS AND GEOGRAPHIES

COMMON LEADERS IDENTIFIED ACROSS GEOGRAPHIES FOR CONTACT CENTER - CUSTOMER EXPERIENCE SERVICES

KEY

- 🔵 Global
- 🔵 US
- 🟠 Europe and UK
- 🟣 Brazil
- 🟢 Australia

Service Provider	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Neobpo	🟣	🟣	🟣	🟣
Plusoft/Pluris		🟣		🟣
Probe CX	🟢		🟢	🟢
Sercom	🟣	🟣		🟣
Sitel Group®	🔵🔵🟠	🔵🔵🟠🟣	🔵🔵🟠	🔵🔵🟠
Startek				🔵
Sutherland	🔵🔵	🔵🔵	🔵🔵	🔵🔵
SYKES	🟢		🟢	🟢
TCS	🟢		🟢	
Tech Mahindra		🔵		

LEADER BOARD ACROSS QUADRANTS AND GEOGRAPHIES

COMMON LEADERS IDENTIFIED ACROSS GEOGRAPHIES FOR CONTACT CENTER - CUSTOMER EXPERIENCE SERVICES

KEY

- 🔵 Global
- 🔵 US
- 🟠 Europe and UK
- 🟣 Brazil
- 🟢 Australia

Service Provider	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Teleperformance	🔵 🔵 🟠 🟣	🔵 🔵 🟠 🟣	🔵 🔵 🟠 🟣	🔵 🔵 🟠 🟣
Transcom	🟠	🟠	🔵 🔵 🟠	
TSA	🟢		🟢	🟢
TTEC	🔵	🔵	🔵 🔵	
Webhelp	🔵 🟠	🟠	🟠	🟠
Wipro	🔵 🔵 🟠 🟣	🟠	🟢	🟠 🟢
WNS				🔵

RISING STARS ACROSS GEOGRAPHIES FOR CONTACT CENTER - CUSTOMER EXPERIENCE SERVICES 2021

Quadrants	● Global	● US	● Europe and UK	● Brazil	● Australia
Digital Operations	Infosys	Infosys	Majorel	Sitel Group®	Cognizant, Startek
AI & Analytics	Infosys, WNS	WNS	Tech Mahindra	Callink	
Work From Home Services	Startek	Startek	Wipro	Sitel Group®	Infosys
Social Media CX Services	Startek, Tech Mahindra	WNS	Tech Mahindra	TTEC	Concentrix

imagine your future® 9

ROLE-BASED SUMMARY

This report is relevant to the customer service leaders, digital operations leaders, marketing, and data security professional in enterprises who are evaluating or re-visiting the contact center sourcing engagements with service providers. This report is of value to enterprises of all sizes and across all industries in Brazil, Europe and U.K., Australia, and the U.S.

Customer Service Leaders

Customer Service Leaders Customer service directors and professionals of enterprises have a key responsibility in devising their contact center strategies and improving the end-user experience. The customer service leaders should understand how providers can help them in delivering engaged and personalized customer service through its advanced capabilities such as conversational chatbots and enables the core team to handle complex queries.

Chief Marketing Officer (CMO)

CMOs should read this report to learn and understand various emerging communication/ sales channels used by the customer to shop a product or resolve their purchase queries. The report also helps them in comparing and selecting the right set of digital capabilities that can be used to capture and analyze data at various touchpoints and measure the effectiveness of their marketing promotions

Chief Information Security Officer (CISO)

CISOs should read this report to understand the different data security services and cybersecurity training offered by the provider for the work-from-home set up, which could help the leaders in enhancing the security controls and preventing any data breaches.

Digital Transformation Leaders

Digital transformation executive should read this report to understand the various levels of transformations delivered by provider's digital capabilities, that not only improves the CX KPIs but also creates a differentiation by establishing a new standard of customer care

Chief Experience Officer (CxO)

Experience has become an important aspect from a workplace perspective. CxO should read this as the leaders should be aware of how a service or solution can impact the overall experience of users. CxO will help to create company-wide focus on customers and establishing metrics for defining customer relationships. CxO will maintain revenues from existing customers and managing the customer experience in service and support departments; for another, it could be managing across multiple organizational divisions, developing new markets, and acquiring new customers.

iSG Provider Lens™

imagine your future®   10

Further Reading

FURTHER READING

You can access the detailed country-specific reports in the links below.

Global

Digital Operations

AI & Analytics

Work From Home Services

Social Media CX Services

US

Digital Operations

AI & Analytics

Work From Home Services

Social Media CX Services

Europe and UK

Digital Operations

AI & Analytics

Work From Home Services

Social Media CX Services

Brazil

Digital Operations

AI & Analytics

Work From Home Services

Social Media CX Services

Australia

Digital Operations

Work From Home Services

Social Media CX Services

⁂ISG Provider Lens™

imagine your future®

AUTHORS AND EDITORS

Dr. Kenn Walters
Lead Analyst — U.S. Europe & UK and Global Archetype

Kenn is a thought leader and practitioner in networks, digital business solutions and services, smart infrastructure and services and the application of advanced technologies globally. As an author and distinguished lead analyst of ISG Provider Lens™ reports on Software Defined Networking and Digital Business Solutions, as well as authoring multiple ISG Insights. He supports clients with custom engagement activities and events on SDN, Future Ne tworks, ICT Network Services, IoT, Smart Cities and Infrastructure, Mobile Enterprise client strategies, Digital Business Transformation, market development and trends. Kenn is a known expert and practitioner in these fields in many countries internationally and is highly published, with over 40 years of experience in the ICT sector, together with a PhD in computer and communication science.

Venkatesh B — Co-Author and Enterprise Context Analyst
Research Specialist

Venkatesh is a Research Specialist with ISG Research. He is responsible for assessing the industry and technology trends and developments across the BPM sector including Procurement, Finance and Accounting and Contact Center industries and providing key insights for business decision makers in the enterprise clients and service provider ecosystem. He brings in more than a decade of experience in research, advisory, presales and other go-to-market initiatives across multiple geographies.

iSG Provider Lens™

imagine your future®

AUTHORS AND EDITORS

Sandya Kattimani Co-Author and Global Summary Analyst
Senior Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, which includes market trends and insights.

Jan Erik Aase, Editor
Partner and Global Head – ISG Provider Lens/ISG Research

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

ⓘSG Provider Lens™

imagine your future®

ISG Provider Lens™ Report: Contact Center - Customer Experience Services 2021
October 2021

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.