

Contact Center - Customer Experience Services

Guide for enterprises assessing providers to enhance customer experiences amid dynamic shifts



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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 substantial risks 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.



Contact Center – Customer Experience Services 2024

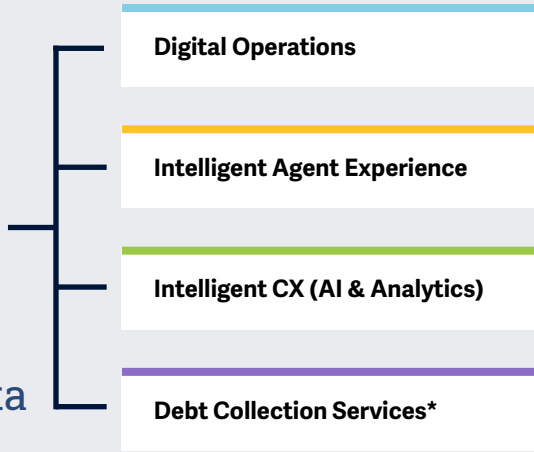
Quadrants

Areas Covered

Digital Operations	Vision and Investments	Consulting	Conventional Infrastructure	Digital Infrastructure	Talent	Delivery
	<ul style="list-style-type: none"> • Vision to build portfolio • Growth strategy story • Strategic Investments • Expansion Plans • ESG Goals • Innovation 	<ul style="list-style-type: none"> • Domain Expertise • Tech consulting • Industry Knowledge • Transformation framework/ maturity self-assessment • Change Management 	<ul style="list-style-type: none"> • CC Infra – software and hardware • Channel strategy and implementations • Solutions and accelerators 	<ul style="list-style-type: none"> • Automation • Cloud Capabilities • AI • Analytics • Emerging – GenAI • Security 	<ul style="list-style-type: none"> • Talent retention • Employee wellbeing • Talent onboarding and training 	<ul style="list-style-type: none"> • Right shoring models • Remote working • Gig CX/Hybrid/ contractor model • Pricing Models
Intelligent CX (AI & Analytics)	Advisory	AI Tools & Technology	Data Strategy and Analytics	Measurement Metrics	Talent	
	<ul style="list-style-type: none"> • AI Advisory Offering • Maturity assessment framework • Transformation framework/ maturity self-assessments 	<ul style="list-style-type: none"> • CX AI offerings/applications • AI homegrown/ partnerships solutions • GenAI (LLM) investments and strategies 	<ul style="list-style-type: none"> • Analytics offerings • Data strategy/synthetic data • Solutions homegrown and Partnerships 	<ul style="list-style-type: none"> • Defining KPIs (Churn Rate, CSAT, NPS) • Measurable business outcomes – revenue generation, customer retention 	<ul style="list-style-type: none"> • Certified professionals • Training curriculums and partnerships 	
Intelligent Agent Experience	Agent Growth Investments	Agent Management	Digital Strategies	Measurement Metrics		
	<ul style="list-style-type: none"> • Training curriculum • Gamification • Security Trainings • Career Growth Programs 	<ul style="list-style-type: none"> • Realtime quality monitoring • Workforce management • Knowledge Management 	<ul style="list-style-type: none"> • AI and Analytics implementation • Agent Assist • Unified and integrated agent desktop 	<ul style="list-style-type: none"> • Establishing KPIs (AHT, FCR, ESAT, utilization) • Measurable outcomes – quality, service level 		



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



Simplified Illustration Source: ISG 2024

*Applicable only for Brazil

The ISG Provider Lens™ Contact Center - Customer Experience Services 2024 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the Global market, U.S., Europe, Brazil and Australia

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



Digital Operations

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



Intelligent Agent Experience

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 agent experience. 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 agent experience becoming an essential measure of success, some of the 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



Intelligent CX (AI & Analytics)

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. Demonstrate effective data **strategies and frameworks** and analytics implementations such as sentiment analytics, VoC, speech or text analytics, homegrown tools and solutions, and partnerships
4. Possess **certified AI professionals** and training and curriculum partners
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**



Debt Collection Services

Definition

Broad access to the credit market is crucial for productive investment and consumption, two of the main drivers of Brazil's economic growth. In this scenario, debt collection services remain relevant for managing receivables and minimizing losses.

High transaction volume, complex requirements and the need for the right combination of skilled professionals, supported by leading technology, make collection services one of the most sought-after offerings from contact centers in the Brazilian market.

To improve debt collection services and ensure greater flexibility, scalability and lower costs, contact center providers are taking full advantage of the power of analytics tools and solutions based on AI, RPA, ML and chatbot capabilities. This will help them enable a more empathetic way to communicate with consumers. They are improving customer satisfaction and recovery efficiency by investing in cloud computing and omnichannel support solutions.

Contact center providers are investing in delivering advanced technologies that merge automation and predictive models with a human touch, ensuring compliance with privacy and cybersecurity standards. They are forced to innovate in response to new regulatory demands concerning LGPD, IT security and cybersecurity and the need to deliver high-quality CX through unified processes from front and back offices.

This quadrant assesses contact center service providers that offer debt collection and credit recovery solutions using multiple technologies, statistical models, data science, integration tools and accelerators to speed collection negotiations and improve CX.

Eligibility Criteria

1. **Offer services encompassing the entire collection cycle**, from the pre-collection phase to the credit recovery phase, following effective strategies designed per customer objectives
2. **Use relevant tools and technologies**, such as AI, analytics, GenAI, cloud and security; provide self-service negotiation portals
3. **Demonstrate integration** with major originator banking systems, debt and financial systems and other ecosystem partners such as credit rating companies, skip tracing agencies and specialist law firms
4. **Engage the workforce in the collection process**; focus on humanized negotiations, talent onboarding and training, employee well-being programs and talent retention strategies
5. **Possess an extensive partner ecosystem and proprietary solutions**
6. **Have referenceable case studies**



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study on Contact Center - Customer Experience Services 2024, we are introducing the following four quadrants:

Quadrant	Global	U.S.	Europe	Brazil	Australia
Digital Operations	✓	✓	✓	✓	✓
Intelligent Agent Experience	✓	✓	✓	✓	✓
Intelligent CX (AI & Analytics)	✓	✓	✓	✓	✓
Debt Collection Services				✓	



The research phase falls in the period between April and May 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2024.

Milestones	Beginning	End
Survey Launch	April 11, 2024	
Survey Phase	April 11, 2024	May 17, 2024
Sneak Previews	July 2024	August 2024
Press Release & Publication	September 2024	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

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

Research Production Disclaimer:

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



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

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

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:

ISG.star@isg-one.com



ISG Star of Excellence



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 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 April 2024, 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.



Contacts For This Study

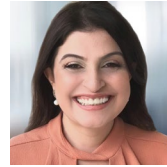
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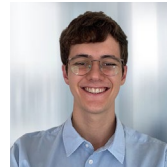
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**Global Project
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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



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**Director –
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Saha

**Principal
Consultant**



Jarrod
Magill

**Director and Regional
Manager, NSW**



Himanshu
Chawla

Director



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

[24]7.ai*	Concentrix*	Grupo Redebrasil*	Mphasis*
Acquire BPO*	Conduent*	HCLTech*	Mutant
Actionline*	Connvert*	Hexaware*	Neo*
AeC*	CPM*	HGS*	NTT Group
Algar Tech*	CSU*	Home Agent*	Parla
Almaviva*	Datacom*	Infosys*	Paschoalotto*
Alorica*	Datamatics*	Intervalor*	Pluris Midia*
ASTIA*	DBM Contact Center	Kainos BPOTECH*	Probe CX*
Atento*	EXL*	Konecta*	Proxis
Averbach*	Firstsource*	LIQ	Quantiphi*
Bellinati Perez*	FIS*	Localcred	ResultsCX
Brasilcenter*	Forrest Marketing*	Majorel*	Serco*
Callink*	FoundeverTM*	Merchant*	Sercom*
Capita*	Gepact*	Mindpearl*	Shapiro*
Cognizant*	Grupo Acao*	Movate*	SoftMarketing



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Sollo Brasil	TSA*
SoluCX	TTEC*
Starhub	Unity4*
Startek®*	Voxline
Straive*	Webhelp*
Sutherland*	Winover
TaskUs	Wipro*
Tatho	WNS*
TCS*	Xceedance*
Tech Mahindra*	yoommday*
Teleperformance*	Zanc*
Telstra*	
TELUS International	
Transcom*	



*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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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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.





APRIL, 2024

REPORT: CONTACT CENTER - CUSTOMER EXPERIENCE SERVICES