

# Contact Center— Customer Experience Services

A research report aligning enterprise  
requirements and provider capabilities

Customized report courtesy of:



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## Vendors Perspective

- In 2021 there were 602 managed services awards over \$5 million in ACV, a 14% increase over 2020
- ISG acts as the Sourcing Advisor on approximately \$15 billion of contract value each year
- For every advised deal there are normally 3-6 Bidders shortlisted
- Understanding the archetype of your Buyer is key in your pursuit effectiveness – ensuring bid success
- This study lays a foundation to understand the current landscape of Buyer archetypes

## Buyers Perspective

- Traditional quadrant studies assume all Buyers have the same set of needs from Vendors
- Price is important but other factors play a vital role - The lowest bidder only wins the deal 40% of the time<sub>1</sub>
- When compiling a shortlist, it's important that you select Vendors who can address your needs most effectively
- Selecting the right Vendors for your shortlist is crucial to negotiating a successful partnership
- This research analyses which Vendors are most effective at addressing different Buyer archetypes in the market today



### **Automation is important in driving advanced CX**

As the contact center industry is rapidly evolving to address future consumers' needs, businesses are beginning to realize the need for new technologies and operating models. Accelerating transformation has become a priority for all businesses. There has been a drastic change in the business approach in the last 30 months, and new trends, which are redefining this industry, are emerging.

There is a strong and growing market for advanced customer experience (CX) as part of the surge in the demand for managed services BPO. The BPO industry achieved one of the best first-half-year levels ever, with nearly \$6 billion in annual contract value (ACV). This represents a nearly 59 percent increase year on year: (refer to Figure 1 on next page)

The majority of this growth was driven by the Americas and EMEA. In addition, industry-specific BPO saw huge market traction and doubled its annual contract value year on year. Engineering research and development (ER&D) also contributed heavily to the growth of BPO managed services in the first half of 2022.

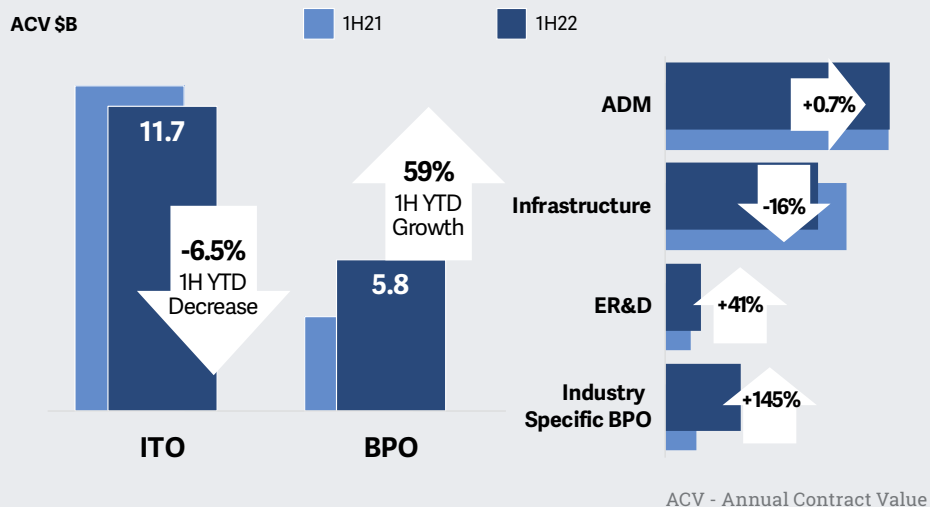
The advanced customer service and CX contact center segment contributed heavily to the significant growth of managed services BPO. Post the pandemic, the need for robust, modern and advanced digital CX rose and led to a surge in activity in this space.

Advanced technologies with more automation and analytics across all channels are being utilized far more with the advent of new working models (work from home/WFH or remote, premises based and mixed/hybrid) globally. Hiring and retaining skilled staff or agents has also reached importance levels never

# Advanced automation at forefront of CX delivery



Figure 1: Global Managed Services



seen before across many businesses. Companies are adapting to and evaluating new ways of working. They are also accelerating their enterprise digital transformation plans and programs, including their CX services, which are now seen as strategically vital at a business level by executives.

Providers are investing heavily in creating advanced CCCX solutions and CCaaS platforms that can service and meet the demands of enterprise clients as a service, in real time. They are implementing advanced features such as performance dashboards that create a direct connection between enterprise leadership and their agents; automated coaching, training, assistance, gamification, retention and social programs for agents; customer sentiment scoring; and customized avatars, keeping agents motivated and focused even in remote working or gig worker situations.

**CX and CCaaS trends**

The following global trends highlight some of the areas of importance in the contact center CX and CCaaS areas, along with some common trends.

**Working environment, hiring, churn reduction and retention**

The contact center industry has always had a high churn. However, in the past eight to 12 months, the industry has experienced unprecedented attrition challenges.

Attracting and retaining talent has become much more difficult now, and a lack of skill sets is further accentuating this challenge. Furthermore, the skill set requirement has dramatically changed over the years, and agents are now required to have different skill sets, with the advent of new technologies.



Flexible working conditions are a key driver for attracting and retaining talent. The contact center industry is innovating in this space. Providers that have introduced flexible working conditions are experiencing reduced attrition numbers, higher productivity rates and happier employees.

Service providers are taking multiple measures to enable remote or hybrid working.

- Providers are introducing smaller satellite offices called “hubs,” across multiple locations. They typically have state-of-the-art infrastructure that can be leveraged by agents that live closer to these hubs. Not only are these offices enabling collaboration and engagement, but they can also be used by agents if their work-from-home infrastructure is unable to support working effectively.

- Currently, providers are also actively leveraging technologies such as AI and CCaaS cloud platforms to drive hiring and training. Companies have introduced extensive learning platforms into their overall CCCX and CCaaS offerings that are either developed in-house or in partnership with universities to enable training, reskilling and upskilling.
- In some cases, providers are leveraging AI to drive sentiment analysis so that they can check the pulse of employees and tackle attrition proactively.
- Companies are also investing significantly in employee engagement platforms that can enable remote engagements. An example is gamification, which has proven to be highly successful in keeping employees engaged.
- Many providers are making significant investments in introducing tools and platforms to help employees engage virtually. Some companies are actively exploring the metaverse technology to create a collaborative environment in the near future.
- With remote working, several companies that we spoke to in our research for this study have adopted a GigCX employment model (a model that allows a pool of remote workers to flexibly participate according to their time preferences, by logging in and out of an availability pool). This has not only helped companies tap into the talent pool but also enabled 24-hour support and effectively addresses seasonal demands, while utilizing common platforms and tools via CCCX and CCaaS solutions.

There is no final decision when it comes to deciding the future state of delivery in scenarios where significant investments are being made to find alternate delivery models. There is no simple solution that can address all the issues faced by a company.

### **Technological advances that are redefining the industry**

Technology has played a crucial role in shaping the CX industry in the past few years. For several years, most enterprises were heavily investing in robotic process automation (RPA). However, since the pandemic, digital transformation acceleration has become prevalent, driving many organizational and technological changes to automate and modernize the CX space. Advances in technology and the adoption of new technologies have grown rapidly and exponentially.



## Executive Summary

- AI has made significant inroads into the contact center industry. Whether leveraging a bot to serve a customer or improve agent experience, AI is rapidly becoming table stakes in this industry and within CCCX and CCaaS platform deliveries.
- Enterprises are adopting a “cloud first” approach. The pandemic made it clear that cloud is essential to enable hybrid working and it is the best contingency plan in terms of business continuity.
- As remote working takes center stage, heightened security has become a necessity. Security protocols, policies and procedures, training, effective implementation, monitoring and analyzing have become vitally important. Voice biometrics, facial recognition, automatic desktop locking, video proctoring, user-environment security monitoring, near-recording-device restriction, biometrics and multi-

part user verification are some of the technologies that are helping secure work-from-home and remote work environments.

- Analytics is essential to redefine processes. Without analytics, CX will be limited to customer service and engagement, as opposed to creating a more holistic experience. Predictive analytics, sentiment analytics, speech analytics, speech to text, text analytics, intent analytics and skill routing are some of the popular techniques that are helping companies empower agents and enable contextual conversations. Such services are expected to be built into CCCX deliveries and offerings.
- Social media services is another key offering that has rapidly gained traction in the contact center industry. Many industries are adopting social media as a channel of communication. Customer support and engagement

services are being delivered effectively through social media channels. Most companies are also leveraging content moderation services for trust and safety. Companies are using AI and analytics to predict customer sentiments, moderate content and manage their product portfolios to build their brands. They also expect advanced CCaaS platforms to enable these services.

Advanced automation stands in the forefront of the charge to enable modern, highly efficient and cloud-based CX solutions to meet enterprises’ needs and demands.

**The high demand for advanced CX is driving CX automation adoption.**



## ISG Archetype

A typical group of buyers in the market that share a set of objectives and have the same needs/expectations from their vendor or services provider.

4th  
Annual Study

4 Distinct  
Archetypes identified

67  
Vendors Analyzed

16  
Identified as Leaders

This ISG Provider Lens™ report summarizes the relative capabilities of 16 providers and their ability to address the requirements of four typical, frequently encountered categories of enterprise buyers (“archetypes”). Each archetype represents a unique set of business and technological needs and challenges. ISG research found multiple providers with the capabilities needed to satisfy the Contact Center – Customer Experience Services requirements across most archetypes.

This is primarily due to two core realities regarding the archetypes:

1. The characteristics of each archetype are in a constant state of flux; while the core requirements rarely change, the relative importance of the requirements can vary, based on changes in the business and/or technological environments.

2. Most enterprises, especially large firms, encompass multiple archetypes. As each archetype’s requirements evolve, based on business and technological changes, so too does the presence and value of each archetype within the enterprise. Therefore, enterprises have an ongoing series of options when it comes to contact center service provider selection. They will need to strike a balance between optimal business value and relative cost of

the provider engagement, integration and management. Market changes, new business models, fluctuating economic factors and other variables will continually add to and subtract from user needs.





### **Work from anywhere is now the new norm:**

New models of working in the CX space now include hybrid or WFH, which bring enterprises new challenges and inherent security and remote staff inclusion difficulties. This includes the massive shift to AI and automation with analytics, including the use of bots and virtual assistants, cloud-based CX solutions and social media channels.

The inherent issues in required technology, retention (addressing EX, technology, incentive and lifestyle) and occasional-use locations, (hubs or offices) should also be carefully considered when planning a work-from-anywhere solution.

### **Hiring and onboarding issues:**

Today, organizations have several options to choose from, such as gig economy, BYOD agent onboarding and larger work-from-home setups. These allow organizations to seamlessly address onboarding issues, undertake training and certification programs, provide social interaction and inclusion for the agents to create a sense of loyalty, and take gamification-type approaches to make work for agents less strenuous and improve retention. Enabling these advanced features comes with the essential need for providing enhanced security at the point-of-agent device in remote locations. Most of this is now evolving to automated and persona-based relations with the agents and advanced security at the device and point-of-operations levels. It is essential

that these important points are taken into consideration when planning WFH staff hiring and onboarding.

### **Correct level of automation and channel selection is key:**

Choosing what level of automation to apply and to which channel and contact tier in CX is a key decision and key business differentiator. For example, choosing if a virtual agent is required at all levels, if bot/virtual agents should be used to monitor social media channels or to automate routine tasks, leaving human customer agents for other tasks such as subject matter expert roles or difficult problem interaction, is a key decision because it can affect a firm's image either positively or negatively. Simulating or scenario testing in a CX lab may be a key decision to be made here.

### **Overall digital business transformation must remain a priority:**

CX is part of the overall digital business transformation story, aligning business goals with customer satisfaction as efficiently as possible. Enterprises that are already well advanced in digital transformation weathered the transformational challenges during the COVID-19 crisis. Accelerating digital transformation plans or scaling technology adoption is essential to enhance CX.



## Client Archetype Descriptions

Client archetypes used in this report (and in our ongoing advisory and consulting engagements) represent the various types of clients ISG has observed and how we classify them according to their relative outsourcing maturity and objectives. Each client archetype encapsulates the typical characteristics of a specific type of buyer that is looking to outsource one or more processes or functions. The use of archetypes enables us to develop sets of characteristics and needs that can be applied uniformly and repeatedly across multiple environments, industries, provider types and other variables within one service line.

The archetypes are not meant to be comprehensive examinations of all potential or likely client situations and requirements. They are meant to provide a simple, relevant and repeatable set of

user-side requirements against which a similarly simple, relevant set of provider capabilities can be assessed.

The archetypes included in our reports are based on the most current marketplace knowledge regarding prevalent buy-side goals, resources, initiatives and requirements. Archetype characteristics are also developed (and refined over time) based on our advisory and consulting work with enterprise clients and IT service providers, and on our global business IT market research and advisory programs.

Note: None of the service providers that have participated in this study are confined to a particular archetype in terms of their portfolio of services. While each service provider is best suited to a particular archetype based on its strengths and other characteristics, they all have some elements of services that are applicable across all the archetypes.

The archetypes used in our reports are based on most current market knowledge regarding prevalent buy-side goals, resources, initiatives and requirements.



## Automation Embracers Archetype

Automation Embracers are still low on the digital maturity curve but are looking to embark on their automation journeys. Full-time equivalents (FTEs) will continue to play an important role, and channel adoption has matured to chatbots, which goes beyond regular voice, email and text options.

Providers are investing heavily in creating advanced CX solutions and CCaaS platforms that can service and meet these enterprise demands as a service in real time. They are implementing advanced features such as performance dashboards that create a direct connection between enterprise leadership and their agents; automated coaching, training, assistance, gamification, retention and social programs for agents; customer sentiment scoring; and customized avatars.

These efforts and capabilities are keeping agents motivated and focused even in remote working or gig worker situations.

Buyers in this archetype have made digitalization a priority and are looking for a healthy shoring mix. Cost savings continue to be a priority; hence, these buyers are leveraging automation to reduce overhead costs. Automation Embracers will also be seeking more flexible pricing options that go beyond per-FTE-based pricing. Robotic process automation is also more prevalent among the buyers that are looking to scale. Most deals today have RPA embedded, and RPA has become table stakes. The pandemic has pushed these buyers to rethink their digital strategy, adopt other channels and leverage automation to ensure customer loyalty and retention.

Business benefits are gradually gaining traction with Automation Embracers compared with standard key performance indicators (KPIs) that are slowly losing relevance.

### Prime Decision Making Criteria

1. Leveraging global expertise and presence
2. Overcoming inadequacies in skill and technology capabilities
3. Prioritizing cost savings to continue
4. Harnessing automation expertise and capabilities
5. Pricing flexibility is an important factor for these clients
6. Leveraging industry experience and domain expertise to change customer service



## CX Evangelists Archetype

For these clients, CX transformation is the highest priority. Driving superior CX by leveraging technology-driven insights is their prime focus. CX Evangelists are seeking to leverage analytics services to bring about improvements at every stage of the customer service lifecycle. Bringing in highly skilled domain experts as agents is critical for these buyers. Their transformation goal is long term and strategic, and they avoid point solutions and quick fixes.

CX Evangelists look for strategic business partners for outsourcing and are keen on partnering with service providers that bring industry experience, implementation experience, domain expertise, transformation solutions and a wide range of analytics services to transform CX. Speech, text and sentiment are important

criteria for providers to qualify, not just in traditional customer care channels but also in social media channels. KPIs are tied to business outcomes such as revenue, opportunity generation, customer satisfaction (CSAT) and net promoter score (NPS).

In interactive and social media channels, automatic brand or reputation defense is also fast becoming a prerequisite. The ability to spot negativity or problem statements in chat, analyze them and intervene via chatbot, while potentially alerting a human to become involved, is often critical. Having a domain expert involved, with full CRM-backed facts available about incidents or cases, can often help deliver superior CX, which also conveys the idea, on social media

channels, that an enterprise/brand is proactively monitoring and attempting to improve situations in real time.

Service providers offer highly digitally skilled FTEs and a “work anywhere” culture and bring about the right balance of human and machine, leveraging AI and automation to assist humans wherever possible, including in the agent experience and retention domains.

### Prime Decision Making Criteria

1. Leveraging outsourcing ecosystem to drive business outcomes
2. Using technology extensively
3. Recognizing that digital transformation is key to drive CX
4. Gaining real-time insights to deliver improved CX
5. Leveraging technology and domain expertise
6. Adopting innovative approaches to transform
7. Recognizing the importance of pricing flexibility, such as gainshare models
8. Having a proven track record of transforming CX
9. Focusing on business-outcome-driven KPIs



## Digital Connoisseurs Archetype

These clients are digitally more mature than Automation Embracers or have made digitalization their top priority. They have explored multiple channels and automation areas for their operations. Familiar with technologies and related implications, the enterprises in this archetype are planning to scale digital transformation (and automation) to have a larger impact on CX. They have leveraged multiple channels to enable better connectivity and communication.

Enterprises in this archetype are looking to partner with providers that have widespread digital capabilities and expertise in implementing omnichannel solutions and cloud transformation and can even scale automation to leverage AI and machine learning. This automation is not just to improve efficiency or

influence workforce numbers but also to help deliver the best results to clients, either directly via chatbots and similar technologies or via agent assistance. Skilled agents to manage multiple channels, technical capabilities such as automation and cloud advisory teams are prerequisites for such engagements.

With the trend of work-from-home/remote working or hybrid WFH/on-premises working, providers must be equipped with cloud contact centers and other solutions. This is one of the critical requirements, along with robust security and compliance adherence. As a result of hiring difficulties and churn rates for staff, automation must also help with staff retention and attrition reduction.

### Prime Decision Making Criteria

1. Improving CX is a priority
2. Leveraging technology is critical
3. Introducing multichannel strategy to clients
4. Recognizing omnichannel as essential for seamless CX
5. Prioritizing cloud, with the sudden shift to work from home
6. Engaging in partnerships
7. Looking for flexible and competitive pricing—inclined toward gain-sharing models
8. Gaining competitive edge with digital technologies
9. Leveraging advanced automation
10. Harnessing technology and domain expertise



## Work-From-Home Buyers Archetype

Clients in this archetype are looking to adopt the work-from-home model completely or are considering the hybrid operating model. In either case, service providers must offer robust work-from-home and remote working capabilities. These clients seek training, skill sets and qualified agents, and technological capabilities that enable work-from-home infrastructure. Long-term cost savings, business resiliency and tapping into the talent pool are the major objectives of the clients in this archetype.

Work-From-Home Buyers are looking to partner with providers that have widespread digital capabilities and expertise in implementing omnichannel and cloud solutions to leverage AI and machine learning. Providers must be equipped with cloud contact centers,

automation, high levels of both solution and workplace security, and other solutions to enable seamless work from home.

With hiring difficulties and the high churn rates for staff, automation must also address the delivery of an inclusive and pleasant working environment for remote workers. Solutions, products and tools must work well and be easy to use, such as in gamification forms, while infusing teaming, training, coaching and assistance into remote workforces. Furthermore, building staff knowledge and experience is as essential as retention and attrition reduction. In today's hiring marketplace, this is one of the critical requirements.

### Prime Decision Making Criteria

1. Leveraging partners to drive implementations against business outcomes
2. Leveraging technology and domain expertise to provide tools and methods that can be easily used and templated quick starts
3. Adopting innovative approaches to transform the WFH environment, including security, training, inclusion and attrition avoidance
4. Recognizing the importance of pricing flexibility, such as gainshare and PPU models
5. Having a proven track record of transforming WFH CX



## Archetype Leaders Club

Of the 26 service providers included in our research, ISG found 16 Leaders that stand out above the others and match the four archetypes of buyers, based on our assessment of their capabilities. These 16 referred to as Archetype Leaders are highly suitable for meeting the needs of their respective buyer archetypes.

Note: The service providers listed are arranged in the alphabetical order. No ranking is implied.



## Leaders Club

Automation Embracers	CX Evangelists	Digital Connoisseurs	Work-From-Home Buyers
Atento	Cognizant	[24]7.ai	Atento
Cognizant	Concentrix	Cognizant	Concentrix
Concentrix	HGS	Conduent	Conduent
Conduent	Sitel Group®	EXL	HGS
HGS	Sutherland	HGS	Sitel Group®
Infosys	Tech Mahindra	Sitel Group®	Startek®
Sitel Group®	Teleperformance	Sutherland	Sutherland
Sutherland	TTEC	Tech Mahindra	Teleperformance
Tech Mahindra		Teleperformance	Transcom
Teleperformance		WNS	TTEC



# Sitel Group®

Sitel Group® has developed advanced solutions, making a huge impact on business outcomes for its clients. Sitel Group® delivers powerful AI-driven solutions in the CX space, effectively and seamlessly.

## Overview

Sitel Group® is headquartered in Florida, U.S., and operates in 40 countries. One of the largest global CX services companies, Sitel Group® employs more than 160,000 associates and supports more than 800 customer brands. In FY21, the company generated \$4.3 billion in revenue.

## Benefits Delivered

Sitel Group® offers extensive, sophisticated solutions and platforms with analytics and AI to clients. EXP+™ is Sitel Group’s end-to-end suite of CX products and services. This drives enhanced CX and employee experience with its digital solutions and technology ecosystem.

## Key Provider Capabilities

**EXP+™ suite:** This is Sitel Group’s end-to-end suite of CX products and services. Sitel Group® is committed to investing in AI technologies. The company’s offerings with embedded AI include learning and talent services (EXP+™ CX Learning), insight and

Automation Embracers	CX Evangelists	Digital Connoisseurs	Work From Home Buyers
Leader	Leader	Leader	Leader

analytics (EXP+™ CX Analytics), CX digital operations (EXP+™ CX Operations) and AI and automation (EXP+™ CX Digital and CX Technology).

**EXP+™ CX Analytics:** The solution provides a vast array of analytics services, coupled with highly advanced visualizations. As part of this solution, 100 percent of the interactions are analyzed to derive insights, enabling coaching, training and scoring. Sitel Group® has also backed these solutions with defined frameworks that outline implementations.

**EXP+™ CX Technology:** This brings the technology stack to its clients. Sitel Group’s technology ecosystem includes a range of proprietary software tools and third-party bots, AI and RPA from partners.

**EXP+™ CX Digital:** Sitel Group® is improving the CX platform with chatbots, digital agents and support bots, interactive voice response with conversational and visual IVR, and customer contact automation with QA automation.







# Automation Embracers Archetype

## Automation Embracers Archetype

### **Automation Embracers**

These are firms embarked on an automation journey. FTEs play key roles, and omnichannel adoption is a must. Buyers have digitalization and cost savings as a priority, leveraging automation to reduce overhead costs.

### **Automation Offerings**

These firms harness automation expertise and capabilities wherever possible across the CX chain to enhance CX and UX and deliver value.

### **Automation Ecosystem**

These firms overcome skill inadequacies and ensuring technology capabilities by developing an advanced portfolio of proprietary products and solutions and those from the partner ecosystem.

### **Advanced Automation Capabilities**

These firms implement omnichannel solutions and cloud transformation scaling automation to leverage AI and machine learning. This automation is to help deliver the best results to clients as efficiently as possible.

### **Proven Track Record**

These firms leverages global expertise and presence, including industry experience and domain expertise to change customer service, with good reference accounts and use cases available.



## Automation Embracers Archetype – Leaders Club



### Leaders Club

Of the 26 service providers included in our research, ISG found that 16 met the qualification criteria to be included in this Archetype report. ISG recognized ten providers that stand out above the others as matching the Automation Embracers archetype, based on our assessment of their capabilities as described in the Methodology section in the Appendix. These ten vendors, referred to as Archetype Leaders, and their relevant capabilities are presented in the adjacent figure and briefly examined in the following sections.

Note: The service providers listed are arranged in the alphabetical order. No ranking is implied.

	Automation Offerings	Automation Ecosystem	Advanced Automation Capabilities	Proven Track Record
Atento	●	●	●	●
Cognizant	●	●	●	●
Concentrix	●	●	●	●
Conduent	●	●	●	●
HGS	●	●	●	●
Infosys	●	●	●	●
Sitel Group®	●	●	●	●
Sutherland	●	●	●	●
Tech Mahindra	●	●	●	●
Teleperformance	●	●	●	●
Noteworthy Providers	Alorica Startek® Straive (SPi Global) Webhelp	Alorica Startek® Straive (SPi Global) Transcom Webhelp	[24]7.ai Alorica EXL Genpact Hexaware Movate WNS	Alorica Transcom TTEC Wipro
	Rest of the Market			





## Automation Embracers Archetype

Peer Average	Sitel Group®	Desired Provider Capabilities
		<b>Automation Offerings:</b> EXP+™ is Sitel Group’s end-to-end suite of CX products and services with embedded advanced automation and AI capabilities.
		<b>Automation Ecosystem:</b> The company’s offerings with embedded AI include learning and talent services (EXP+™CX Learning), insight and analytics (EXP+™ CX Analytics), CX digital operations (EXP+™ CX Operations), and AI and automation (EXP+™ CX Digital and CX Technology).
		<b>Advanced Automation Capabilities:</b> With EXP+™ CX Digital and CX Technology, Sitel Group is evolving the CX platform away from humans with chatbots, digital agent and support bots, interactive voice response with conversational and visual IVR and CC automation with QA automation.
		<b>Proven Track Record:</b> Sitel Group employs more than 160,000 associates across 40 countries and supports more than 800 customer brands. In FY21, the company generated \$4.3 billion in revenue.





Dr. Kenn Walters  
**Lead Analyst**

Sitel Group is well known for its highly comprehensive solutions portfolio comprising end-to-end services and capabilities backed by deep industry expertise.





# CX Evangelists Archetype

## CX Evangelists Archetype

### **CX Evangelists**

For these clients, CX transformation is the highest priority. Driving superior CX by leveraging technology-driven insights utilizing highly skilled domain experts is their prime focus.

### **CX Consulting**

These clients look for strategic business partners that bring industry experience, implementation experience, domain expertise and transformation solutions driven by expert advisory teams.

### **Digital Ecosystem**

An advanced range of CX solutions utilizing AI and a range of analytics services that are fully omnichannel (including social channels) to transform CX are important criteria for providers.

### **Pricing Flexibility**

Recognizing the importance of pricing flexibility and modern offerings, such as gainshare models, while focusing on KPIs driven by business outcomes is essential for this archetype.

### **Innovation Drivers**

Gaining real-time insights to deliver improved CX by leveraging technology and domain expertise, while adopting innovative approaches to transform CX, is crucial and must be backed by use cases.

### **Proven Track Record**

Providers should be leveraging global expertise and presence, including industry experience and domain expertise, to change customer service, with good reference accounts and use cases available.



## CX Evangelists Archetype – Leaders Club



### Leaders Club

Of the 26 service providers included in our research, ISG found that 16 met the qualification criteria to be included in this Archetype report. ISG recognized eight providers that stand out above the others as matching the CX Evangelists archetype, based on our assessment of their capabilities as described in the Methodology section in the Appendix. These eight vendors, referred to as Archetype Leaders, and their relevant capabilities are presented in the adjacent figure and briefly examined in the following sections.

Note: The service providers listed are arranged in the alphabetical order. No ranking is implied.

	CX Consulting	Digital Ecosystem	Pricing Flexibility	Innovation Drivers	Proven Track Record
Cognizant	●	●	◐	◐	◐
Concentrix	●	●	●	◐	●
HGS	●	◐	●	●	●
Sitel Group®	●	●	●	●	●
Sutherland	●	●	◐	●	●
Tech Mahindra	●	●	●	●	◐
Teleperformance	◐	●	●	●	●
TTEC	◐	◐	◐	◐	◐
Noteworthy Providers	Atento EXL Hexaware Movate Wipro	Datamatics EXL Genpact Hexaware Transcom Wipro WNS	[24]7.ai Alorica Conduent Firstsource Infosys Startek® Transcom Webhelp	Alorica Firstsource Majorel Movate Straive (SPi Global) Webhelp Wipro	[24]7.ai Alorica Conduent Movate Startek®
	Rest of the Market				







## CX Evangelists Archetype

Peer Average	Sitel Group®	Desired Provider Capabilities
		<b>CX Consulting:</b> Sitel Group® is a diversified, stable long-term partner with advisory-led, industry-experienced consultants with deep CX expertise.
		<b>Digital Ecosystem:</b> The company fields a vast range of offerings, including learning and talent services (EXP+™ CX Learning), insight and analytics (EXP+™ CX Analytics), CX digital operations (EXP+™ CX Operations) and AI and automation (EXP+™ CX Digital and CX Technology).
		<b>Pricing Flexibility:</b> Sitel Group® offers a comprehensive range of pricing plans for managed and non-managed solutions that are highly flexible.
		<b>Innovation Drivers:</b> EXP+™ CX Digital and CX Technology includes chatbots, digital agent and support bots, interactive voice response with conversational and visual IVR, and CC automation with QA automation.
		<b>Proven Track Record:</b> Sitel Group® has demonstrated successful case studies exhibiting efficient usage of AI and analytics for its clients.





Dr. Kenn Walters  
**Lead Analyst**

Sitel Group delivers powerful AI-driven solutions with an effective and seamless approach. The company also continues to enhance its EXP+™ suite.





# Digital Connoisseurs Archetype

## Digital Connoisseurs Archetype

### Digital Connoisseurs

These buyers are more mature than Automation Embracers or have made digitalization their top priority. They are planning to scale digital transformation (and automation) to have a larger impact on CX.

### Digital Operations

These enterprises have explored multiple channels and automation for their operations and want to scale digital transformation (and automation) to have a larger impact on CX operations.

### Omnichannel Capability

These enterprises are looking to partner with providers that have widespread digital capabilities and expertise in implementing omnichannel solutions with proven references in doing so.

### Cloud Environment

With the trend of WFH or hybrid work model, providers must be equipped with cloud contact centers and other solutions. This is a critical requirement, along with robust security and compliance adherence.

### Automation Domain

This automation is to deliver the best client results. Improved agent systems/assistance, AI, machine learning, talent management and IVR/chatbots are required. Automation and cloud advisory teams are a prerequisite.



## Digital Connoisseurs Archetype – Leaders Club



### Leaders Club

Of the 26 service providers included in our research, ISG found that 16 met the qualification criteria to be included in this Archetype report. ISG recognized ten providers that stand out above the others as matching the Digital Connoisseurs archetype, based on our assessment of their capabilities as described in the Methodology section in the Appendix. These ten vendors, referred to as Archetype Leaders, and their relevant capabilities are presented in the adjacent figure and briefly examined in the following sections.

Note: The service providers listed are arranged in the alphabetical order. No ranking is implied.

	Digital Operations	Omnichannel Capability	Cloud Environment	Automation Domain
[24]7.ai	●	●	◐	●
Cognizant	●	◐	●	◐
Conduent	◐	◐	◐	●
EXL	●	◐	●	◐
HGS	◐	●	●	●
Sitel Group®	●	●	◐	●
Sutherland	●	●	◐	●
Tech Mahindra	●	●	◐	◐
Teleperformance	●	●	◐	●
WNS	◐	◐	◐	◐
<b>Noteworthy Providers</b>	<b>Atento</b> <b>Firstsource</b> <b>Transcom</b> <b>Wipro</b>	<b>Atento</b> <b>Infosys</b> <b>Startek®</b> <b>Transcom</b> <b>Wipro</b>	<b>Concentrix</b> <b>Datamatics</b> <b>Genpact</b> <b>Hexaware</b> <b>Movate</b> <b>Transcom</b>	<b>Alorica</b> <b>Concentrix</b> <b>Majorel</b> <b>Movate</b> <b>Startek®</b>
<b>Rest of the Market</b>				





## Digital Connoisseurs Archetype

Peer Average	Sitel Group®	Desired Provider Capabilities
		<b>Digital Operations:</b> One of the largest global CX services companies, Sitel Group® employs more than 160,000 staff operating from 160 locations worldwide.
		<b>Omnichannel Capability:</b> EXP+™ is Sitel Group's end-to-end suite of CX products and services. The enterprise experience platform offers advanced analytics capabilities and is fully omnichannel.
		<b>Cloud Environment:</b> Sitel Group® has developed advanced cloud-based solutions, delivering powerful AI-driven solutions in the CX space.
		<b>Automation Domain:</b> EXP+™ CX Digital and CX Technology has chatbots, digital agent and support bots, interactive voice response with conversational and visual IVR, and CC automation with QA automation.





Dr. Kenn Walters  
**Lead Analyst**

Sitel Group continues to invest in AI technologies and is expanding its suite of advanced, AI-driven products and services to deliver high levels of automation.





# Work-From-Home Buyers Archetype



## Work-From-Home Buyers Archetype

### **Work-From-Home Buyers**

This archetype applies to clients adopting a WFH or hybrid operating model, requiring robust remote working capabilities. These clients seek training, qualified agents and technological capabilities enabling work-from-home infrastructure.

### **WFH Consulting**

These clients look for strategic partners that bring industry experience driven by advisory teams with expertise in implementing remote/WFH and hybrid model CX solutions, delivering demonstrable benefits to business.

### **Digital Ecosystem**

An advanced range of WFH solutions utilizing AI and a plethora of analytics services that are fully omnichannel (including social channels) to transform WFH CX are critical criteria.

### **Pricing Flexibility**

Recognizing the importance of pricing flexibility and modern offerings, such as gainshare models, while focusing on business-outcome-driven KPIs, is essential for this archetype.

### **WFH Innovation Drivers**

WFH automation and solutions must work seamlessly and easily, such as in gamification, and infuse teaming, training, coaching, assistance and the inclusion in remote workers.

### **Proven Track Record**

Leveraging global expertise and presence, including domain expertise to change remote working and deliver positive WFH outcomes, with good reference accounts and use cases available is essential.



## Work-From-Home Buyers Archetype – Leaders Club



Of the 26 service providers included in our research, ISG found that 16 met the qualification criteria to be included in this Archetype report. ISG recognized ten providers that stand out above the others as matching the Work From Home Buyers archetype, based on our assessment of their capabilities as described in the Methodology section in the Appendix. These ten vendors, referred to as Archetype Leaders, and their relevant capabilities are presented in the adjacent figure and briefly examined in the following sections.

Note: The service providers listed are arranged in the alphabetical order. No ranking is implied.

	WFH Consulting	Digital Ecosystem	Pricing Flexibility	WFH Innovation Drivers	Proven Track Record
Atento	●	●	●	●	●
Concentrix	●	●	●	●	●
Conduent	●	●	●	●	●
HGS	●	●	●	●	●
Sitel Group®	●	●	●	●	●
Startek®	●	●	●	●	●
Sutherland	●	●	●	●	●
Teleperformance	●	●	●	●	●
Transcom	●	●	●	●	●
TTEC	●	●	●	●	●
Noteworthy Providers	[24]7.ai Alorica Hexaware Tech Mahindra Wipro WNS	[24]7.ai Alorica Cognizant Genpact Infosys Movate Wipro	[24]7.ai Firstsource Hexaware Straive (SPi Global) Tech Mahindra Webhelp WNS	Alorica Firstsource Movate	[24]7.ai Cognizant Firstsource Movate Straive (SPi Global) Tech Mahindra Webhelp Wipro WNS
	Rest of the Market				





## Work-From-Home Buyers Archetype

Peer Average	Sitel Group®	Desired Provider Capabilities
		<b>WFH Consulting:</b> The company's combination of end-to-end services, work-from-home flexibility and expertise in multiple industry verticals is driven by its advisory practice.
		<b>Digital Ecosystem:</b> Sitel at Home™ is Sitel Group's work-from-home solution that delivers improved performance. The firm's work-from-anywhere platform is built on several patented tools and technologies.
		<b>Pricing Flexibility:</b> Sitel Group® offers a comprehensive range of highly flexible pricing plans for managed and non-managed solutions.
		<b>WFH Innovation Drivers:</b> Sitel® MAX provides the framework for MAXhubs, which has the amenities of a traditional brick-and-mortar contact center and the flexibility of a virtual environment for WFH staff.
		<b>Proven Track Record:</b> Sitel Group's work-from-anywhere approach offers three flexible working models globally across 40 countries. Sitel Group® has more than 100,000 associates working from home.





Dr. Kenn Walters  
**Lead Analyst**

Sitel Group has a long history in the WFH space where it offers a robust portfolio, including Sitel at Home™ that delivers improved performance and key benefits to clients.



## Service Providers Across Archetypes

	Automation Embracers	CX Evangelists	Digital Connoisseurs	Work From Home Buyers
[24]7.ai	Noteworthy	Noteworthy	Leader	Noteworthy
Alorica	Noteworthy	Noteworthy	Noteworthy	Noteworthy
Atento	Leader	Noteworthy	Noteworthy	Leader
Cognizant	Leader	Leader	Leader	Noteworthy
Concentrix	Leader	Leader	Noteworthy	Leader
Conduent	Leader	Noteworthy	Leader	Leader
Datamatics	Not In	Noteworthy	Noteworthy	Not In
EXL	Noteworthy	Noteworthy	Leader	Not In
Firstsource	Not In	Noteworthy	Noteworthy	Noteworthy
Genpact	Noteworthy	Noteworthy	Noteworthy	Noteworthy
Hexaware	Noteworthy	Noteworthy	Noteworthy	Noteworthy
HGS	Leader	Leader	Leader	Leader
Infosys	Leader	Noteworthy	Noteworthy	Noteworthy

Note: All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to capability requirements were identified as Leaders or Noteworthy Providers



## Service Providers Across Archetypes

	Automation Embracers	CX Evangelists	Digital Connoisseurs	Work From Home Buyers
Majorel	Not In	Noteworthy	Noteworthy	Not In
Movate	Noteworthy	Noteworthy	Noteworthy	Noteworthy
Sitel Group®	Leader	Leader	Leader	Leader
Startek®	Noteworthy	Noteworthy	Noteworthy	Leader
Straive (SPi Global)	Noteworthy	Noteworthy	Not In	Noteworthy
Sutherland	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader	Noteworthy
Teleperformance	Leader	Leader	Leader	Leader
Transcom	Noteworthy	Noteworthy	Noteworthy	Leader
TTEC	Noteworthy	Leader	Not In	Leader
Webhelp	Noteworthy	Noteworthy	Not In	Noteworthy
Wipro	Noteworthy	Noteworthy	Noteworthy	Noteworthy
WNS	Noteworthy	Noteworthy	Leader	Noteworthy

Note: All Service Providers evaluated for this report have the abilities to service all four archetypes, only those with the best fit to capability requirements were identified as Leaders or Noteworthy Providers



Almost all enterprises have adopted new strategies for their businesses and accelerated their digital transformation plans over the last two years. Many have now learned from experience that their previous customer contact and experience planning were inadequate to deal with new modes of customer interaction, such as social media, and new models of working in the CX space, which now includes the hybrid model or WFH. This presents enterprises with new challenges and inherent security and staff inclusion difficulties. This includes the massive shift to AI and automation with analytics, including the use of bots and virtual assistants, cloud-based CX solutions and social media channels

Contact centers have evolved from providing reactive inbound contact center services and outbound sales and information channels to offering advanced CX and user experience services. There

is a high percentage of agents working remotely or in hybrid situations, and smaller, more localized hubs are emerging to support WFH agents that sometimes want to use small office facilities. With the severe hiring shortages and competition in many regions, “lifestyle CX centers” have also recently been set up, moving CX centers to attractive locations, usually in warm coastal areas, and in locations with attractive cost-of-living rates to help retain staff. With this evolution occurring, companies have naturally transitioned to higher levels of the digital maturity curve.

Before 2020, many enterprises opted for work-at-home agents to address peak season demand. Today, organizations have several staffing options to choose from, such as gig economy, BYOD agent onboarding and larger work-from-home setups that allow organizations to seamlessly address peak seasons, offloading premises or

downsizing premises in many cases. This has increased the need to address onboarding issues, undertake training and certification programs, provide social interaction and inclusion for the agents to create a sense of loyalty, and gamification-type approaches to make work for the agent less strenuous. For enterprises and providers, enabling these advanced features comes with the essential need of providing enhanced security at the point-of-agent device in remote locations. Most of this is now evolving to automated and persona-based relations with agents, and advanced device and point-of-operations security.

The journey of contact center outsourcing begins with automation in the new era. Automation is a given; therefore, the archetype of customer services buyers that relied heavily on full-time equivalents (FTE)-driven transactions has become

Automation Embracers. Digital Connoisseurs and CX Evangelists are also growing rapidly in the market.

Enterprises are proactively adopting new technologies to make significant changes in the way they serve their customers and relate to their agents/users. To address evolving customer demands and help enterprises during this transition, service providers must not only offer advanced technologies, best practices and newer operating models but also deliver through advisor-led engagements with vertical expertise to help enterprises build the right CX strategy.





# Appendix



This report uses four archetypes, typical sets of client requirements (archetypes) to assess the relative suitability of Contact Center – Customer Experience Services providers. Data regarding the providers' capabilities and positioning were provided to ISG via briefings, ISG advisor interviews and surveys of service providers, including client references if appropriate.

Contact Center – Customer Experience Services providers shared their data across different Contact Center – Customer Experience Services service dimensions through the research initiatives noted above. These dimensions cover their technological competency, preferred engagement models, scope of work performed, service capability, functional expertise and industry and regional presence.

### **Our general methodology is as follows:**

1. The data provided by the service providers were categorized and assessed according to the Contact Center – Customer Experience Services service requirements described for each of the Contact Center – Customer Experience Services client archetypes. For cases in which provider descriptions and data were not worded as precisely as archetype requirements, ISG Contact Center – Customer Experience Services service analysts relied on their expertise and experience to classify provider capabilities.

2. Each archetype capability requirement was measured, based on its relative importance to that archetype's typical requirements. Weightage of each archetype's requirements add up to a total of 100 percent. Specific weights are not disclosed in this report. The relative importance of each capability requirement is depicted in illustrations at the beginning of each

archetype section, using differently sized "hexagon" icons.

3. Once the relative ability of each service provider was assessed for each of the archetype requirements, each provider was then positioned in a relevant quartile (for example, top 25 percent, second 25 percent, and so on) — the top quartile was awarded a "capability score" of 4/4; the second quartile earned a score of 3/4; the third quartile earned a score of 2/4; and the fourth quartile earned a score of 1/4. The ones with no capabilities to meet the archetype requirements were not included in the assessment.

4. Provider capability scores from Step 3 were then multiplied by the weightage developed for each client archetype requirement in Step 2. The results for each provider were then added to develop a cumulative score for each service provider. These cumulative scores are not disclosed in this report.





5. The cumulative scores were then used to identify the service providers that are well suited for each archetype's requirements. These providers are listed alphabetically and briefly profiled in each archetype section. Wherever relevant, additional services providers, with noteworthy capabilities, are also mentioned (for example, providers that may have scored well on a specific requirement but not across all the requirements for that archetype).

Please note: This report simply presents services providers' known capabilities in the context of user enterprises' typical needs. It does not intend to rank providers or to assert that there is one top provider with abilities that meet the requirements of all clients that identify themselves with a particular archetype.



## Provider Capability Scores

The cumulative score for each of the selected services providers against each archetype requirement is represented using Harvey Balls. For example: if a provider is assessed with a score of 4 out of 4, then a full Harvey Ball is used to represent their capability against that requirement. Similarly, if a provider is assessed a score of 1 out of 4, then a one-quarter Harvey Ball is used, as shown in the adjacent chart

Harvey Ball Representation	Score
	Score 4 out of 4
	Score 3 out of 4
	Score 2 out of 4
	Score 1 out of 4



## Author & Editor Biographies

Author



**Dr. Kenn Walters**  
**Lead Analyst**

Dr. Kenn Walters is a highly skilled senior executive with more than 40 years of experience in directing and managing major transformational technology projects, research and development programs, as well as extensive experience within providers and in global industry research and management consultancy. For ISG, Kenn has written more than 100 articles as a distinguished lead analyst for ISG Insights in areas such as digital transformation, cloud managed networks, SD networking, SDN and digital disruptors.

He is a Distinguished Lead Analyst and author for multiple regions in the Provider Lens™ [reports](#), in such areas as Networks – Software Defined Networking, Digital Business Solutions and Services, Contact Center as a Service and CCCX. He holds BSc, MSc and PhD degrees in computer science and communications systems. He is a Fellow of the BCS and a member of the NY Academy of Sciences.

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 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.



### \*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

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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. For more information, visit [www.isg-one.com](http://www.isg-one.com).





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**REPORT: CONTACT CENTER – CUSTOMER EXPERIENCE SERVICES**