ISG Provider Lens™

Contact Center / Customer Experience Services

Archetype Report

A research report aligning enterprise requirements and provider capabilities

March 2019

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About this Report

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The research and analysis presented in this report include 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 was current as of November 2018. 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.

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ISG Provider Lens™

ISG 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.

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EXECUTIVE SUMMARY

Contact Center Of The Future And Evolving Customer Experience Journey

What does the contact center of the future look like?

The contact center of the future lies in personalized services. As speed, accuracy, agility and accessibility are becoming prime requirements, consumers dictate how they want to interact with the brand and not the other way around.

Customer retention, loyalty and stickiness are highly dependent on the quality of services delivered and on whether the services offered today are rapid, relevant and personalized.

Customer centricity is the renewed focus of contact center services. Technologies such as artificial intelligence (AI) are changing the way customer services are being delivered. Analytics is empowering agents to deliver better and personalized services to customers. Digital technologies are here to stay, bring process improvements and mainly to augment human interaction. As the number of interactions increases across non-voice channels, it is important for enterprises to build their strategy on the utilization of these channels, capturing information and seamlessly transferring it across channels.

CRAWL

Customer Service

Agent-driven, voice calls, objective is query resolution

WALK

Customer Engagement

Multiple channels, omnichannel experience, seamless journey, know your customer better, quick query resolution, cloud enablement for contact centers, social media integration

RUN

Customer Experience

Enriched customer journey, personalization, intelligent engagement, AI and cognitive technology, automation, self service, bots, avatars, self-help videos, analytics, sales, marketing, customer-centric business model

TRANSFORM

Customer Experience Transformation

Holistic engagement to transform customer experience, adopt the right tools and technologies, implement omnichannel, advanced analytics for improvised personalization, adoption of automation and AI to empower agents, cloud adoption for real time access, long term strategic goals to enrich customer experience.

The journey of contact center has evolved from crawl, walk and run to transformation. Moving away from the piecemeal approach of traditional "agents on the seat" model to end-to-end journey, enterprises are keen to look at this entire approach from the end user's perspective. In order to achieve the desired customer experience results, companies are relying on experts to design their strategy by reimagining and re-engineering the customer journey as well as identifying areas that can drive enhanced operational efficiencies and ensure preparedness for the future.

The contact center of the future should address the following aspects to experience the true epitome of evolution:

- Instant — Utilization of chatbots or virtual agents to serve customers 24/7 when agents are not available.
- Digital — Support offered by contact centers must be digitized.
- Easy — Providing customers with anywhere/anytime access and ease of availability of any information that they seek.
- Personalized — A key requirement for contact centers to survive; customizing the offerings or services is quintessential to deal with digital-first generations.

To achieve the above, contact centers of the future are making notable changes in the following areas:

Understanding the customer

The journey of revolutionizing customer services cannot be initiated without understanding the needs of customers. With the growing importance to map the customer journey and better understand their needs, contact centers are making investments to strengthen their consulting offerings, particularly in design thinking, end-user research and innovation labs.

Human interaction continuing to decline but not facing elimination

Digital channels are increasing, cheaper to run than voice and are easily accessible. Voice calls continue to decline and interactions with agents/virtual agents over digital channels are rising. However, human involvement is pertinent to complete the interaction, particularly in handling complex tasks.

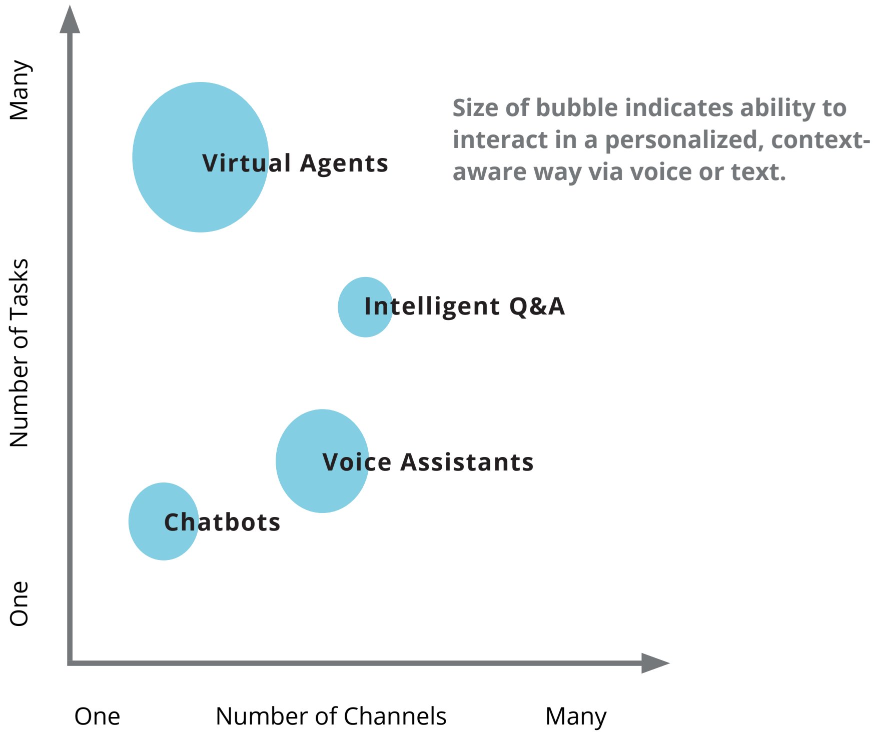
According to ISG Research™, the role of an agent will see a significant shift and narrow down to three main types, depending on complexity. These roles will be augmented by AI and analytics. The three main types are:

- Exception handler: Handles or manages data that do not fall under any automation channel.
- Multi-discipline handler: Handles tasks that are not automated yet and are usually complex.
- Deep domain experts: Specialized in a single domain and help customers resolve queries that are typically very complex in nature and require highly specialized skills.

Uptake in intelligent assistants in contact centers

AI is a game changer in the contact center industry and is witnessing a surge in adoption. The technology will immensely augment customer interactions pertaining to human quality, self-service or chatbots. AI has huge potential to replicate human-like behavior, understand customer needs and answer appropriately without human intervention. Conversational AI is ready for prime time; it is moving beyond prototypes and rapidly progressing into the implementation of production-ready products.

According to ISG Research™, technologies such as intelligent Q&A, virtual agents and chatbots are grouped as intelligent assistants and are actively being adopted in contact centers. The following illustration depicts the various technologies and their ability to interact in a personalized way via voice or text. This is based on the number of channels the technologies can operate on and the number of tasks they can perform as per their complexity.



Self-service to intelligent self-service

Given its faster turnaround and quick response time, self-service is emerging as one of the popular channels among most customers. With technology enablement such AI, traditional self-service portals have evolved into more than just robotic automation such as interactive voice response (IVR). These portals are highly intelligent crowd drivers and form a knowledge management hub that can predict patterns and pull out information that is most relevant.

Social media strategy and management

Social media is an important and dominant tool for customer engagement. A popularly evolving channel, the technology is gaining popularity, particularly among millennials. One of the critical aspects of growing and managing a brand is a well-defined social media strategy. From product support, query resolution, sales and inquiry, a large chunk of queries are being routed through this channel. It is pertinent for organizations to adopt an effective management strategy for social media in order to improve customer experience.

Introduction

Contact Center of the Future and Evolving Customer Experience Journey

This ISG Provider Lens™ report summarizes the relative capabilities of 17 contact center service providers and their abilities 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. Our research found no shortage of providers with capabilities that are adequate to satisfy the contact center requirements of most user enterprises. However, it is rare to find one contact center services provider that can address all contact center needs across most user archetypes. This is largely due to the two core realities regarding the archetypes:

- The characteristics of each archetype are moving targets. While the core requirements rarely change, the relative importance of different requirements can vary based on business and/or technological environment changes.
- Most enterprises, especially larger firms, tend to include multiple archetypes. As the requirements of each archetype evolve based on business and technological changes, so does the presence and value of each archetype within the enterprise. Therefore, enterprises have an ongoing series of choices when it comes to selecting contact center service providers. 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.

About This Research

This ISG Provider Lens™ report summarizes the relative capabilities of 17 contact center service providers and their abilities 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. Our research found no shortage of providers with capabilities that are adequate to satisfy the contact center needs across most user archetypes. This is largely due to two core realities regarding the archetypes:

- The characteristics of each archetype are moving targets. While the core requirements rarely change, the relative importance of different requirements can vary based on business and/or technological environment changes.
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This report uses research and analysis from ISG's long-running work with enterprise clients and BPO services providers to identify and examine key changes, approaches and buyers of contact center services. We map the user-side requirements to provider-side offerings and capabilities. Not every user enterprise has the same requirements. In this report, we use four buyer archetypes (detailed in the following sections) to identify and assess buy-side requirements for business value relative to provider-side offerings and capabilities. All revenue references are in U.S. dollars ($US) unless noted.

The assessment methodology has been developed and refined over several years of working with buyers to understand and articulate their services requirements as well as engaging with services providers to understand how buyer requirements influence the development of suitable solutions and go-to-market strategies.

This report assesses the capabilities of 17 providers. Some services providers that are typically included in our research are not included in this report because they were unable to or declined to participate. They may be included in future versions of the report based on merit and the willingness of services providers to provide current and relevant materials. Readers should not make any inferences based on a services provider's absence from this report.

How to Use This Report

This report is intended to provide advice founded on ISG's experienced-based, proprietary assessment of services providers' relative suitability to the needs of a typical contact center customer. This advice is applied across each of the four archetypes as profiled. No recommendation or endorsement is indicated, suggested or implied. Clients must make the decision to engage with any provider based not only on their specific, current workplace needs, but also on other factors such as cost, culture and timing.

This report is organized as follows:

Client Archetype Descriptions – This section identifies and describes the most common user-side archetypes that we have identified in our ongoing research and analysis.

Assessments by Archetype – These sections detail each of the client archetypes, along with the types of service offerings that each type requires to realize the most business value. Each archetype section includes our assessment of the relevant capabilities and positioning of the service providers surveyed and interviewed. It covers the relative suitability of the providers for each archetype based on the information they have provided to ISG. These assessments are developed using the data, analysis and comparative methodology described in the methodology section.

Methodology – In this section, we have outlined and explained how we developed and applied the data, analysis and insights provided in this report.

Please note*: This report presents the known capabilities of services providers in the context of typical project needs of user enterprises (categorized as specific archetypes). This report is not meant to rank providers or to assert that there is one top provider with capabilities that can meet the requirements of all clients that identify themselves as a particular archetype.*

CLIENT ARCHETYPE DESCRIPTIONS

The client archetypes used in this report (and in our ongoing advisory and consulting engagements) represent the various types of clients that 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 the assessment of a similarly simple, relevant set of providers capabilities.

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.

In this contact center archetype report, we have positioned the 17 service providers into four buyer categories as follows:

A1

CUSTOMER SERVICE BUYERS

Traditional buyers are classified as those that focus on managed solutions and do not consider contact centers a part of their core operations. However, they are taking a step-by-step approach, including the adoption of non-voice channels, during their digital transformation. They are looking to collaborate with those providers that have significant experience and efficiencies in delivering services through basic non-voice channels, including self-service, chat and social media channels.

A2

PEAK SEASON BUYERS

These buyers seek providers that offer cost-effective services through an established work-at-home model. The flexibility to increase or decrease agents depending on varying business demands allows clients to engage with service providers during seasonal peaks. Peak season buyers prefer flexible pricing models over fixed-price contracts.

A3

AUTOMATION SEEKERS

These buyers seek to embark on their digital journeys to cope with the changing preferences of technology-advanced millennials by offering 24x7 connectivity across all touchpoints. They want to engage with service providers that are not only adept at managing traditional contact center services but have automation capabilities, including virtual agents, desktop automation and robotic process automation (RPA) that help drive higher operational efficiencies. The use of automation allows buyers to train their agents on handling more complex queries to enable an enhanced customer experience. These buyers also look for consultative guidance to future-proof themselves as a long-term growth strategy.

DIGITAL EXPERTS

A4

These buyers focus on domain-specific consulting strategies that involve design thinking. They are not just looking for technology partners or vendors but want to engage with those providers that can help them in their transformational journey and be more of a transformational partner than an outsourcing partner. They want to stay ahead of the transformation curve and thus prefer providers that can help them leverage digital technologies to drive innovation and increased efficiencies. These buyers are seeking to engage with providers with end-to-end offerings that include platforms, solutions and services.

Contact Center / Customer Experience Services Archetypes

CUSTOMER SERVICE BUYERS

This type of buyer typically seeks providers that offer managed services solutions. Such buyers do not view contact center operations as an integral part of their business model and intend to focus their energies on other operations. From a pricing perspective, customer service buyers typically look for flexible pricing options. They mostly leverage voice channels but have no defined roadmap for digital transformation. Such outsourcers have large global operations and rely on service providers that have a wide global or regional presence, support few non-voice channels and focus on point solutions.

Customer service buyers are neither innovators nor inclined toward technologically advanced contact center solutions. They are progressing toward the utilization of non-voice channels, such as self-service portals, social networks and others for resolving customer queries, and they also intend to collaborate with providers that have the optimum efficiencies in non-voice channels and necessary compliance capabilities. These buyers manage high call volumes and are seeking providers that can assist in reducing call volumes by using non-voice channels such as self-service options, thereby driving cost efficiencies and agent productivity.

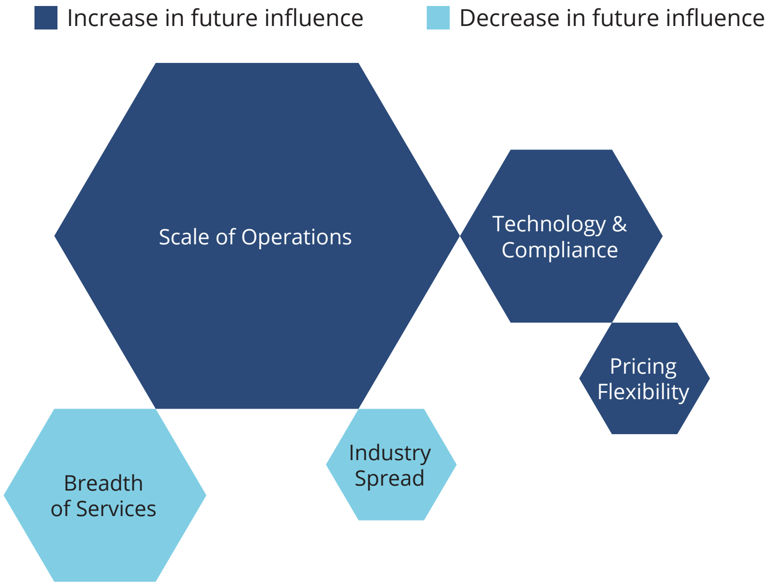
The need to achieve cost efficiencies influences the outsourcing decisions of these buyers. Such buyers engage with those providers that can support them in areas of technology, multiple language support, floor management and forecasting and offer them necessary cost savings. They intend to manage service provision via contracted service levels and governance.

Customer Service Buyer Client Imperatives

- Achieve cost efficiencies
- Manage high call volumes
- Engage with global provider to address needs of customers globally
- Effective management of basic non voice channels
- Partner with providers that have the necessary technology and compliance capabilities

Fig 1

Customer Service Buyer Archetype Provider Capabilities Importance



Size based on relative current importance in the archetype profile

Fig 2 Customer Service Buyers Archetype Leaders

● Score 4 out of 4 ◕ Score 3 out of 4 ◑ Score 2 out of 4 ◔ Score 1 out of 4

Out of the 17 services providers included in our research, we found 8 leaders that stand out from the others and match the customer service buyers type based on our assessment of their capabilities as described in the methodology section in the appendix. These eight, referred to as archetype leaders, and their relevant capabilities are presented in Figure 2, and briefly examined in the following sections.

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

	Scale of Operations	Breadth of Services	Technology & Compliance	Industry Spread	Pricing Flexibility
Alorica	●	◕	●	●	●
Atento	◕	◑	●	●	●
Concentrix	●	●	◕	◕	◕
Conduent	◕	●	●	●	●
HGS	◕	◕	●	●	●
Sitel	●	●	◑	●	●
Teleperformance	●	●	●	●	●
TTEC	●	●	◕	◕	◑

SITEL

Headquartered in the U.S, Sitel is a global contact center provider that employs more than 74,000 human agents. Generating $1.7 billion in revenue, the firm derives 34 percent from Western Europe followed by 25 and 24 percent from North America and Asia Pacific, respectively. It has more than 30 years of experience in delivering contact center services in 48 language across 150 delivery locations to 400 clients. Sitel has a high revenue concentration in three verticals, namely telecom, media, financial services and retail. Accounting for 25.6 percent of its overall revenue, telecom and media are the top revenue generators, followed by financial services with 18.8 percent. Transportation is a key vertical of focus that the organization is envisioning to grow in. Sitel also helps clients address customer queries through a combination of voice and live chat, self-service portals and FAQs. From a pricing perspective, Sitel is a willing participant to take more risk and offers a mix of fixed and performance-based pricing approaches to deliver shared outcomes.

OTHER NOTEWORTHY PLAYERS – CUSTOMER SERVICE BUYERS

Some other providers scored high in one or more areas that are important for customer service buyers. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for customer service buyers are:

Fig 3 Other Noteworthy Players – Customer Service Buyers

Scale of Operations	Breadth of Services	Technology & Compliance	Industry Spread	Pricing Flexibility
Transcom	Aegis	Aegis	Aegis	Genpact
	Genpact	EXL	Sutherland	Sutherland
	Sutherland	Genpact	TechM	
	Wipro	Hexaware	Transcom	
	WNS	Sutherland	Wipro	
		Wipro	WNS	
		WNS		

A2 PEAK SEASON BUYERS

Workforce flexibility is a major outsourcing driver for peak season buyers. These buyers intend to manage unpredictable call volumes by partnering with providers that offer flexibility in ramping up or down the agent headcount on demand. Such extended virtual solutions help clients in accessing a provider's broad base of a skilled and vertically experienced talent pool, local language support and regional expertise. These buyers follow a flexible pricing approach in their contracts and are averse to a fixed-pricing model.

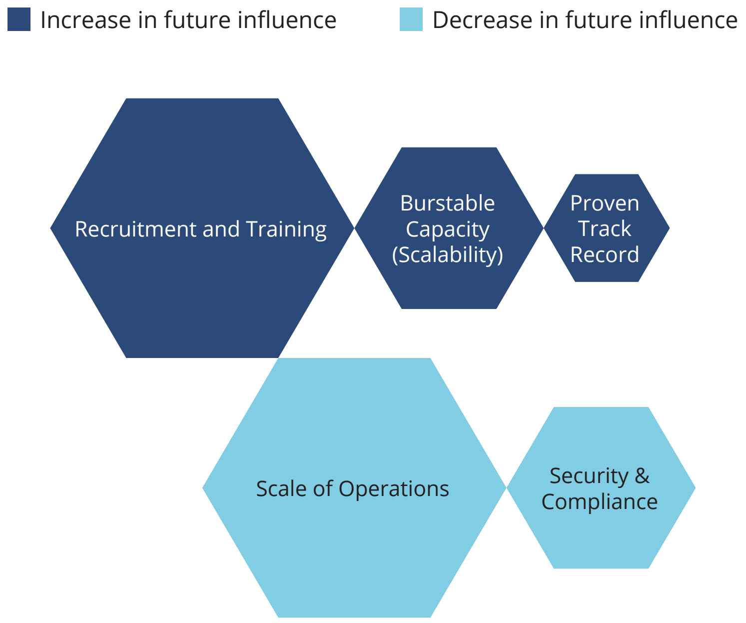
Cost savings is another driver that influences peak season buyers. Remote workforce helps such buyers in reducing both the infrastructure operational cost and the technology cost. Employment of remote workforce for contact center solutions is booming in North America and some European countries where customers prefer local language support and nearshore or onshore service delivery at the cost of offshore outsourcing.

A2 Peak Season Buyers Client Objectives

- Flexible work schedules.
- Access to large talent pool.
- Near/onshore presence.
- Leverage work-at-home solutions for seasonal challenges and business continuity planning.
- Rapid ramp up of flexible workforce.
- Increased security and compliance competencies.

Fig 4

Peak Season Buyers Influence of Provider Capabilities



Size based on relative current importance in the archetype profile

Out of the 17 service providers included in our research, we found 5 leaders that stand out and match peak season buyers based on our assessment of their capabilities as described in the methodology section in the appendix. These five leaders, referred to as archetype leaders, and their relevant capabilities are presented in Figure 5, and briefly examined in the following sections.

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

Fig 5 Peak Season Buyers Archetype Leaders

● Score 4 out of 4 ◕ Score 3 out of 4 ◑ Score 2 out of 4 ◔ Score 1 out of 4

A2	Scale of Operations	Recruitment and Training	Burstable Capacity (Scalability)	Security & Compliance	Proven Track Record
Alorica	●	●	◑	●	●
Sitel	◕	◕	●	◕	●
Sutherland	●	●	◕	●	◑
Teleperformance	●	●	◔	●	◔
TTEC	◕	●	◑	◑	●

SITEL

Sitel's work-at-home program employs more than 1,500 virtual associates to provide remote services. Besides being a global BPO leader with a vast workforce, most remote agents are based in the U.S. The firm also offers work-at-home services in Canada, Germany and France. Sitel showcases improved burstable capacity to accommodate staffing requirements by large volume during seasonal peaks. One of the key differentiators of this model is the lower attrition rate of remote agents that benefits clients in gaining access to experienced agents, leading to enhanced customer relationship and experience. The model also aids clients in reducing the total cost of ownership by reducing the operating costs and customizable training programs, resulting in higher agent productivity.

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OTHER NOTEWORTHY PLAYERS – PEAK SEASON BUYERS

Some other providers scored high in one or more areas that are important for peak season buyers. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for peak season buyers are:

Fig 6 Other Noteworthy Players – Peak Season Buyers

A2

Scale of Operations	Recruitment and Training	Burstable Capacity (Scalability)	Security & Compliance	Proven Track Record
Concentrix	Concentrix		Concentrix	Aegis
HGS	Conduent		Conduent	Hexaware
Transcom	HGS		HGS	Transcom
WNS	Transcom		WNS	WNS
	WNS			

A3 AUTOMATION SEEKERS

Automation seekers intend to optimize their operations and minimize costs by reducing the number of agents required to handle queries. The agents are later channelized to solve more complex problems within the organization. Automation seekers rely on the automation competencies of service providers to deal with high volumes of repetitive tasks and reduce human dependency and errors. These buyers engage with those service providers that can offer innovative automation solutions such as intelligent automation for a faster and efficient resolution of queries.

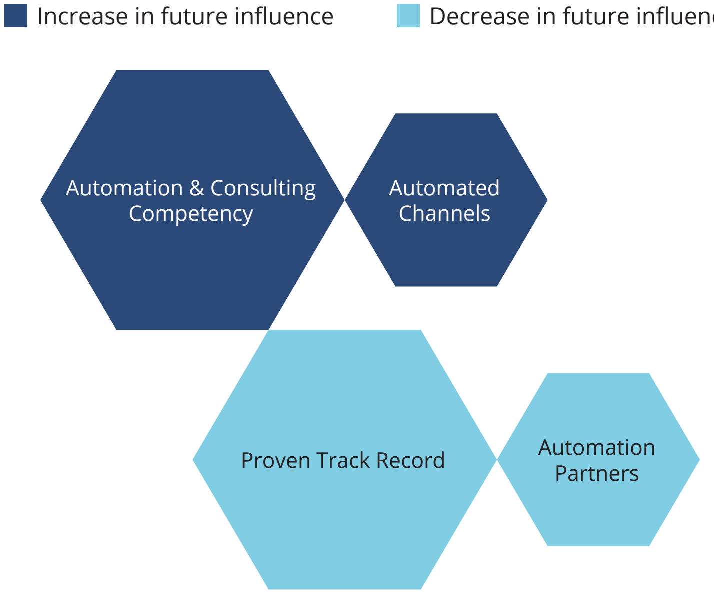
By implementing such advanced solutions, these buyers intend to offer a more prompt and personalized solution to their customers and gain operational efficiencies by depending less on human assistance. They also want to leverage automation platforms coupled with other advanced technologies to deliver customized, personalized and quick responses to their customers. Besides implementing advanced automation solutions across channels, these buyers seek consultative guidance from providers to future-proof themselves as a long-term growth strategy.

A3 Automation Seekers Client Objectives

- Reduce manual and repetitive tasks handled by human agents
- Automation solutions such as the desktop automation and RPA
- Utilizing human agents for complex issues
- Leveraging automation platforms across channels
- Value addition through newly-added consultancy segment

Fig 7

Automation Seekers Influence of Provider Capabilities



Size based on relative current importance in the archetype profile

Out of the 17 services providers included in our research, we found 8 leaders that stand out and match the automation seekers type based on our assessment of their capabilities as described in the methodology section in the appendix. These eight leaders, referred to as archetype leaders, and their relevant capabilities are presented in Figure 8, and briefly examined in the following sections.

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

Fig 8 Automation Seekers Archetype Leaders

● Score 4 out of 4 ◕ Score 3 out of 4 ◑ Score 2 out of 4 ◔ Score 1 out of 4

A3	Automated Channels	Automation Partners	Automation & Consultancy Competency	Provent Track Record
Alorica	●	◑	●	●
Conduent	◕	◕	◕	●
Genpact	◔	◑	◑	◕
Hexaware	●	●	◕	◕
HGS	●	●	◕	◕
Sutherland	●	◕	●	●
TechM	◑	●	◑	●
WNS	◑	●	◕	◕

OTHER NOTEWORTHY PLAYERS – AUTOMATION SEEKERS

Some other providers scored high in one or more areas that are important for automation seekers. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for automation seekers are:

Fig 9 Other Noteworthy Players – Automation Seekers

Automated Channels	Automation Partners	Automation & Consultancy Competency	Provent Track Record
Aegis	Aegis	Aegis	EXL
Sitel	EXL	Concentrix	Sitel
Teleperformance	Sitel	EXL	
	Teleperformance	Wipro	

A4 DIGITAL EXPERTS

With the proliferation of digital devices, social networks and chatbots, digital experts are seeking digital channels to optimize customer experience and address queries across all touchpoints. Customers want consistent experience across all communication platforms of enterprises. They also expect buyers to give them engagement options to get their information of choice from different channels such as intelligent FAQs. Hence, these buyers engage with those providers that have an efficient omnichannel capability and a framework that brings people, process, technology and data together on a single platform to better serve their customers. From a pricing perspective, such buyers are willing to take risk and offer a mix of outcome-based and flexible pricing models in their contracted solutions.

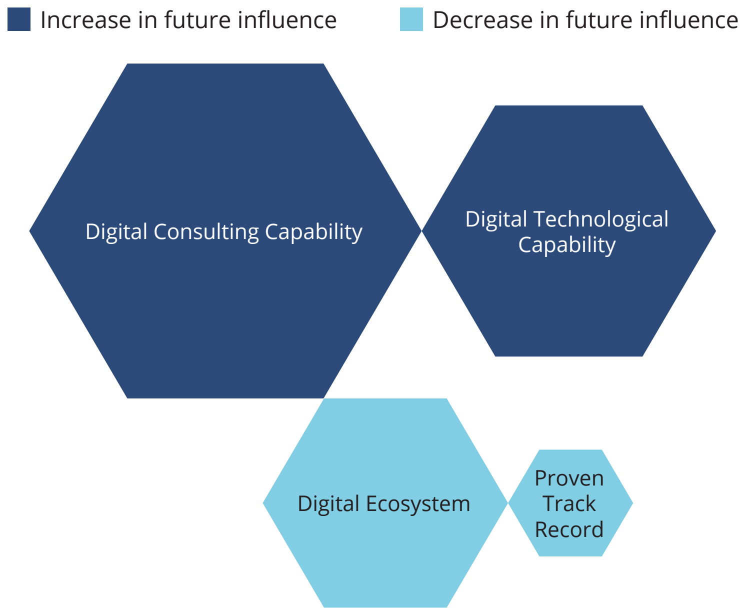
Digital experts aim to develop a customer-centric solution and offer a seamless journey to customers in order to gain a competitive edge. Hence, they look for innovative solutions such as digital technologies and design thinking to address evolving business needs such as customer journey mapping for a proactive solution. Such buyers seek to leverage automation platforms paired with analytics, AI and consultancy guidance to deliver personalized and quick solutions to their customers. They intend to develop a customer-centric solution that can provide a seamless journey and optimize information exchange across multiple channels. Such digitally-inclined buyers are innovators and engage with providers that can assist them in the digital journey from inception to transformation.

A4 Digital Experts Client Objectives

- Holistic approach to transform customer experience journey
- Adoption of advanced automation
- Introduce omnichannel solutions and offerings
- Advanced analytics solutions
- Adoption of varied digital channels to cater to tech-savvy millennials
- Strategic alignment with providers to achieve greater benefits

Fig 10

Digital Experts Influence of Provider Capabilities



Size based on relative current importance in the archetype profile

Fig 11

Digital Experts Archetype Leaders

● Score 4 out of 4 ◕ Score 3 out of 4 ◑ Score 2 out of 4 ◔ Score 1 out of 4

Out of the 17 services providers included in our research, we found 7 leaders that stand out and match the digital experts type based on our assessment of their capabilities as described in the methodology section in the appendix. These seven leaders, referred to as archetype leaders, and their relevant capabilities are presented in Figure 11, and briefly examined in the following sections.

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

	Digital Technological Capability	Digital Ecosystem	Digital Consulting Capability	Proven Track Record
Concentrix	◕	●	◕	●
Genpact	●	●	◕	●
HGS	◕	◑	●	●
Sitel	◕	●	◕	◑
Sutherland	●	●	●	●
Teleperformance	●	●	●	●
TTEC	●	◕	●	●

SITEL

Sitel is partnering with a plethora of technology providers to help clients design and optimize their customer-centric processes. From a capability perspective, Sitel integrates different components that help develop a 360-view degree of customer requirements. Key focus areas include enabling clients to innovate and identify automaton opportunities to optimize service delivery. The partnership begins with a joint discussion to identify a problem and a potential solution that is unique to the client business. A key differentiator to this consultative landscape is the visualization techniques that allow customers to view relevant data points on a mobile or a tablet to make quick operational decisions. Analytics specialists run statistical models, armed with some of the latest technologies to bring out key recommendations for clients.

Sitel has engaged with a diverse client base in the areas of organizational design, process design and journey mapping to help them speed their offerings to the market compared to competitors. For instance, to optimize the knowledge management ecosystem from both platform and content perspectives, Sitel has exhibited the use of AI for active listening and visual IVR.

Sitel is also engaged in the development and design of automation strategies with enabling technologies such as AI and bots. This is delivered through combination in-house work across different platforms and in collaboration with third-party providers such as NICE inContact, Bridgei2i, Qlik and Fractal and Novagile Interactions, Rul.ai, etc. Sitel's three CX labs enable all innovations and focus on digital solutions, desktop & ops and analytics in the U.S. and the other American regions. The labs focus on various tasks, including hypothesis testing, development of business cases, and eventually productization into enterprises workstreams.

OTHER NOTEWORTHY PLAYERS – DIGITAL EXPERTS

Some other providers scored high in or more areas that are important for digital experts. However, they were not categorized as leaders for this archetype because they did not rate high in enough categories.

Noteworthy providers (services providers with a high score in one or more categories) for digital experts clients are:

Fig 12 Other Noteworthy Players – Digital Experts

Digital Technological Capability	Digital Ecosystem	Digital Consulting Capability	Proven Track Record
Conduent	Atento	EXL	Conduent
EXL	Wipro	TechM	EXL
Hexaware	WNS	WNS	TechM
TechM			WNS
Wipro			

SERVICE PROVIDERS ACROSS ARCHETYPES

	Customer Service Buyers	Peak Season Buyers	Automation Seekers	Digital Experts
Aegis	✓✓✓	✓	✓✓✓	□
Alorica	*	*	*	□
Atento	*	□	□	✓
Concentrix	*	✓✓✓	✓	*
Conduent	*	✓✓	*	✓✓
EXL	✓	□	✓✓✓	✓✓✓
Genpact	✓✓✓	□	*	*
Hexaware	✓	✓	*	✓
HGS	*	✓✓✓	*	*

* = Leaders

✓ = Noteworthy Providers *(number of check marks indicate the degree of alignment with the capability requirements of each client archetype)*

□ = *Not In (the Service Provider wasn't considered a leader in any of the capability requirements for this archetype)*

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

SERVICE PROVIDERS ACROSS ARCHETYPES

	Customer Service Buyers	Peak Season Buyers	Automation Seekers	Digital Experts
Sitel	✱	✱	✓✓✓	✱
Sutherland	✓✓✓✓	✱	✱	✱
TechM	✓	□	✱	✓✓✓
Teleperformance	✱	✱	✓✓	✱
Transcom	✓	✓✓✓	□	□
TTEC	✱	✱	□	✱
Wipro	✓✓✓	□	✓	✓✓
WNS	✓✓✓	✓✓✓✓	✱	✓✓✓

✱ = Leaders

✓ = Noteworthy Providers *(number of check marks indicate the degree of alignment with the capability requirements of each client archetype)*

□ = *Not In (the Service Provider wasn't considered a leader in any of the capability requirements for this archetype)*

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

GUIDANCE

The nature of engagement with contact centers has taken a dramatic shift. From traditional channels of voice and basic self-service portals (FAQs), customers can now interact across multiple channels such as voice, chat, SMS, social media and self-service. With the changing dynamics and growing needs, the transformation of contact centers is inevitable.

Transformation is not limited to just tools and technologies; the journey involves end user needs, organizational changes, role changes, people focus and support from leaders. The journey of contact centers has evolved from crawl, walk and run to transform.

Despite the increased willingness of organizations to embrace digital transformation, they seem lost in this journey and are perhaps seeking immediate results that may let them to reap the benefits of long-term strategies.

The customer services buyer archetype will gradually lose relevance, and most contact centers are between the walk and run stages of the cycle. Contact centers must adopt a holistic approach to transform. In this archetype report, we also focus on aspects such as consulting, strategy and roadmap besides tools technologies. Bearing in mind the industry shift and traction, conforming with guidance is a key focus area for enterprises and service providers.

Enterprise Leadership Actions

Effective social media strategy

Growth in the social media user base is exponential. The cost of usage of social media compared to traditional channels is practically zero. Enterprises must earnestly consider deploying social media as a customer support channel. While mere deployment doesn't solve the problem, it's also essential for enterprises to have a well-defined social media strategy in conjunction with a seamless integration with other channels of communication. While social media is the new rage, it comes with its own set of challenges. Unlike traditional voice calls where enterprises have complete control, social media can be overwhelming with the number of users having access at the same time. The information can proliferate within minutes, and forming online communities can be effortless and instantaneous. In such cases, managing posts, delivering swift responses and more importantly, providing closure are key strategies. Whether it is equipping agents with social media skills to handle posts immediately, responding to them in a timely fashion or assessing the complexity of the problem, and directing them to the right channel, a clear definition of service levels is also paramount for an effective social media strategy. Today, a large chunk of millennials is heavily engaged in social media. Hence, the use of the technology as a channel for customer support is inevitable. Enterprises should include this as part of their customer experience strategy.

Adopt a long-term strategy for automation

It is not surprising that automation is gaining traction in this space, particularly with many routine tasks, which relieves the workload of agents. However, the right strategy along with a long-term strategy in particular is key for the successful implementation of automation. According to ISG study BOT 3.0, many companies hold off creating a Center of Excellence (CoE) unless they have hit the RPA wall at about 20–30 automations. As the number of automations increases, so does the production support issues. Building a CoE early in the game will help define a strategy and an operating model, lay a foundation for building and supporting bots, and establish metrics and reporting standards. To avoid the RPA wall, enterprises must consider building a CoE before building their first bot.

Establish support within organization

In this digital era, change is advancing faster than expected. The adoption of technologies is bound to create displacement and these changes are easier to implement and manage with overall organizational support. Establishing organizational support upfront is essential for successful transformation. Enterprises must work towards involving all the stakeholders early in the game before beginning the transformation journey for a seamless transition. Involving the stakeholders or getting their buy in during the process will only hamper it, leading to a dysfunctional transformation journey.

Provider Leadership Actions

Building agent of the future

Investing in the right skillset and upskilling agents by providing the necessary training to empower them will be one of the key requirements for contact centers. With automation replacing repetitive queries, complex queries are left to the agents to solve. The nature of queries will call for skilled and domain experts to resolve. According to ISG Research™, contact centers of the future will significantly narrow down to three broad roles, namely exception handler, multi-discipline expert and deep domain expert, which will require a high degree of specialization. In addition to domain skills, HECI (humanity, ethics, creativity, imagination) skills will become even more critical to solve complex queries. The agent of the future will bring the best of both worlds — an understanding of technology coupled with human skills to enable creativity and out-of-the-box thinking to improve customer experience.

Helping enterprises understand the benefits upfront to help embrace change

One of the biggest challenges that inhibits the transformational journey is the organization’s resistance to change itself due to limited knowledge about the business benefits of adopting tools and technology. Service providers can play a key role in helping enterprises craft a well-defined roadmap that is long term and will help businesses understand the benefits that will be realized along the way. Helping enterprises understand these businesses upfront will also bring in organizational support that is critical for a successful transformation.

The role of a service provider has transformed into that of a strategic partner than a mere outsourcing function. Supporting the client end to end in its outsourcing journey will increasingly become a requirement. In addition to making clients understand the business benefits of transformations, helping them to cope with the changes is equally important. Post the implementation of tools and technology, enabling them to adopt the right approach to deal with the changes such as educating the leaders, training employees, implementing process reengineering or defining roles.

Appendix

APPENDIX

Methodology

As previously noted, this report uses four archetypical sets of buy-side client requirements to assess the relative suitability of contact center services providers. Data on the capabilities and positioning of providers was given to ISG via briefings, ISG advisor interviews and surveys of service providers, including client references whenever appropriate.

Contact center services providers shared their data across different contact center 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.

Report Methodology

1. Categorize and assess provider data
2. Weight Importance of capability requirement
3. Determine provider position in quartile
4. Create cumulative score
5. Categorize providers in archetypes

Methodology Details

1. The data provided by the services providers were categorized and assessed according to the contact center services requirements described for each of the four client archetypes. In cases where provider descriptions and data were not worded as precisely as our archetype requirements, our contact center services analysts used their expertise and experience to classify provider capabilities.

2. Each archetype capability requirement was weighted based on its relative importance to the typical requirements of that archetype. Weightings for each archetype's requirements add up to a total of 100 percent. Specific weightings 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 services provider was assessed for each of the archetype requirements, each provider was then positioned in a relevant quartile (e.g., top 25 percent, second 25 percent and so on). The top quartile was awarded a numerical capability score of 4/4; the second quartile earned a score of 3/4; the third quartile scored 2/4, and the fourth quartile was rated 1/4. Those 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 weightings developed for each client archetype requirement in step 2. The results for each provider were then totaled 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 services providers that most suited the requirements of each archetype. These providers are listed alphabetically and are briefly profiled in each archetype section. Wherever relevant, additional services providers with noteworthy capabilities are also mentioned (e.g. 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 project needs. This report is not meant 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.

Fig13 Provider Capability Scores as Harvey Balls

Score	Harvey Ball representation
Score 4 out of 4	●
Score 3 out of 4	◕
Score 2 out of 4	◑
Score 1 out of 4	◔

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 below.

Additional Relevant Contact Center - Customer Experience Services Providers

The capabilities of 17 providers were assessed in this report. Some services providers that are typically included in our research are not included in this report. Some companies were not able to participate while others declined. Providers that do not offer a full portfolio of contact center services have not been included in the study. They may be included in future versions of this report based on merit and the willingness of services providers to provide current and relevant materials. Readers should not make any inferences about a services provider's absence from this report.

Other Relevant Service Providers	Headquarters Country
Arise	U.S.
Firstsource	India
HCL	India
Infosys	India
Premiere Response	U.S.
TCS	India

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