ISG Provider Lens™

# Contact Center as a Service – CX

## Contact Center as a Service (CCaaS)

A research report comparing provider strengths and competitive differentiators

Customized report courtesy of:

TATA COMMUNICATIONS

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Table of Contents

*Report Author: Kenn Walters*

## Seismic shift to advanced CCaaS platforms and solutions

The contact center industry is facing rapid and intensive change. This is driven by evolving enterprise buying behaviors and technological demands for new working models, coupled with business demands for higher customer satisfaction.

Adoption of digital customer experience services has significantly grown over the last two years, in tandem with the reality of the new hybrid working model, and a large part of the contact center (and other) workforce continues to work from home. As this becomes the new norm, companies are now looking to adopt cloud contact centers to enable work from home on an ongoing basis.

The benefits of the cloud contact center are well known to enterprises. Over time, the contact-center-as-a-service (CCaaS) solution has evolved and offers much more than basic channels of communication. At present, cloud contact center solutions are designed with multiple features and functionalities, including workforce management or optimization, as well as embedded technologies such as AI, machine learning, automation and analytics.

Providers are investing heavily in developing advanced customer experience solutions and CCaaS platforms that can address the demands from enterprise as a service in real-time. They are offering enhanced features such as performance dashboards that create a direct connect between enterprise leadership and their agents, automated coaching, training, agent assistance, gamification, retention and social programs for agents, customer sentiment

AI is redefining **customer experience** scoring, and customized avatars, keeping agents motivated and focused even in remote working or gig-worker situations.

As the industry is evolving, so is the CCaaS solution.

Some of the trends influencing the customer experience industry are as follows.

**Enterprise leaders want to deliver enhanced experiences and high satisfaction to their customers:** Customer satisfaction and experience in dealing with enterprises interactively via customer contact channels have become major differentiators and key business performance metrics among many industries and companies. In many cases, ensuring quick customer interactions, in as an intuitive and expert-led manner as possible, has become as important or more important than designing shopfront transaction sites and engines. Customer satisfaction metrics are being increasingly tied directly to the overall performance ratings of enterprises, particularly the ones that are publicly traded.

**AI is redefining customer experience:** With continuous advances in AI, enterprises have gained significant confidence in the ability of AI to deliver enhanced customer experience. With extensive investments in R&D, AI systems can extract a large volume of data to augment human capabilities. AI has become more critical to the industry than ever.

**AI and chatbots are redefining query resolution:** AI goes beyond level-1 queries and plays a significant role in query resolution. AI bots can determine the need for human intervention and handle skill-based routing based on customer needs. Cloud contact centers are extensively tapping into AI, and vendors are heavily investing in making contact centers highly AI driven.

**Cloud migration is on the rise:** The COVID-19 pandemic certainly accelerated the growth of cloud adoption. Cloud-based contact centers are no exception. Cloud strategy is a top priority for most organizations, because the hybrid working model is here to stay. Enabling business continuity and increasing security and agility are the major focus areas. The industry is witnessing an accelerated growth in cloud migrations and XaaS platforms, and this transformation continues to grow.

**Workforce management is evolving:** As the hybrid working model becomes the industry standard, maintaining ongoing engagement levels is a prime concern for enterprises. As much as customer experience is important, employee and agent experience and management are equally important to ensure high-quality outcomes. Therefore, most CCaaS product companies are investing in expanding their product capabilities to include extensive workforce management capabilities such as speech analytics, supervision features, real-time coaching functionality and gamification. These capabilities enable businesses to virtually maintain engagement levels with their employees.

**Improving agent experience with technology becomes vital:** Agent experience is a critical area of focus for providers. They are increasingly investing in developing comprehensive agent dashboards with built-in analytic functionalities and insights, enabling agents to deliver smart and improved results. From designing user interface to training, coaching, assisting, driving ease of use with gamification and creating analytics-led insights, providers help ensure enhanced customer and agent experiences.

**Agent experience and retention becomes vital:** The contact center industry has always witnessed a high churn. However, in the past two years, the industry has experienced unprecedented attrition challenges. Attracting and retaining talent has become more difficult now, and a lack of skill sets is further accentuating this challenge. Also, 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. Allowing for flexible working conditions is 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, high productivity rates and increased employee satisfaction.

With remote working, several companies have adopted a GigCX employment model. This has not only helped companies tap into talent but also enables 24-hour support and effectively addresses seasonal demands, while utilizing common platforms and tools via CCaaS. It also addresses some of the employee attrition and retention issues mentioned previously.

**Omnichannel communication becomes critical:** Omnichannel is a mature concept that has been in the industry for many years. However, given the massive increase in the number of channels currently being used, omnichannel once again becomes a critical feature of all CCaaS products. Ensuring seamless conversation across channels is a foundation for enhanced customer service.

**Another key offering is social media services:** These social channels have rapidly gained traction in the industry. Many industry verticals are adopting social media as a channel of communication. Customer support and engagement services are being delivered effectively through social channels. Most companies are also adopting content moderation services to ensure clients' trust and safety of their information. With the help of advanced CCaaS platforms, companies are using AI and analytics to predict customer sentiments, moderate content and manage their product portfolio to better market their brands.

**The cloud contact center has become commercially essential to enterprises:** As the buyer landscape evolves, cloud contact center companies are continuing to innovate and are investing in improving the features and functionalities of their products, to accommodate the changing enterprise requirements.

> CCaaS is advancing to keep pace with the industry's evolving needs.

# Provider Positioning

**Page 1 of 2**

| | **Contact Center as a Service (CCaaS)** |
|---|---|
| 8x8 | Leader |
| Alvaria (Aspect) | Contender |
| Amazon Connect | Leader |
| Anywhere365 | Contender |
| Avaya | Rising Star ★ |
| Content Guru | Leader |
| Evolve IP | Contender |
| Five9 | Leader |
| Genesys | Leader |
| Lifesize (Serenova) | Market Challenger |
| Liveperson | Contender |

# Provider Positioning

**Page 2 of 2**

| | **Contact Center as a Service (CCaaS)** |
|---|---|
| Mphasis | Product Challenger |
| NICE CXone | Leader |
| Odigo | Leader |
| Puzzel | Product Challenger |
| Talkdesk | Leader |
| Tata Communications | Product Challenger |
| TCN | Product Challenger |
| Twilio | Product Challenger |
| uContact net2phone | Product Challenger |
| Vonage | Market Challenger |

# This study focuses on ISG's view of **critical factors** in 2022 for CCaaS.

**Contact Center as a Service (CCaaS)**

Simplified Illustration Source: ISG 2022

## Definition

The ISG Provider Lens™ quadrant report on contact center as a service (CCaaS) focuses on cloud-based platforms and contact center solutions. In this study, the providers are assessed based on their platform capabilities, open architecture, AI and machine learning capabilities, including speed, reliability, scalability and embedded analytics, and the overall quality of the solutions offered.

The shift toward remote and hybrid work, together with digital communication, use of enterprise cloud and multicloud solutions, and edge capabilities and technologies, has increased the importance of quick resolution and highly personalized customer service across channels.

Enterprises want to serve their customers through multiple digital channels, while maintaining quality, consistency, and the best possible user experience. Thus, CCaaS will play a more critical role in enhancing the customer experience than ever before.

The study on Contact Center as a Service 2022 aims at understanding enterprises' requirements for CCaaS, considering the new paradigms of mobile and distributed workforces and the advanced networking and enhanced security needs of enterprises while looking at the providers able to meet those needs.

## Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following quadrant on CCaaS solutions.

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

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

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

## Provider Classifications

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

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

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

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

## Provider Classifications: Quadrant Key

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

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

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

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

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

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

# Contact Center as a Service (CCaaS)

## Who Should Read This

This report evaluates contact center as a service (CCaaS) providers that offer solutions for a better customer experience while integrating technical requirements across industries across the globe.

In this report, ISG examines how global CCaaS providers address key enterprise challenges in the current hybrid working environment and how they adapt to the increasing customer demands.

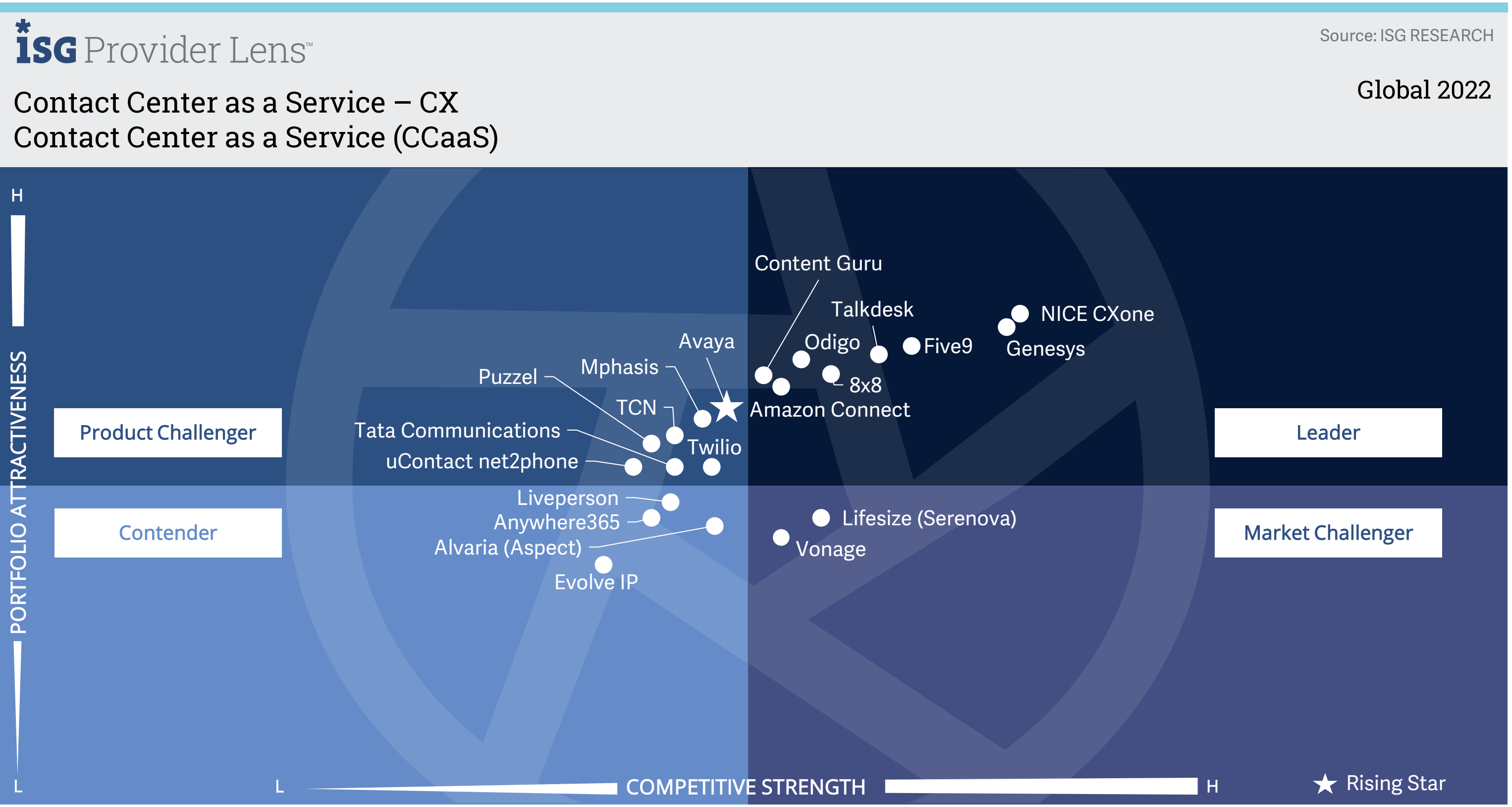
The COVID-19 pandemic has pushed CCaaS providers to redefine market demand, providing customers with omnichannel communication, advanced technology stacks and security, among other capabilities. By automating tedious tasks and providing insights into customer needs, the service ensures increasing employee satisfaction and productivity. With the popularity of the hybrid working model, quick response in customer service has become essential to businesses today. The use of advanced technologies such as AI and analytics has helped address this need, improving the overall experience of both employees and customers and facilitating growth in this market.

**Data management professionals** should read this report to gain a better understanding of the relative positioning and capabilities of CCaaS providers in the global market. The report also discusses new technologies that are more intuitive and informative for increasing employee engagement and improving customer service.

**Digital professionals** should read this report to understand how major CCaaS providers are adapting to the rapid digitalization of businesses by integrating AI, the cloud, big data, analytics and other advanced technologies. They will also learn how digitalization has enhanced customer care services.

**Networking professionals** should read this report to learn how leading global CCaaS providers are improving uptime guarantees, network services and communication capabilities to address and adapt to the changing business needs.

**Strategy professionals** should read this report to understand how key players adopt various strategies to stay relevant in a highly competitive environment. The report also highlights how providers extend their infrastructure and customer networks by broadening the product portfolios.




This quadrant assesses the providers of CCaaS **that deliver advanced platforms and solutions** to enterprise clients **to enable innovative customer experience** and the **associated business benefits** expected in the market.

*Kenn Walters*

## Definition

With the increasing adoption of cloud and multicloud solutions, advanced enterprise networks, and enhanced security measures, enterprise business functions demand better capabilities and functionalities from technology stacks.

The CCaaS solution enables enterprises to run a virtual contact center using cloud software, enterprise networks and security protocols and tools to ensure scalability, flexibility and savings in overhead on information and communications technology costs.

This cloud offering provides the required capabilities for routing inbound and possibly outbound customer interactions, along with multichannel functionalities that not only simplify business processes but also help deliver a secure and enhanced customer experience.

This quadrant assesses service providers' cloud solutions that include omnichannel platforms, customer experience platforms and other cloud solutions for contact centers.

### Eligibility Criteria

1. Ability to **support integration** with various client communication channels and enterprise applications
2. Offer custom-built solutions with **self-service** capabilities
3. Demonstrate experience in automated call distribution, **interactive voice response (IVR)** and intelligent call routing (ICR) to deliver an enhanced customer experience
4. Offer **personalized** customer support across the web, phone, email, chat and social media
5. Exhibit experience in **speech/ voice analytics**, real-time monitoring and workforce management
6. Capability to **centrally manage** multiple call contact centers via a portal
7. Demonstrate out-of-the-box **cloud deployment** capabilities
8. Demonstrate the ability to interface with or make use of enterprise **security tools** and services to ensure secure transactions and the security of customer data
9. Demonstrate customer experience capabilities such as **AI and analytics** agent experience
10. Ability to provide subscription-based pay-as-you-go (PAYG) models, monthly subscription models and other **modern pay-per-use** or similar contract terms

## Observations

With the growing prominence of cloud adoption, enterprise business functions demand better functionalities from technology stacks. This cloud offering provides the required capabilities for routing inbound customer interactions and potentially outbound campaigns, along with multichannel functionalities that not only simplify business processes but also help deliver a high-quality customer experience.

Providers are investing actively in the CCaaS segment, through partnerships, mergers and acquisitions. They are also spending heavily on R&D to expand their portfolios to map to the various needs of enterprises across regions and industry verticals. Announcements regarding the expansion of partner ecosystems or mergers and acquisitions are frequent in this space.

This quadrant assesses providers' cloud solutions that include omnichannel platforms, customer experience platforms and other cloud solutions for contact centers.

From the 44 companies assessed for this study, 21 have qualified for this quadrant with eight being identified as Leaders and one as a Rising Star.

8x8

**8x8** delivers a comprehensive range of communications platforms-as-a-service (CPaaS) capabilities. These help enterprises integrate their business solutions, websites or apps with 8x8 platforms. The company provides a strong inbound and outbound solution set with powered by AI. 8×8 completed its acquisition of Fuze for about $250 million in January 2022.

### Amazon Connect

**Amazon Connect** is an easy to use omnichannel cloud contact center solution. The robust cloud solution is integrated with advanced technologies, including AI/ML and analytics. Amazon Connect includes many ML-enabled capabilities (e.g.Contact Lens, Wisdom, and Voice ID). It is easy to deploy with drag-and-drop features.

CONTENT GURU

**Content Guru's** automation and AI capabilities are its key differentiating factors. The company provides an AI toolkit, namely brain®, which can be seamlessly integrated into its cloud contact center solution, storm®. The company makes deployment, use and scalability seamless with a single portal approach and UI.

Five9

**Five9** offers an Intelligent Cloud Contact Center solution with inbound and outbound services that include interactive voice response (IVR), intelligent virtual assistant (IVA), analytics, and real-time and historical dashboards. It also offers reporting, workforce optimization (WFO), workflow automation and other capabilities. The company grows significantly and expands its presence, especially in Europe, the Middle East and Africa and Latin America.

GENESYS

**Genesys** offers an end-to-end Genesys Cloud CX CCaaS solution with a suite of features and tools that enable and deliver customer experience, workforce management, and workforce engagement and services, all with embedded AI and analytics technology.

Genesys AppFoundry marketplace delivers pre-built application integrations from an extensive repository.

## NICE CXone

**NICE CXone** delivers CXone as a full stack cloud contact center solution. CXone has a wide range of AI applications with strong capabilities that drive customer and agent experience. CXone has seamless conversation routing between bot and an agent, along with NEVA virtual assistant interaction.

## Odigo

**Odigo** has a strong, defined roadmap for scaling its products globally. It is a cloud-based contact center software solution delivered as a service. Odigo helps large organizations connect with individuals through high-quality, cloud-based contact center solutions.

## Talkdesk

**Talkdesk** is a cloud-based contact center provider. Talkdesk CX Cloud™ is an end-to-end customer experience solution offered as a service. It offers solutions to specific industries such as retail, e-commerce, financial, healthcare, government, IT and services, manufacturing, and travel and hospitality.

## Avaya

**Avaya** (Rising Star) enables organizations to create customer experience centers by expanding their digital capabilities and effectively leveraging the power of cloud, AI and IoT to deliver advanced customer service. Avaya OneCloud™ CCaaS enables organizations to support customers with engagement options that are more precisely aligned to their buying journeys.

TATA
TATA COMMUNICATIONS

**Tata Communications** (Product Challenger) has a strategic vision for CCaaS, providing a hyper-personalized, omnichannel, empathetic and anticipatory CX through innovative digital solutions powered by InstaCC and backed by a design-thinking-led, consultative approach along with deep industry experience

# Tata Communications

**Product Challenger**

"Tata Communications delivers scalable and powerful CCaaS and InstaCC with attractive flexible pricing options."

*Kenn Walters*

## Overview

Tata Communications has a presence in over 190 countries and territories. It serves more than 7,000 customers that represent over 300 of the Fortune 500. Its network carries around 30 percent of the world's Internet routes. It is listed on both the Bombay Stock Exchange and the National Stock Exchange of India. The company's vision for CCaaS is to provide a hyper-personalized, omnichannel, empathetic and anticipatory CX.

## Strengths

**InstaCC™ solutions:** Tata Communications InstaCC™ is an end-to-end next-generation contact center solution for enterprises providing services at scale. The solution enables agents to drive enterprise efficiency while delivering seamless and intuitive customer experiences. The Tata Communications' InstaCC™ solution stack encompasses contact center setup, virtualization, storage, global voice network, load balancing, and in-depth monitoring, deployed over a unified cloud ecosystem that reduces complexity.

**Scalable business sizing and flexible financial conditions:** Tata Communications delivers platforms and solutions that are fully scalable and offer flexible pricing options for enterprises all of sizes. It also delivers platform flexibility, with off-the-shelf, or fully customizable installations. Tata Communications works with market leaders like Genesys, Amazon and Cisco to solution their contact center products, and has in-house products InstaCC Cloud and InstaCC Dedicated to addressing specific customer needs.

## Caution

Globally, Tata Communications has a strong portfolio positioning and is moving toward leadership while expanding its customer base. With its payment methods and scalable enterprise strategy, it should be able to penetrate the market further through a focused marketing and PR campaign. The company should also highlight its platform and as-a-service capabilities to executives in decision-making roles.

# Appendix

The ISG Provider Lens™ – Contact Center as a Service – CX 2022 analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Lead Author:**
Dr. Kenn Walters

**Editors:**
Sajina B and Grant Gross

**Research Analyst:**
Sneha Jayanth

**Data Analyst:**
Rajesh Chillappagiri

**Consultant Advisors:**
Scott Furlong and Dee Anthony

**Project Manager:**
Abhilash M V

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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

*Lead Author and Analyst*

## Dr. Kenn D Walters
**Distinguished Lead Analyst**

Dr. Kenn Walters is a highly skilled senior executive with over 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 over 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 lead analyst and author for multiple regions in the Provider Lens™ reports, in such areas as Networks – Software Defined Networking, Digital Business Software and Services, Contact Center as a service and CC CX. He holds BSc, MSc and PhD in computer science and communications, is a member of the N.Y. Academy of Sciences and a Fellow of the British Computing Society.

*Research Analyst*

## Sneha Jayanth
**Senior Research Analyst**

Sneha Jayanth is a senior research analyst at ISG. She supports and co-authors Provider Lens™ studies on contact center, healthcare digital services, healthcare platform studies and procurement services/ platforms. She also provides enterprise perspectives and contributes to global summary reports. For ISG clients, Sneha offers expertise in technology, business and market research.

She previously worked with a research firm specializing in IoT, cloud, AI and analytics, delivering market intelligence and authoring reports. In various consulting projects, Sneha conducted market research, analyzed data, and collaborated with internal stakeholders to provide deep market insights to the clients.

*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.

## ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

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

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

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