ISG Provider Lens™

Contact Center as a Service

Contact Center as a Service (CCaaS)

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

TATA COMMUNICATIONS

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Advanced CCaaS platforms and solutions are becoming mainstream across geographies

The contact center industry is evolving at pace, driven by rapidly changing customer requirements driving intensive change. Evolving enterprise buying behavior, technological demands of new hybrid working models, need for greater efficiency in handling contacts, focus on enhancing CX and the growing complexity of business demands have increased focus on improving customer satisfaction. CX has become a key topic of discussion at the boardroom level.

The adoption of digital CX services has significantly increased during the last three years, with the emergence of the new hybrid working model. A large part of the contact center (and other) workforces continue to work at least part-time from home. Similarly, there is an increase in the use of contact center services and end-user demand for smooth, efficient and quick resolution of issues.

The expansion of throughput brings with it the specter of additional costs/staffing for enterprises operating the CX platform unless automation is deployed to increase the volume of contacts transacted per agent. Enterprises are now looking to adopt cloud contact centers to ensure that these key issues are addressed and are continuously adaptive and flexible.

Enterprises understand the benefits of the cloud contact center. During the last few years, the contact-center-as-a-service (CCaaS) solution has evolved significantly and offers more than basic channels of voice and text communication. The current cloud contact center solutions are designed with a vast array of features and functionalities, including workforce management, retention or optimization and embedded technologies such as AI, ML, automation, chatbots/personas and analytics. Offered as an as-a-service model, the current contact centers are an extremely attractive proposition for enterprises to achieve their business goals at low cost and with low risk while upgrading to state-of-the-art technologies without significant capital investment.

AI and chatbots are redefining and **streamlining CX** while **boosting volumes** serviced.

Providers are investing in the continuous development of advanced CX solutions and CCaaS platforms that address the demands from enterprises for as-a-service solutions delivered in real time. They also offer enhanced features sets, including AI and chatbot/persona agent delivery; performance dashboards that create a direct connection between enterprise leadership and their agents; automated coaching, training, agent 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 and enhancing the user experience (UX).

With the changing user and enterprise requirements, CCaaS solutions are evolving. Providers are also focusing on addressing some instances of perceived future needs in advance.

Some of the key trends influencing the CX industry include the following:

Enterprises and their leaders are now being reviewed and rated based on their CX scorings and customer satisfaction: CX and overall customer satisfaction via contact channels are now the major differentiating factors of enterprises. These factors have become the key business performance metrics among many industries and companies. They publish customer satisfaction figures, experience metrics, and actual customer stories. These metrics are used to determine the performance of businesses and their executives, especially the ones that are publicly traded. Ensuring rapid and smooth customer interactions intuitively and expertly has now become crucial for a business' growth rather than designing shopfront transaction sites and engines.

AI is a major driver of advanced and effective CX: As AI continuously advances in capability and dependability, enterprises have gained significant confidence in the delivery and robustness of operations with humans. AI has become essential in delivering advanced and enhanced CX. AI systems can extract a large volume of data to augment human capabilities and provide the basis for virtual assistants or self-service information and ease of use. AI also allows a greater volume of transactions to be processed without increasing the number of employees than ever before. AI has, therefore, become critical to the industry and is expected to be integrated into all CCaaS offerings.

AI and chatbots/persona agents or virtual assistants (VA) redefine query resolution: AI goes far beyond just level-1 queries, playing a vital and significant role in query resolution. AI bots can determine the need for human intervention and the level/specialty of the human. Automation handles skill-based routing based on customer requirements, ensuring that the customer is connected only with a relevant and skilled human agent if required. AI bots can also resolve many simple contacts automatically and without human intervention while retaining a high level of customer satisfaction. This increases the number of transactions a center can service per hour enormously without increasing staffing levels and costs. Cloud contact center providers are implementing AI vigorously into their solutions. They are heavily investing in making contact centers highly AI-driven, with semi-autonomous VA and chatbots as standard offerings.

The use of multicloud migration and solutions is a major trend globally: Cloud migration and multicloud solutions are a top priority for most enterprises not only for various efficiency and capability reasons, but also, and not least, because the hybrid remote/office working model remains in place and is highly adopted in many countries. Ensuring business continuity while increasing security and agility are additional primary focus areas driving this cloudification trend. Generally, and not just related to the contact center area, we are witnessing accelerated growth in cloud migrations and the adoption of anything-as-a-service (XaaS) platforms. This transformational growth is continuing at a high pace.

Workforce management and improved agent experience are key issues: Employee and agent experience and management are as important as CX to ensure high-quality outcomes. CCaaS platform and solution providers have invested heavily in most cases to expand their product capabilities to include extensive workforce management capabilities such as speech analytics, supervision features, real-time coaching functionality and gamification. CCaaS platforms with these features and the development of agent dashboards with built-in analytic functionalities and insights are highly effective as they enable agents to deliver smart and improved results and enhance agent satisfaction.

Advanced social media services have become imperative: Social media channels have rapidly gained traction and importance in the industry. Most industry verticals now have adopted social media as a channel of communication. Customer support and engagement services are being delivered effectively through social media channels. Most companies now employ content moderation services to ensure branding protection, trust and safety of clients' information. With modern CCaaS platforms and their advanced AI and analytics, companies can predict customer sentiments, moderate content and manage their product portfolio to better market their brands.

CCaaS is evolving rapidly and constantly to meet the changing requirements of customers and the industry. AI and ML technologies are integrated into CCaaS solutions to provide a range of benefits to clients, resulting in more satisfied end users without expanding the number of staff, while increasing the overall functionality and flexibility of the CX environment.

Provider Positioning

	Contact Center as a Service (CCaaS)
8x8	Leader
Alvaria	Product Challenger
Amazon Connect	Leader
Anywhere365	Product Challenger
Avaya	Leader
Content Guru	Leader
DIABOLOCOM	Contender
Ericsson (Vonage)	Market Challenger
Evolve IP	Contender
Five9	Leader
Genesys	Leader
GoTo	Contender
Lifesize (Serenova)	Market Challenger
Liveperson	Product Challenger
net2phone	Product Challenger
NICE CXone	Leader
Odigo	Leader
Puzzel	Product Challenger
Talkdesk	Leader
Tata Communications	Leader
TCN	Product Challenger
Twilio	Product Challenger

A key focus area for the **Contact Center as a Service 2023** study is the in-depth analysis of global CCaaS providers' capabilities.

Contact Center as a Service (CCaaS)

Simplified Illustration Source: ISG 2023

Definition

The ISG Provider Lens™ quadrant report on Contact Center as a Service (CCaaS) focuses on cloud-based platforms and contact center solutions providers.

The contact center industry is undergoing rapid and intensive change, driven by evolving enterprise technological demands for supporting new working models and business demands for higher customer satisfaction.

The adoption of digital CX services has significantly grown over the last three years in conjunction with the reality of the hybrid working model. A large part of the contact center workforce (and others) continues to work from home or in a hybrid home/office situation.

Companies are embracing cloud contact centers to flexibly enable and support a modern work model. This model, along with digital communication and the use of multicloud solutions and edge technologies, has increased the importance of providing quick resolution and highly personalized customer service across channels. Today's CCaaS solutions are cloud-based and have multiple features and functionalities, including workforce management and optimization, plus embedded technologies such as AI, ML, automation and analytics.

This study assesses providers based on their flexibility to deliver cloud-based platforms and solution capabilities, open architecture, AI and ML capabilities, including speed, reliability, scalability and embedded analytics, and the overall quality of their solutions offered as a service.

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following quadrant for services/ solutions: Contact Center as a Service (CCaaS).

This ISG Provider Lens™ study offers contact center and IT decision makers with the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- 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 evaluation within defined market segments (quadrants) and always applies to all business sectors and company sizes. In case the service requirements are different and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation by performance is made according to the target group for products and services. ISG considers the requirements of the business sector or the number of employees, as well as the corporatestructures of the customers, and positionsthe providers according to their area of interest. As a result, ISG differentiates them, if necessary, into two groups defined as follows:

Midmarket: Companies with 100 to 4,999 employees or revenues between $20 million and $999 million, headquartered in the respective country, usually privately owned.

Large accounts: Multinational companies with more than 5,000 employees or revenues above $1 billion, with worldwide activities and globally distributed decisionmaking structures.

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

Number of providers per quadrant: ISG evaluates and places key providers according to the scope of consideration for each study; the number of providers per quadrant is limited to 25, but exceptions may apply.

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 Section

This report evaluates contact center as a service (CCaaS) providers that offer solutions to enhance CX 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.

CCaaS is evolving rapidly to adapt to the changing requirements of customers and industries. One of the key advancements in this evolution is the integration of AI and ML technologies into CCaaS solutions.

By incorporating AI and ML, CCaaS platforms can provide a range of benefits to both businesses and their end users. These technologies enable automation and intelligent decision-making capabilities, improving efficiency and enhancing CX.

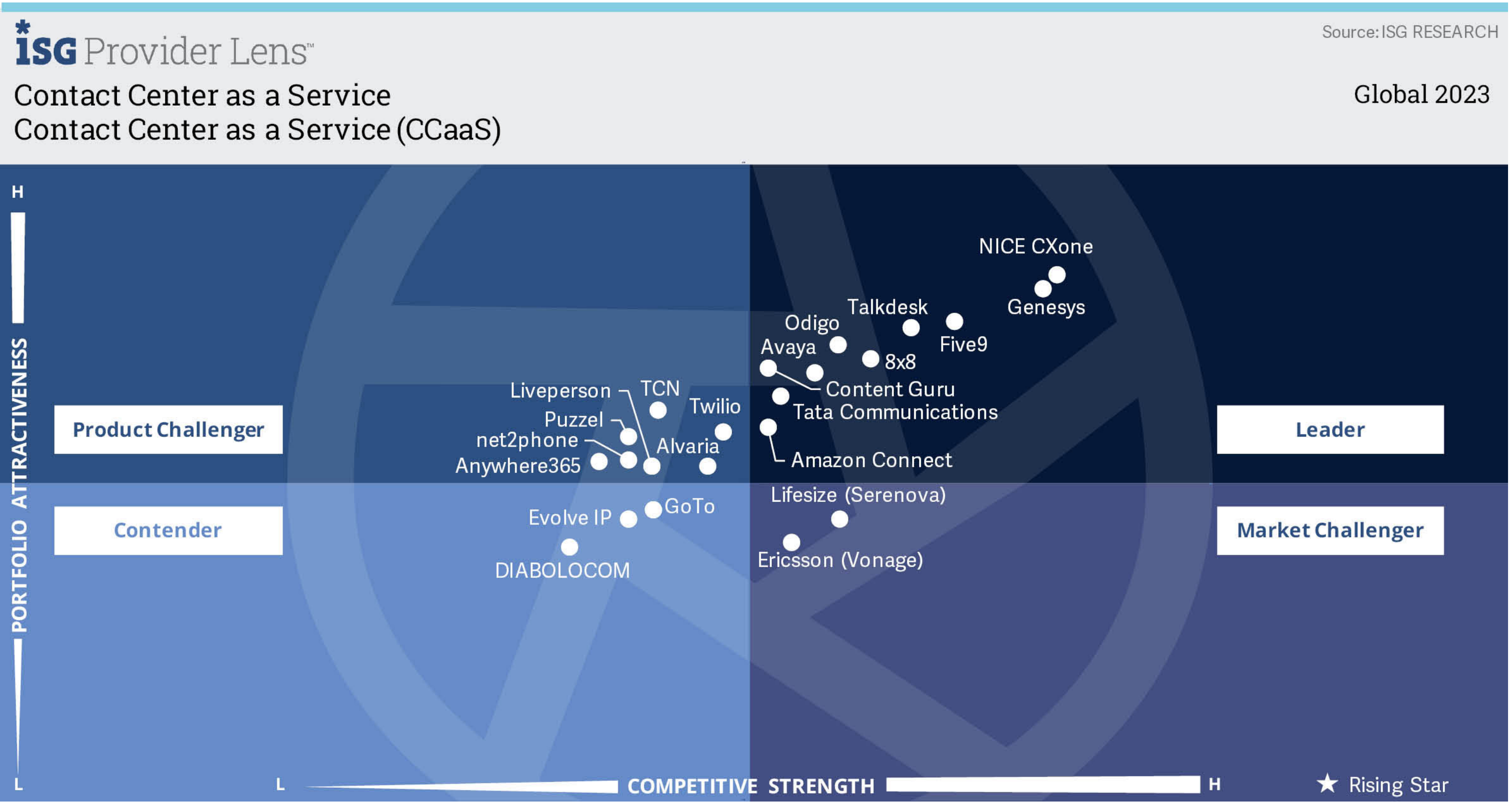
In addition to bringing solutions, service providers must be able to define a data strategy and offer data and knowledge management tools. With enterprises' growing maturity and appetite to utilize data and convert them into insights, analytics has become a differentiating factor for service providers. Companies that can define a well-rounded data strategy and provide enterprises with real-time information visibility are well-positioned to gain a competitive advantage in the market.

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 and analytics.

Strategy professionals should read this report to understand how key players adopt various strategies to stay relevant in a highly competitive environment.

Data management professionals should read this report to gain insights into CCaaS providers' global positioning and capabilities.

IT and technology professionals should read this report to understand the performance, reliability and scalability of the CCaaS platform, aiding informed decision-making on infrastructure, integrations and security.



This quadrant assesses the providers of **advanced CCaaS platforms and solutions,** which **enable innovative CX** and deliver associated **business benefits** to enterprise clients, including the **omnichannel agility** expected in the market.

Dr. Kenn Walters

Definition

Enterprises strive to serve their customers through multiple digital channels while maintaining quality, consistency and the best possible UX. At the same time, implementing and maintaining state-of-the-art customer contact center solutions with their existing staff and knowledge are challenging. Therefore, CCaaS plays a critical role in rapidly delivering modern solutions and satisfying enterprise needs while enhancing CX more than ever.

Enterprise business functions are demanding better capabilities and functionalities from technology stacks, owing to the increasing adoption of cloud and multicloud solutions, advanced enterprise networks and enhanced security measures. CCaaS solutions enable enterprises to run virtual contact centers using cloud software, enterprise networks and advanced security protocols and tools, ensuring scalability, flexibility, security and savings in overhead IT costs. This cloud offering provides the required capabilities for routing inbound customer interactions, along with multichannel functionalities that not only simplify business processes but also help deliver a secure and enhanced CX.

The Contact Center as a Service 2023 study aims at understanding enterprises' requirements for CCaaS, considering the new paradigms of mobile and distributed workforces and their advanced networking and enhanced security needs. The Contact Center as a Service (CCaaS) quadrant assesses service providers' cloud solutions that include omnichannel platforms, CX platforms and other cloud solutions for contact centers.

Eligibility Criteria

1. Offer **custom-built** solutions with **self-service** capabilities
2. Demonstrate experience in **automated call distribution,** interactive voice response **(IVR)** and intelligent call routing **(ICR)**
3. Offer **personalized customer support** across the web, phone, email, chat and social media
4. Exhibit experience in **speech/voice analytics,** real-time monitoring and workforce management to measure contact center experience
5. Demonstrate the capability to connect **several call centers** at various locations and manage them via a **central management portal**
6. Demonstrate the ability to interface with or use **enterprise security tools and services**
7. Demonstrate CX capabilities such as **AI and analytics agent experience**
8. Ability to provide **modern** pay-per-use or similar **contract terms**

Observations

Enterprises demand more efficient and agile functionalities from technology stacks to achieve their business goals. As the overall enterprise ICT cloudification increases, these functionalities and the consequent business results become more vital than ever. CCaaS as a cloud offering has become vital for addressing these requirements and achieving enhanced CX. CCaaS, along with high levels of automation, allows for increased transaction flows with no additional costs being incurred by enterprises. The capabilities CCaaS introduces to ensure agent satisfaction, increased agent retention and a reduction in churn rates of skilled agents are vital for many organizations.

Providers are investing heavily in M&As and CCaaS, utilizing partner ecosystems. In addition, they are spending heavily on R&D to expand their own solutions to address various enterprise needs across industry verticals worldwide. Development of new CCaaS solution sets and platforms and individual functionalities or announcements regarding the expansion of partner ecosystems or M&As are frequent in this space.

This IPL study assesses providers that offer cloud solutions such as omnichannel platforms, CX platforms and other contact center–related solutions.

From the 48 companies assessed for this study, 22 have qualified for this quadrant with 10 being Leaders.

8x8

8x8 delivers an omnichannel contact center solution supporting inbound/outbound interactions for all voice and digital channels, together with a powerful conversational AI solution for automated self-service experiences.

Amazon Connect

Amazon Connect is a pay-as-you-go service. It is scalable, has powerful real-time analytics and ML capabilities, and easily integrates with client companies and other business systems.

AVAYA

Avaya's Experience Platform™ is its flagship AI-powered contact center solution delivering advanced CX services and enabling millions of agents across thousands of global organizations.

CONTENT GURU

Content Guru's primary offering, storm® CONTACT™, is an enterprise-grade omnichannel CCaaS solution. The offering is trusted by enterprises globally for mission-critical applications because of its scalability, 99.999% availability and rich functionality.

Five9

Five9 provides an all-in-one cloud-based call center platform, which enables agents to communicate with customers via phone, email, chat, SMS, social media platforms and more. The company's AI capabilities help automate most aspects of customer support and routing.

GENESYS

Genesys offers Genesys Cloud CX based on a CCaaS model, which enables organizations to orchestrate customer and employee experiences that lead to swift, sustainable differentiation for delivering maximum resiliency and agility.

NICE · CXone

NICE CXone is a unified, scalable cloud-native CX platform with embedded purpose-built AI, empowering organizations of all sizes to deliver connected, intelligent and complete brand experiences.

odigo

Odigo delivers an omnichannel platform, allowing customers to use any channel they need, voice or digital. It is an AI-driven cloud platform in tune with the maturing market. Odigo has a strong, defined roadmap for scaling its products globally.

Talkdesk CX Cloud offers a complete set of enterprise-level, integrated CX applications for customer self-service, omnichannel engagement, workforce engagement, employee collaboration and CX analytics.

Tata Communications offers various hosted and partner-hosted CCaaS solutions based on individual client needs. The CCaaS solutions offered are advanced, highly efficient and powered by AI.

Leader

"Tata Communications provides advanced and efficient functionalities across a wide CCaaS solution set comprising its IP and partner solutions, that are enterprise-focused and fully compliant."

Dr. Kenn Walters

Tata Communications

Overview

Tata Communications is headquartered in Mumbai, India and operates in 15 countries. It has more than 12,000 employees across 22 global offices. In FY23 the company generated $2.2 billion in revenue, with Data and Managed Services (DMS) as its largest segment. Tata Communications can power enhanced CX with high-quality and efficient delivery of calls, edge coverage and low latency utilizing advanced technology and algorithms. In the CCaaS space, the company focuses on logistics, automobiles, retail, aggregators/shared economy firms, OTT platforms, and the travel and hospitality verticals globally.

Strengths

Wide range of CCaaS offerings: The company offers enterprises a wide range of hosted and partner-hosted CCaaS solutions. Its contact center applications are built on Enghouse/Cisco and hosted on its own data centers. The partner solutions are hosted on the respective partner data centers.

Tata Communications hosted solutions: InstaCC™ Cloud is a global, multi-tenant Microsoft-based offering for enterprises looking to enhance customer and employee experiences. InstaCC™Dedicated is a dedicated, holistic offering designed to enhance customer journeys and agent productivity by mitigating security and regulation risks for large enterprises. InstaCC™Connect is a smart routing and self-serve solution providing the first step for enterprises to move to the cloud while retaining their legacy platforms.

Partner-hosted solutions: The Genesys Cloud CX™ powered by Tata Communications is an omnichannel contact center solution for unified customer and agent experiences. Amazon Connect by Tata Communications is a cloud contact center solution with inherent AI/ML capabilities powering personalized contact center experiences on a pay-as-you-go model. Webex Contact Centre powered by Tata Communications is a unified, omnichannel contact center solution for large enterprises migrating their on-premises workload to the cloud.

Caution

Tata Communications competes in this highly aggressive market globally with some of the largest providers in the world for advisory, contact center, network and SI services. Demonstrating full capabilities is vital in many countries to retain the leadership position. The company must focus on awareness efforts.

Appendix

The ISG Provider Lens™ 2023 – Contact Center as a Service research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2023, 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 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

Author

Dr. Kenn D Walters
Distinguished Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with over 40 years of experience 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

Sandya Kattimani
Senior Research Analyst

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

She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other ad-hoc business research assignments.

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 partner 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.

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

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