Everest Group®

Contact Center-as-a-Service (CCaaS) PEAK Matrix® Assessment 2023

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Locations: costs, skills, sustainability, portfolios

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Sharang Sharma, Vice President

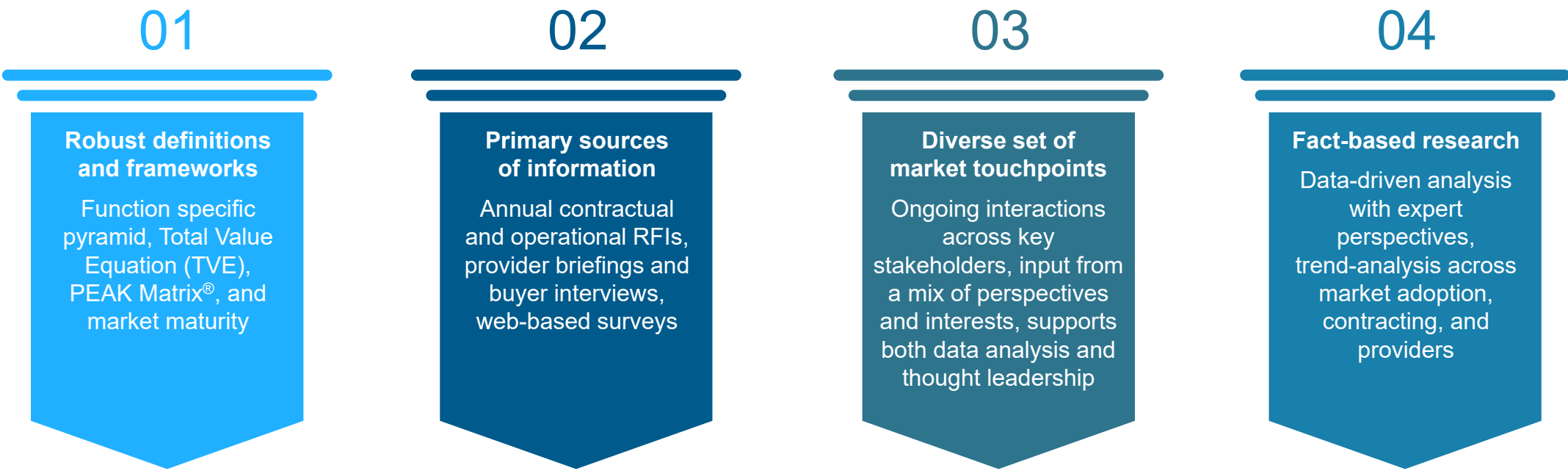**Anubhav Das,** Senior Analyst

Nimish Sharma, Analyst

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Introduction and overview

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- Key information on the report
- Background and scope of the research

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

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Primary sources of information
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Proprietary database of technology providers' CCaaS capabilities

Large repository of existing research on CCaaS

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

This report is based on multiple key sources of proprietary information

- Proprietary database of CCaaS providers in the scope of work (updated annually)
- The database tracks technology providers offerings/capabilities for:
  – Design, development, and integration
  – Technology and software components
  – Reporting & analytics
  – Workforce management capabilities
  – Platform security

- Proprietary operational database of CCaaS providers (updated annually)
- The database tracks the following operational information for each provider:
  – Revenues
  – Number of clients
  – FTE split by role

- Provider briefings
  – Vision and strategy
  – Current state of market
  – Annual performance and future outlook
  – Emerging areas of investments

- Buyer reference interviews, ongoing buyer surveys, and interactions
  – Drivers and challenges for adopting CCaaS platform
  – Assessment of provider performance
  – Emerging priorities
  – Lessons learnt and best practices adopted

Providers assessed[1]

[24]7.ai   AVAYA

CM.com   exotel

GENESYS   LeadDesk

sprinklr   TATA COMMUNICATIONS

1   Assessments for Avaya and Genesys include partial provider inputs and are primarily based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with its buyers

The source of all content is Everest Group unless otherwise specified

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

Introduction

The current market state for CCaaS is rapidly growing, driven by the increasing demand for flexible remote work solutions, scalability to cater to fluctuating demand, and the need for businesses to provide exceptional customer service. Everest Group defines Contact Center-as-a-Service (CCaaS) as a cloud-based offering that provides the essential capabilities required to manage omnichannel customer interactions through capabilities such as automatic call distribution, Interactive Voice Response (IVR) and self-service tools, workforce optimization and scheduling/forecasting, and reporting & management insights, among others. CCaaS allows companies to scale their contact center operations quickly, without the need for significant investments in infrastructure and software. Many businesses are now transitioning from on-premise contact center solutions to cloud-based CCaaS solutions, as they offer greater flexibility, scalability, and cost-effectiveness. The CCaaS market is highly competitive, with numerous providers providing solutions with varying sophistication and pricing models. Additionally, the industry is undergoing consolidation, as larger companies are acquiring smaller players to broaden their service portfolio and increase market share.

In this research, we present an assessment and detailed profiles of eight CCaaS providers featured on the Contact Center-as-a-Service (CCaaS) PEAK Matrix® for 2023. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2023, interactions with leading CCaaS providers, client reference checks, and an ongoing analysis of the CXM technologies market.

This report includes the profiles of the following eight leading CCaaS providers featured on the Contact Center-as-a-Service (CCaaS) PEAK Matrix® :

- **Leaders:** Avaya and Genesys
- **Major Contenders:** [24]7.ai, Exotel, Sprinklr, and Tata Communications
- **Aspirants:** CM.com and LeadDesk

Scope of this report

Geography
Global

Providers
Eight leading CCaaS providers

Technology providers
Contact Center-as-a-Service (CCaaS)

02

Executive summary

Summary of key messages

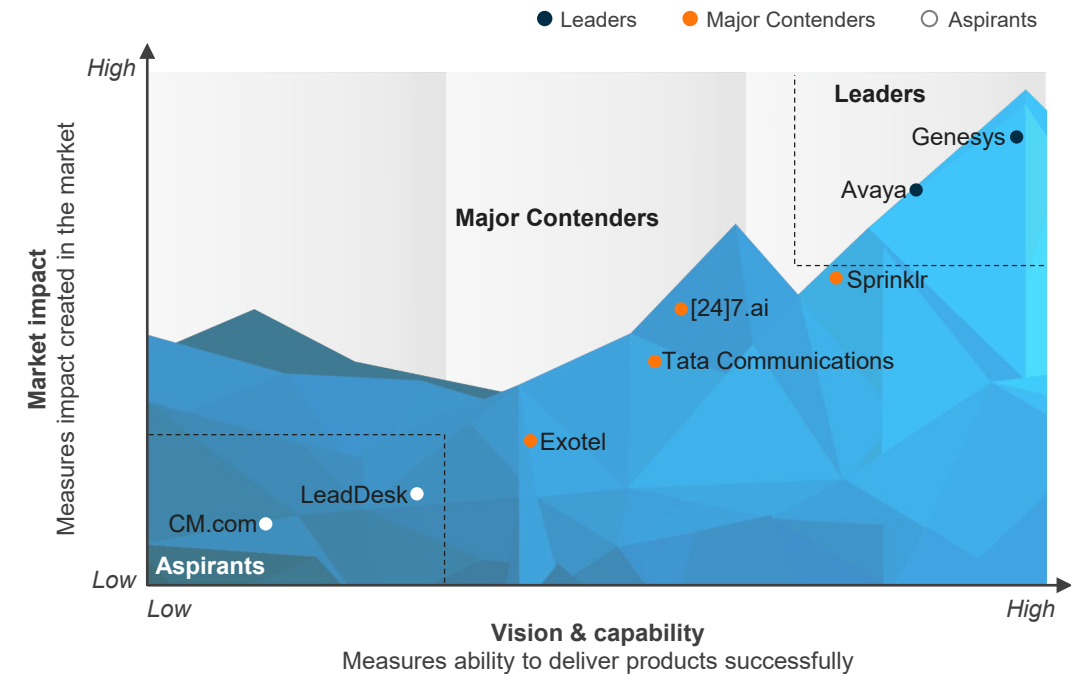Everest Group®

Summary of key messages

- The products PEAK Matrix® is a proprietary framework used to assess the market impact and overall vision and capability of technology providers

- Everest Group classifies CCaaS providers on the Everest Group products PEAK Matrix® into three categories:
  - **Leaders:** Avaya and Genesys
  - **Major Contenders:** [24]7.ai, Exotel, Sprinklr, and Tata Communications
  - **Aspirants:** CM.com and LeadDesk

- Avaya and Genesys are the top technology providers in terms of CCaaS revenue

CCaaS competitive landscape

- Genesys and Tata Communications are among the leading technology providers across four geographies, while Avaya and Sprinklr are other leading technology providers across multiple geographies

- Avaya and Genesys lead in all the major industries; [24]7.ai and Sprinklr are the other leading technology providers across multiple industries

- Avaya, Genesys, and Tata Communications are the leading technology providers with a wide mix of buyers of different sizes and seating requirements

Everest Group Contact Center-as-a-Service (CCaaS) PEAK Matrix® Assessment 2023[1,2]

1 Assessments for Avaya and Genesys include partial provider inputs and are primarily based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with its buyers
2 Other notable providers for CCaaS are 8x8, Amazon Web Services (AWS), Cisco, Content Guru, Five9, NICE, Odigo, Talkdesk, Twilio, and Vonage
Source: Everest Group (2023)

03

CCaaS PEAK Matrix® characteristics

- PEAK Matrix® framework
- Everest Group PEAK Matrix® for CCaaS Products 2023
- Characteristics of Leaders, Major Contenders, and Aspirants
- Other notable providers for CCaaS
- Technology provider capability summary dashboard

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix®
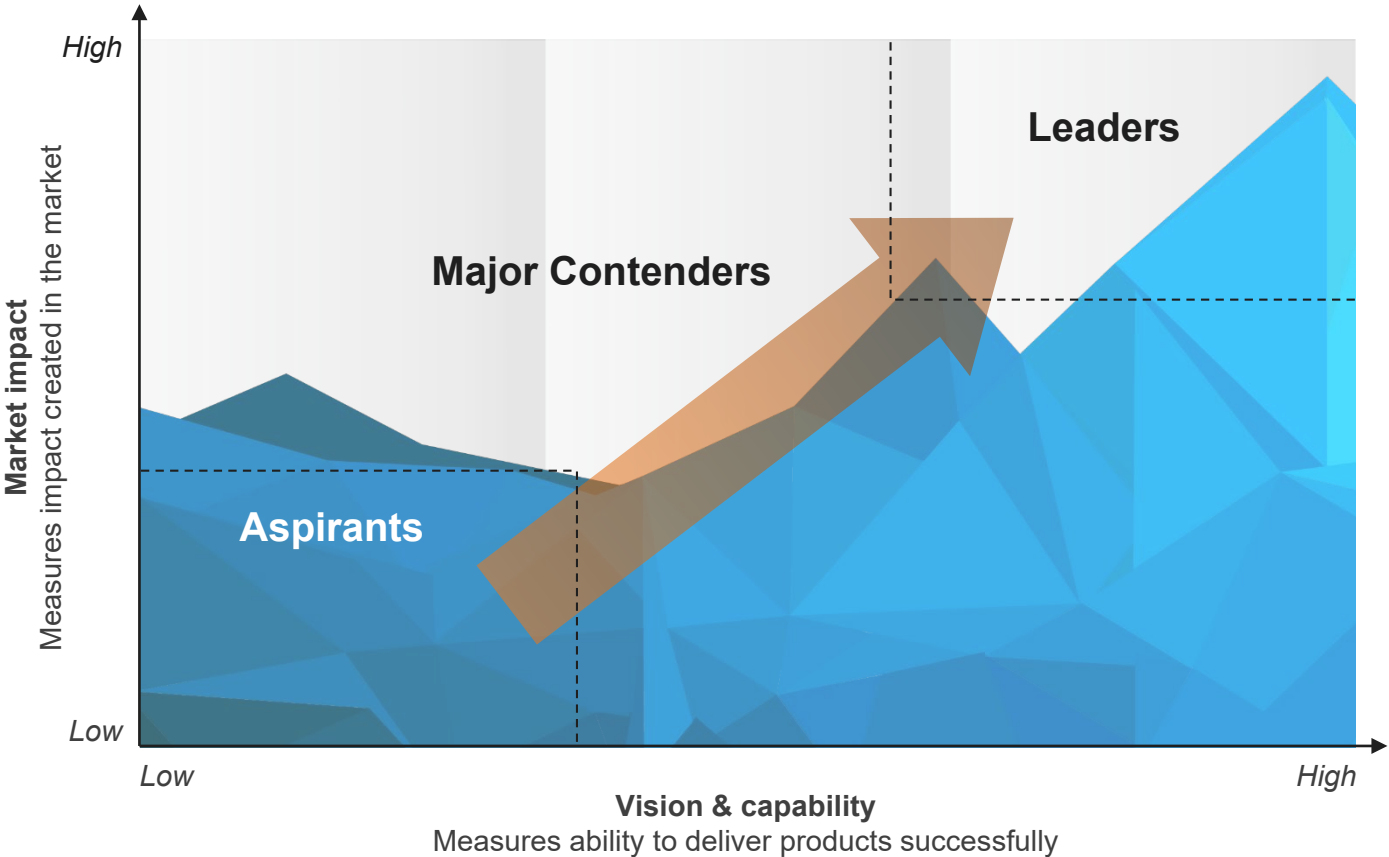
Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth

Portfolio mix
Diversity of client base across industries, geographies, enterprise size class, and seating requirements

Value delivered
Value delivered to the client based on customer feedback and other measures

Market impact

Major Contenders

Leaders

Aspirants
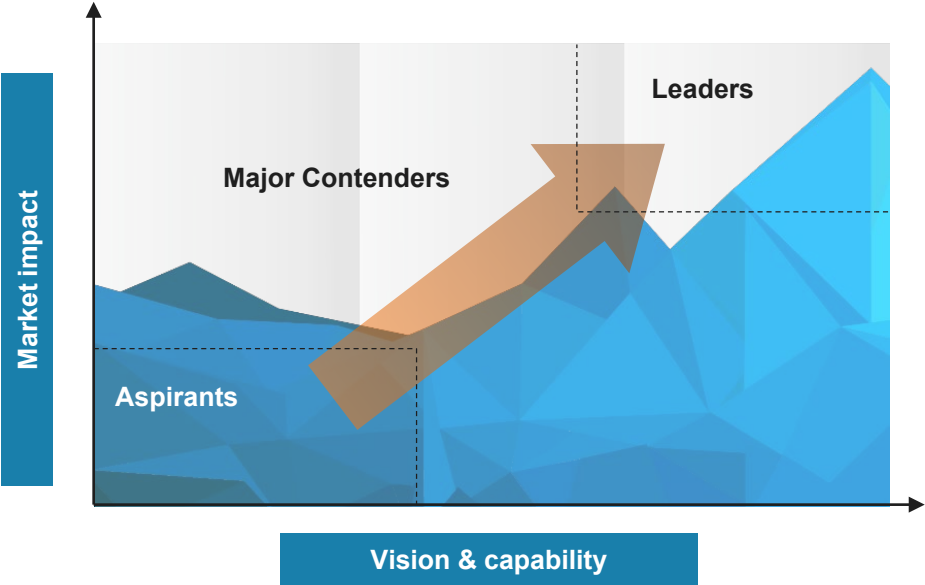
Vision & capability

Measures ability to deliver products successfully.
This is captured through five subdimensions

Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint
Vision for the client and itself; future roadmap and strategy, and progressiveness and flexibility of commercial models	Implementation services, telecom connectivity, integrations and security	ACD, IVR and self-service tools, inbound/outbound services, unified agent desktop, knowledge management, omnichannel, workforce management, and quality assurance	Monitoring & improvement and client training & support	Delivery/operational centers and data centers footprint across the globe

Everest Group PEAK Matrix®
Contact Center-as-a-Service (CCaaS) PEAK Matrix® Assessment 2023

Everest Group Contact Center-as-a-Service (CCaaS) PEAK Matrix® Assessment 2023[1,2]
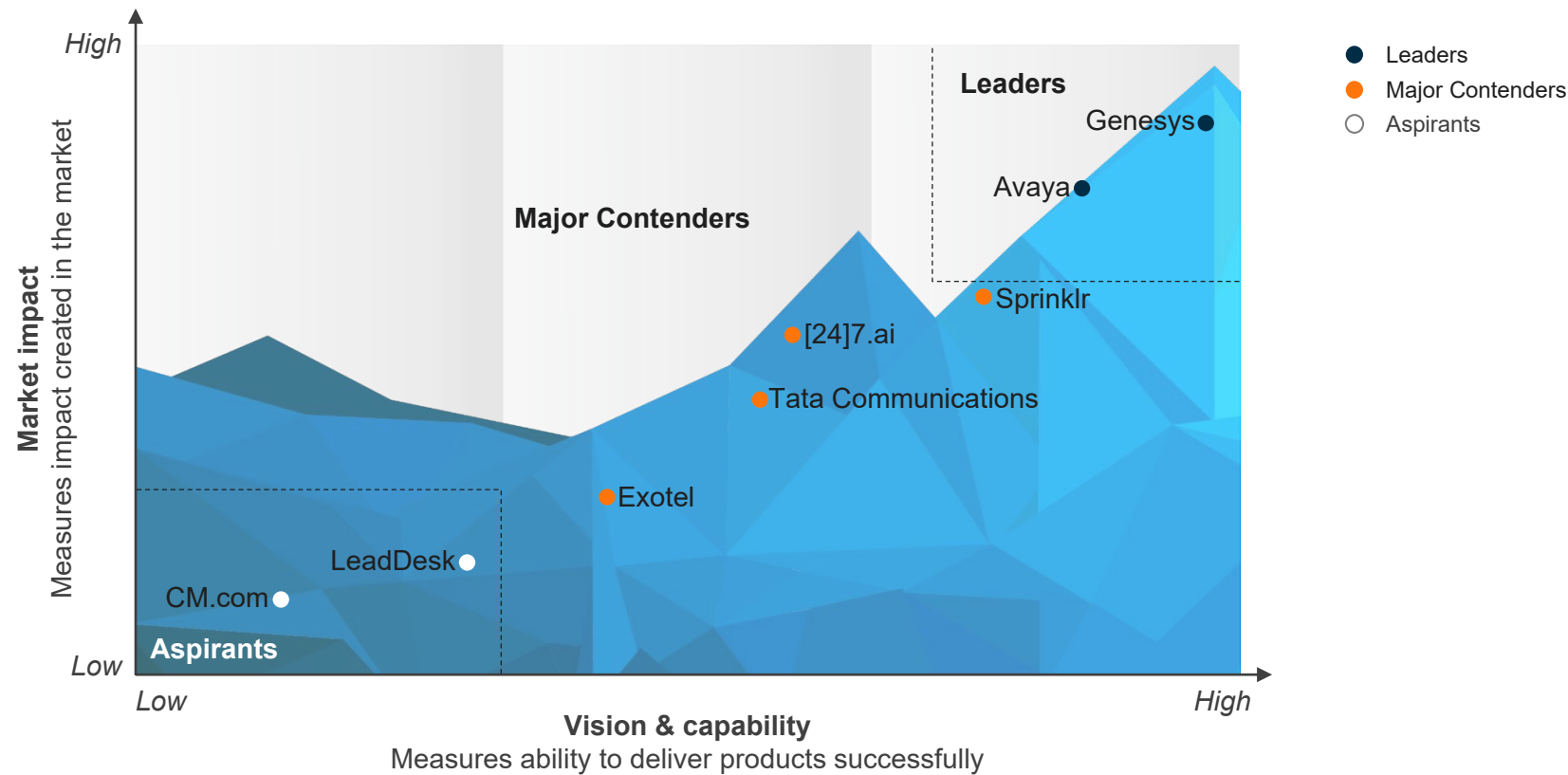
1   Assessments for Avaya and Genesys include partial provider inputs and are primarily based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with its buyers
2   Other notable providers for CCaaS are 8x8, Amazon Web Services (AWS), Cisco, Content Guru, Five9, NICE, Odigo, Talkdesk, Twilio, and Vonage
Source: Everest Group (2023)

Contact Center-as-a-Service (CCaaS) PEAK Matrix® characteristics

Leaders

Avaya and Genesys

- Leaders have the most comprehensive set of cloud-based solutions that they offer through their native capabilities, as well as through partnerships with workforce management solutions, conversational automation platforms, analytical platforms, and gamification software, among others. They also have a large ecosystem of technologies such as Unified Communications-as-a-Service (UCaaS) and Communications Platform-as-a-Service (CPaaS), which they are able to integrate with their CCaaS offering to provide the full range of customer and employee communication technologies

- They also have a global network of datacenters, operational centers for driving customer success and maintenance, and sales centers for supporting multinational brands. Their vast network of resellers, implementation partners, and system integrators helps them drive widespread commercial success of their offerings

Major Contenders

[24]7.ai, Exotel, Sprinklr, and Tata Communications

- Major Contenders approach the market by targeting segments through building capabilities that focus on either functions, industries, or geographies, and plan to expand on these capabilities to capture a wider clientele

- They are investing in cutting-edge technologies and extending service and technology partnerships to drive digital transformation for their clients. They are also looking to increase the reach of their platforms by enhancing their GTM strategy through more resellers and implementation partners such as system integrators and IT BPO vendors

Aspirants

CM.com and LeadDesk

- Aspirants are relatively new technology providers in the CCaaS market, and focus on differentiation through investing in dedicated solutions such as outbound campaigns, and call routing

- These providers focus on providing specialized services for a particular market(s) and tend to bring differentiation through personalized services for their clientele, high responsiveness to client needs, and favorable pricing

Other notable providers for CCaaS

Other notable providers	Description
8x8	Headquartered in California, 8x8 is a global cloud communications and CCaaS provider that offers an integrated CCaaS, UCaaS, and CPaaS platform through its eXperience Communications Platform. It serves a diverse clientele of small, medium, and enterprise businesses across industries such as healthcare, financial services, and retail.
aws	Amazon Web Services (AWS) is a cloud computing platform that provides a broad range of services such as computing, storage, and database management. Built on the AWS platform, Amazon Connect is a cloud-based contact center solution that offers features such as IVR, chat, and voice functionality, having a strong global presence.
CISCO	Cisco is a multinational technology company headquartered in California, which offers Cisco Webex Contact Center as its CCaaS solution. It has a global presence in multiple regions including the Americas, Europe, Asia Pacific, and the Middle East and largely serves small and midsize businesses.
CONTENTguru	Content Guru is a Europe-focused CCaaS provider, headquartered in the UK, that offers a scalable and omnichannel customer engagement platform to small and large enterprises, with a focus on providing a flexible, customizable solution. It serves clients across various industries, including finance, healthcare, retail, and government.
Five9	Five9 is a CCaaS provider, headquartered in the US, that offers a comprehensive suite of solutions for customer engagement and sales acceleration, including omnichannel routing, workforce optimization, and speech analytics. It serves a diverse range of clients, from small businesses to large enterprises, across various industries globally.
NICE®	NICE is a multinational company that offers CXone, its specialized CCaaS platform, designed to improve customer engagement and operational efficiency through advanced analytics, AI-powered automation, and personalized customer experiences. It serves clients across various industries with a focus on large enterprises.
odigo	Odigo is a Europe-based CCaaS provider that offers a scalable and flexible platform primarily designed for large contact centers. It is headquartered in France and serves clients across various industries, such as telecommunications, finance, healthcare, and retail.
talkdesk	Talkdesk offers CX Cloud platform as a native cloud-based CCaaS solution, known for its user-friendly interface and focus on innovation, including the use of AI and machine learning, to improve customer engagement. It serves multinational clients across various industries.
twilio	Twilio is a cloud communications platform that offers a range of communication APIs and services, including CCaaS. Twilio's CCaaS platform is designed to serve businesses of all sizes, from start-ups to large enterprises, with a focus on providing flexible, developer-friendly solutions that can be customized to meet the unique needs of each organization.
VONAGE	Vonage is a communications platform provider offering UCaaS, CCaaS, and CPaaS capabilities. It is headquartered in the US and has a global presence with offices in the UK, Australia, and various other countries. It primarily has clients across Europe but is also growing in the Americas and APAC regions.

Source: Everest Group (2023)

Summary dashboard | market impact and vision & capability assessment of providers for CCaaS products
Leaders

Measure of capability: ◔ Low ● High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
Avaya	◕	●	◔	◕	◔	◕	●	●	◕	◕
Genesys	●	●	◔	◕	◔	◕	●	◕	●	◕

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Summary dashboard | market impact and vision & capability assessment of providers for CCaaS products
Major Contenders

Measure of capability: ◔ Low ⬤ High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
[24]7.ai	◕	◕	◔	◔	◔	◕	⬤	◕	◐	◔
Exotel	◔	◕	◕	◐	◔	◔	◔	◔	◐	◔
Sprinklr	◕	◕	◔	◕	◕	◔	◕	◕	◕	◕
Tata Communications	◐	◕	◕	◐	◔	◕	⬤	◕	◕	◕

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Summary dashboard | market impact and vision & capability assessment of providers for CCaaS products
Aspirants

Measure of capability: ◔ Low ● High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
CM.com	◔	◑	◕	◔	◕	◑	◑	◑	◔	◑
LeadDesk	◔	◔	◕	◑	◑	◕	◕	◕	◕	◕

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04

Enterprise sourcing considerations

- Leaders
  - Avaya
  - Genesys

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Avaya
Enterprise sourcing considerations – Leader

Measure of capability: ◔ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
◕	●	◔	◕	◑	◕	●	●	◕	◕

Strengths

- Avaya offers its CCaaS platform under the OneCloud portfolio, and it is closely integrated with its UCaaS and CPaaS offerings. Its CCaaS offering has a multi-tenant and API-first infrastructure, running on Microsoft Azure public cloud
- Avaya has an expansive GTM footprint with over 3,000+ channel partners and 4,000+ sales and support professionals spread across 190+ countries. To complement its CCaaS platform, it also offers enterprise cloud and managed services, as well as professional services
- The platform offers automated and assisted routing of voice, email, chat, and other messaging channels, with built-in IVR with speech recognition to collect information for routing. It also uses Google Dialogflow to capture customer intents
- Its unified agent desktop, called Avaya Workspaces, is a browser-based application that allows contact center agents to handle inbound customer interactions with information widgets and interaction cards to aid in conversations
- Avaya AI Workflow capability enables the building of new virtual agents, allowing users to integrate Google IBM Watson, Nuance, and other conversational AI offerings into the CCaaS platform
- Analytics for the Avaya Experience Platform is hosted in the cloud. It supports interactive historical and real-time dashboards, dossiers, scorecards, formatted reports, ad hoc queries, thresholds and alerts, and automated report distribution capabilities
- Its buyers have mentioned that the Avaya Experience Platform has strong capabilities to enable remote working such as workforce scheduling & optimization, and supervisor dashboards for monitoring real-time adherence & occupancy

Limitations

- As the organization is currently going through restructuring and debt refinancing, it needs to clearly convey its platform investment roadmap in the near future to clients and ensure it has the capability to keep pace with its peers in the CCaaS market space
- Buyers feel that Avaya's platform is more expensive to work with as it has high support costs, and its initial configuration is quite complex to carry out, making it relatively difficult for small organizations to work with Avaya
- Some buyers also cited quality of call recordings, sluggishness of the live chat channel, and time to set up as potential areas where Avaya can improve

Genesys
Enterprise sourcing considerations – Leader

Measure of capability: Low High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall

Strengths

- Genesys Cloud CX is a CCaaS platform that enables businesses to manage their customer interactions across various channels, including voice, email, chat, and social media
- It services a wide set of industries such as technology, BFSI, retail, healthcare, manufacturing, and the public sector. It has a global footprint, and more than 40% of its business comes from EMEA, APAC, and LATAM markets
- Genesys has a comprehensive marketplace called AppFoundry that offers its customers a curated selection of integrations and applications. In 2022, there was a 35% increase in the number of partners on the AppFoundry
- It has a global footprint of delivery centers from where it provides customer services. It uses multiple, independent AWS datacenters around the globe to provide a distributed cloud environment, with secure access for organizations
- The platform uses advanced AI and machine learning algorithms to provide businesses with intelligent routing, sentiment analysis, and Automatic Speech Recognition (ASR) features
- It also provides tools for workforce management, including scheduling, forecasting, and quality management, helping businesses to optimize their workforce
- Genesys completed various acquisitions in 2021, such as that of Pointillist for customer journey analytics and Exceed.ai for conversational AI in marketing and sales
- During the fiscal year 2022, more than 70% of Genesys customers used the company's public APIs to customize the customer experiences to meet their unique needs, which was well appreciated by buyers. They also lauded the security features and scalability of the platform

Limitations

- Buyers mentioned that Genesys could consider simplifying the release of new features and increasing transparency around pricing. Some buyers also felt that the dashboarding features of the platform could be improved and made more user-friendly
- While Genesys has a strong heritage in serving technology, BFSI, retail, and healthcare clients, it is relatively inexperienced to serve the telecom and energy & utilities sectors

04

Enterprise sourcing considerations

- Major Contenders
    - [24]7.ai
    - Exotel
    - Sprinklr
    - Tata Communications

[24]7.ai
Enterprise sourcing considerations – Major Contender

Measure of capability: ◔ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
◕	◕	◕	◕	◑	◕	●	◕	◐	◕

Strengths

- [24]7.ai's CCaaS platform, Engagement Cloud, offers capabilities such as intelligent routing, conversation automation using advanced NLU & intent prediction modes, workforce engagement, and campaign management capabilities
- [24]7.ai serves clients in North America, and is also present in the APAC market, servicing industries such as banking, retail, telecom & media, and travel & hospitality
- The platform has the capability to configure and manage intelligent routing configurations by real-time interaction data such as time of the day, customer sentiment, repeat caller, or pre-defined business routing data
- Through its native low-code/no-code conversational AI capabilities, users of the platform can build complex, muti-turn conversational workflows for IVR/digital channels using a visual interface. The platform also supports integrations with third-party chatbots via its open-channel API architecture
- Drawing from its expertise in contact center operations, [24]7.ai provides comprehensive consulting, implementation, and support services such as CRM integration/transfer services from on-premises to cloud and learning services for its customers
- Its analytics component, Conversation Insights, has the ability to ingest structured and unstructured omnichannel data to provide voice of the customer analytics and agent performance & operational performance insights. It also has text & speech analytics capabilities to track real-time customer sentiment
- Buyers highlighted [24]7.ai's openness to feedback, expertise of the leadership team, and contact center expertise as its key strengths

Limitations

- Although Engagement Cloud has an omnichannel proposition, it misses out on email and in-app messaging channels; which can be a deterrent for enterprises that heavily rely on these channels for their contact center operations
- [24]7.ai lacks experience to serve clients in the EMEA market. It also lacks experience deploying its CCaaS solution in industries such as insurance, public sector, manufacturing, and energy & utilities
- The platform does not have UCaaS capabilities and enterprises looking for a unified communication stack for internal as well as external communications may find this limitation prohibitive
- It also lacks screen recording capability, which can help supervisors identify coaching opportunities and native gamification features to keep agents engaged
- The platform only has a web-based interface and misses out on a mobile-based interface, which can allow agents to access customer interactions across any channel from their mobile devices
- Buyers cited concerns over the UI of the analytics platform, shortage of technical staff leading to missed implementation deadlines, and lack of testing after deployments to ensure that the new functionality is working as expected/designed as areas of improvement for [24]7.ai

Exotel
Enterprise sourcing considerations – Major Contender

Measure of capability: ◔ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
◕	◔	●	◐	◔	◔	◔	◔	◐	◔

Strengths

- Exotel provides a cloud omnichannel contact center solution through Ameyo, post the merger of the two entities, to deliver unified CX with voice and non-voice channels, real-time analytics, and business-specific configurations and customizations in a single platform
- It has experience in catering to clients from BFSI, telecom, retail & CPG, e-commerce, technology, manufacturing & logistics, education, travel & logistics, and hospitality industries. It has a large presence in APAC, primarily in South Asia and Southeast Asia in countries such as India and Indonesia, and in the Middle East region in countries such as UAE
- For its Indian clients, Exotel has acquired a telecom license or the Unified License for Virtual Network Operator (UL VNO Access Service) from the Department of Telecommunications (DoT) for integrating telecom and software capabilities. With this pan-India license, Exotel will be able to serve businesses across India with its cloud-based customer engagement solutions for remote working
- It provides multilingual support through AI-driven bots with support for over 100 languages. In India, it provides regional and local in-house support and services to bring regional expertise and nuances, which is a strength appreciated by its Indian clients
- The platform offers application marketplace integration with pre-built connectors for Microsoft Dynamics, Salesforce, Freshdesk, Zendesk, Zoho, and Freshsales. Further, it also offers integrations with home-grown systems and applications for a hybrid working model support with its cloud platform
- Exotel offers elasticity in terms of pricing and contract through pricing models such as subscription-based, on-premises CCaaS solution rental, perpetual pricing, and slab-based pricing
- Buyers appreciated easy platform integrations using their existing APIs with their CRMs, quick implementation and initial setup, user-friendliness, and ease of use of the product interface, and native analytics capabilities of the platform

Limitations

- Exotel primarily serves clients in the APAC region, and has limited experience in serving clients in North America and Europe
- Some essential workforce scheduling capabilities such as agent workload prediction, time management tools, agent schedule overview, and scheduling by the supervisor are not present on the platform. It also lacks automated agent evaluation feature and gamification features for workforce engagement
- Most of the platform's competitors offer text analytics capability, which can help businesses gain valuable insights into customer behavior and agent performance, leading to improvements in customer satisfaction, cost reduction, and business growth. However, this capability is currently missing in the platform
- The platform also fails to offer a UCaaS component that can be integrated with the CCaaS solution, which can be a deterrent for buyers seeking seamless communication and collaboration between customers and employees across multiple channels
- Exotel presently does not offer complete transfer of services from on-premises/cloud solutions that its clients are presently using, thus offering a challenge for organizations that lack a dedicated IT team to migrate systems
- Common improvement areas for Exotel that its buyers have pointed out are customer support, IVR implementation, long periods for product customization, high pricing of its CCaaS platform, sales support for cost negotiation, and better training modules

SprinkIr
Enterprise sourcing considerations – Major Contender

Measure of capability: ◔ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall

Strengths

- SprinkIr Service is a CCaaS platform that is built on SprinkIr's unified CXM platform comprising features such as omnichannel agent desktop, automatic call distribution, conversational IVR, AI-driven agent productivity tools and performance analytics, automated quality management, workforce management, and conversational AI and bots
- It primarily serves clients in North America, followed by EMEA and APAC, from a variety of industries including telecom, technology, banking & finance, retail, and manufacturing & automobile. The clients served include both SMEs and large enterprises
- Owing to its modular design and a shared code base with SprinkIr's suite of solutions, SprinkIr Service platform offers extensive customizations of its platform based on varying customer needs
- To offer its customers a more comprehensive solution, SprinkIr has partnered with CX providers such as Foundever, to develop an end-to-end set of digital services for businesses, ranging from social listening and engagement to social media strategy and design. It also partnered with Twilio, a customer engagement platform, to integrate the Twilio voice and SMS technology into the SprinkIr Service platform
- Based on the size and complexity of organizations, SprinkIr offers various deployment options for its CCaaS platform, with different roll-out strategies and regional & market alignment
- With the latest product release, SprinkIr has offered over 650 enhancements in the platform, with features such as sub-ticketing, full device co-browsing, insights manager, and profile impersonation, among others
- SprinkIr Service's buyers have appreciated the unified platform for multiple channels, voice interface of the platform, and quick scalability of solutions based on customer requirements, along with customization options

Limitations

- SprinkIr has limited experience in serving clients in the APAC region as its clients mostly belong to North America and EMEA
- The platform does not offer a UCaaS component that can integrate with the CCaaS offering. This can deter buyers in the market seeking UCaaS and CCaaS integration in a single platform
- New-age buyers looking for revenue-share or gain-share pricing through outcome-based pricing models will be deterred to opt for SprinkIr Service platform as it does not offer any outcome-based pricing model
- The platform does not offer a screen recording facility that allows capturing the agent's screen during customer interaction. It can be a useful addition for agent training and monitoring purposes
- No gamification tool for employee engagement is available on its platform presently, which can result in decreased agent motivation and engagement, and can ultimately impact overall business performance and customer satisfaction
- Buyers have highlighted some improvement areas for the SprinkIr Service platform such as platform performance and data accuracy, pending product backlogs that affect the delivery of customized features, and high cost per license

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Tata Communications
Enterprise sourcing considerations – Major Contender

Measure of capability: ⊙ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
◑	◔	◕	◑	◔	◕	●	◔	◔	◔

Strengths

- Tata Communications offers the InstaCC™ CCaaS platform both as a proprietary-hosted solution and a partner-hosted solution with partners such as Genesys Cloud CX™, Amazon Web Services Connect, and Cisco Webex Contact Center to its clients. It offers a consulting-based approach to help clients select the most suitable option based on their needs
- It serves industries such as technology, travel & hospitality, e-commerce, FGT, and banking & financial industries predominantly in the APAC region, followed by North America, EMEA, and UK regions. It also has a global presence in terms of datacenters and delivery centers, with a centralized administration
- It offers omnichannel communications for inbound/outbound campaigns through various voice and non-voice channels, AI and NLP integrations for chatbots and IVR, advanced analytics & reporting, speech recognition, and customer journey mapping. It also offers tools for agent productivity, workforce management, quality management, and agent-assist tools for the Tata Communications-hosted cloud platform
- Through partnership with Genesys, Tata Communications has enhanced its InstaCC™ platform with digital features for transforming enterprise customer engagement. Such strategic partnerships have helped Tata Communications leverage its partner's expertise, innovation, and resources to stay competitive in the market
- Tata Communications has the experience of catering to a wide mix of buyers, ranging from small to large buyers, and possesses scalability which is reflected in its ability to cater to clients with dynamic contact center seating requirements
- Its buyers highlighted that the platform has a good support and service system backed by account relationship management, robust security features, and scalability

Limitations

- It has limited experience in serving industries such as the public sector, retail, and manufacturing & automobile
- Tata Communications currently does not offer outcome-based pricing model to its clients, which is a sought-after pricing model for CCaaS platforms that new-age buyers are demanding
- The adoption of Tata Communications' proprietary InstaCC™ platform has been limited vis-a-vis its partner-hosted platforms, which may deter clients that find these solutions to be price-prohibitive or unsuitable for their contact center operations
- Buyers expect an improvement in its indigenously hosted platform capabilities and ease of use while navigating its interface. They also pointed out the need to have more comprehensive analytics capabilities and better knowledge sharing of industry insights through existing clients' case studies

04

Enterprise sourcing considerations

- Aspirants
  - CM.com
  - LeadDesk

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CM.com
Enterprise sourcing considerations – Aspirant

Measure of capability: ◔ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
◔	◑	◕	◔	◔	◑	◑	◑	◔	◑

Strengths

- CM.com offers Mobile Service Cloud, its CCaaS platform, to its clients across retail & e-commerce, travel & leisure, telecom & utilities, charities, and automotive industries. Its clients are spread across North America, Europe, and India
- It has strong expertise in SMS and OTT platform messaging such as WhatsApp, Facebook Messenger, Instagram, Twitter, and Telegram, along with email and live chat interactions, which are integrated into a single inbox for the agent
- The platform offers vertical integrations, third-party integrations, and integrations with its own broader product suite such as Mobile Marketing Cloud, Conversational AI Cloud, and its payments platform. To complement its Mobile Service Cloud CCaaS platform, CM.com also has an in-house professional services center for complex customized integrations
- CM.com completed the acquisition of Building Blocks in 2022, which is in the consumer AI space to provide customer profiling in its suite of offerings
- It launched the CM Connect marketplace in 2022, which is a central marketplace for its customers where they can have add-ons for data integration. Integrations for UCaaS, quality assurance, and workforce management tools are also in the roadmap
- Buyers appreciated the reliability and support of the platform, responsiveness of the support services team, and the UX of the platform

Limitations

- CM.com lacks experience in LATAM and the Middle East & Africa regions and does not have a deep footprint in the APAC and European regions. It also has limited experience in serving clients from industries such as banking & finance, insurance, technology, public sector, and healthcare
- Its marketplace, CM Connect, is at a nascent stage currently, due to which there are not many additional offerings available on it yet. CM.com can work on launching integrations for the capabilities it lacks in its native CCaaS platform which are currently not in the roadmap, such as advanced analytics, agent performance and training tools, and chatbot & conversational AI integrations
- Despite having agent-assist features such as real-time supervision by the supervisor for text-based channels, real-time supervision is missing for voice-based channels. Also, it lacks a call conferencing feature on its platform currently
- Although the platform has SIP trunking capability and launched native voice facilities last year, it is missing out on PSTN coverage for customers looking for regional network coverage
- The platform does not offer outbound campaigns, which might deter onboarding potential clients looking for a single platform for their inbound and outbound requirements
- For its inbound offering, some essential features such as video interaction support and real-time data analysis for inbound calls are currently missing. Further, the platform also lacks smart AI-based routing options for streamlining the routing process, which can help decrease agent idle time and increase the efficiency of agents and the platform

LeadDesk
Enterprise sourcing considerations – Aspirant

Measure of capability: ◔ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation and support	CCaaS capabilities	Execution	Location footprint	Overall
◕	◔	◕	◑	◑	◔	◔	◔	◑	◕

Strengths

- LeadDesk offers a cloud-based contact center solution supporting omnichannel routings such as IVR, email, web-based messaging, enterprise, and social messengers to its clientele across the EMEA region, within verticals such as banking & financial, energy & utilities, healthcare, and public sector
- It has experience in catering to the dynamic seating requirements of different clients to ensure scalable operations
- It offers integrations for establishing contact center workflows by leveraging its ready-made connectors or API to integrate with clients' existing AI solutions and CRMs and supports 100+ different integrations including Salesforce, Dynamics, Kayak, Pipedrive, and Zendesk
- LeadDesk's outbound sales solution offers data-driven sales campaigns through real-time monitoring and advanced historic reporting, along with a predictive dialer and automatic dialer to optimize agent efficiency, and gamification features for interactive agent performance monitoring. It has set up various datacenters across Europe to deal with regional compliance controls
- Through a partnership with Calabrio, LeadDesk offers workforce scheduling and management services including features such as predictive agent staffing, skill-based scheduling, supervisor co-browsing capabilities, real-time coaching, and live performance analysis
- Buyers have recognized outbound functionalities and management, account management, an easy-to-use interface, hassle-free deployment, and competitive pricing of LeadDesk's platform as its strengths

Limitations

- LeadDesk is a hyper-localized company, with a focus on the EMEA region, specifically in Western and Central Europe. Its limited experience in serving clients in the Americas and the APAC region can be a deterrent for other buyers to test its platform
- Most of its clients are small and medium enterprises, with limited experience in serving large enterprises. LeadDesk also has limited experience working with clients in industries such as technology, retail and e-commerce, insurance, and travel & hospitality
- Although real-time monitoring is present for outbound services, it lacks real-time data analysis for inbound calls. The solution also lacks the capability of speech recognition in IVR, which can dissuade customers seeking a platform to offer seamless inbound call distribution
- Outcome-based pricing is currently unavailable for its CCaaS platform, which potentially deflects customers looking for a gain-share or revenue-share pricing to use its platform
- In a market where customers seek an integrated UCaaS and CCaaS platform, LeadDesk does not offer a UCaaS solution presently, but it is in the roadmap
- Knowledge management tools such as an integrated knowledge base for the agent to refer to and AI-based suggestions for agent assistance are currently not present in the platform
- Buyers pointed out LeadDesk Mobile functionality, servers and connectivity, the flexibility of the software, and its reporting capabilities as key areas of improvement

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05

Appendix

- Glossary

- Research calendar

Glossary of key items used in this report (page 1 of 2)

ACD	Automatic call distribution is a type of technology that helps distribute incoming calls to available agents based on pre-set rules and priorities
Agent-assist	A type of assistive technology that assists the agents during calls through features such as real transcriptions, displaying customer profiles, and suggesting the next-best reply
Agent routing	A type of assistive technology that transfers the call from the bot to skilled agents using a combination of sentiment analysis and profile matching
API	Application Program Interface **r**efers to a set of protocols, tools, and standards that enable communication between different software applications within a contact center environment
BPO	Business Process Outsourcing refers to the purchase of one or more processes or functions from a company in the business of providing such services at large or as a third-party provider
Buyer	The company/entity that purchases outsourcing services from a provider of such services
Business users	A type of users focused on the business side of the technology, who depend on the ease of use aspect of the platform to use the technology
Buyer size	Buyer size is defined as large (>US$5 billion in revenue), midsize (US$1-US$5 billion in revenue), and small (<US$1 billion in revenue)
CPaaS	Communications Platform-as-a-Service is a cloud-based platform that enables developers to integrate real-time communication capabilities, such as voice, video, and messaging, into their applications
CRM	Customer Relationship Management software is a tool that helps businesses manage interactions and relationships with their customers
FTEs	Full-time Employees on the rolls of a company
Gamification	Refers to the use of game-like elements and mechanics, such as points, badges, and leaderboards, to motivate and engage contact center agents and improve their performance
Intent prediction	A type of technology where AI predicts the user intent by analyzing the input message through Natural Language Processing and Machine Learning
Intelligent routing	A type of technology that uses algorithms and data analysis to automatically direct customer interactions to the most appropriate agent or channel for optimal resolution
IVR	A type of technology that allows users to interact with the host system using voice and the keypad input through the user device
Machine learning (ML)	A type of artificial intelligence that provides computers with learning capabilities without explicit programming
NLP	Natural Language Processing is a cognitive intelligence-based methodology to interpret human languages
Public Switched Telephone Network (PSTN)	It is a traditional telephone network that provides circuit-switched voice communication services over copper wires, and it may be integrated into a CCaaS platform to support inbound and outbound calls
RPA	A type of automation that interacts with a computer-centric process through the User Interface (UI) / user objects of the software application supporting that process; typically deployed on virtual machines and can enable end-to-end process automation without the need for human triggers

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Glossary of key items used in this report (page 2 of 2)

Sentiment analysis	Understanding the mood and emotions of the user by deploying NLP, text analysis, and computational linguistics
Service provider	A company/entity that provides outsourcing services to another company/entity
SIP	Session Initiation Protocol is a type of technology where a signaling protocol is used to establish, modify, and terminate communication sessions, such as voice and video calls, instant messaging, and presence information
Speech-to-text	A type of assistive technology program that converts words that are spoken aloud to electronic written text
Text-to-speech	A type of assistive technology program that reads digital text aloud
UCaaS	Unified Communications-as-a-Service is a cloud-based communication technology that provides a variety of communication and collaboration services to businesses, including voice and video calling, messaging, and file sharing
Virtual Network Operator (VNO)	A company that uses the technology and infrastructure of a third-party contact center platform to offer their own contact center services to customers
VoC	Voice of Customer refers to the process of gathering and analyzing feedback from customers about their experiences with a CCaaS solution
VoIP	Voice over IP refers to the use of internet-based communication protocols to transmit voice data between a customer and a contact center agent.
WFM	Workforce management is the process of optimizing staffing levels and resource allocation to efficiently handle customer interactions across various channels within a cloud-based contact center

Research calendar
Customer Experience Management (CXM) Services

Reports title	Release date
Healthcare Customer Experience Management (CXM) Services in North America – PEAK Matrix® Assessment 2023	November 2022
Driving the Digital Wave and Advancing Contact Centers through Digital Customer Experience Management (CXM)	December 2022
Capturing the Post-pandemic Resurgence: Customer Experience Management (CXM) State of the Market Report 2023	December 2022
Healthcare Customer Experience Management (CXM) Services in North America – Provider Compendium 2023	January 2023
The Contact Center for Rapidly Scaling Organizations: Leveraging Service Providers to Unleash Growth	January 2023
Delivering Extraordinary Customer Experiences Using Conversational AI	January 2023
Africa on the Rise: The Next Frontier in Customer Experience Management (CXM)	March 2023
Engaging with Customers in the Metaverse – Turning Fantasy into Reality	April 2023
Impact Sourcing Adoption in the CXM Industry	April 2023
Contact Center-as-a-Service (CCaaS) PEAK Matrix® Assessment 2023	**May 2023**
Customer Experience Management (CXM) – Provider Compendium 2023	Q2 2023
Driving Data-Led Digital Customer Experience Management	Q2 2023
Conversational AI (CAI) Technology Vendor Landscape with Products PEAK Matrix® Assessment 2023	Q2 2023
Customer Experience Management (CXM) Service Provider Landscape with PEAK Matrix® Assessment 2023 – Global, Americas, APAC, and EMEA	Q2 2023
Customer Experience Management (CXM) State of the Market 2023 – Digital CXM Trends	Q3 2023

Note: Click to see a list of all our published Customer Experience Management (CXM) Services reports

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