

Customer Experience Services

An enterprise guide evaluating
service providers enabling
enriched customer experiences

QUADRANT REPORT | SEPTEMBER 2023 | AUSTRALIA

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Executive Summary 03

Introduction

Definition	09
Scope of Report	10
Provider Classifications	10

Appendix

Methodology & Team	34
Author & Editor Biographies	35
About Our Company & Research	37

Digital Operations 12 - 18

Who Should Read This Section	13
Quadrant	14
Definition & Eligibility Criteria	15
Observations	16
Provider Profiles	18

Hybrid Working Solutions 19 - 25

Who Should Read This Section	20
Quadrant	21
Definition & Eligibility Criteria	22
Observations	23
Provider Profiles	25

Social Media CX Services 26 - 32

Who Should Read This Section	27
Quadrant	28
Definition & Eligibility Criteria	29
Observations	30
Provider Profiles	32

Report Author: Craig Baty

Customer contact centres increasingly drive business success or failure based on agents' performance. Organisations ought to possess the right tools and information to provide optimal CX. The trend of contact centres returning to their native countries is extending beyond the pandemic.

The future of work is transitioning towards an AI-driven, hyperpersonalised workplace, enabling organisations and individuals to be productive, creative and purposeful. Key shifts in the market include the rise of frontline workers, the direct impact of metaverse on workplaces, the continued shift to hybrid working, AI and automation integration and a strong focus on sustainability. AI is acting as a catalyst for contact centre cloud conversion, and enterprises are beginning to realise the financial benefits of this transition to the cloud.

Organisations adopt an analytical approach to deliver a deeper level of service as they seek to better understand individual customer

needs and preferences and use data from varied sources to deliver a more personalised service. Structured data such as customer feedback streams, customer transaction data and CRM data are the most common data types collected. In contrast, unstructured data, such as social media data, web browsing data, and data generated by connected devices and mobile devices, continues to grow exponentially.

Operators presently recognise that employee relationships with work and work-life balance have changed. Some CX vendors are pioneering new flexible working models.

Since the pandemic, contact centre management and the manner in which agents respond to changing customer behaviours and needs have witnessed significant evolution. This trend is likely to continue over the next few years. The pandemic has propelled companies to adopt new technologies to accommodate evolving working practices. Transitioning to new working environments leads to increased workforce and employee engagement management.

Work from home
has become a **critical**
delivery model even
for **highly regulated**
industries.



Executive Summary

Companies transition towards cloud-based contact centre solutions to safeguard operations and ensure business continuity during crises. By hosting contact centres centrally, Australian companies implement solutions that can better supervise contact centre agents.

More and more Australian organisations are adopting a work-at-home CX delivery model. This model has created win-win solutions for clients, service providers and agents, leading to the work-from-home (WFH) concept becoming an accepted norm.

Clients are transitioning from RPA and recruitment process outsourcing (RPO) for internal efficiencies to customer-facing automation for business continuity planning. They are increasingly focusing on digital as a CX differentiator and are leveraging NLP for human-like experiences.

Contact centres are gradually undertaking a more strategic, central role in organisations. They are becoming more integrated with other company functions, such as marketing. Companies are becoming more skilled at

collecting, combining and leveraging customer data through AI and ML techniques. This includes using data in real-time to derive more meaningful insights. New revenue opportunities are created by providing companies with tools to deliver innovative experiences.

Digital solutions are vital to support human contact centre agents as they work remotely from any location. Technologies built to manage AI-based and analytics solutions that work collaboratively to improve EX increasingly support digital solutions. These solutions facilitate improved flexibility with human and digital agents, coupled with investments in automation and analytics solutions, such as automating workflows. Thus, by adopting digital solutions, companies can streamline agent and work management and save time and costs.

Contact centres are more engaged with business intelligence solutions and will further integrate customer interaction analytics software into processes and combine these with ML-driven AI models. This integration will provide contact centre managers access to real-time data insights and predictive behaviours.

Enhancing EX can provide clients with a better overall experience and boost customer loyalty. Contact centre managers can obtain key insights on churn, propensity to buy, fraud and client vulnerability, enabling them to act on agent behaviours before they can negatively impact the organisation.

Enterprises are now seeking newer technologies as CX is gaining more importance. While demands on the buyer side are increasing, the supply side faces newer challenges, such as staffing and retention. Owing to the increased demand for flexible working conditions among employees, providers are attempting to strike a balance with new hybrid working models.

Some specific trends in each of the quadrants covered in this report are listed as follows:

Digital Operations

Contact centres are evolving into smart centres that can obtain customer insights and predict human intent. Workforce optimisation, analytics and other advanced applications are assisting call centres to evolve into CX centres. Two technologies that will rapidly change digital

workplace services and contact centre services over the next 18 months are generative AI and intelligent automation.

Several providers are exploring new and innovative ways to collaborate in the blockchain and crypto space in accordance with the ongoing development and growth of these industries within CX.

Service providers leverage their industry experience, research, vertical expertise, nuances and benchmarks to define clients' transformation roadmap and support technology adoption, enabling tangible business outcomes and ensuring ROIs.

Australian contact centre consultants have significant opportunities to help organisations optimise and develop AI systems. Companies are challenged by the sheer volume and flow of unstructured data within organisations. Call centre service providers can use AI systems to collate, analyse and interpret this unstructured data and provide actionable, real-time feedback. Globally and in Australia, an increasing number of CX providers are now incorporating AI into their CX strategies using customer analysis,



Executive Summary

insights personalisation to CX, enhanced web search, fulfilment and logistics, and voice-powered applications. Other installed features, such as customer-facing chatbots, virtual assistants and RPA in customer service, provide a predictive and personalised experience.

Australian organisations can optimise their CX performance, reduce costs, increase revenue and profit, and deliver high shareholder value by successfully deploying AI. AI enables companies to drive continuous improvement across businesses, including lower operational costs by reducing headcount for repetitive roles.

Hybrid Working Solutions

The COVID-19 pandemic has changed the work-life relationship for employees worldwide. Contact centre agents become a crucial touchpoint between businesses and their customers. Organisations investing in work-from-home setups will likely experience improved CX and increased productivity.

One of the primary contributors to a great CX is a great EX — especially for frontline workers that directly interact with and serve customers

and make up for 80 percent of the workforce.

It has become a key priority to ensure that the infrastructure used to enable agents to work from anywhere is as secure as in traditional offices. The requirement for a secure infrastructure to support a hybrid workplace is driving organizations to consider outsourcing. An increased focus on CX delivery through digital channels is driving captive contact centres to seek third parties.

Work from home has become an inherent delivery model even for the most highly regulated industries. Hybrid working models are now essential for talent acquisition and retention, which, in turn, have led to the introduction of new delivery models and improved productivity.

Increased flexibility and the ability to work from anywhere, at any time, will likely drive the expansion of the Australian freelance workforce. This working style can also be implemented into the contact centre model.

CX and personalised and customised experiences are becoming important differentiators to achieve success.

Australian organisations have started implementing advanced EX strategy services that support teams and enable more flexible working arrangements. They have realised that this arrangement will help attract the most qualified and experienced new staff.

AI and analytics play an integral role in digital transformation. Advancements in AI and analytics implementation, use cases and adoption benefit customers and agents. Agent experience is equally important as CX. Implementing AI and analytics in this space will help companies drive meaningful and empathetic conversations with end users and significantly impact business outcomes.

Social Media and CX Services

Australian companies with a well-developed CX strategy can benefit from an EX that eliminates organisational silos and results in a compliant and responsible approach for using and managing customer data. Companies benefit from reduced operating costs, increased customer retention and reduced customer churn. They also observe improvements in customer satisfaction, operational efficiency

and customer lifetime value.

CX and EX must be more seamless as the world becomes more digital. With robust digital CX strategies and technology platforms, companies can play a crucial role in business success by providing real-time customer support across multiple channels.

There will be a continuation of the transition from human point-of-contact channels towards low-cost, digital, self-service channels, such as smartphone apps, social media, chatbots and instant messaging.

CX and EX must be more seamless as the world becomes more digital. With robust digital CX strategies and technology platforms, companies can play a crucial role in business success by providing real-time customer support across multiple channels.





Provider Positioning

Page 1 of 3

	Digital Operations	Hybrid Working Solutions	Social Media CX Services
[24]7.ai	Contender	Contender	Not In
AcquireBPO	Leader	Not In	Not In
ASTIA	Contender	Not In	Not In
Cognizant	Product Challenger	Product Challenger	Product Challenger
Concentrix	Leader	Leader	Leader
CPM	Contender	Not In	Not In
Datacom	Leader	Leader	Leader
EXL	Contender	Contender	Not In
Forrest Marketing	Not In	Not In	Contender
Foundever™	Leader	Leader	Rising Star ★





Provider Positioning

Page 2 of 3

	Digital Operations	Hybrid Working Solutions	Social Media CX Services
Genpact	Product Challenger	Leader	Leader
HGS	Contender	Contender	Contender
Infosys	Product Challenger	Product Challenger	Product Challenger
Merchant	Product Challenger	Contender	Contender
Mindpearl	Contender	Contender	Contender
Mphasis	Contender	Contender	Contender
Probe CX	Leader	Leader	Leader
Serco	Product Challenger	Product Challenger	Not In
Startek®	Product Challenger	Product Challenger	Leader
TCS	Product Challenger	Contender	Contender





Provider Positioning

Page 3 of 3

	Digital Operations	Hybrid Working Solutions	Social Media CX Services
Tech Mahindra	Product Challenger	Contender	Leader
Teleperformance	Rising Star ★	Leader	Product Challenger
Telstra	Not In	Product Challenger	Leader
Transcom	Contender	Contender	Contender
TSA	Leader	Leader	Leader
TTEC	Leader	Leader	Contender
Unity4	Not In	Contender	Not In
Wipro	Leader	Leader	Leader
WNS	Product Challenger	Rising Star ★	Product Challenger



The report focuses on **critical pillars of customer experience** that include people, technology, process and data.

Simplified Illustration Source: ISG 2023



Definition

In 2022, BPO had a record year, with notable growth in ER&D, industry-specific BPO and contact centres. The contact centre/digital CX industry grew more than 44 percent. While this industry is clocking remarkable growth, certain trends have redefined the industry. With evolving enterprise requirements and KPIs and changing agent roles, the contact centre industry is transforming into a holistic solution provider, ensuring a seamless and best-in-class customer experience. The industry has witnessed a seismic shift in how it works. For example, how the workforce operates today differs significantly from what it used to be. With the adoption of hybrid work culture now a norm, the workforce today is distributed. The contact centre industry is undergoing technological maturity and increased adoption growth. For instance, AI is revolutionizing the industry by bringing in more mature and seamless experiences.

With changing and ever-growing customer expectations, the industry is posed with the significant challenge of continuously innovating and taking customer experience to the next level. Bringing the best of human knowledge and technology, expectations from this transformation have grown multifold. Enterprises are more focused on enriching customer experiences, hyperpersonalising them and enabling private and secure conversations. Companies are focused on a better return on investments, such as improved growth.

Given contact centre industry dynamics, the ISG Provider Lens™ Customer Experience Services report will focus on evaluating service providers offering cutting-edge solutions and services in the industry.



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions: Digital Operations, Hybrid Working Solutions and Social Media CX Services.

This ISG Provider Lens™ study offers IT decision makers the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on the Australian 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 service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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 \$20 million and \$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 \$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 & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has 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.

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.

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.

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.





Digital Operations

Who Should Read This Section

This quadrant report is relevant to enterprises across industries in Australia for evaluating digital operation providers of CX services. In this quadrant, ISG highlights the current market positioning of these providers and evaluates how they address critical regional challenges.

Contact centres are evolving into smart centres that can obtain customer insights and predict human intent. Expectations concerning workforce optimisation, analytics and other advanced applications are typical eligibility criteria that need to be managed. Generative AI and intelligent automation will change digital workplace services rapidly.

Service providers leverage their industry experience, research, vertical expertise, nuances and benchmarks to define clients' transformation roadmap, supporting technology adoption, enabling tangible business outcomes and ensuring ROIs. Australian enterprises seek the right partners with the right digital solutions.

In Australia, several CX providers use AI as part of their CX strategy through customer analysis, insights personalisation to CX, enhanced web search, fulfilment and logistics, and voice-powered applications. Other installed features include customer-facing chatbots, virtual assistants and RPAs in customer service that help provide a predictive and personalised experience.

With the complexity of engagements changing due to high expectations from end users and evolving user behaviours, contact centre service providers are increasingly investing in consultation to help enterprises with their transformation roadmap.



Technology professionals should read this report to understand providers' relative positioning and capabilities to help professionals effectively plan and select digital operations for CX services.



Data management professionals should read this report to understand the changing end-user experience and evaluate how digital operation providers address compliance and security challenges.



Marketing and sales professionals should read this report to explore EX investing value and assess how providers implement and expand contact centre digital operations to drive business outcomes.



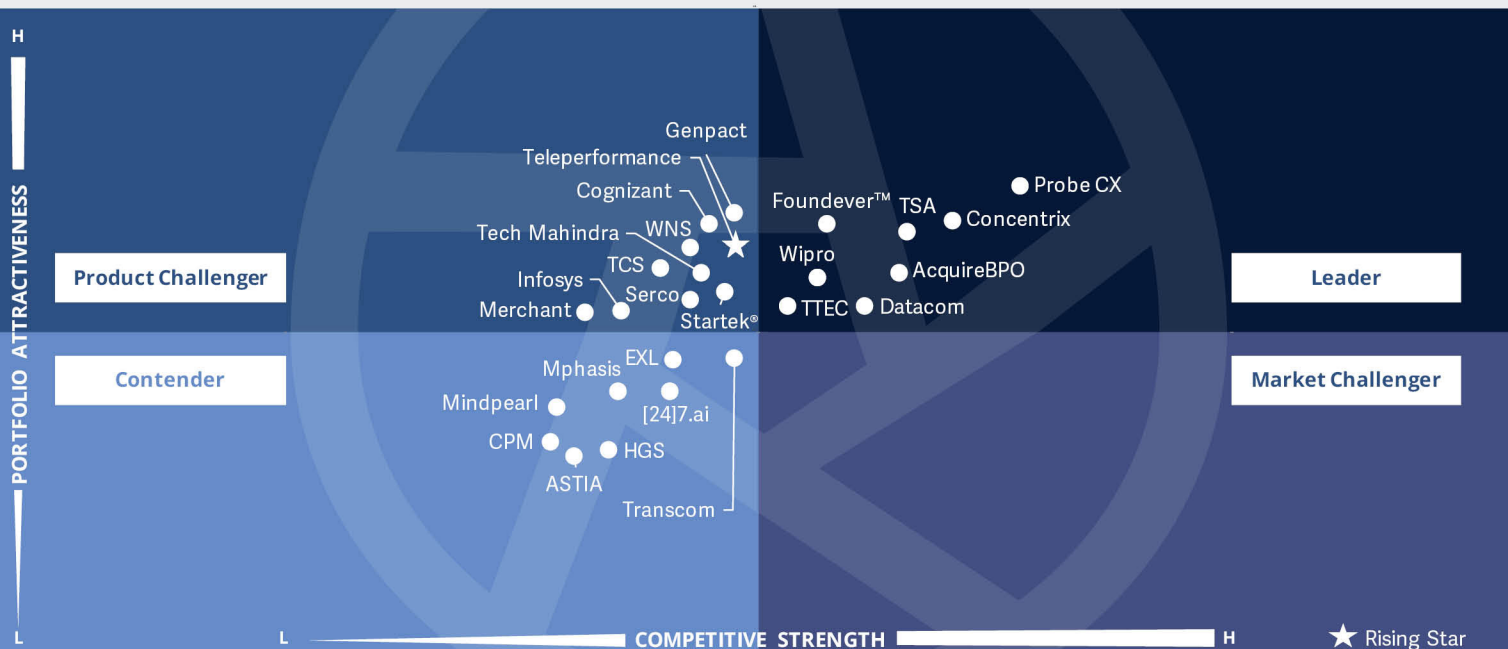
Strategy professionals should read this report to determine providers offering digital operations to better prepare the workforce for changing business models and dynamics post-pandemic.



ISG Provider Lens™
Customer Experience Services
Digital Operations

Source: ISG RESEARCH

Australia 2023



This quadrant assesses providers' **digital operation** capabilities in the Australian market. Critical factors such as **right shoring, global delivery capability and technological solutions** are also evaluated.

Craig Baty



Definition

For enterprises looking to outsource contact centre services, the Digital Operations quadrant encompasses all fundamental tenets of customer experience services. As the horizons of customer experience services broaden, enterprises are looking to partner with providers offering a broad range of customer experience services. They seek to learn from providers that offer in-depth consulting services and exhibit domain, technical and industry vertical knowledge. It is pertinent for providers to bring mature technology to help enterprises as digital transformation is becoming core to all transformation journeys. With the right digital solutions and consulting services, enterprises can ensure that their customer experience strategies remain relevant and effective in an ever-changing digital landscape. Enterprise expectations from these engagements are far from mere implementation services. Key performance indicators (KPIs) are taking a sharp turn and growing beyond first-call resolution and average handling time.

They are becoming more holistic because enterprises are keen to develop strategic relationships with providers that are better growth enablers.

To cater to the growing needs, providers in this space are evolving to become solution providers having a nuanced understanding of changing end-user expectations. They will also be expected to deeply understand the industry vertical, craft industry-specific solutions and enable faster go-to-market. This quadrant will assess service providers on other critical parameters such as right shoring, global delivery capability and technological solutions – IP and partnerships, industry-specific CX solutions, consulting services, transition services such as OCM, talent management and training capabilities.

Eligibility Criteria

1. Demonstrate strategy, innovation and vision for growth
2. Offer a broad range of **contact centre services**
3. Offer **well-rounded consulting capabilities** that exhibit domain and industry knowledge
4. **Design long-term transformation roadmaps** – using any homegrown framework that articulates the roadmap
5. **Possess technological capabilities** that include cloud capabilities, automation, AI and omnichannel support
6. Offer multiple channel strategies and capabilities
7. Demonstrate **industry-specific solutions** (if any)
8. Articulate target markets and differentiators
9. **Ability to offer nearshore, onshore and offshore services** (delivery centres)
10. Offer effective **transition services** (organizational change management capability)
11. Exhibit **talent management strategies**
12. **Help enterprises achieve their ESG goals**
13. Have trained and skilled FTEs
14. **Referenceable case studies**



Observations

With an increased focus on enhancing CX and other evolving requirements, Australian enterprises seek the right partner and appropriate digital solutions. As the complexity of engagements changes due to high expectations from end users and evolving user behaviour, contact centre service providers are increasingly investing in consulting to help enterprises with their transformation roadmap. The market grew significantly over the past year, with most players improving their position but a few declining in strength.

Probe CX's acquisition by KKR and Sitel Group's acquisition of SYKES and subsequent rebranding as Foundever™ have been completed. A notable change in position this year is Teleperformance's advancement to Rising Star from Product Challenger. HGS in the position of Contender is the latest addition to this study.

From the 56 companies assessed for this study, 26 have qualified for this quadrant with eight being Leaders and one a Rising Star.

Acquire BPO

Acquire BPO is a global outsourced contact centre provider that operates in Australia, the Philippines, the US and the Dominican Republic. It has ownership of end-to-end operations and deliverables across the complete customer lifecycle.



Concentrix is a global CX specialist company headquartered in the US, operating across 40 countries, including Australia, with a fast-growing presence. It has an industry-leading CX platform and robust AI capabilities.

DATAKOM

Datacom is one of Australasia's largest professional IT services companies with four contact centre service sites in Sydney, Adelaide and Wellington. The company is focused on becoming a net talent creator, delivering value to its clients.



Foundever™ is one of the largest global providers of CX products and solutions, with over 40 years of experience and over 170,000 associates globally. It has a robust global footprint spanning over 40 countries and has three onshore delivery centres in Australia.



Probe CX is the largest digitally-driven CX specialist in Australia. The company has robust capabilities in contact centre and customer management, digital consulting, intelligent automation and analytics.



TSA is a leading Australia-based CX specialist offering a broad range of CX technology and consulting services. It offers robust AI automation capabilities for CX through a highly tailored strategy for CX delivery.



TTEC

TTEC is a global CX technology and service provider with robust capabilities in AI-enabled consulting and customer experience management (CXM) platform service and delivery. The company has a growing presence in Australia, with call centre operations in Sydney.



Wipro is a leading global IT, consulting and business process service provider. The company has a well-established contact centre and CX practice centre in Australia. An innovative digital-first strategy supports Wipro's growing presence in Australia.

Teleperformance

Teleperformance (Rising Star) is a global digital business services company that operates across 91 countries and has a fast-growing presence in Australia. Teleperformance's target for 2025 is to become an undisputed global leader in digital integrated business services and solutions.



Probe CX



"Probe CX has robust capabilities in contact centre and customer management, digital consulting, intelligent automation and analytics. The company provides help desk/support desk and specialist knowledge services."

Craig Baty

Overview

Probe CX is a leading digitally-driven CX specialist and BPO provider in Australia with over four decades of experience. A global investment firm KKR acquired Probe CX in 2022. Probe CX is one of the largest CX providers in Australia and New Zealand. It has 18,000 employees working across five countries, namely Australia, New Zealand, the Philippines, U.S. and India. It has 33 delivery locations globally. The company has over 7,000 staff members in Australia, with offices in Sydney, Melbourne, Wollongong, Gold Coast, Brisbane, Maroochydore and Perth. Probe CX has a site delivery strategy covering metro and regional areas.

Strengths

Comprehensive CX solution portfolio: Probe CX offers a broad range of CX-based solutions that span customer management, consulting and intelligent automation. Probe CX's digital transformation practice specialises in UX design, process simplification, customer journey mapping and workforce optimization. It also specialises in data analytics, digital deployment, automation and customer sentiment analysis.

Advanced embedded AI functionality:

Probe CX's Oration product is an AI-powered NLP Open Menu that incorporates open identification, verification and intelligent routing functionality. This AI solution increases self-service take-up, reduces handling times, and improves agent and customer engagement.

Large Australian client base across varied industries:

Probe CX's regional client base includes three of Australia's five largest banks and several major consumer retailers, insurance and buy-now-pay providers. It caters to nearly all major telecommunication, travel and tourism, energy, logistics and utility providers, and government departments and agencies.

Caution

Probe CX maintains its leading position as one of Australia's key providers of contact centre digital operation services. However, its current strategy of generating several deals by strongly competing on the pricing front may not be sustainable in the long term.





Hybrid Working Solutions

Hybrid Working Solutions

Who Should Read This Section

This quadrant report is relevant to enterprises across industries in Australia for evaluating hybrid working solution providers. In this quadrant, ISG highlights the current market positioning of these providers and evaluates how they address key regional challenges.

Companies are now transitioning towards cloud-based contact centre solutions to protect their operations and ensure business continuity during crises. Australian providers are implementing solutions that can better supervise contact centre agents by hosting contact centres centrally.

Australian contact centres are increasingly using a hybrid remote and office-based work model. Thus, it has become a key priority to ensure that the infrastructure used to enable agents to work from anywhere is as secure as working in traditional offices.

Workforce and employee engagement management are beginning to evolve with the transition to new work environments. Technologies built to manage AI-based and analytics solutions that work collaboratively to improve EX increasingly support hybrid working solutions.

Enterprises that have implemented advanced CX strategies services are now supporting their teams with more flexible working arrangements. They realise that this implementation will give them the best chance to attract the most qualified and experienced new staff.



Technology professionals should read this report to understand providers' relative positioning and capabilities to help professionals effectively plan and select hybrid working solutions for CX services.



Data management professionals should read this report to understand the changing end-user experience and assess how hybrid working solution providers address compliance and security challenges.



Marketing and sales professionals should read this report to understand EX investing value and assess how providers implement and expand hybrid working solutions to drive business outcomes.



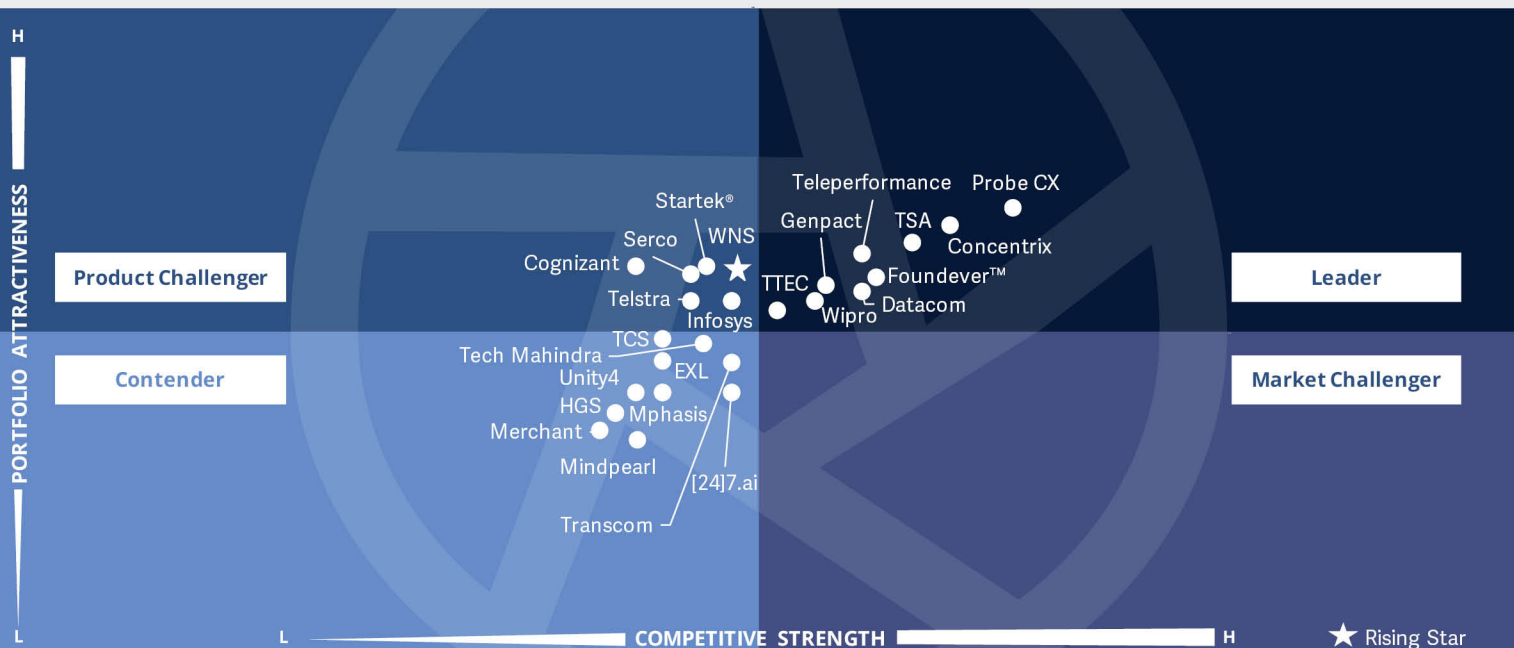
Strategy professionals should read this report to determine providers offering hybrid working solutions to better prepare the workforce for changing business models and dynamics post-pandemic.



ISG Provider Lens™
Customer Experience Services
Hybrid Working Solutions

Source: ISG RESEARCH

Australia 2023



This quadrant assesses service providers' capabilities to offer **relevant technologies and tools**, such as **cloud solutions**, enabling organisations to **scale capacity up and down** and allow **work from home or office**.

Craig Baty



Hybrid Working Solutions

Definition

The contact centre industry has undergone multifold changes in the past few years. From nearly 100 percent brick-and-mortar workplaces to supporting working from home, the industry finally seems to be settling on hybrid working strategies. In this quadrant, we assess service providers well-equipped to enable an efficient hybrid work model for enterprises. The model combines on-premises and remote work, allowing employees to work in an office and from home. Giving increased flexibility to organizations worldwide, hybrid working has brought multiple benefits to enterprises, such as access to a larger pool of talent, improved employee morale, management of talent attrition and enhanced efficiency levels. Thus, service providers are required to bring relevant technologies and tools, such as cloud solutions, to offer the flexibility to ramp capacity up and down and enable work from home or office. Remote hiring, training, online employee engagement and collaboration tools are essential for this model. Enhanced and vast sets of training tools are essential for constantly upskilling employees.

With distributed workforce and, in some cases, BYOD becoming part and parcel of the hybrid working model (especially with gig employment), systems have become more vulnerable and susceptible to cybercrimes. Thus, having an improved and robust cybersecurity policy and posture is pertinent. In addition, tools and techniques such as gamification and other employee engagement tools are also essential to enable a hybrid working model.

Eligibility Criteria

1. **Enable a hybrid working model**
2. **Demonstrate technological implementations** (cloud contact centre, omnichannel platforms, automation, agent experience and CX enablement)
3. **Offer talent management solutions** (ability to offer virtual onboarding, including interviews and training facilities)
4. **Provide cybersecurity measures** (facial recognition and other biometrics and instances of cybersecurity management in remote working conditions)
5. **Offer effective collaboration tools**, such as through gamification
6. **Offer workforce management services** (monitoring, supervising and training recommendations)
7. **Demonstrate large-scale implementations**
8. **Offer innovation hubs** to enable state-of-the-art infrastructure
9. **Have burstable capacity** – the ability to ramp workforce capacity up and down
10. **Demonstrate referenceable case studies**



Hybrid Working Solutions

Observations

A hybrid remote and office-based work model is becoming increasingly common for contact centres in Australia.

The transition to new working environments results in increased workforce and employee engagement management for Australian organisations. There is a growing demand from workers to work from anywhere and at any time. An increased number of workforce management and engagement solutions is required to assist people in managing workloads effectively.

Continued M&As in the market and a renewed effort to grow locally led to provider repositioning. Many improved their position over the last year, whereas a few witnessed a decline in their positions. Probe CX's acquisition by KKR was finalised, similar to Sitel Group's acquisition of SYKES and subsequent rebranding as Foundever™.

Notable changes this year include Genpact progressing to the Leader contention from Product Challenger and WNS being moved from Product Challenger to a Rising Star. HGS, as a Contender, is a new addition to the study.

From the 56 companies assessed for this study, 25 have qualified for this quadrant with nine being Leaders and one a Rising Star.



Concentrix is a global CX specialist company headquartered in the US. It operates in 40 countries, including Australia, with a fast-growing presence. A key differentiator of the company is its advanced CX technology platforms.

DATAKOM

Datakom is one of Australasia's largest professional IT services companies, with four contact centre service sites located in Sydney, Adelaide and Wellington. It offers innovative on-premises services to local clients and a well-developed Work From Anywhere (WFA) model.



Foundever™ is one of the largest providers of CX products and solutions, with over 40 years of experience and more than 170,000 associates globally. The company is significantly investing in hybrid working solutions and security in Australia and New Zealand.



Genpact is an IT services and consulting company headquartered in the US. It operates across 35 countries. In Australia, Genpact has over 600 onshore staff, two CoEs and more than 150 direct customer support staff.



Probe CX is a leading and one of Australia's largest digitally-driven CX specialists. The company has a proven track record of designing, implementing and managing remote contact centres.

Teleperformance

Teleperformance is a global digital business services company that operates in 91 countries and has a fast-growing presence in Australia. It offers highly competitive hybrid working solutions with advanced functionalities.



TSA is a leading Australia-based provider of CX technology and services. The company offers innovative hybrid working solutions and invests strongly in skills training and development.

TTEC

TTEC is a global CX technology provider with robust AI-enabled consulting capabilities and customer experience management (CXM) platform service and delivery. It has introduced a flexible working model to acquire a more diverse workforce, improve retention and reduce costs.



Hybrid Working Solutions



Wipro is a leading global IT, consulting and business process service provider headquartered in India, with a well-established CX practice in Australia. It has an innovative experience-led redesigning strategy.

WNS

WNS (Rising Star) is a leading business process management company with a key presence in Australia. Its in-depth industry knowledge, technology, analytics and process expertise assist in co-creating innovative, digitally-led transformational solutions.





"Probe CX has a strong and proven track record in designing, implementing and managing remote contact centres."

Craig Baty

Probe CX

Overview

Probe CX is a leading digitally-driven CX specialist and BPO provider in Australia with over four decades of experience. It has 18,000 staff across five countries, namely Australia, New Zealand, the Philippines, U.S. and India. The company has a strong presence in Australia and New Zealand, with 33 delivery locations across 16 sites. Probe CX has more than 7,000 staff in Australia, with offices in Sydney, Melbourne, Wollongong, Gold Coast, Brisbane, Maroochydore and Perth. The company manages large and complex offshore and onshore outsourcing requirements to support its hybrid working solutions.

Strengths

Comprehensive hybrid working solutions:

A wide range of technologies support the Probe CX Remote Working Operating Model, which enables standard practices regardless of location to achieve improved productivity, increased job satisfaction and better work-life balance. Other hybrid working solutions include Google Workspace; Heartbeat, a cloud-based HR platform; Safetrac, a cloud-based compliance training platform; and Preceda - a payroll management platform.

Advanced work-from-home (WFH)

functionality: Probe CX's WFH functionality incorporates cloud-based security tools that function regardless of end users' location and cloud-based identity management and authentication through Okta.

It also incorporates cloud-based telephony services via Genesys Cloud, multifactor authentication (MFA) VPN services, internal connectivity via SD-WAN, cloud-based proxying and zero trust enablement via Zscaler.

Advanced CX functionality: Probe CX's strategy centres worldwide and industry expertise are complemented by local delivery and customisation capabilities. The company offers next-generation digital enablers to enhance clients' digital transformation journey. Probe CX provides end-to-end capabilities, bespoke solution delivery, and robust IT architecture and data security.

Caution

Probe CX maintains its position as a Leader in the Australia hybrid working solutions market. However, the significant shortage of skilled resources to support local clients will be a key challenge to the company's growth and ability to harness its new owner, KKR's global resources.





Social Media CX Services

Who Should Read This Section

This quadrant report is relevant to enterprises across industries for evaluating social media CX service providers. In this quadrant, ISG highlights the current market positioning of these providers and evaluates how they address key regional challenges. ISG's assessment is based on the depth and breadth of the providers' service offerings and market presence in Australia.

A robust digital experience strategy can be crucial to business success by providing real-time customer support across multiple channels. Enterprises are likely to witness improvements in customer satisfaction, operational efficiency and customer lifetime value.

Australian companies continue transitioning from human point of contact channels towards low-cost, digital and self-service channels, such as social media and instant messaging. They might also face new challenges in delivering a seamless multichannel experience.

Social media CX service providers are expected to support multiple social media channels to offer customer support services. Content moderation is a critical focus area to ensure trust and safety services for brands.

Australian companies are embracing technologies such as AI to continuously monitor social media channels. They are offering personalised services by leveraging analytics solutions such as sentiment analysis. These channels help companies garner immediate customer feedback, enabling them to act appropriately and improve customer service.



Marketing and sales professionals should read this report to understand how social media CX services assist marketing and sales processes and how providers implement technologies to tap into the market.



Strategy professionals should read this report to determine leading providers offering social media CX services for contact centres to drive significant business outcomes in the post-pandemic era.



Technology professionals should read this report to understand providers' relative positioning and capabilities to help professionals effectively plan and select social media CX services.



Data management professionals should read this report to understand the changing end-user experience and assess how social media CX service providers address compliance and security challenges.





This quadrant evaluates **service providers with the capability** to assist organisations in **managing, moderating and effectively using content**. Content moderation is an **essential area of focus to ensure trust** and safety services for brands.

Craig Baty



Social Media CX Services

Definition

Social media has become an important communication channel and a growth enabler for most enterprises. As multiple channels grow significantly, social media offers an effective way for businesses to connect with their customers and target audiences and promote their products and services. It provides a platform for companies to listen to customer feedback, respond to queries and complaints and build customer relationships. Agents can interact with multiple customers and resolve their issues simultaneously.

Companies are adopting various social media channels to offer customer support services, embracing technologies such as AI to monitor these channels continuously and offering personalised services by leveraging analytics solutions such as sentiment analysis. These channels also help companies garner immediate customer feedback, enabling them to take appropriate measures quickly and improve customer service. With customised advertisements, cross-selling and upselling have become more effective.

With the adoption of AI, social media channels can help enterprises with their marketing and sales processes significantly. With content growing on these channels, managing, moderating and effectively using content has become more pertinent. Content moderation is an important area of focus to ensure trust and safety services for brands.

Service providers are ramping up their social media services and adopting the necessary technologies to tap into the market rapidly. This quadrant assesses providers offering social media services with relevant technologies to provide seamless CX.

Eligibility Criteria

1. Provide **social media services**
2. Support **multiple social media channels**, including region-specific channels (if any)
3. Offer content moderation services to ensure **trust and safety**
4. Have trained employees (FTEs)
5. Actively **leverage AI and analytics to manage content**
6. Apply analytics solutions such as **sentiment analysis, voice of the customer (VOC) analysis and customer journey mapping solutions**
7. Offer **marketing and sales support**
8. Offer large-scale implementations
9. Help customers **achieve tangible business outcomes**
10. **Showcase growth stories with improved KPIs**
11. **Offer a large partner ecosystem and proprietary solutions**
12. Demonstrate **referenceable case studies**



Social Media CX Services

Observations

Australian companies adopt various social media channels to offer customer support services. They embrace technologies such as AI to continuously monitor these channels. They also offer personalised services utilising analytics solutions, such as sentiment analysis.

These channels also help companies garner immediate customer feedback, enabling them to quickly undertake appropriate measures and improve customer service. With customised advertisements, cross-selling and upselling have become more effective techniques.

With AI adoption, social media channels can significantly help enterprises with their marketing and sales processes. Service providers are expanding their social media services and adopting the necessary technologies to tap into the market rapidly.

The social media CX services market grew at the same pace as the other two quadrants but was much more competitive. Most players improved their position, but a few declined in terms of their strength.

Probe CX's acquisition by KKR was completed, as was Sitel Group's acquisition of SYKES and its subsequent rebranding as Foundever™.

Notable changes this year include Startek® and Genpact, moving from Rising Star to Leader and Foundever™ from Product Challenger to a Rising Star. A new addition to the study was HGS in the position of Contender.

From the 56 companies assessed for this study, 22 have qualified for this quadrant with nine being Leaders and one a Rising Star.



Concentrix is a global CX specialist company headquartered in the US, operating in 40 countries, including Australia, with a fast-growing presence. It provides comprehensive social media CX offerings with robust AI functionality.

DATAKOM

Datacom is one of Australasia's largest professional IT services companies, with four contact centre service sites located in Sydney, Adelaide and Wellington. Datacom delivers innovative social media CX offerings and is making significant investments in CX analytics.



Genpact is an IT service and consulting company headquartered in the US. It operates across 35 countries, including Australia. The company provides advanced social media evaluation and consulting services. It has recently launched an AI platform for CX.



Probe CX is one of the largest digitally-driven CX specialists in Australia. The company offers an innovative CX social media strategy with advanced customer service capabilities.

Startek

Startek® is a global CX specialist with over 30 years of experience. It has a fast-growing presence in Australia. The company provides advanced social media CX functionality and highly advanced features via its LISA offering.



Tech Mahindra is a leading provider of digital **transformation** services across 92 countries. It has a growing presence in Australia. Tech Mahindra's proprietary consulting solution, CareXa, follows a design thinking methodology.



Telstra is Australia's largest telecommunications provider. It employs a well-developed CX strategy and multiple collaboration options to deliver an end-to-end solution for the contact centre ecosystem.



Social Media CX Services



TSA is a leading Australia-based CX specialist offering a broad range of CX technology and consulting services. It provides a comprehensive range of social media CX offerings through a rapidly changing CX strategy.



Wipro is a leading global IT, consulting and business process service provider headquartered in India. The company has a well-established CX practice base in Australia. It offers a wide range of social media CX service functionalities to its clients.



Foundever™ (Rising Star) is one of the largest providers of CX products and solutions. It has over 40 years of experience and has employed more than 170,000 associates. The company offers social media CX functionality through a broad portfolio of services to its clients.





"Probe CX offers an innovative CX social media strategy and has advanced customer service capabilities."

Craig Baty

Probe CX

Overview

Probe CX is a leading digitally-driven CX specialist and BPO provider in Australia with over four decades of experience. In 2022, the global investment firm KKR acquired Probe CX. Probe CX employs 18,000 staff members across five countries, namely Australia, New Zealand, the Philippines, U.S. and India. It has 33 delivery locations globally. Probe CX has a robust presence in Australia and New Zealand across 16 sites. It has over 7,000 employees in Australia, with offices in Sydney, Melbourne, Wollongong, Gold Coast, Brisbane, Maroochydore and Perth. Probe CX has a site delivery strategy covering metro and regional areas and delivers CX services nationally.

Strengths

Wide range of CX solutions: Probe CX has expertise in advanced solutions that include advanced analytics, RPA, chatbots and intelligent virtual agents, AI and NLP, and biometric verification. The company has expertise in successfully implementing engagement solutions within the government, energy, travel, retail and healthcare sectors.

Advanced customer service capabilities: Probe CX is expanding its enablement practice and housing specialist consultants and developers. Its digital enablement capabilities include UX design, AI-powered virtual agents, advanced data analytics and robotics.

Innovative social media strategy: Probe CX supplies staff, processes and tools to support each company's social media strategy. The company has experience working with various social media software monitoring tools. It uses its own supplied software or integrates with clients' preferred toolset. These toolsets include Qualtrics Social Connect that provides public and private messages and insights/analytics/content moderation. Clients can use the Genesys Cloud CX platform, Freshdesk and other Probe CX partner platforms to meet customer support needs and enhance their social messaging capabilities.

Caution

For the third consecutive year, Probe CX continues as a Leader in the Australian social media CX services market. Numerous small companies are increasingly challenging this position because, despite their lack of scale, they can rapidly respond to market changes, thus posing greater competition.





Appendix

The ISG Provider Lens 2023 – Customer Experience Services study analyzes the relevant software vendors/service providers in the Australian 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 August 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 Customer Experience Services 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 & Editor Biographies

Author



Craig Baty
Lead Analyst

Distinguished Analyst and author Craig Baty has extensive research and thought leadership experience in the AP/J ICT markets. Craig is principal and founder of DataDriven, a research and advisory firm, and ISG Research Partner for AP/J. Craig has over 30 years of executive and board-level experience in the ICT industry, including as a group VP and head of Gartner Research AP/J, CEO of Gartner Japan, global VP Frost & Sullivan, and more recently as VP global strategy and VP Digital services in Fujitsu's Tokyo headquarters.

As a well-known ICT commentator and analyst, Craig has written more than 200 research pieces, and presented at over 1,500 events globally. He is also regularly quoted in regional media. Craig is active in the ICT community as a board member of the Australian Information Industry Association (AIIA) and a past Vice Chair of the Australian Computer Society NSW(ACS).

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Phil Harpur is an Australia-based technology analyst and consultant with over 25 years of experience across telecommunications, the cloud, data centres and digital media. His expertise spans over 35 countries across Asia. He also works as an analyst and writer in the financial services industry, with a focus on the technology sector.

Phil is currently part of the DataDriven team, which is the Asia Pacific research partner for ISG, and has contributed to the creation of tens of ISG Provider Lens™ reports.

Prior experience includes Gartner, Frost & Sullivan, and BuddeComm. He has been quoted in multiple global publications and appeared on business TV programs including Bloomberg, CNBC, Fox Business, and ABC. He has also presented at numerous local and international conferences. Phil has a Bachelor of Science degree, with majors in computing and statistics from Macquarie University and holds a graduate certificate in applied finance and investment from the Securities Institute of Australia.



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Her areas of expertise lie in IT services management and enterprise planning services. Angie develops content from an enterprise perspective and writes Global Summary reports for Provider Lens studies. She also supports the lead analysts in the research process and ad hoc 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](#).

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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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