ISG Provider Lens™

Contact Center– Customer Experience Services

Digital Operations

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:
probegroup

QUADRANT REPORT | OCTOBER 2024 | AUSTRALIA

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Contact centres to increase engagement with business intelligence and AI-enabled services

State of the industry

Overall BPO growth, which includes CX and other back-office operations, remained flat at $5.6 billion in the first half of 2024 compared to 1H23. The number of awards in 1H24 was 457, higher than the 403 recorded in 2023. This is a strong indicator that the market demand is intact. However, deal sizes have reduced.

In the CX segment, the ACV of $1.2 billion in 1H23 declined to $0.8 billion in 1H24. Although there was a reduction in ACV, similar to the BPO trend, the number of awards was higher in 1H24 than 1H23.

In particular, APAC was a significant contributor to the overall BPO market growth. The region witnessed 48 contract awards, the highest number recorded, with overall BPO ACV for APAC exceeding $700,000.

Cost optimization is a key priority and a top driver for outsourcing. Companies are looking to optimize costs and improve process efficiencies by scaling their automation. These are some of the key factors influencing the size of the deals.

In 2022 and early 2023, the BPO industry experienced unprecedented growth across most service lines, including CX. However, with demand slowing and numbers returning to pre-pandemic levels, service providers are now facing margin pressures. Clients are seeking greater cost optimization, and to balance the top and bottom lines, providers are significantly slowing down hiring and other discretionary spending.

Shifting customer interactions in Australia

The contact centre landscape in Australia is diverse and dynamic, with a wide range of industries and companies utilising contact centres for customer service, sales and support. Both in-house and outsourced contact centres operate in the country, serving local and international customers, with cost optimisation as a key driver for outsourcing.

AI is transforming CX and AX with personalized support, efficiency and strategic value.

The nature of CX engagements has evolved significantly beyond traditional labour arbitrage and involves a high degree of technical infusion. On the enterprise side, the business units no longer get involved, but there is vested interest and involvement from the CIOs/CTOs to drive tech modernization. Modern CX engagements now encompass technical, people and process requirements, prompting service providers to invest heavily in developing proprietary intellectual property or expanding their partner ecosystems to meet diverse technological needs.

The technology stack has undergone substantial changes at every level, influencing the CX landscape. IT-BPO integration was discussed earlier but we are seeing a gradual uptake. This shift highlights a trend where service providers are leveraging advanced technologies and comprehensive solutions to meet the complex demands of contemporary CX engagements. This evolution underscores the growing importance of integrated solutions that blend technology, workforce expertise and optimized processes. Overall, the contact centres in Australia adopt a mix of traditional and innovative approaches driven by a commitment to providing excellent, omnichannel and cost-effective customer service and adapting to changing consumer preferences by scaling their automation.

Major trends revolutionising CX engagements in 2024

Australian contact centre providers are making substantial investments in digital capabilities to meet customer demands. The enterprises are compelled to reassess their operational frameworks, adapt with agility, address increasing security challenges and navigate other factors due to influences such as technological advancements, evolving workplace dynamics and escalating end user demands.

With emerging technologies transforming contact centres into smart centres, the significance of CX engagements and contact centres in siloed business units is fading and is being embraced into the enterprise's corporate strategy. There has been a notable shift in how regional contact centres are managed and how agents respond to changing customer behaviours and needs. The contact centre industry focuses on achieving exceptional customer and agent experiences while boosting cost-savings and efficient operations. The key transformation catalysts in the CX landscape are people, processes, data and technology.

Service providers are developing innovative intellectual property and seeking strategic partnerships to expand their portfolio of solutions and capabilities while being adaptable and agile in redesigning enterprise operating models and redefining KPIs and outcomes. The providers are also increasingly investing in strengthening their technological expertise and developing the skills of their workforce to remain knowledgeable and competitive in modern enterprise conversations.

The key trends impacting the contact centre industry in 2024 are listed below:

Enhanced CX and AX through AI-powered support

With omnichannel support and automation, self-service options, RPA and bots, routine contact centre tasks such as ticket categorisation, handling customer queries and managing customer data can be easily carried out. While reducing the response time considerably, such data-driven automation streamlines business processes and enhances operational efficiency by allowing human agents to focus on other challenging and value-added customer interactions.

In particular, integrating AI, such as conversational AI (with natural language understanding), in business operations can significantly boost customer satisfaction and loyalty by simplifying processes and offering customers real-time support and a personalised experience at scale. AI-powered algorithms can streamline customer service and empower end users with better process control and reduced response times to their queries. Another notable advantage of AI-driven assistance is improved agent experience (AX), which reduces the cognitive strain on agents without compromising the quality of CX. Leveraging AI applications such as speech and sentiment analytics in contact centre interactions can further assist in gauging customer sentiments, targeting training needs and boosting AX.

Business continuity with cloud infrastructure

Post the COVID-19 pandemic, Australian enterprises have turned to cost-effective and user-centric cloud-based contact centre solutions to ensure secure operations and business continuity during times of crisis. This surge in enterprises seeking to switch from on-premises to cloud helps them navigate the challenges associated with omnichannel integration and hybrid and remote working models. The firms are increasingly opting to centrally host contact centres, utilising solutions that facilitate better supervision of agents. Additionally, the growing demand for cloud-based solutions is expected to increase the focus on multiple tools that are complementary to cloud solutions such as Unified communications as a service (UCaaS) and agent engagement solutions. This provides significant omnichannel support, ensuring seamless customer interactions across multiple channels. The cloud offers some notable advantages such as portability, business continuity, rapid scalability and decreased dependence on internal IT resources and system upgrades.

Emphasis on GenAI and intelligent processes

Generative AI (GenAI) is poised to significantly disrupt the contact centre industry through a proliferation of use cases to boost both AX and CX. According to ISG's 2024 AI Buyer Behavior Study, nearly half of the organizations said the biggest priority in their AI strategy is to build use cases that improve CX. The contact centre industry is marching forward for GenAI adoption, and the numerous use cases being developed in this space are either in mature proof of concept stages or are already implemented. Service providers are expanding and investing in partnerships with leading hyperscalers and other model hubs to build enterprise-grade GenAI solutions.

AI-powered chatbots and virtual assistants streamline customer interactions by offering instant, data-driven responses, reducing wait times and efficiently resolving issues. Integrating GenAI enhances customer service by analysing previous interactions to create customised responses, improving customer satisfaction and providing valuable insights into customer preferences. GenAI enables proactive issue resolution while empowering human agents with intelligent suggestions and recommendations during live chats aimed at accuracy and exceptional efficiency. The technology also has the potential to identify knowledge gaps by analysing agents' performance, thereby recommending personalised learning programs and ensuring continuous skill development in the workforce.

Focus on analytics, security and compliance

The shift to hybrid and remote work models, growing cyberthreats and sensitive consumer data collection necessitate enterprises to adhere to tighter data privacy regulations and security and compliance standards. Prioritising data transparency can help companies foster long-term trust, value, loyalty and customer satisfaction while complying with the privacy regulations. Industry standards and regulations, such as the Australian Communications and Media Authority (ACMA) guidelines, also play a significant role in shaping the contact centre landscape in Australia, ensuring compliance with privacy and consumer protection laws.

Implementing contact centre software embedded with advanced analytics capabilities offers enterprises the requisite customer insights. The software can assist in swiftly analysing large volumes of data and identifying non-compliance issues and broken processes, thus generating actionable insights. This aids businesses in shaping their marketing and product development strategies to provide better offerings, in addition to facilitating improved and personalised customer service for end users. Advanced analytics can also help companies spot cross-selling and upselling opportunities, promoting business growth.

Mix of onshore and offshore delivery capabilities

The Australian BPO market is experiencing increased competition and fragmentation due to the entry of global service providers. Delivering efficient BPO services while meeting rising customer expectations is crucial. As a result, service providers are continuously striving to balance onshore and offshore delivery capabilities. Australian BPO providers are increasingly establishing onshore delivery operations through acquisitions or rebadging client staff, ensuring proximity to customers.

This approach leads to better interactions, higher satisfaction, and improved data privacy and security, especially for public sector clients. Conversely, service providers are leveraging offshore locations such as India and the Philippines for commonly outsourced business services to remain cost-effective. The success of service providers depends on their ability to efficiently manage this balance while meeting customer expectations. Achieving the optimal mix of onshore and offshore capabilities enables providers to optimize cost, quality and customer satisfaction, driving operational excellence and market competitiveness.

Looking ahead and forecasting future developments

The contact centre landscape is shifting at a breakneck speed, driven by advancements in AI, automation, analytics, security and compliance, and real-time, personalised and omnichannel customer support. GenAI technologies, including ChatGPT and large language models, present numerous possibilities, and it is essential to choose the appropriate LLM for specific contact centre use cases.

While some service providers enable contact centres to utilise the selected LLM for specific GenAI use cases, we expect this to be a significant focus among more providers in 2024.

Enterprises must continuously evaluate their contact centre CX and focus on leveraging the right tools and training to drive business success. With GenAI increasingly outpacing human agents, it is imperative for them to be adept at using next-generation technologies and accessing AI-powered insights. With the bots managing the routine tasks, the onus of handling sensitive and challenging issues with emotional intelligence remains on the agents. Coupled with empathetic problem-solving abilities and being technologically adept, it can result in a truly engaging and value-based customer journey.

In the Australian market, contact centres are evolving with significant investments in digital capabilities, AI-powered support and cloud infrastructure. The focus is on integrating CX into corporate strategies, enhancing business intelligence, security and compliance. GenAI is transforming processes, and a mix of onshore and offshore delivery balances cost and quality.

Provider Positioning

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	Digital Operations	**Intelligent Operations**
[24]7.ai	Contender	Contender
Acquire BPO	Leader	Leader
ASTIA	Contender	Contender
Cognizant	Product Challenger	Product Challenger
Concentrix	Leader	Leader
CPM	Contender	Contender
Datacom	Leader	Leader
EXL	Product Challenger	Product Challenger
Foundever®	Leader	Leader
Genpact	Rising Star ★	Leader

Provider Positioning

	Digital Operations	Intelligent Operations
HGS	Product Challenger	Product Challenger
Infosys	Product Challenger	Product Challenger
Merchants	Contender	Contender
Mindpearl	Contender	Contender
Mphasis	Contender	Market Challenger
Probe Group	Leader	Leader
Serco	Product Challenger	Contender
Startek®	Product Challenger	Product Challenger
TCS	Product Challenger	Product Challenger
Tech Mahindra	Leader	Leader

Provider Positioning

	Digital Operations	Intelligent Operations
Teleperformance	Leader	Leader
Transcom	Market Challenger	Contender
TSA	Leader	Leader
TTEC	Leader	Rising Star ★
Wipro	Product Challenger	Product Challenger
WNS	Product Challenger	Leader

Customer experience transformation, **multidimensional approach to CX transformation**, relies on key catalysts such as **people, process, data and technology**.

Simplified Illustration Source: ISG 2024

Definition

Amid profound shifts, delivering exceptional CX demands a multidimensional approach to holistic transformation. Swift advancements in technology, evolving workplace dynamics and escalating end-user demands exert considerable pressure on enterprises, compelling them to reassess their operational frameworks, adapt with agility, address growing security challenges and navigate various other factors. These factors drive constant evolution in the contact centre industry, prompting enterprises to regularly reassess strategies and implement technological changes to foster growth. Enterprises are actively seeking strategic partnerships that will help them successfully manoeuvre through this evolving landscape.

To adapt to changes, service providers are taking substantial risks by investing in and expanding their portfolio of solutions and capabilities. They are advancing beyond traditional boundaries and expanding capabilities to address the entire spectrum of contact centre services, necessitating the development of technological expertise and a skilled workforce. As GenAI rapidly advances, it is poised to significantly disrupt the industry, leading to a proliferation of use cases. We believe people, process, data and technology will be key transformation catalysts and quintessential for successful implementation. Thus, it is pertinent for providers to have robust knowledge and know-how and foster greater agility. From helping enterprises redesign their operating models to redefining KPIs and outcomes, service providers are expected to engage in more strategic conversations.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following two quadrants for services: Digital Operations and Intelligent Operations.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the Australian market

Our study serves as the basis for important decision-making by covering providers' 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.

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

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

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

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

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

Digital Operations

Who Should Read This Section

This report is relevant to Australia-based enterprises across industries evaluating digital operations services providers for contact centres.

In this quadrant report, ISG highlights the current market positioning of Australian contact centre digital operations services providers that help deliver exceptional CX and how they address key enterprise challenges.

Australia's contact centre providers invest heavily in digital capabilities to meet evolving customer demands. They aim to enhance customer interactions and streamline operations by focusing on AI-powered automation, omnichannel support and real-time analytics. ISG identified over 60 percent of clients undergoing digital transformations, including generative AI (GenAI) implementations, which showcases a commitment to innovation and maintaining a competitive edge.

This report offers valuable insights for contact centre professionals, business leaders and decision-makers. Readers can expect a detailed analysis of AI and analytics' transformative impact and perspective on other technologies, including RPA, speech analytics and NLP.

Enterprises are leveraging these technologies to boost productivity, CX and real-time coaching. They are also exploring opportunities for personalisation, efficiency and intelligent conversations, which are essential for understanding the potential of AI and analytics to drive business growth in Australia's contact centre industry.

Technology professionals should read this report to understand how contact centre service providers leverage multiple technologies and to compare their technical capabilities.

Strategy professionals should read this report to understand global providers' capabilities and solutions, including their modernization efforts for improved CSAT scores and loyalty.

Digital professionals should read this report to understand and compare the providers of contact centre services that enhance digital operations to improve CX.

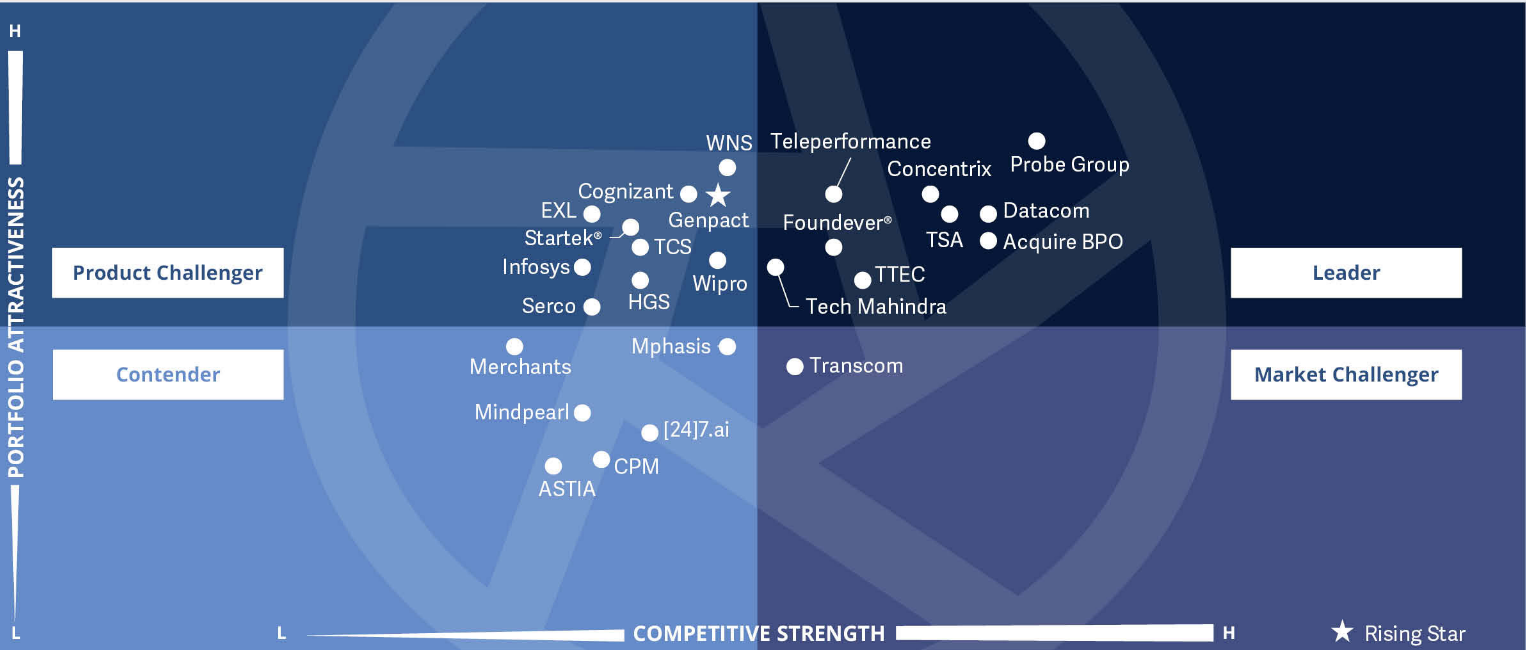
Contact centre professionals should read this report to enhance their understanding of contact centre operations, leading to refined service delivery, enhanced workplace and improved industry standards.

ISG Provider Lens

Source: ISG RESEARCH

Contact Center – Customer Experience Services
Digital Operations

Australia 2024



The Digital Operations quadrant evaluates Australia's contact centre providers that focus on their investments in **AI automation, omnichannel support and real-time analytics** to improve customer interactions and streamline operations.

Sandya Kattimani

Definition

The Digital Operations quadrant assesses service providers' broad capabilities to address the end-to-end value chain of contact centre services. It starts with understanding their consulting services, domain knowledge, industry expertise and technology know-how. Service providers must demonstrate their ability to assess clients' maturity through their maturity assessment framework. It is crucial to showcase their ability to design and deliver tailored solutions that include optimal operating models, demonstrating the length and breadth of their technological capabilities, the contact centre infrastructure they offer, and their delivery models and innovative pricing strategies. Digital infrastructure is a critical element in accessing service providers' capabilities. This assessment encompasses digital technology proficiency and integrates multiple dimensions to define successful business outcomes, which will serve as a key measure to help clients achieve their ESG goals. Talent is another crucial topic; companies are actively building talent capabilities that include onboarding, training, employee engagement and retention programs. They are actively using digital technologies such as AI and analytics to manage the talent landscape within organisations.

Service providers' vision and vested interest to grow in this industry are crucial. Strategic initiatives such as investments in proprietary solutions, successful partnerships, mergers and acquisitions, innovation centres or CoEs and thought leadership play pivotal roles in their growth trajectory.

Eligibility Criteria

1. Demonstrate strategic **vision and investments** to build service providers' capabilities or portfolio of solutions
2. Offer **consultation** backed by domain expertise, industry leadership and maturity assessment frameworks
3. Provide essential **contact centre infrastructure** to enable agents and customers with multichannel/omnichannel capabilities and industry solutions
4. Bring various **digital capabilities** such as AI, analytics, GenAI, cloud and security
5. Have **talent onboarding and training** approaches, employee well-being programs and talent retention strategies in place
6. Focus on delivery centres, **right shoring models**, innovation, pricing models, **employee engagement models** (GigCX or contracting models) and hybrid working strategies

Observations

Australia's contact centre providers are investing significantly in digital capabilities to meet evolving customer demands. In 2024, there is an increasing focus on integrating AI-powered automation, omnichannel support and real-time analytics to enhance customer interactions and streamline operations. Tailored AI consulting and automation solutions are optimising processes across various industries.

Comprehensive agent development is improving personalised interactions and performance metrics, leading to better customer satisfaction and operational efficiency. With over 60 clients undergoing digital transformations, including GenAI implementations, providers are enhancing customer engagement and maintaining a competitive edge. This approach demonstrates a commitment to innovation and adaptability in a rapidly evolving landscape.

The integration of AI and automation is streamlining workflows and improving CX, with omnichannel support enabling seamless interactions across different channels. Data analytics drive more personalised experiences, and cloud contact centres provide significant flexibility and cost-effectiveness. These developments are essential for maintaining a competitive edge, especially as customer expectations for real-time service and personalised interactions increase.

From the 34 companies assessed for this study, 26 qualified for this quadrant, with 9 being Leaders and one Rising Star.

Acquire BPO

Acquire BPO offers comprehensive CX outsourcing solutions. It combines skilled resources with the latest technologies to help businesses expand their digital capabilities and enhance CX.

CONCENTRIX

Concentrix offers comprehensive CX services and has a strong presence in Australia's contact centre operations, with robust expansion plans supported by eight local delivery centres.

Datacom

Datacom has rapidly expanded its business in Australia and New Zealand, securing numerous government and private contracts. This growth is attributed to the extensive domain knowledge and expertise of its native Australian CX representatives.

foundever

Foundever® offers a range of services, including customer care, business optimisation, strategy and design, omnichannel CX, self-service solutions, chatbots, analytics and AI solutions. It drives digital transformation by combining deep expertise and technical capabilities to enhance operational efficiency.

probegroup

Probe Group has established a prominent position in the Australian CX outsourcing sector, providing a broad array of CX, operations, technology and staff augmentation services, all while leveraging emerging technologies such as AI and automation.

Tech Mahindra

Tech Mahindra is establishing itself as a leading provider of digital transformation and contact centre services in Australia, bolstered by its recent BPO acquisition in the Philippines, which enhances its ability to serve customers across Australia and APAC.

Teleperformance

Teleperformance's strong global presence, scale and ability to leverage its capabilities at a regional level make it a Leader in the Digital Operations quadrant.

tsa

TSA offers tailored solutions to effectively address market-specific challenges. Its proactive contact approach boosts call response rates, showcasing its capability to enhance customer interactions.

TTEC

TTEC's omnichannel capabilities and AI-driven automation significantly boost productivity and customer engagement, making its contact centre solutions cost-effective and user-centric.

genpact

Genpact (Rising Star) is an IT service and consulting company headquartered in the US. Its approach to Cora ContactUs.ai, a modular plug-and-play offering, and Total Experience (TX) methodology in assessing the ROI is a key differentiator.

Probe Group

Leader

> "Probe Group, a dominant player in this market, offers clients a balanced mix of onshore, nearshore and offshore CX services, leveraging local expertise to enhance customer engagement."
>
> *Hemangi Patel*

Overview

Probe Group is a leading digitally driven CX specialist and BPO provider in Australia with over 40 years of experience and more than 120 contact centres globally. It has 19,000 employees working across five countries and 29 delivery locations. With 28 percent of the employees based in ANZ locations, the company delivers exceptional CX through its strong onshore delivery capabilities in outsourcing, strategy and advanced AI technology. It has significantly reduced network congestion and customer complaints, showcasing the transformative power of AI in optimising service delivery and workforce management.

Strengths

Strong delivery and unmatched experience: Probe Group brings strong industry knowledge and experience serving the Australian market. Its extensive contact centre portfolio has contributed to an average client tenure of over nine years. In the past years, the company has showcased significant new customer wins — most of them being local players — across industries, including BFSI, logistics, retail, utilities, travel and hospitality, and telecom.

Strong focus on geographic expansion: In 2023, Probe Group significantly expanded its geographic footprint in APAC. It opened a new delivery centre in New Zealand with 150 consultants and established three new delivery centres in the Philippines with approximately 4,000 consultants newly added. The company added 30 employees in India through a hybrid model and opened a sales office in Texas.

Hybrid workforce management solutions: A wide range of technologies support Probe Group's hybrid workforce portfolio. It has designed initiatives such as the BYOX program, geolocation management and productivity analytics to enhance efficiency, job satisfaction and work-life balance.

Caution

Probe Group maintains its position as one of Australia's leading providers of contact centre solutions. However, to stay competitive with global players, it must move away from the time-based pricing method to more hybrid pricing methods adopted in the market.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till September 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Contact Center - Customer Experience Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

Most satisfied
Sales/Marketing

Least satisfied
Legal/Compliance

Region

Most satisfied
Australia/New Zealand

Least satisfied
Central/South America

Industry

Most satisfied
Telecom and media

Least satisfied
Public sector

Industry Average CX Score

Highest CX: 95.0
Lowest CX: 62.7

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 334

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	59.2%
Nearshore	20.3%
Offshore	20.5%

Appendix

The ISG Provider Lens 2024 – Contact Center - Customer Experience Services research study analyzes the relevant software vendors/service providers in the Australia 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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of Contact Center - 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

Lead Analyst and Author

Namratha Dharshan
Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens™ program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens™ program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance.

She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.

Co-Author

Hemangi Patel
Senior Manager and Principal Analyst

Hemangi has more than 10 years of experience in the field of strategy research and consulting space especially within ICT sector. She has proven her excellence in delivering projects, that include quality analysis, extensive primary and secondary research, market entry and go-to-market strategy, competitive benchmarking and company analysis, and opportunity assessment.

Here at ISG, Hemangi leads research activities for service provider intelligence report in the areas of BPO focused on customer experience and contact center services.

Hemangi holds her bachelor's degree in commerce from Mumbai University and MSc in economics from Symbiosis International University, Pune.

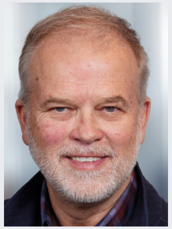
Research Analyst & Co-Author

Sandya Kattimani
Senior Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes. Sandya has over six years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in competitive intelligence, customer journey analysis, battle cards, market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights.

Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other ad hoc business research assignments.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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

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