ISG Provider Lens™

Contact Center–Customer Experience Services

Intelligent Operations

A research report comparing provider strengths, challenges and competitive differentiators

QUADRANT REPORT | OCTOBER 2024 | AUSTRALIA

Table of Contents 🏠

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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.

Executive Summary

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

Provider Positioning

Page 1 of 3

	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

Page 2 of 3

	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

Page 3 of 3

	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

Digital Operations

Intelligent Operations
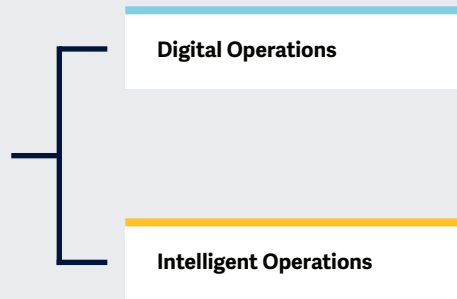
Definition

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.

★ **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.

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.

Intelligent Operations

Who Should Read This Section

This report is relevant to Australian enterprises across industries that evaluate intelligent operations providers for contact centres.

In this quadrant report, ISG highlights the current market positioning of Australian contact centre intelligent operations services providers and how they address key enterprise challenges.

The report highlights the critical link between agent experience (AX) and CX, covering necessary technological and non-technological elements for successful interactions. It emphasises unified communications, AI-based assistance, automated interaction summaries and performance monitoring to boost productivity. It stresses the importance of a supportive work environment, comprehensive training, continuous feedback and career development to reduce turnover and enhance agent experience.

Australian service providers are exploring the transformative impact of AI and analytics in contact centres. AI-driven tools like sentiment analytics and voice recognition provide real-time insights, enhancing operational efficiency and customer satisfaction. They recognise GenAI's potential to revolutionise the industry with advanced data analysis and contextual conversations. Leveraging these technologies and best practices can drive superior CX, improve employee satisfaction and boost performance and retention in contact centres.

Digital professionals should read this report to understand how AI and analytics enhance internal operations and customer interactions through better personalisation and efficiency.

Strategy professionals should read this report to discover how AI and analytics, including RPA, speech analytics and NLP, transform productivity, CX and real-time coaching.

Technology professionals should read this report to learn about the latest trends, best practices and challenges in implementing AI and analytics in contact centres.
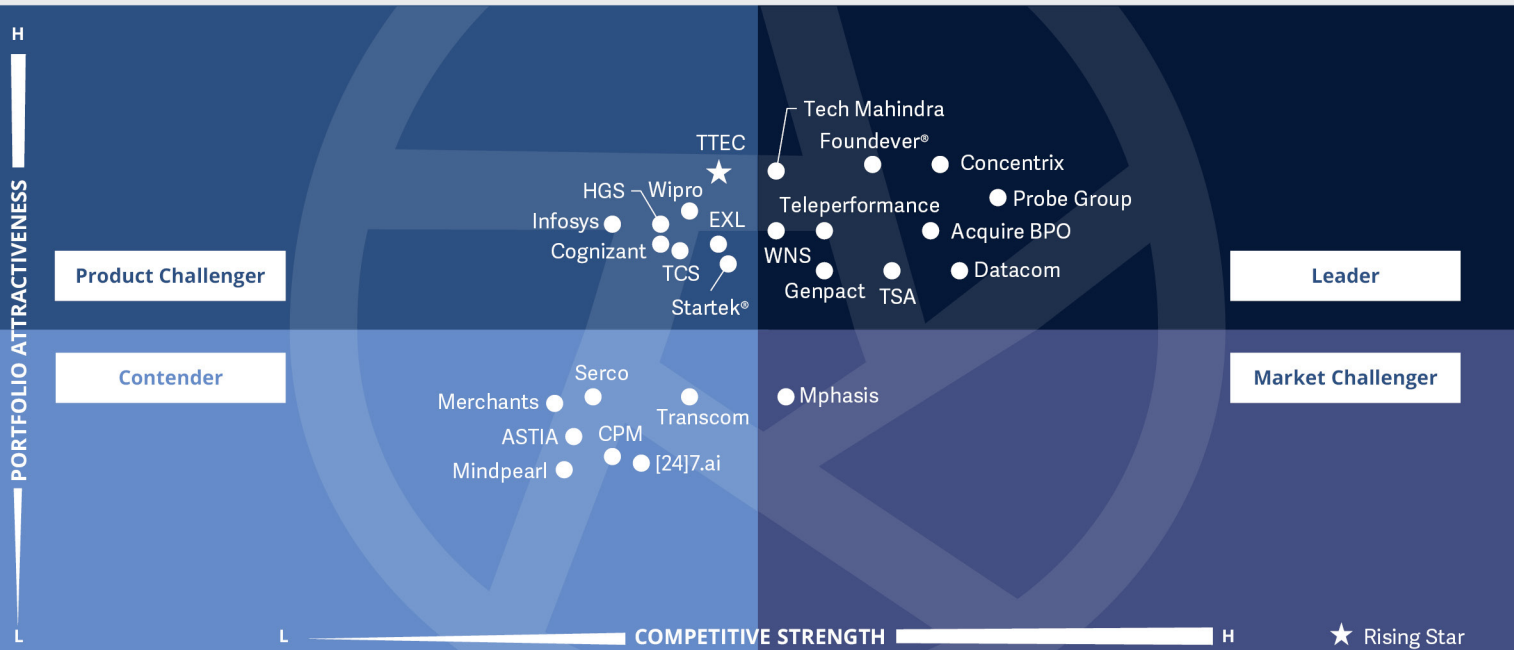
Vertical leaders should read this report to understand industry-specific solutions backed by technologies using AI and analytics offered by various providers.

ISG Provider Lens™

Contact Center – Customer Experience Services
Intelligent Operations

Source: ISG RESEARCH

Australia 2024

Quadrant chart:

- Y-axis: PORTFOLIO ATTRACTIVENESS (L to H)
- X-axis: COMPETITIVE STRENGTH (L to H)

Quadrants:
- Product Challenger (top left)
- Contender (bottom left)
- Leader (top right)
- Market Challenger (bottom right)

Providers plotted:
- TTEC ★ (Rising Star)
- Tech Mahindra
- Foundever®
- Concentrix
- HGS
- Wipro
- Infosys
- EXL
- Teleperformance
- Probe Group
- Cognizant
- TCS
- WNS
- Acquire BPO
- Startek®
- Genpact
- TSA
- Datacom
- Serco
- Merchants
- Transcom
- Mphasis
- ASTIA
- CPM
- Mindpearl
- [24]7.ai

★ Rising Star

The Intelligent Operations quadrant assesses how **advancements in AI, automation and analytics** are enhancing customer interactions and agent performance, focusing on personalisation, efficiency and real-time support.

Hemangi Patel

Intelligent Operations

Definition

The use of emerging technologies for intelligent operations is transforming the contact centre landscape, significantly enhancing both agent and customer experiences. AI and analytics are crucial in boosting operational efficiency and customer satisfaction. AI applications, such as sentiment analytics and voice recognition, enable contact centres to gauge customer sentiments, facilitating superior CX. Analytics helps companies identify cross-selling and upselling opportunities, fostering business growth. Analysing customer information and behaviour patterns allows companies to proactively adjust strategies, products and services to meet changing customer needs and maintain a competitive edge. AI-powered algorithms, with their ability to analyse vast data and offer informed suggestions, simplify customer service.

AX is directly linked to CX and requires robust infrastructure and programs. It encompasses two dimensions — technological and non-technological. The technological aspect includes unified communications, providing a single interface for interactions across channels, and AI-based agent assistance offering real-time support, empowering agents with insights for informed decisions. Automated interaction summaries and real-time performance monitoring further enhance agents' efficiency. The non-technological aspect involves training, empowerment, supportive environments, continuous feedback, work-life balance, career development and upskilling programs. As AX becomes a critical success metric, tools such as analytics and reporting, collaboration technologies and best practices are essential in fostering loyalty, improving performance and satisfaction, and ultimately driving superior CX.

Eligibility Criteria

1. Offer **advisory services** with automation maturity and benchmarking assessments supported by a skilled consulting team

2. Provide AI and analytics technology applications, partnerships, homegrown solutions and **investments in GenAI**

3. Implement data strategies, frameworks and analytical solutions such as **sentiment analytics, VoC and speech/text analytics**

4. **Showcase case studies** that are focused on enhancing customer experience and agent capabilities with business outcomes such as revenue generation, customer retention, improved productivity, quality, satisfaction and engagement

5. Provide **career development programs**, training curriculums and tools such as gamification and security training

6. Utilise tools for real-time quality monitoring, workforce management, **remote work management and knowledge management**

7. Use **AI and analytics tools** to enhance AX

Observations

The rapid advancement of emerging technologies such as AI, automation and analytics is transforming the contact centre landscape, significantly enhancing customer and agent experiences. GenAI has further expanded opportunities by introducing benefits such as personalisation, improved efficiency, agent empowerment, and intelligent, context-aware conversations. AI-powered chatbots and virtual assistants streamline customer interactions by delivering instant, accurate responses, reducing wait times and efficiently resolving issues. Integrating GenAI enhances customer service by analysing previous interactions to create tailored responses, leading to more engaging and satisfying experiences. Analytical capabilities provide valuable insights into customer behaviour and preferences, enabling proactive issue resolution.

For agents, AI and analytics simplify routine tasks, reduce workload and offer real-time support, allowing them to focus on complex queries and deliver high-quality service.

By leveraging AI, contact centres can provide agents with real-time assistance tools that offer suggestions, relevant information and next-best-action recommendations during live interactions, enhancing their efficiency and accuracy. By leveraging AI capabilities, contact centres can also identify knowledge gaps and training needs by examining agent performance and customer interactions, enabling personalised and targeted learning programs. This accelerates the onboarding process for new agents and ensures continuous skill development and proficiency. The integration of these advanced technologies not only enhances operational efficiency but also drives customer satisfaction and loyalty.

From the 34 companies assessed for this study, 26 qualified for this quadrant, with 10 being Leaders and one Rising Star.

Acquire BPO

Acquire BPO, with its tailored AI consulting and advanced automation solutions, optimises operations across industries. It offers a robust work-from-home solution for seamless remote operations.

Concentrix leverages advanced AI technologies to enhance customer interactions and streamline operations in the Australian market.

Datacom

Datacom delivers customised solutions and boosts customer satisfaction through its innovative CX approach of design thinking, testing, rapid prototyping and ideation workshops, combined with emerging technologies such as conversational AI and predictive data analytics.

Foundever® is a leading global provider of CX products and solutions with a robust portfolio leveraging AI, automation, analytics and the metaverse. It prioritises enhancing AX with a strong emphasis on learning and development, agent assistance and KMS solutions.

Genpact's ability to leverage AI for CX services, especially CX.AI Hub, creates a compelling value proposition for customers while reducing costs and achieving business outcomes.

Probe Group's commitment to enhancing CX and satisfaction is demonstrated through its human-centric design approach, customised solutions, and the ability to leverage AI and analytical capabilities, positioning it as Leader in this quadrant.

Tech Mahindra continues to enjoy its Leader position in this quadrant owing to its comprehensive CX offerings, comprising a blend of both partner-driven and proprietary solutions.

Teleperformance

Teleperformance delivers a comprehensive portfolio of digital transformation and CX solutions. Its strength lies in its expertise in digital strategies, transforming CX and business processes.

TSA's proprietary, cloud-based solution and strong partnership with AWS drive innovation, delivering better customer experiences.

WNS is well-positioned to deliver valuable insights and innovative solutions, with over 1,000 GenAI-trained specialists and a strong analytics team, driving significant digital transformation for its clients.

TTEC

TTEC's (Rising Star) focus on AI and comprehensive agent development ensures robust, personalised interactions and effective performance metrics, driving customer satisfaction and operational efficiency.

Probe Group

Leader

> "Probe Group has been a leader in CX digitisation, adopting technologies and solutions such as intelligent automation, anomaly detection, real-time speech analytics, conversational AI and data analytics to improve CX."
>
> *Hemangi Patel*

Overview

Probe Group is a leading digitally driven CX specialist and BPO provider in Australia with an experience of more than 40 years and over 120 contact centres globally. It has 19,000 employees working across five countries, spread across 29 delivery locations. With 28 percent of the employees based in Australia and New Zealand, the company's strength is in delivering agile, flexible and tailored intelligent CX solutions. Probe Group can provide the desired scale and diversity with operations in Australia, New Zealand, the Philippines, the US and India.

Strengths

Comprehensive suite of CX services: Probe Group is a leader in delivering comprehensive CX services, including strategy and design. It develops tailored process platforms, software and strategies to meet client needs. Its ability to leverage AI for CX solutions, combined with a lean digital approach, optimises business processes, minimises investment risks and ensures high returns.

Continuous investments in IP solutions for better CX: Through its subsidiary Convai, Probe Group developed Oration, an intelligent automated conversational solution that enhances contact centre agents' ability to deliver superior customer service. Oration integrates identification, verification and intelligent routing functionalities, increasing self-service adoption, reducing handling times, and improving agent and customer engagement. Probe Group continues to invest in Oration to create a holistic platform.

Leveraging AI and analytical capabilities: Probe Group utilises AI strategies, intelligent automation, predictive modelling and prescriptive analytics to make data-driven decisions and deliver personalised CX. Key areas of integration include virtual agents, conversational AI, knowledge management, anomaly detection, optimised workforce management and sentiment analytics.

Caution

Probe Group maintains its position as a leader in the intelligent operations space in Australia. However, the company should address its attrition rate factor by enhancing its focus on AX capabilities.

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.

Customer Experience (CX) Insights

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

80.9

▲ 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

Methodology & Team

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

Author & Editor Biographies

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.

Author & Editor Biographies

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.

ïSG 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.

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