

The Forrester New Wave™: Conversational AI For Customer Service, Q2 2019

The 14 Providers That Matter Most And How They Stack Up

by Ian Jacobs
June 11, 2019

Why Read This Report

In Forrester's evaluation of the emerging market for conversational AI for customer service, we identified the 14 most significant providers in the category — [24]7.ai, Aivo, Avaamo, Cognigy, eGain, Inbenta Technologies, Interactions, IPsoft, Kore.ai, LogMeIn, Nuance Communications, Omilia, Salesforce, and Verint— and evaluated them. This report details our findings about how well each vendor scored against 10 criteria and where they stand in relation to each other. Customer service application professionals can use this review to select the right partner for their conversational AI needs.

Key Takeaways

IPsoft, Nuance Communications, And [24]7.ai Lead The Pack

Forrester's research uncovered a market in which IPsoft, Nuance Communications, and [24]7.ai are Leaders; Avaamo, Interactions, Verint, and Omilia are Strong Performers; LogMeIn, Kore.ai, eGain, and Salesforce are Contenders; and Cognigy, Inbenta Technologies, and Aivo are Challengers.

Vertical Specialization And Human/AI Blending Are Key Differentiators

In our customer survey, many customers cited the lack of vertical expertise as a stumbling block for vendors. The vendors that do provide deep industry-specific functionality stood out. Additionally, those with flexible solutions that allow human agents and conversational AI to intermingle during an interaction show differentiation.

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by [Ian Jacobs](#)

with [Daniel Hong](#), Sarah Dawson, Sara Sjoblom, and Diane Lynch

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Conversational AI Promises More Human-Like Customer Service

Across most industries, brands of all sizes have started to push heavily toward increased automation in their customer service operations. Many, if not most, of those brands now look to conversational AI as one of the key drivers for that automation. For example, nearly one in three global telecommunications technology decision makers for contact centers cite virtual agents as a top investment priority.¹

Conversational AI allows brands to use natural language processing and machine learning-based tools to support both their customers and the agents who support those customers.

Contact center application pros have numerous ways to acquire conversational AI. They could array their own developer resources to use conversational computing platforms, covered in the Forrester report “[The Forrester New Wave™: Conversational Computing Platforms, Q2 2018](#),” to build their own chatbots and virtual agents. Their developers could also use open source tools to roll their own solutions. Or they could work with the vendors in this evaluation — or those vendors’ go-to-market partners — and have those third parties design; develop; deploy; and, often, maintain their conversational AI efforts.

Conversational AI For Customer Service Evaluation Overview

The Forrester New Wave™ differs from our traditional Forrester Wave™. In the New Wave evaluation, we evaluate only emerging technologies, and we base our analysis on a 10-criterion survey and a 2-hour briefing with each evaluated vendor. We group the 10 criteria into current offering and strategy (see Figure 1). We also review market presence.

We included 14 vendors in this assessment: [24]7.ai, Aivo, Avaamo, Cognigy, eGain, Inbenta Technologies, Interactions, IPsoft, Kore.ai, LogMeIn, Nuance Communications, Omilia, Salesforce, and Verint (see Figure 2 and see Figure 3). Each of these vendors has:

- › **Solutions designed, developed, and deployed by the vendor.** Forrester included vendors that primarily provide their own design, development, and deployment services for conversational AI.
- › **Customer-facing solutions.** While we included a criterion for internal-facing solutions, all the vendors in this report also provide customer-facing solutions.
- › **At least \$5 million in annual product revenues.** Forrester included vendors with a minimum of \$5 million in annual license revenue in 2018.
- › **At least 25 active deployments.** Each vendor has a minimum of 25 customers already deployed live on its solution.
- › **Customers in more than one region.** Vendors have live deployments in more than one of these geographic regions: North America, Latin America, EMEA, and Asia Pacific.
- › **An indication of active interest from Forrester customers.** We focused on vendors that are most relevant to Forrester clients, as shown by the frequency of client requests.

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FIGURE 1 Assessment Criteria

Assessment criteria	Platform evaluation details
Artificial intelligence	How well does the product comprehend customer input using natural utterances? How well does it automatically improve with experience? How well does it determine intent? How robust is the product's analytics and reporting?
Omnichannel	How well does the product support conversational interactions over multiple touchpoints such as web, messaging, and IVR? How well does it support escalation to assisted service and provide actionable context to human agents? How well does it provide continuity across channels?
Voice and speech	How well does the product provide differentiated voice-based experiences such as via smart speakers, mobile apps, wearables, automobiles, or through telephony?
Agent augmentation	How well does the product act in an agent-facing capacity; for example, as an assistant for human agents in their interactions with customers?
Human and AI blending	How well does the product enable the interweaving of human agents and conversational AI in a single interaction with a customer? How effortlessly can a human agent invoke a chatbot? How can a chatbot invoke another chatbot? How does the agent tag intent in chatbot transcripts?
Vertical specialization	How well does the product support the needs of specific industries? For example, does the product provide industry-specific intent libraries or industry-specific dialogue flows?
Security and authentication	How robust are the product's security, authentication, and authorization features (including two-factor authentications, biometric authentications, and self-destructing messages)? Does the vendor's security leadership structure reflect broader enterprise needs?
Vision	Does the vendor have a compelling and credible three-year vision for conversational AI relative to competitors? Does the vendor's approach to pricing and professional services offer flexibility to enterprise buyers? What is the overall company focus on conversational AI versus other products?
Road map	What is Forrester's level of confidence in the vendor's road map, in terms of making its solutions more competitive for enterprise buyers, compared with other vendors in this evaluation?
Market approach	Is the vendor executing a successful go-to-market approach for conversational AI for enterprise customer service? How long has the vendor had live conversational AI deployments for text-based interactions? For speech-based interactions? And for both?

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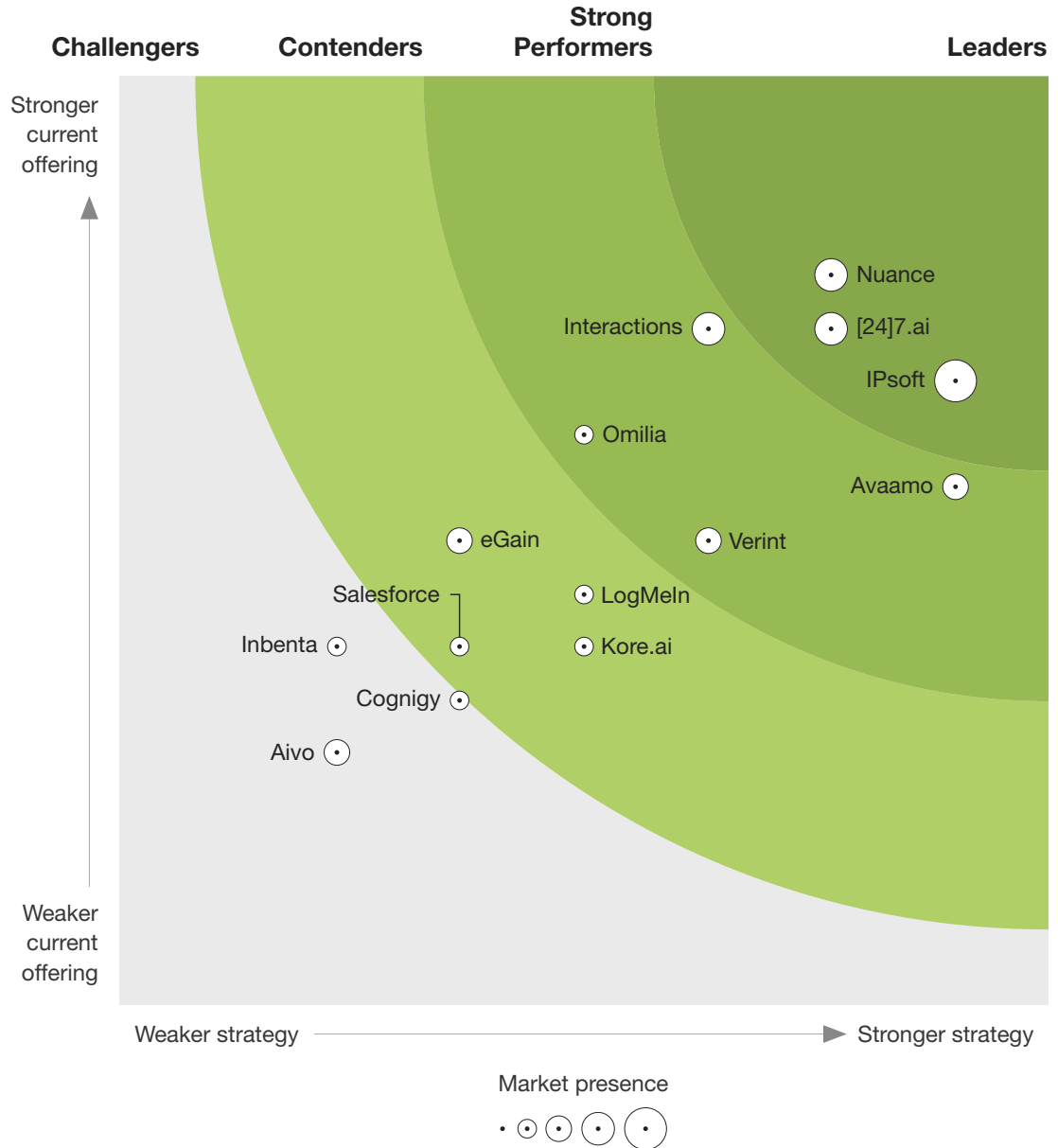
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FIGURE 2 Forrester New Wave™: Conversational AI For Customer Service, Q2 2019

THE FORRESTER NEW WAVE™

Conversational AI For Customer Service

Q2 2019



The Forrester New Wave™: Conversational AI For Customer Service, Q2 2019

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FIGURE 3 Vendor QuickCard Overview

Company	Artificial intelligence	Omnichannel	Voice & speech	Agent augmentation	Human & AI blending	Vertical specialization	Security & authentication	Vision	Road map	Market approach
IPsoft	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Nuance Communications	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
[24]7.ai	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Avaamo	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Interactions	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Verint	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Omilia	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
LogMeIn	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Kore.ai	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
eGain	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Salesforce	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Cognigy	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Inbenta Technologies	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️
Aivo	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️	⬆️

⬆️ Differentiated ⬆️ On par ⬆️ Needs improvement

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Vendor QuickCards

Forrester evaluated 14 vendors and ranked them against 10 criteria. Here’s our take on each.

IPsoft: Forrester’s Take

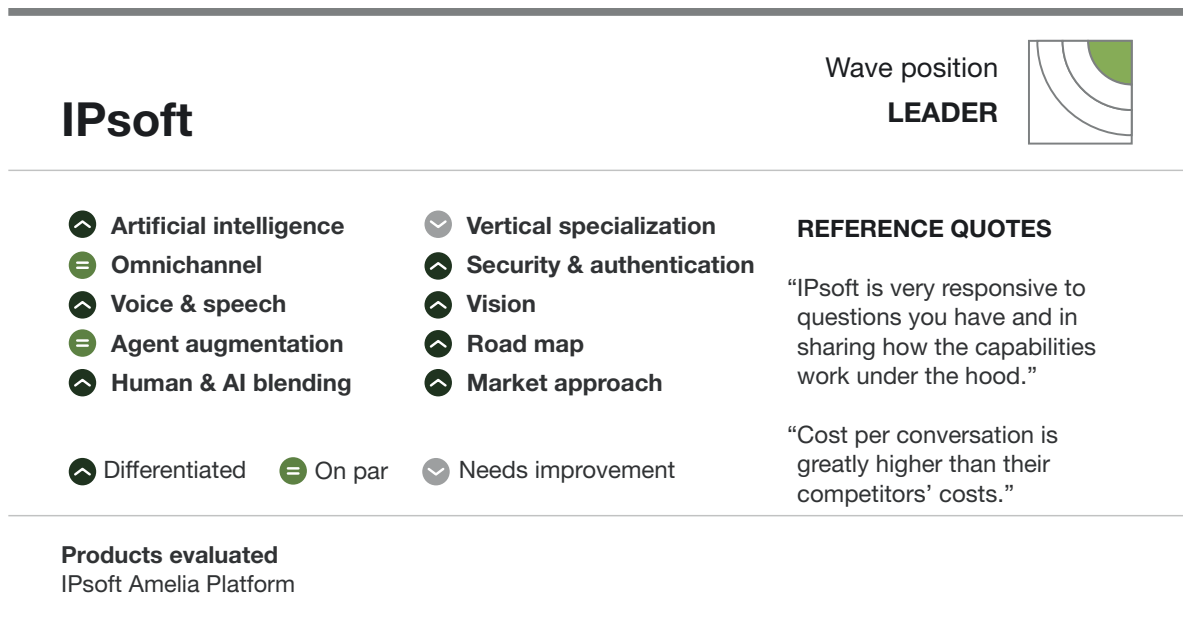
Our evaluation found that (see Figure 4):

- › **IPsoft’s go-to-market approach expands the reach of its already robust product.** IPsoft has beefed up its partner strategy, greatly enlarging its geographic and packaged solution reach and, eventually, its vertical reach, making its market-leading offer more attractive.
- › **IPsoft has, however, made its vertical functionality hard to discover.** IPsoft has created a marketplace for customers to acquire vertical functionality, but good luck finding that marketplace on its website or in its marketing.
- › **IPsoft provides conversational AI for complex use cases.** Though its product could answer simple, FAQ-type questions, it’s a more natural fit for brands looking to provide conversational automation for deep business processes or multi-intent situations.

IPsoft Customer Reference Summary

Customers pointed to a mix of strong pre-sales support and weaker leadership post-purchase from IPsoft.

FIGURE 4 IPsoft QuickCard



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Nuance Communications: Forrester’s Take

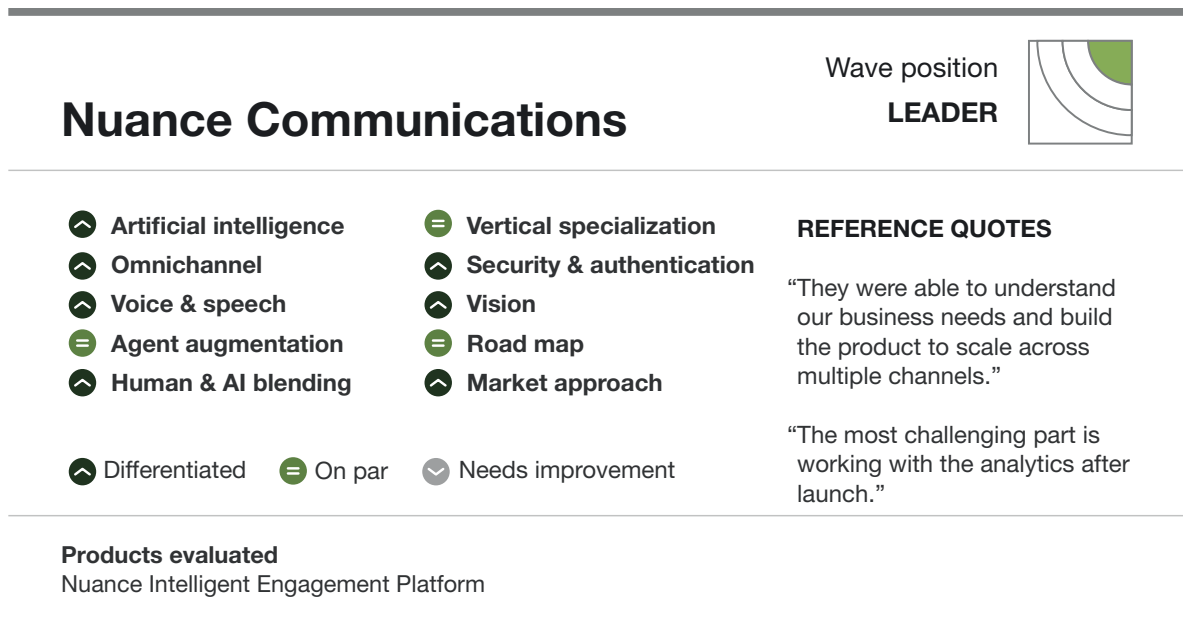
Our evaluation found that (see Figure 5):

- › **Nuance differentiates with its interweaving of humans and AI.** Nuance outstrips its rivals with its tools for human agents, which support the AI through disambiguation and intent detection, and its AI, which supports human agents with conversational suggestions and context.
- › **Nuance needs to modernize its architecture.** Nuance’s long experience in the space means it built its platform in an age before microservices and containerization. It’s still working on enabling microservices for its platforms and products.
- › **Nuance provides mission-critical, enterprise-grade, conversational AI.** From AI to dialog management to testing to customization to security and authentication, Nuance does it well, making it a great choice for very large brands.

Nuance Communications Customer Reference Summary

Nuance’s references collectively agreed that its conversational AI deployments have markedly improved their customers’ experiences.

FIGURE 5 Nuance Communications QuickCard



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[24]7.ai: Forrester’s Take

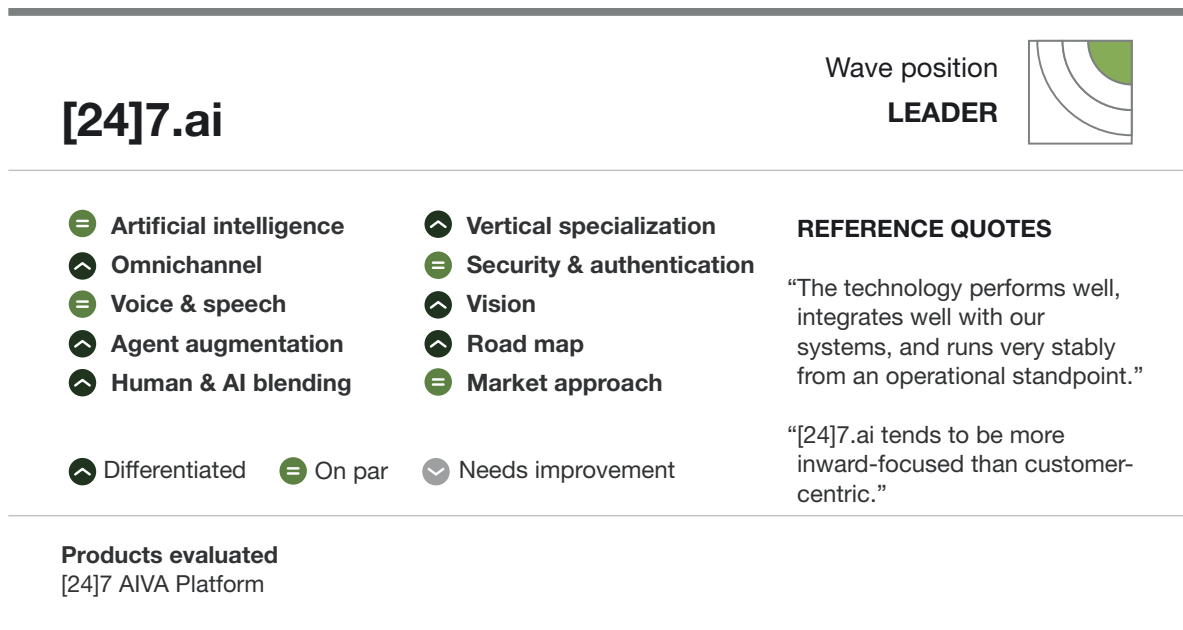
Our evaluation found that (see Figure 6):

- › **[24]7.ai’s vertical features stand out from the pack.** Deep libraries of domain-specific intents and quick-start bots for verticals show that [24]7.ai is strong in an area where most vendors fall behind.
- › **For a Leader, [24]7.ai still needs to expand its view of voice deployments.** Other vendors have started to embed speech-based conversational AI in automobiles and set-top boxes; [24]7.ai, while strong in voice, isn’t advancing the state of the art as those others are.
- › **[24]7.ai fits companies that start with DIY but want a strong vendor backup.** [24]7.ai is moving toward a toolkit approach, allowing brands to get something simple up and running on their own. But for complex use cases, [24]7.ai can provide the required army of resources.

[24]7.ai Customer Reference Summary

[24]7.ai’s customer reference wanted the company to “get out of its own shell” to better understand the customer’s overall business objectives.

FIGURE 6 [24]7.ai QuickCard



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Avaamo: Forrester’s Take

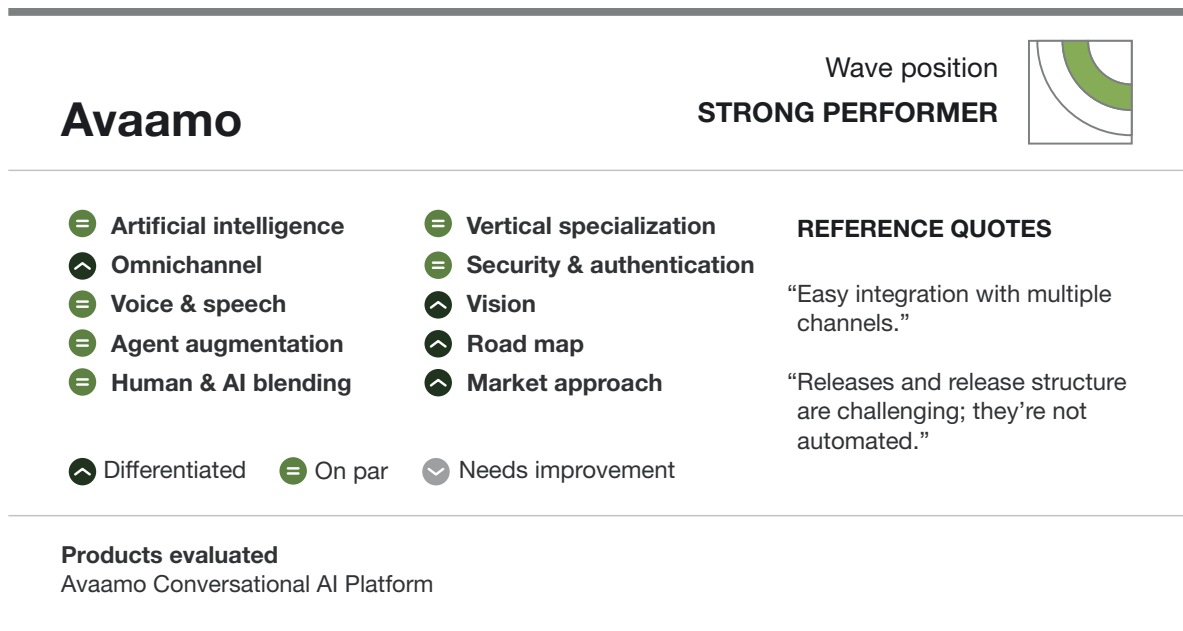
Our evaluation found that (see Figure 7):

- › **Avaamo has made a splash with unique partners.** Avaamo has investments from and technology partnerships with Ericsson and Intel, creating a unique go-to-market approach, and counts Tech Mahindra and Wipro as both investors and implementation partners.
- › **Voice features must remain a focus for Avaamo.** While the company is competent in speech use cases, its road map shows it has a way to go before it can compete with voice specialists that have a long heritage with speech-enabled interactive voice response (IVR) and contact center technology.
- › **Avaamo best suits brands needing simple pricing and beefy omnichannel features.** Avaamo offers a pay-per-use-case model that includes unlimited sessions, users, and languages. It also has numerous deployments at enterprise scale in and across multiple touchpoints, including one embedded in laptops.

Avaamo Customer Reference Summary

Avaamo’s customers provided decidedly mixed feedback on its capabilities in pre- and post-sales support.

FIGURE 7 Avaamo QuickCard



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Interactions: Forrester’s Take

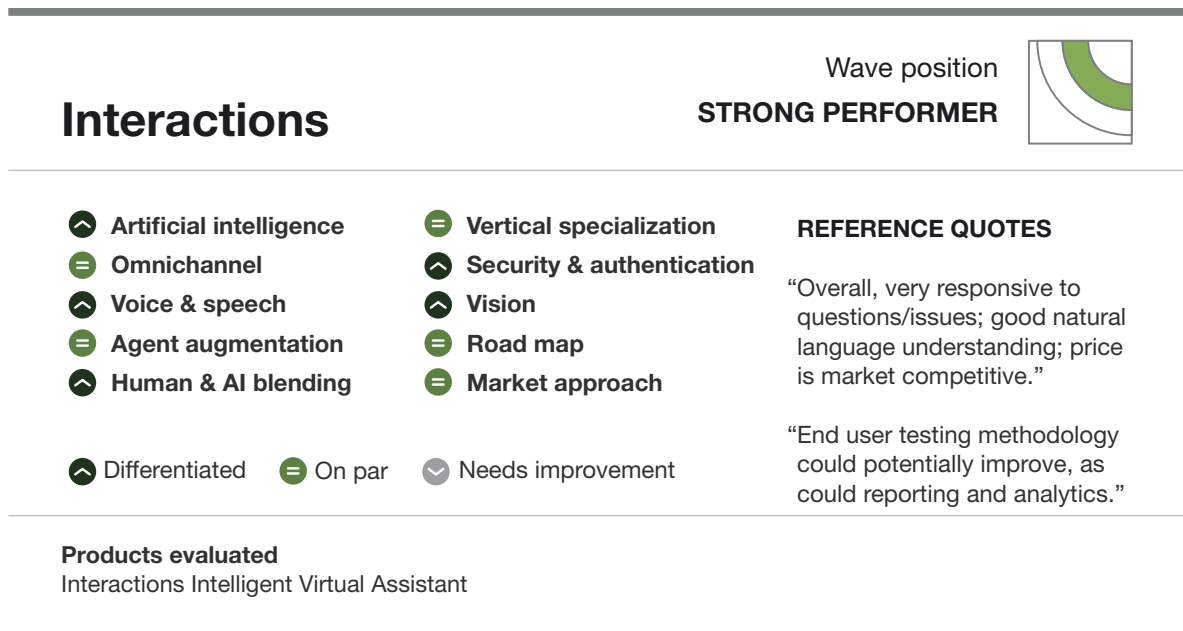
Our evaluation found that (see Figure 8):

- › **Interactions leads the way in real-time accuracy.** Using human-intent analysts to disambiguate confusing or poor audio-quality utterances, Interactions gets it right more often than most. Having humans in the loop continually improves the quality of the AI.
- › **Coming from a speech background, Interactions must amp up its digital functionality.** Over the past two years, Interactions has come a long way in automating digital interactions, but it must quicken its pace to catch up with the Leaders in this assessment.
- › **Interactions best suits brands looking for speech-based automation at scale.** While its recent Digital Roots acquisition has started to flesh out its digital capabilities, Interactions provides real value today for speech-based conversational AI.

Interactions Customer Reference Summary

Interactions customers appreciate the responsiveness of its account teams but would like to see more vertical-specific functionality in the product.

FIGURE 8 Interactions QuickCard



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Verint: Forrester’s Take

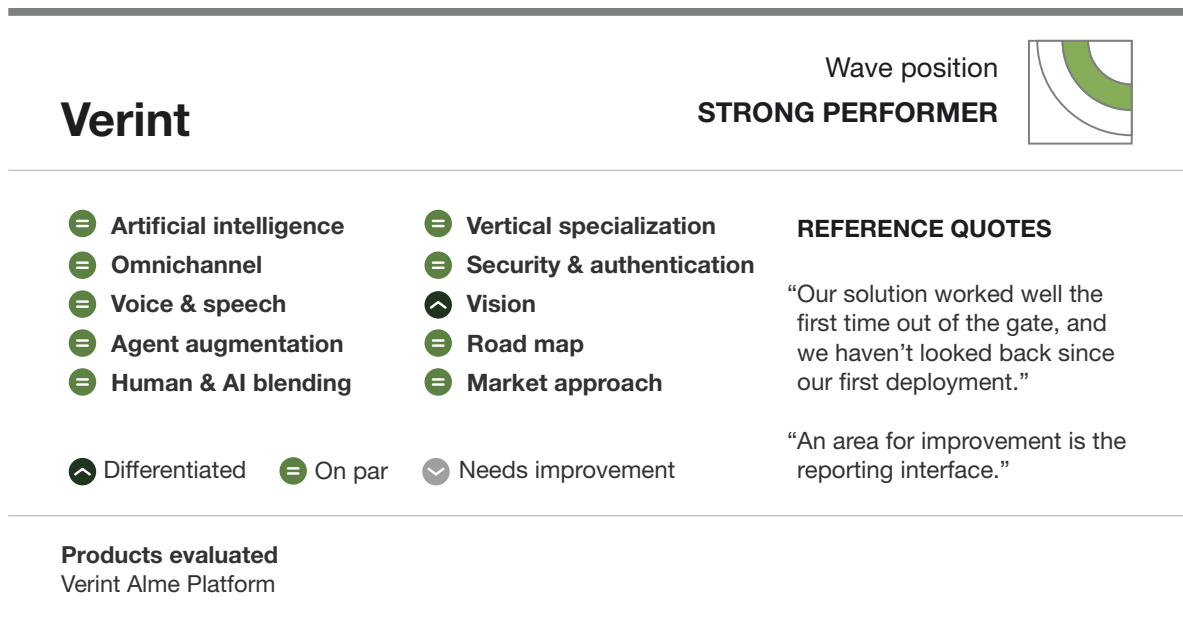
Our evaluation found that (see Figure 9):

- › **Verint’s strong analytics environment stands out from the pack.** Verint believes that natural language understanding (NLU) is swiftly heading toward commoditization. This makes analytics a key differentiator, and it’s an area in which Verint shines.
- › **Verint needs to execute on plans to improve fraud detection and biometrics.** Verint’s voice-based conversational AI already provides robust security features, but the company still needs to hit parity on the digital side.
- › **Verint best fits companies that need a realistic partner for complex issues.** Verint’s long experience in the market, solid functionality across the board, and pragmatic attitude make it a good match to help brands create reasonable goals and achieve them.

Verint Customer Reference Summary

Verint’s customers universally praised the vendor’s experience in the market, pointing to that maturity as a key component in their successful deployments.

FIGURE 9 Verint QuickCard



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Omilia: Forrester's Take

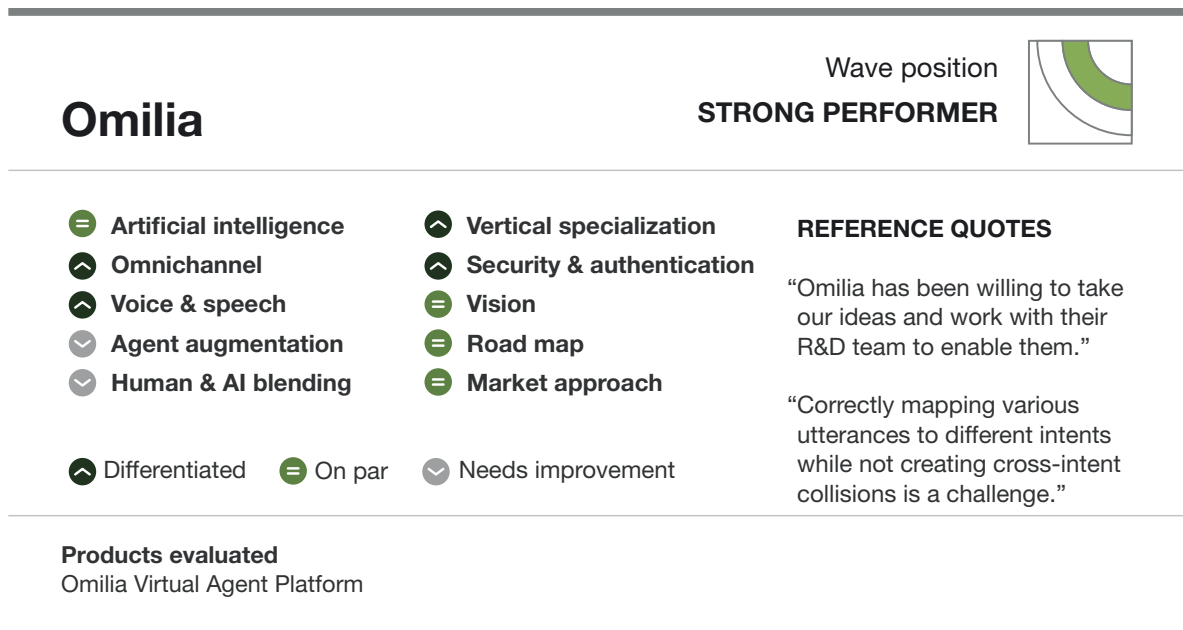
Our evaluation found that (see Figure 10):

- › **Omilia shines in security, privacy, and authentication.** From stout antifraud tools to multifactor authentication to passive voice biometrics, Omilia's security features stand out.
- › **Omilia needs to build out its agent-facing abilities.** Omilia's road map includes many agent-oriented tools for a reason: The existing functionality lags behind that of its peers.
- › **Omilia best suits brands looking for a voice-first approach.** With its powerful conversational IVR tools, Omilia fits brands that want to layer a smattering of digital interactions atop their conversational voice programs.

Omilia Customer Reference Summary

Omilia's customer references uniformly praised the vendor's understanding of their core business challenges and the intricacies of their industries.

FIGURE 10 Omilia QuickCard



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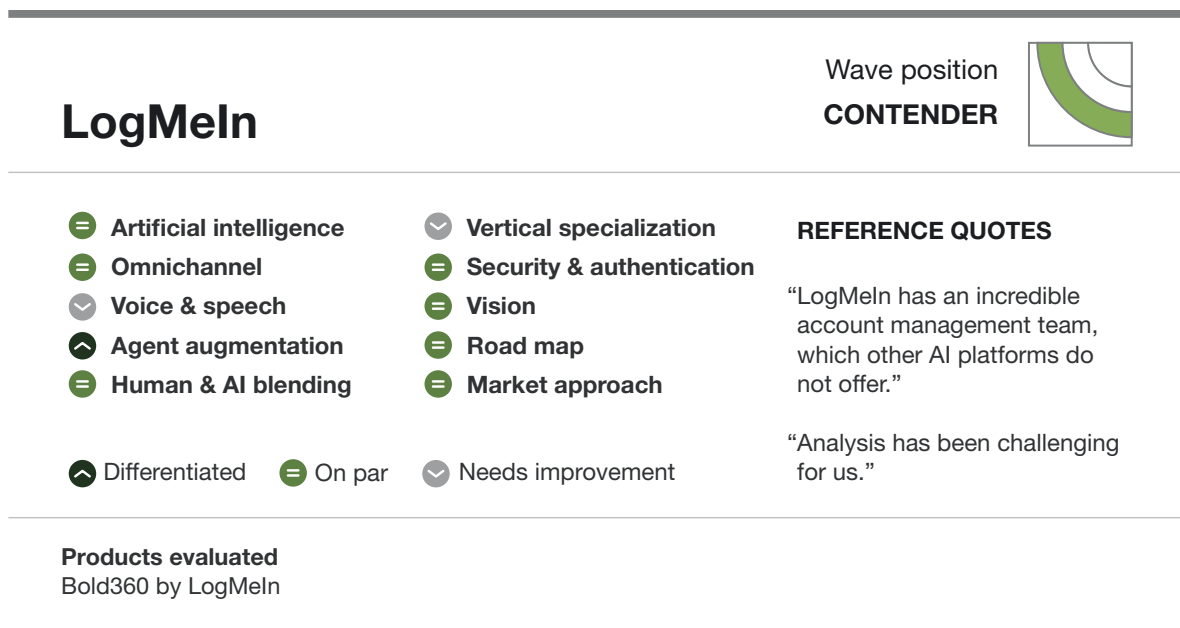
LogMeln: Forrester's Take

Our evaluation found that (see Figure 11):

- › **LogMeln's agent augmentation features stand out.** Many brands are using LogMeln's SmartAdvisor features to bolster their own employees and agents. With a single click, agents can push relevant conversational snippets directly to customers.
- › **LogMeln has yet to productize vertical features and lags in speech.** Although the vendor's customer success team works with brands to help "verticalize" deployments, brands looking for a quick-start approach to their industry-specific needs will come up dry. Additionally, LogMeln's solution lacks strong speech features.
- › **LogMeln best fits brands taking a truly digital-first approach to service.** For digital-heavy brands, LogMeln has tightly woven its conversational AI offer into its digital tools, both on the development side (ingesting chat logs to train the models) and during the interactions.

LogMeln Customer Reference Summary

LogMeln's customer reference loved the partnership, from the vendor's account team to the ability to easily tweak the physical aspects of the conversational AI experience, such as font colors.

FIGURE 11 LogMeln QuickCard

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Kore.ai: Forrester’s Take

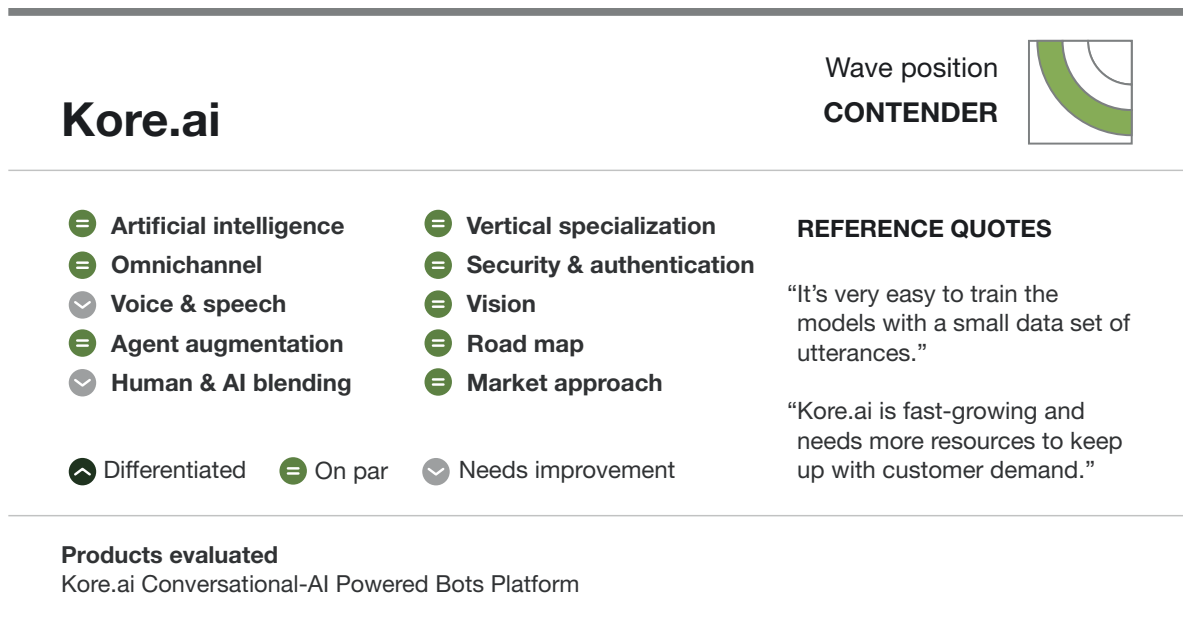
Our evaluation found that (see Figure 12):

- › **Kore.ai offers enterprise-grade tools to enterprise-sized customers.** For example, Kore.ai’s can both create topic models and autogenerate basic dialogues from chat logs or call transcripts. It also offers orchestration of multiple bots through a “universal” or master bot.
- › **Context for AI-to-human handoff is abundant but messy.** While Kore.ai allows brands to define the transfer data using JSON, it still needs to clean up the standard view of metadata it provides to ensure that agents can seamlessly jump into failed conversational AI interactions.
- › **Kore.ai best suits brands that want to eventually take a DIY approach.** Although Kore.ai designs and develops many of its customers’ conversational AI experiences, it provides a rich creation environment that makes it much easier for brands to take over those efforts.

Kore.ai Customer Reference Summary

Kore.ai’s reference customer cited a strong and engaged engineering team but also expressed concern that rapid growth has stretched those resources too thin.

FIGURE 12 Kore.ai QuickCard



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eGain: Forrester’s Take

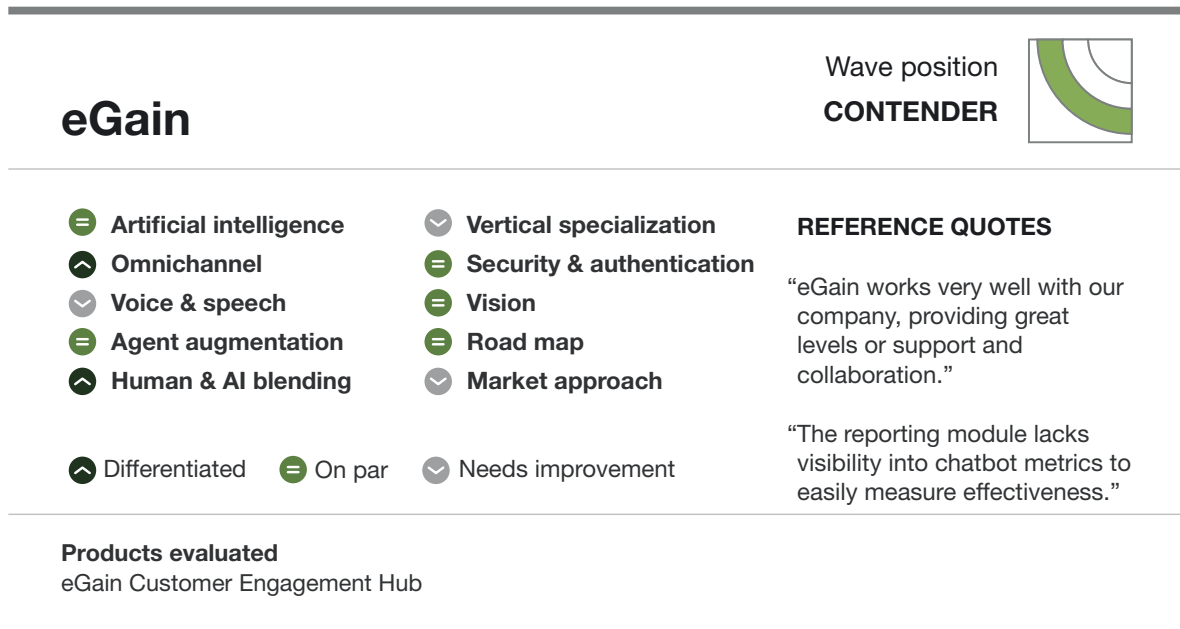
Our evaluation found that (see Figure 13):

- › **eGain leads with a broad, platform-driven story.** While its conversational AI has its own merits, eGain folds that product into a connected platform that marries it with personalization, knowledge management, context, and process guidance as well as other digital channels.
- › **eGain’s enterprise-grade speech functionality still needs to ramp up.** Given eGain’s long digital-first history as a provider of email, chat, and knowledge tools, it shouldn’t be a surprise that it has some catching up to do in the speech arena.
- › **eGain makes sense for brands looking for speed.** With a combination of quick-start methodologies and a focus on pilots that provide measurable value in about a month, eGain specializes in rapid time-to-value.

eGain Customer Reference Summary

eGain’s customers were keen on how willing it was to jump into custom development and to add new features based on their specific requests.

FIGURE 13 eGain QuickCard



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Salesforce: Forrester’s Take

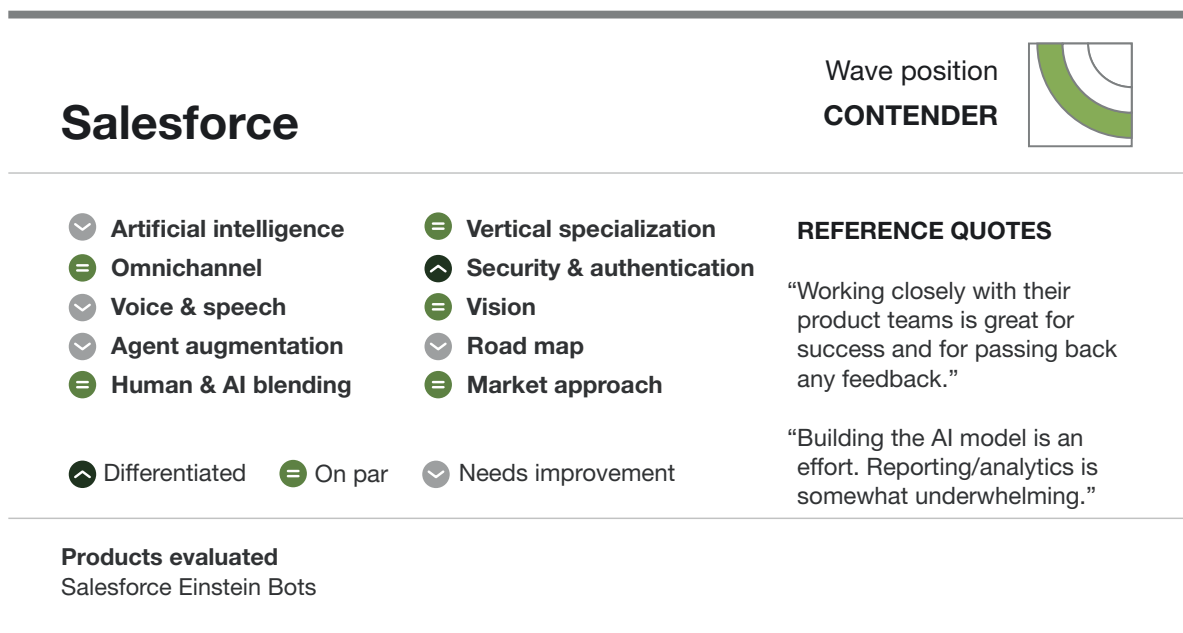
Our evaluation found that (see Figure 14):

- › **Salesforce provides true enterprise scale and functionality.** Salesforce knows what very large enterprises need: Its offering, for example, features a robust version-control system to allow brands to easily roll back from one build to a previous one, with best-in-class security.
- › **Salesforce’s extensive road map will only catch it up to the pack.** Salesforce has drafted an impressively full road map. The content of that road map — such as the ability to ingest chat logs as training fodder — will, however, provide only table stakes functionality.
- › **Salesforce makes a strong fit for brands looking to extend the Salesforce platform.** From the ability to easily surface information that resides in Salesforce records to specific intents triggering specific routing rules for human escalation, Salesforce has clearly looked for ways that customers can derive added value from their existing platform deployments.

Salesforce Customer Reference Summary

Salesforce’s customer reference was pleased with its partnership with the product team but also highlighted the current lack of vertical functionality.

FIGURE 14 Salesforce QuickCard



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Cognigy: Forrester’s Take

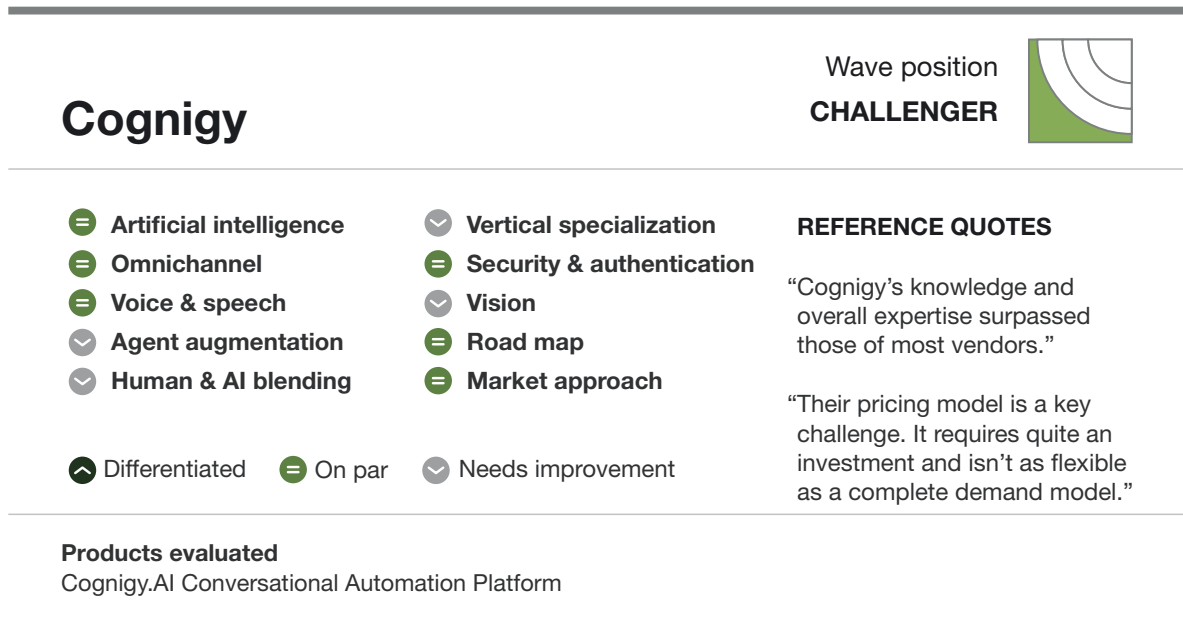
Our evaluation found that (see Figure 15):

- › **Cognigy offers an intuitive system for continuous improvement.** Cognigy created an innovative method for brands to replay previously recorded conversations against a dialogue flow, allowing them to assess each step individually for efficacy.
- › **Brands will need to connect to third-party tools for advanced analytics.** Cognigy’s standard analytics just hit the level of table stakes, but the vendor’s integration framework does allow for connections to business intelligence platforms such as Microsoft Power BI.
- › **Cognigy fits best with brands seeking flexibility and on-premises deployments.** Cognigy takes a “bring your own” NLU approach paired with a powerful dialogue creation environment as well as the ability to deploy conversational AI on-premises.

Cognigy Customer Reference Summary

Cognigy’s customers appreciated the strong support it provided them, specifically citing far less “being handed around” than with other vendors.

FIGURE 15 Cognigy QuickCard



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Inbenta Technologies: Forrester’s Take

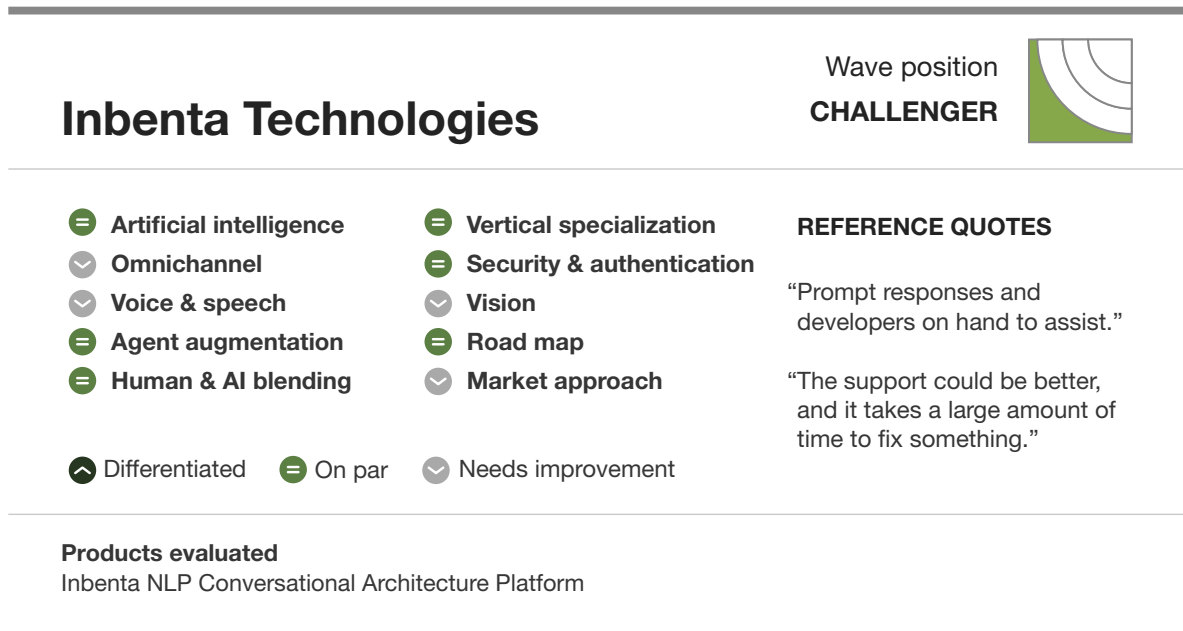
Our evaluation found that (see Figure 16):

- › **Inbenta’s road map sports unique “explainability” approaches.** In its next release, Inbenta’s natural language process debugger will provide brands with much greater transparency about why the AI answers the way it does.
- › **A developer-heavy mindset leaves line-of-business users out in the cold.** While it provides numerous APIs — and works with API partners such as Smooch — Inbenta won’t work as well for brands looking for more control at the business level.
- › **Inbenta best matches brands with a robust knowledge-management program.** Inbenta’s search and knowledge-management background makes it a better fit for brands in tune with that approach rather than those looking to use other sources for training the models.

Inbenta Technologies Customer Reference Summary

Inbenta’s customers complain of ongoing customer support hassles and limited verticalization or domain knowledge.

FIGURE 16 Inbenta Technologies QuickCard



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Aivo: Forrester’s Take

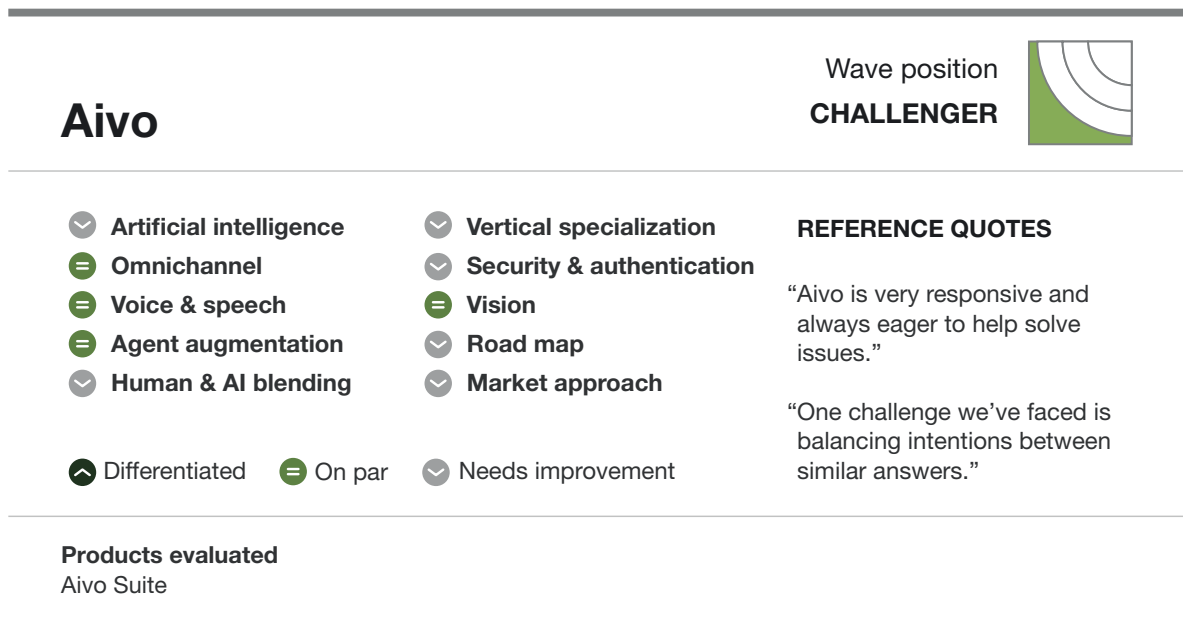
Our evaluation found that (see Figure 17):

- › **Aivo provides sturdy tools for boosting agent performance.** Aivo’s Live product offers omnichannel chat augmented by conversational AI. The tool provides suggestions to agents based on answers that other agents have used successfully over the past seven days.
- › **Aivo needs to quickly step up its security and privacy game.** While the product covers the basic encryption bases, everything beyond that, including biometrics and alternate authentication channels, remains on the road map.
- › **Aivo best matches brands with multilingual needs in the Americas.** Although Aivo will be using the next year or two to extend its geographic and linguistic reach to Asia, it’s a better fit today with brands looking for English and Spanish conversational AI experiences.

Aivo Customer Reference Summary

Aivo’s customer reference mentioned excellent support, both pre- and post-sale.

FIGURE 17 Aivo QuickCard



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The 14 Providers That Matter Most And How They Stack Up

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Supplemental Material

The Forrester New Wave Methodology

We conducted primary research to develop a list of vendors that met our criteria for the evaluation and definition of this emerging market. We evaluated vendors against 10 criteria, seven of which we based on product functionality and three of which we based on strategy. We also reviewed market presence. We invited the top emerging vendors in this space to participate in an RFP-style demonstration and interviewed customer references. We then ranked the vendors along each of the criteria. We used a summation of the strategy scores to determine placement on the x-axis, a summation of the current offering scores to determine placement on the y-axis, and the market presence score to determine marker size. We designated the top-scoring vendors as Leaders.

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Endnotes

- ¹ Thirty-one percent of global telecommunications technology decision makers significantly involved in contact centers (of 20-plus employees and 50-plus seats) say customer-facing virtual agents are a top priority, and 30% say agent-facing virtual agents are a top priority. Source: Forrester Analytics Global Business Technographics® Networks And Telecommunications Survey, 2019.

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