ISG Provider Lens™

Contact Center - Customer Experience Services

AI & Analytics

Global. 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

[24]7.ai

September 2021

About this Report

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The research and analysis presented in this report includes research from the "ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers, and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of <month year>, for providers who actively participated, as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

Contact Center Industry Landscape Post-Covid

'Post-pandemic," several changes happened that had an impact on businesses in some way or other. Some of the changes, however, were irreversible. On the other hand, end consumer buying behavior saw dramatic shifts and businesses are scaling to adapt to these changes.

As the contact center industry rapidly evolves to address the consumers of the future and their needs, businesses are beginning to realize the need for newer technologies and operating models. Accelerating transformation has become a priority item for all businesses. A lot has changed in the 18 months since the pandemic struck. There are new trends that are redefining this industry.

Fig 1

INDUSTRY TRENDS	TECHNOLOGICAL TRENDS	AGENT/ CUSTOMER EXPERIENCE
Outsourcing witnesses' growth	Rise in asynchronous message	Analytics is the new survival of the fittest
End-to-end outsourcing from hi-tech industries redefining outsourcing standards	Conversational AI adoption sees growth	People programs are more important than ever
Industry specific BPO is gaining traction	Cloud Contact Center is inevitable	Embracing hybrid working model – defining new norms
Brands turn to social media for growth	Stringent security measures are the new mandate	

Industry Trends

Outsourcing witnesses growth

Outsourcing activity in the BPO space is consistently growing. BPO annual contract value (ACV) was up 48 percent in the first half of 2021 versus 1H20. When the pandemic struck, contact center customer care faced many disruptions. Due to lack of preparedness, some enterprise captives struggled to move to a work-from-home model while balancing the customer queries at the same time. Given the situation, enterprises also realized the need for technology and the importance of disrupting the traditional business model by going digital. Besides, with the changing buyer behavior and the increase in digital, the skillsets required for an agent are also evolving. Thus, many enterprises are looking to outsource and leverage partnerships to accelerate their transformation journey.

High-tech industries redefining outsourcing standards

There is an uptake in outsourcing, particularly among the digital native companies, especially insurtech, fintech, and healthtech industries. Being asset-light and maintaining lean operational structures, technological adoption is the highest priority among these companies. The companies are also looking at outsourcing a large part of the functions, to reap the benefits of outsourcing from day one, while the businesses focus on their core operations.

Industry-specific BPO is gaining traction

Every industry has nuances attached to it that are distinctly different from the others. Understanding the depth of any industry, applying the learnings, and enabling agents with the right set of data and insights so their conversations with end customers are contextual, personalized, enriching and informed, means delivering true customer experience. One of the points of scepticism that has made most enterprises reluctant to outsource critical functions is whether the service providers would understand business nuances. However, service providers are making investments to strengthen their industry-specific offerings and are actively leveraging what they've learned, by applying analytics to help agents deliver more contextual conversations. With growth and investments occurring, the industry is witnessing a growth in industry-specific BPO sourcing.

Brands turn to social media for growth opportunities

Social media become a more important channel of communication during the pandemic, and post-pandemic. With lockdowns and social distancing norms, customers are leveraging this platform for customer service, complaints, purchases, sales, etc. Brands are increasingly turning to social media to tap into new customers and to manage their existing customers. Social media is acting as one of the key channels for sales and marketing because it makes it easier for companies to reach out to masses effortlessly and quickly. While social media has deep advantages, it also comes with its own set of challenges. Brands have to be extremely agile to manage these channels because brand damage can occur at the same speed at which you can build a business. Content moderation, community management, web crawling and scanning have become extremely important, and companies are required to stay on top of this 24/7.

Fig 2

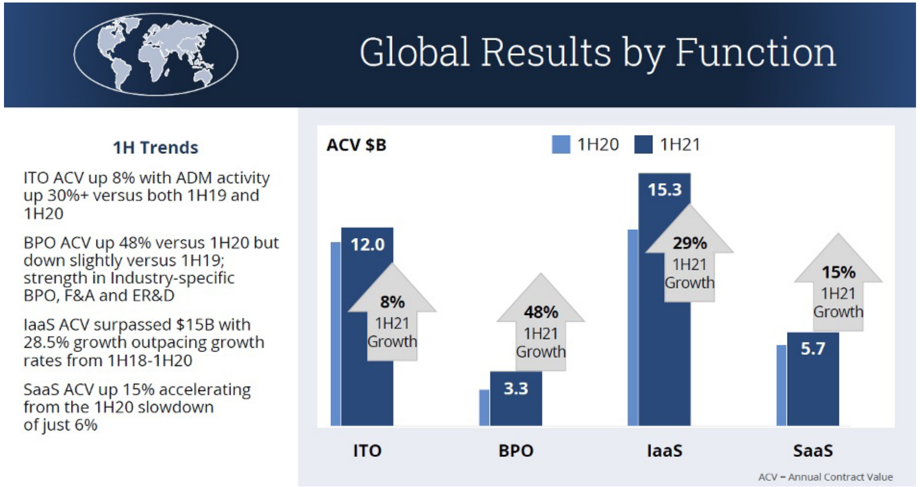
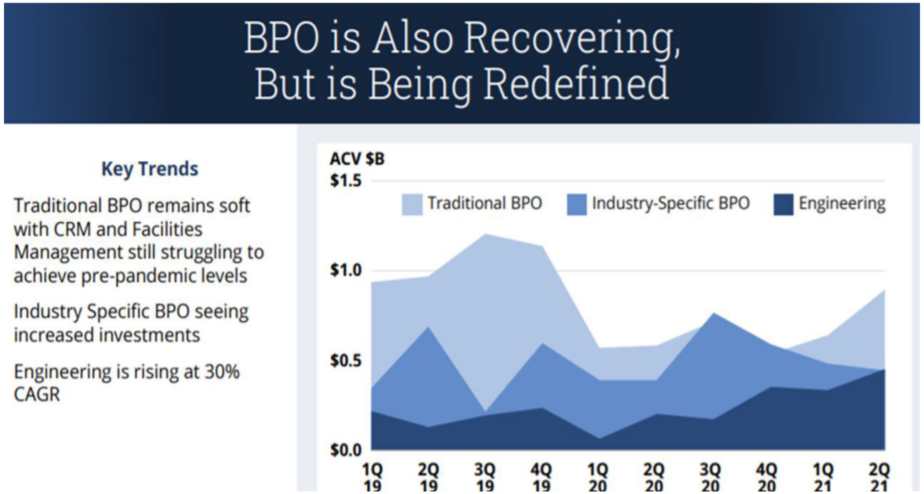


Fig 3



Technological Trends

Rise in the adoption of asynchronous messaging

Asynchronous messaging saw an uptick in usage post-pandemic: Customers turned to digital channels to defeat queues and waiting times. Queries were of all kinds, some that needed immediate attention, and others that could wait if customers received a response to their queries. For these reasons and more, asynchronous messaging worked well. Though agents work sequentially on this in the background, agents can productively resolve more queries, and unlike live chat, one doesn't have to leave customers frustrated. For customers, on the other hand, it becomes a matter of convenience because they could use the chat service at their convenience and pick up threads from where they left off even if they respond hours later.

Conversational AI sees more adoption

Conversational AI has been in the market for some years. However, the adoption rate has dramatically increased in the last 12 months. The solutions in the market are maturing, and with more enterprises realizing the potential a bot can bring, companies are ready to embrace and explore this technology to its fullest.

With low code/no code becoming more prevalent, conversational AI deployment has become easier for companies and employees, even if they lack technical know-how. With the growing importance around industry-specific solutions, conversational AI is no exception. Some of these solutions come preloaded with industry nuances that give companies faster go-to-market with their solution. With the deployment of such industry-specific bots, the bots are rapidly maturing and are able to solve more complex queries. Over time, integrating these solutions so the bots can talk to the internal systems has drastically improved, thus making it easier for companies to deploy solutions.

Cloud contact center is inevitable

With the growth in cloud-based platforms, the market is witnessing a phenomenal trend. Adoption of a cloud contact center is inevitable because the benefits are well known. Taking it to the next level are the service providers, which are significantly expanding their partnerships with cloud platform companies or are investing in developing proprietary solutions to help clients accelerate their transformation and effectively address business continuity.

Security can be the biggest inhibitor if not done right

It was a challenge for most enterprises to accept work-from-home, but given the pandemic situation most enterprises did not have a choice. However, as the work-from-home model has successfully worked for most companies, the question of securely sustaining operations with disparate working models is the burning question for most of them. However, the technology and solutions in this space are evolving beyond multifactor authentication and secure networks. Companies are introducing video analytics, voice biometrics, facial recognition, geolocation and other embedded security solutions to continue monitoring their agents on a real-time basis and to instil strict protocols to ensure security.

Agent Experience Trends

Analytics is the survival of the fittest

Analytics is a game changer for customer experience. Empowering companies with the right set of information at the right time will help them achieve desired business outcomes. This begins with employee experience and, if agents are not empowered with the right information, it can be detrimental to customer success in the long run. With millions of interactions across numerous agents, companies must leverage this data to turn it into meaningful conversations.

Innovation in the space of employee engagement

Burnout is real. The work-from-home environment comes with its own set of advantages and disadvantages. Brick-and-mortar contact delivery centers have always provided a vibrant atmosphere for employees. With daily huddles, team meetings and fun activities, the environment in brick-and-mortar facilities was different. However, in a work-from-home environment, some of these social aspects are missing and companies are working hard to create an engaging atmosphere for agents. Focusing on innovative people programs has become more important, to ensure that employees are motivated and stay productive.

While businesses may not entirely adopt work from home, they will not return entirely to the office either. The hybrid working model is here to stay permanently for several reasons. As businesses adapt and embrace the new working model, companies are getting innovative in finding solutions to make this new working model highly effective for both employees and customers. Service providers in this industry are coming up with creative solutions like engagement hubs that provide state-of-the-art infrastructure to enable employees to strike the right balance between office and home. These platforms provide opportunities for employees to engage with other team members, with facilities for training, team meetings and fun activities. On the other hand, companies are also investing in innovative virtual platforms that provide opportunities for employees to engage virtually. Ultimately, happy agents lead to happy customers.

Introduction

Simplified illustration

Source: ISG 2021

Definition

The ISG Provider Lens™ quadrant report on Contact Center — Customer Experience Services focuses on outsourcing services and the associated aspects of enhancing the customer experience (CX). Providers are assessed based on their service offerings, delivery centers, language capabilities, full-time equivalents (FTEs) and digital transformation elements, such as consulting, artificial intelligence (AI), and analytics capabilities. Contact center service providers use technologies and practices such as design thinking, omnichannel support, cloud offerings, analytics and automation, to offer an end-to-end CX.

As buyer demands have changed drastically in the last 12 months, enterprises are now keen to explore technological transformation and get their CX strategy right to ensure high-quality services and improve the employee experience. This transformation can directly impact CX. As the buyer side matures, the supply side is also required to bring a variety of capabilities that address changing buying behaviors. Advanced

Definition (cont.)

technologies, best practices and newer operating models are needed to help enterprises get their CX strategy right. As CX becomes a priority, contact centers play a critical role in shaping it.

This study on Contact Center — Customer Experience Services 2021 is aimed at understanding enterprise requirements and provider capabilities to meet their demands.

The ISG Provider Lens™ study offers the following to IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- A perspective on different markets, including global, the U.S., Brazil, Australia, Europe, Asia, and the U.K.

Our study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new engagements.

Scope of the Report

As part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants on Contact Center – Customer Experience Services:

Given the growing needs and changing landscape of customer service, service providers in this space are evaluated based on the different offerings they bring to the client's table to address modern customer experience requirements in each quadrant and each region. The criteria of evaluation used are detailed in the introduction to each quadrant.

Digital Operations: Contact center CX services include outsourcing services that are directed toward enhancing the end-user experience. This quadrant covers outsourcing services with brick-and-mortar business models, end-to-end engagement and managed services. Providers in this space have in-depth experience and conduct extensive research to understand the industry and changing customer behaviors. They also have the vertical knowledge to accommodate the nuances of each industry sector and a nearshore or onshore presence to have a stronger understanding of the geographic culture. In addition, they offer digital advisory services to help clients embrace technology. This quadrant assesses each provider's capabilities, including its geographical footprint, workforce, languages supported, pricing models, consulting capabilities, digital technology capabilities, company size and capabilities and plans for the future.

Definition (cont.)

AI and Analytics: AI and analytics are important capabilities that are required in the current situation to deliver seamless CX services. Implementations in this space help companies drive meaningful and empathetic conversations with end users and have a significant impact on business outcomes. As a growing requirement in this industry, AI and analytics will fundamentally change the way customer services are delivered. This quadrant assesses providers with AI and analytics capabilities in terms of solution offerings, partnerships, implementations, innovations delivered, business outcomes, company size and capabilities, and plans for the future.

Work-from-Home CX Services: With the onset of COVID-19 and associated disruptions, industries took a drastic turn toward work-from-home models. Even the most highly regulated industries had to embrace work-from-home services. Over time, industries have recognized that various levels of this model are here to stay, and this factor has shed light on the possibilities of a hybrid model, which is the most feasible solution for business continuity, as resilience is an essential requirement. This quadrant assesses a provider's capability to offer work-from-home services, including infrastructure, technology and reliable cybersecurity measures.

Social Media CX: Social media services are slowly gaining traction. Over time, social media has become an important channel of communication for most enterprises. With the customer buying process making a gradual shift and millennials preferring channels such as Facebook and Twitter, social media is increasing in importance. Also, resolving issues is faster through social media channels, with no waiting time, than issue resolution was by traditional means. Companies are adopting various social media channels to offer customer support services, embracing technologies such as AI to continuously monitor these channels, and offering personalized services by leveraging analytics such as sentiment analysis.

This quadrant assesses providers offering social media services with relevant technologies to provide seamless customer experiences.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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.

Leader

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

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).

Rising Star

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

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.

Contact Center - Customer Experience Services - Quadrant Provider Listing 1 of 3

	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
[24]7.ai	Product Challenger	Leader	Product Challenger	Product Challenger
Alorica	Leader	Market Challenger	Leader	Leader
Atento	Leader	Product Challenger	Leader	Market Challenger
Capita	Market Challenger	Market Challenger	Market Challenger	Contender
Cognizant	Product Challenger	Leader	Product Challenger	Leader
Concentrix	Leader	Leader	Leader	Leader
Conduent	Leader	Leader	Leader	Market Challenger
CSS Corp	Product Challenger	Leader	Product Challenger	Leader
Datamatics	Contender	Product Challenger	Contender	Product Challenger
EXL	Product Challenger	Product Challenger	Product Challenger	Product Challenger

Contact Center - Customer Experience Services - Quadrant Provider Listing 2 of 3

	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Firstsource	Market Challenger	Product Challenger	Market Challenger	Contender
Genpact	Product Challenger	Product Challenger	Product Challenger	Leader
Hexaware	Product Challenger	Product Challenger	Product Challenger	Product Challenger
HGS	Leader	Leader	Leader	Leader
Infosys	Rising Star	Rising Star	Product Challenger	Product Challenger
Majorel	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Mphasis	Contender	Contender	Contender	Contender
Shapiro	Contender	Contender	Contender	Contender
Sitel Group®	Leader	Leader	Leader	Leader
Startek	Market Challenger	Product Challenger	Rising Star	Rising Star

Contact Center - Customer Experience Services - Quadrant Provider Listing 3 of 3

	Digital Operations	AI & Analytics	Work From Home Services	Social Media CX Services
Straive (SPi Global)	Contender	Contender	Contender	Contender
Sutherland	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Rising Star
Teleperformance	Leader	Leader	Leader	Leader
Transcom	Market Challenger	Market Challenger	Leader	Market Challenger
TTEC	Leader	Leader	Leader	Product Challenger
Webhelp	Leader	Market Challenger	Market Challenger	Product Challenger
Wipro	Leader	Product Challenger	Product Challenger	Market Challenger
WNS	Product Challenger	Rising Star	Product Challenger	Leader

Contact Center - Customer Experience Services Quadrants

ENTERPRISE CONTEXT

AI and Analytics

This report is relevant to global enterprises across industries for evaluating the AI and Analytics services of contact center providers. In this quadrant report, ISG highlights the current market positioning of global providers of contact center AI and analytics, delivering exceptional customer experiences and how they address key enterprise challenges globally.

With the COVID-19 pandemic, enterprises are looking at implementing fully operational omnichannel solutions for their customers. They want to engage with providers that offer chatbots and use conversational AI to handle increasing interactions across multiple channels, to reduce average handling time and enable agents to deal with complex queries. In addition to AI capabilities, enterprises are looking for deep analytics to understand customer sentiment and derive insights from speech and text data mining. Such solutions will enable enterprises to efficiently monitor agents' performance and have an in-depth understanding of sentiments toward their brands.

ISG notes that providers are investing in developing solutions that can be deployed across multilingual channels to understand first interaction resolution drivers, provide sentiment analysis and identify areas where digital solutions can reduce customer efforts. They are looking at driving efficiencies by implementing omnichannel analytics and voice to text agent analytics. Service providers are deploying advanced AI solutions that support the automation of complex self-service transactions, together with intelligent chatbots with human-centric automation to help agents seamlessly handle digital agent escalations.

IT and technology leaders should read this report to better understand the strengths of these providers and the areas that need improvement regarding their AI and analytics offerings. The report also helps them to analyze the multiple offerings of the providers and select the solutions that align with their business needs.

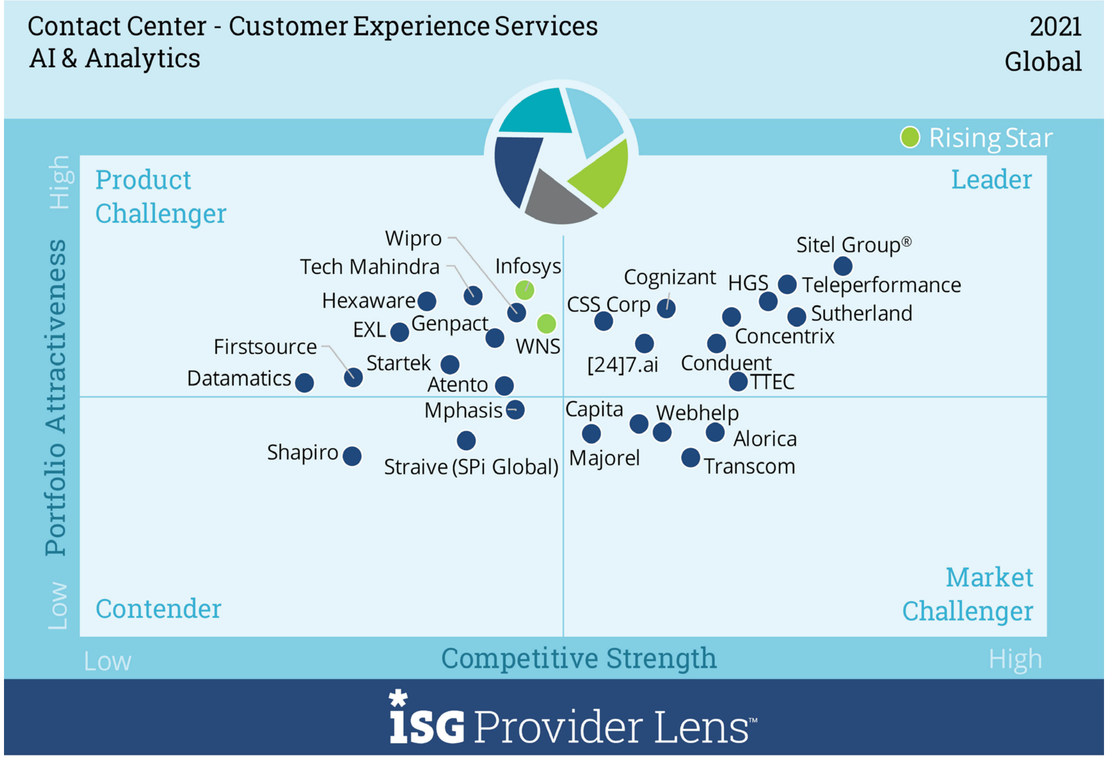
Digital transformation professionals should read this report to understand the broad range of AI and analytics solutions offered by providers and how they implement these solutions, at scale, to realize the desired outcomes.

Vertical leaders should read this report to understand the industry-specific solutions, backed by AI and analytics technologies, offered by these providers.

AI & ANALYTICS

Definition

AI and analytics are important capabilities that are required in the current situation to deliver seamless CX services. Implementations in this space help companies drive meaningful and empathetic conversations with end users and have a significant impact on business outcomes. As a growing requirement in this industry, AI and analytics will fundamentally change the way customer services are delivered. This quadrant assesses providers with AI and analytics capabilities in terms of solution offerings, partnerships, implementations, innovations delivered, and business outcomes.



Source: ISG Research 2021

AI & ANALYTICS

Eligibility Criteria

- Ability to maintain AI and analytics advisory teams
- Technical expertise
- Ability to provide AI bots, including conversational AI, digital assistants, etc.
- Analytics services such as speech analytics, text analytics, customer behavior prediction, predictive analytics, and sentiment analysis
- Ability to demonstrate successful implementations
- Scale of implementations
- Ability to help customers achieve business outcomes such as customer satisfaction scores (CSAT), net promoter scores (NPS), cost savings, and revenue generation
- Partnership ecosystem or proprietary solutions
- Ability to demonstrate referenceable case studies

Observations

- **[24]7.ai,** as the name suggests, has a developed AI portfolio, and the breadth of offerings led the company to be selected as a qualified Leader in this quadrant. Conversational AI being its most significant and prominent offering, the company also has other AI-based offerings that address both agent experience and customer experience.
- **Cognizant** has modular solutions and a large, skilled team, a combination that enables it to satisfy a wide range of client requirements.
- **Concentrix** and **TTEC** are named leaders in this quadrant because they have strong portfolios of solutions that are infused with AI and analytics.
- **Conduent's** continued focus and investments have led to it to build strong AI and analytics offerings. With its widely expanded partnership ecosystem, the company has a defined approach to help clients with these technology implementations.
- **CSS Corp** qualifies as a Leader in this quadrant for a second year in a row. The company made further progress with the launch of its proprietary solution, featuring AI, analytics and its automation-led approach, which has differentiated CSS Corp from other vendors.

AI & ANALYTICS

Observations (cont.)

- **HGS** has mature automation and analytics offerings. The company has demonstrated several case studies with implementations of AI and analytics helping clients with digital transformation.
- **Sitel Group®** leads in this quadrant with its highly differentiated AI and analytics offering. Sitel Group® has a well-developed automation ecosystem, with partnerships and proprietary solutions. Importantly, the company has made significant progress in implementing these solutions and delivering measurable results.
- **Sutherland** has always taken a digital-first approach. The company has been continuously focusing on developing its AI and analytics capability. Strong offerings, outcome-based pricing and successful implementations move this company into a leadership position in this quadrant.
- **Teleperformance** has made significant investments in expanding its portfolio. The company is named a Leader for its suite of proprietary solutions that it has developed, with some of them being industry specific, demonstrating a high degree of domain expertise.
- **Infosys** and **WNS** have been designated as Rising Stars for this quadrant. Infosys is winning new customers by bringing together a wide range of internal solutions and partner capabilities. WNS is gaining traction in the market with its EXPiRiUS solution and has several useful bots.

[24]7.AI

Overview

[24|7.ai has been providing analytic services, powered by AI technologies, to clients for more than a decade. With 184 enterprise customers, 200 million or more virtual agent inquiries and 1.2 billion self-service interactions per year, [24]7.ai is a Leader in AI and analytics. With more than 118 patents, [24|7.ai one of the strongest providers of AI and automation solutions

Strengths

Pioneering conversational AI solutions: [24]7.ai has differentiated itself in this space with its mature solutions around conversational AI. The company currently holds 118 patents and continues to invest in and develop AI-based solutions. Having achieved 95 percent accuracy on verbal input, this capability is a clear differentiator for [24]7.ai

Rapid deployment with [24]7.ai Engagement Cloud: Engagement cloud is [24|7.ai's proprietary platform that It is a cloud based and is an omnichannel platform powered by automation and analytics. It's It is a low-code platform that can automate conversations. [24]7.ai commits to a 20% percent automation within the first week, and 40% percent within the first quarter. Rapid Implementation gives [24|7.ai an edge over other vendors in this market.

Creating AI/human agent synergy: The company's Engagement Cloud is not only designed to bring automation on the customer front, but the platform also embeds "Assistance" that is designed to assist agents. Because the importance of human and digital collaboration is increasing, Engagement Cloud is a well-designed platform that enhances the capabilities of human agents. The platform provides AI modeling, analytics, automation and experiences to improve insights, predictions, outcomes and better experiences. Insights produced by AI can help drive CX decisions. The platform has enabled 1.2 billion annual conversations.

Caution

The company has laid out a strong roadmap for its solution development. Following its roadmap will further strengthen its solution. Since agents play an important role, the company must also focus and highlight agent training and reskilling that will empower them to use these solutions more effectively.

2021 ISG Provider Lens™ Leader

[24|7.ai has a strong suite of AI and analytics-driven solutions that caters to both customer and employee experience. The company's offerings demonstrate its domain expertise, translating into a full-fledged solution for contact centers.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 Contact Center - Customer Experience Services, Global" analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of 2021 Contact Center - Customer Experience Services, Global 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

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Namratha Dharshan brings nearly 17 years of extensive research experience to lead the ISG Provider Lens BPO and Industry vertical program that includes 17 different reports and is designed to deliver research on service provider intelligence. As part of her role she heads a team of analysts and is responsible for delivery of research reports for the Provider Lens™ program. Namratha is also a 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 centre services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance and contact center. Her research focuses specifically on the customer experience as it relates to digital transformation, omnichannel, analytics, AI and automation.

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Venkatesh is a Research Specialist with ISG Research. He is responsible for assessing the industry and technology trends and developments across the BPM sector including Procurement, Finance and Accounting and Contact Center industries and providing key insights for business decision makers in the enterprise clients and service provider ecosystem. He brings in more than a decade of experience in research, advisory, presales and other go-to-market initiatives across multiple geographies.

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Jan Erik, Author

Partner and Global Head – ISG Provider Lens/ISG Research

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 research director, principal analyst 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™ | Quadrant Report
September 2021

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