ISG Provider Lens™

Contact Center - Customer Experience Services

AI & Analytics

Global 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

CSS Corp

September 2020

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 May 2020 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The lead author for this report is Namratha Dharshan. The co-authors are Praveen Nair and Bharti Nagraj. The editor is Ambrosia Sabrina. The research analyst is Bharti Nagraj and the data analyst is Kankaiah Yasareni. The quality and consistency advisors are Dr. Linda Delbridge, Scott Furlong, Jarrod Magill and Wayne Butterfield.

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

Changing Contact Center Dynamics and Covid Impact

The lockdown in several regions due to the pandemic has led to service disruptions across many industries. Every industry had its own set of challenges. The travel industry, in particular, has been experiencing high call volumes because of the sudden restrictions on movement. Insurance is also reeling under the effects with higher claim settlements, while retail has faced a dip in call volumes. The impact of the pandemic thus varies significantly from industry to industry.

The contact center space is facing the following challenges:

- Many companies have experienced more than 20 minutes in wait/resolution time — a significant increase from 18 seconds.
- Some have warned its consumers of high wait times.
- Many consumers have been asked to call after 48 hours.

The COVID-19 crisis has brought in a dramatic shift in the buying/communication patterns of end users and this change is likely an irreversible phenomenon. The usage of non-voice channels has increased, and consumers have turned toward digital channels in this social distancing era. Expectations of an improved customer experience and a seamless shift between channels have increased multifold. Only a few companies have succeeded in delivering an omnichannel experience, while many others are continuing with basic channels. Brands are challenged to deliver the best customer experience with more personalization to ensure that brand loyalty does not shift and customer retention remains high.

Figure 1 – Impact of COVID on contact centers and future of communication

Voice calls will see a drastic decline but will continue to serve as an important medium of communication, especially to resolve complex queries.

Working from home is the new norm. Lesser regulated industries will continue with the work-from-home set up or move to a hybrid model. This will help expand the talent pool.

The adoption of **digital channels** will increase significantly. With the increased channel proliferation, channels such as WhatsApp and social media are gaining traction.

Cloud contact centers are a necessity. With the impact of COVID-19 in this space, the adoption of cloud contact centers will be fast tracked to enable seamless connectivity.

Personalization is the need of the hour. Enterprises can truly differentiate themselves by providing personalization backed by analytics that empowers the agent.

The increased adoption of **chat bots/conversational AI** to drive connectivity and handle most level 1 and level 2 queries during the pandemic was a game changer.

Source: ISG Research 2020

Trends that are shaping the contact center industry post COVID-19

With the rise of new working models and technologies, companies are still adapting and evaluating new ways of working. "Pandemic-accelerated digital transformation" may sound cliched, but enterprises have been accelerating their digital transformation journey. As most companies are trying to figure out the most optimal ways of working, the following global trends highlight the future of the contact center industry and the direction it is taking.

Shift in operating model: The pandemic has forced organizations to opt for completely new working models that would allow nearly all agents to work remotely. Traditionally, contact center agents have been working from secure facilities and were seated with hundreds of other agents with immediate access to their supervisors. However, with the new work-from-home facility, the dynamics have shifted with a complete change in environment. Many organizations are rethinking their geographic or facility expansion strategy. At the same time, there are concerns about connectivity issues and background noise that must still be addressed by most organizations. Significant investments have already been made to resolve some of these challenges, allowing many organizations to reap numerous benefits such as cost savings, access to talent, flexibility and higher productivity.

There are going to be challenges in adapting to this model. However, with technology evolving rapidly to support the work-from-home setup, a healthy mix of brick-and-mortar and remote working models is expected to emerge.

Beefing up security: As contact center employees are moving away from secure facilities and desktops, some agents are following the bring-your-own device (BYOD) model. As a result, security has taken precedence. Several technologies are evolving and are being embraced to support the work-from-home facility. Companies are adopting facial recognition, auto screen lock, voice biometrics along with a robust usage of VPN, screen monitoring, data discovery tools, etc. to strengthen security controls. Artificial intelligence (AI) is a game changer and will be highly leveraged to bring the latest security solutions to agents.

Bearing in mind that the contact center industry has been prone to breaches and with the sudden shift to the work-from-home model, systems have become more vulnerable than ever. Enterprises should thus take utmost care while address security concerns and provide frequent and extensive training for agents to make them aware of security breaches and the importance of following protocols.

Evolution of cloud contact centers: During a crisis, enterprises face a new set of challenges, especially while delivering highly personalized services seamlessly across channels. They are forced to rethink their technology strategy. Even legacy-heavy enterprises are making cloud platforms a priority. Those that have already adopted cloud contact centers have quickly implemented the work-from-home setup and are ensuring minimal disruption while making this transition. With the benefits of remote working, there is a push to adopt this setup on a long-term basis. Some of the benefits include productivity gains from employees, cost optimization and flexibility to tap into a larger pool of talent. Thus, to enable better business outcomes, contact centers are looking to accelerate their move to cloud solutions.

Technological advancements have significantly changed the way customer service is being delivered. Cloud contact center solutions are embedded with a multitude of technologies and deliver considerable business benefits to contact centers. The omnichannel enablement has been made considerably easier, and enterprises that leverage technology to deliver a better customer experience will be able to clearly differentiate themselves in this space. Analytics and single-screen management functionalities have enabled agents to deliver highly personalized services, thus ensuring high customer satisfaction. With a range of benefits offered by cloud contact centers, more enterprises are moving to cloud platforms and are taking full advantage of the available technology stack, including AI and machine learning (ML) for redefining personalization. These solutions also come with a suite of workforce management capabilities that empower supervisors with information about their teams, making them more effective in terms of managing agents, coaching them and providing live training. With workforce management, agents are fed with quality and timely feedback that allows them to seek opportunities for training and improvement.

With such functionalities embedded into one packed solution, the cloud contact center solution is highly suitable for enterprises that want to deliver a high-quality customer experience with its advanced technologies and ability to integrate seamlessly and talk to existing systems.

Channel proliferation increasing exponentially: With the announcement of lockdowns across the world and the immediate requirement for a remote working practice, none of the industries were prepared to embrace this sudden change. Call volumes, wait times and call abandonment rates increased significantly. Bandwidth challenges in the home environment have resulted in frustration among customers; long waiting hours culminated in calls getting disconnected while talking to advisors. This has induced a significant shift to asynchronous channels such as emails, social and async messaging wherein customers can communicate their issue and receive a response later without the need to wait. Some software vendors are reporting a 300 percent increase in the usage of these channels vs. the traditional voice system.

In the past, millennials have led in the adoption of digital channels much quicker than other generations. This in turn has resulted in immense pressure on omnichannel connectivity and seamless experiences. However, the pandemic has proved that channel adoption is generation agnostic. Every member of a household is being forced to turn towards digital channels such as for buying essential items. With this change in end-user behavior, enterprises are now required to ensure that their customers have enough choices and are not limited to voice channels.

Rise of intelligent contact centers: Automation has seen a sharp spike in usage during the pandemic. When agents were being shifted to the remote working setup, many enterprises leveraged chat bots to serve their customers for basic query resolution. Digitally native entities, especially FinTech and InsurTech companies, experienced minimal or no disruption due to their early adoption of flexible working models, cloud technologies and automation. Companies that adopted automation and leaned on conversational AI or bots to resolve numerous level 1 and level 2 queries had a great advantage. With automation becoming a necessity, most contact centers are actively looking to scale this capability and turn to newer technologies such as conversational AI, digital/virtual assistants, chat bots, etc. As bots are maturing and becoming smarter to provide a more human-like experience, agents will become more specialized to handle complex queries.

Analytics to drive empathetic conversations: An exceptional customer experience is enabled by true employee experience. If the agent is not empowered with information, it is nearly impossible to start the call without asking for basic information like name and phone numbers. With AI and analytics, an agent can now get complete background information to have more relevant, contextual, proactive and meaningful conversations with end users. Speech analytics, text analytics, sentiment analytics, customer behavior prediction, persona-based interactions, etc. are enabling more meaningful conversations.

Talent management and development as the next essential step: Agents are being pushed to adapt to new ways of working. They will be required to unlearn certain protocols that were more apt for the brick-and-mortar setup and pick up new protocols that are suitable for a remote working environment. This has become essential as companies are seeking to accelerate digital adoption. With the rapid implementation of automation, agents must keenly look into reskilling for handling more sophisticated calls or queries With newer skills, they will play an important role in retaining customers. Investing in training programs, agent development programs, including security training and education, will be highly critical for their development. Gamification in recent times has gained popularity and is highly engaging. Employees are highly engaged and maintain a healthy competition, thus impacting their productivity and motivation levels. With the shift to the work-from-home model, the adoption of robust collaboration tools is on the rise to enable peer interactions and agent-supervisor interactions.

Enterprises have identified that long-term remote working could lead to fatigue and lower motivation levels. Keeping employees engaged will be a challenge for most companies. Investments are being made in programs to address this concern. They are leveraging external agencies to ensure agent well-being and create a brick-and-mortar type of environment to keep active conversations going.

Revisiting BCP: Organizations did not have a business continuity plan (BCP) that was pandemic proof. It has become essential for them to revisit their existing BCPs that can enable nearly a 100 percent secure work-from-home environment and adapt to emergency situations such as the current pandemic. Companies are looking at long-term business resiliency plans. The COVID-19 crisis will bring several "new normal" practices to this industry, especially because companies have been fairly conservative in providing the work-from-home option. They are now reevaluating numerous options, one of which involves revisiting and improving existing BCPs to address such situations on priority. In the case of outsourced engagements, companies should work with their service providers to ensure business resiliency.

Introduction

Definition

Contact center services have evolved into customer experience services. Organizations are now taking a holistic approach towards customer services and how they are being delivered. Operating models have changed and shifted from mere full-time employee (FTE)-based models; shoring mix requirements have evolved; digital technologies have become table stakes and converting data into insights is the need of the hour. Channel proliferation and the demand for immediate responses have significantly increased during the crisis. Requirements for an omnichannel strategy and a seamless customer experience have always existed but have now increased exponentially.

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 the modern customer experience requirements. Some of the key tenets of modern-day contact center services are:

Consulting services: With the growing complexity of contact center services, consulting services are becoming more important. Keeping in mind the end-user expectations and proliferation of channels along with an organization's current infrastructure and increased usage of digital technologies, contact center service providers design the transformation roadmap for enterprise clients. Apart from their industry experience, research and vertical expertise service providers apply design thinking principles and leverage industry benchmarks to define a client's transformation roadmap to support technology adoption, enable tangible business outcomes and ensure return on investments (ROIs).

Services offered: Services have evolved from mere customer care and voice calls to multiple channels and brand support. Key performance indicators (KPIs) for measuring success are not limited to first call resolution (FCR) and average handle time (AHT). They are more inclined towards cost savings, upsell, cross sell opportunity creation, revenue generation, customer satisfaction (CSAT) scores and net promoter scores (NPS) scores. Social media services such as

Definition (cont.)

content moderation are gaining traction and becoming an integral part of marketing and selling for every brand. As part of services , it includes inbound, outbound calls an activities such as customer support activities, collections, sales, product support, telemarketing, recruitment and staffing, helpdesk and a host of other services.

Delivery competency: This area primarily covers employee strength, geographic presence, delivery centers, the shoring mix offered, languages supported and pricing models among other aspects.

Talent development: Talent is the most critical aspect of contact center services. Trainings, employee engagement programs, career development plans and flexible working options are important for grooming and developing talent.

Digital technologies: As digital gains more importance, technologies such as automation have become table stakes. Technologies such as cloud contact centers, automation, omnichannel platforms, AI, ML and advanced analytics are critical factors that influence an enterprise’s digital transformation journey.

Definition (cont.)

Scope of the Report

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
- Focus on different markets, including global, U.S, U.K., Europe and Brazil

This study serves as the basis for important decision-making pertaining to 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.

For this reason, ISG's report on Contact Center Services – Customer Experience is comprised of multiple quadrants covering the spectrum of services that an enterprise client requires.

Simplified illustration

Source: ISG 2020

Definition (cont.)

The quadrants descriptions are as follows:

Contact Center Customer Experience — Digital Operations

Based on fewer parameters such as FTEs, delivery centers and language capability, the contact center industry has evolved leaps and bounds. With the changing customer expectations and mounting pressure for an improved customer experience, contact centers are now measured on multiple factors such as talent, automation, partnerships, scale of operations, omnichannel capability and implementation, AI/ML and analytics services. With the COVID-19 situation, work-from-home capabilities, infrastructure and security have also become important parameters.

AI & Analytics

AI has a significant impact on the customer experience industry. Humans and machines are coming together to deliver seamless customer experiences. Bots are able to mimic humans and are able to take over a large chunk of customer queries without human intervention. Over time, machines are learning and improving significantly. Humans are now freed up to handle more complex queries. Data analytics is enabling and empowering humans with insights that help agents to be better informed and drive empathetic conversations. Multiple solutions that embed ML, speech analytics, sentiment analytics and other such technologies are driving informed and enhanced customer experiences, thus bearing a significant impact on metrics such as reduced AHT, FCR better CSAT scores, cost savings and revenue generation opportunities. AI and analytics have opened up numerous opportunities for customers. This quadrant assesses AI and analytics capabilities, including solutions and partnerships, level of implementations, scale of implementations, innovation, business outcomes and impact.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "Leaders" among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "Product Challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market Challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the "leaders." Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the "rising stars" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "rising stars" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

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

	Digital Operations	AI & Analytics
Alorica	Leader	Market Challenger
Atento	Product Challenger	Product Challenger
Capita	Market Challenger	Market Challenger
Cognizant	Product Challenger	Leader
Concentrix	Leader	Market Challenger
Conduent	Leader	Leader
CSS Corp	Product Challenger	Leader
EXL	Product Challenger	Product Challenger
Genpact	Product Challenger	Product Challenger
Hexaware	Product Challenger	Product Challenger
HGS	Leader	Leader

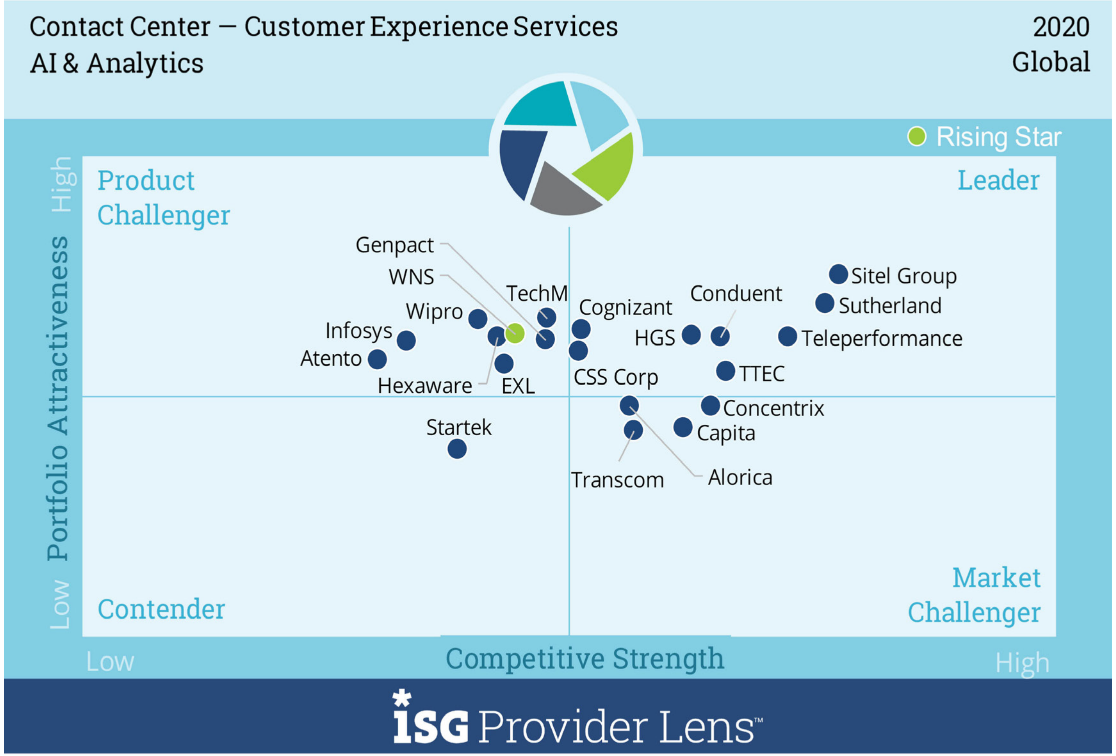
	Digital Operations	AI & Analytics
Infosys	Market Challenger	Product Challenger
Shapiro	Contender	Not in
Sitel Group	Leader	Leader
Startek	Market Challenger	Contender
Sutherland	Leader	Leader
TechM	Product Challenger	Product Challenger
Teleperformance	Leader	Leader
Transcom	Rising Star	Market Challenger
TTEC	Leader	Leader
Wipro	Leader	Product Challenger
WNS	Product Challenger	Rising Star

Contact Center - Customer Experience Services Quadrant

AI & ANALYTICS

Definition

AI and analytics are important capabilities that are required in today's era to deliver seamless customer experience 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, innovation delivered and finally the business outcomes.



Source: ISG Research 2020

AI & ANALYTICS

Eligibility Criteria

- Ability to maintain AI and analytics advisory teams
- Exhibit technical expertise
- Provide AI bots — conversational AI, digital assistants, etc.
- Offer analytics services — speech analytics, text analytics, customer behavior prediction, predictive analytics, sentiment analysis
- Demonstrate successful implementations
- Scale of implementations
- Help achieve business outcomes such as CSAT, NPS scores, cost savings and revenue generation
- Establish a partnership ecosystem or proprietary solutions
- Demonstrate referenceable case studies

Observations

- Sitel Group leads the pack in the AI and analytics space with its innovative solutions and effective usage of speech analytics to drive more empathetic conversations, making a significant impact on customer experience.
- Sutherland brings skin in the game with its innovative pricing models and significant automation and analytics implementations.
- Conduent and Teleperformance are long standing players in this industry. They bring in scale of operations, vast automation and analytics capabilities through extensive partnership ecosystems. With a sheer breadth of offerings and implementations, they stand as leaders in this quadrant.
- HGS brings a healthy mix of voice and digital channels. With matured social media offerings and expertise in managing social media content, the company leads by helping clients manage their brand reputation and address customer queries effectively.

AI & ANALYTICS

Observations (cont.)

- CSS Corp entered this space as a leader for its extensive usage and deployment of AI and ML. It implements automation at scale, offers risk sharing pricing models and delivers high-level insights with impressive case studies that demonstrate tangible outcomes.
- TTEC has been named as a leader with its digital-led investments and unified offerings that deliver end-to-end customer experiences.
- Cognizant has numerous case studies with AI deployments. It deploys speech, text and sentiment analytics to deliver a seamless customer experience.
- WNS is chosen as a Rising Star in this space for its ability to expand up its digital capabilities by leveraging its strategic partnerships, global delivery network and vast industry experience.

CSS CORP

Overview

CSS Corp is a global provider of contact center services with 18 delivery centers spread across multiple geographies and has more than 8,000 employees. It is a chosen leader in the quadrant for its technology and innovative solutions. The company has demonstrated extensive usage of AI and analytics to bring the desired value of to its clients. Highly technology driven, it has over 70 digital experts to craft solutions for global brands.

Caution

CSS Corp is well known for its IT services and must work towards creating more awareness around its BPO services.

It is more aligned towards small and mid-sized businesses than large establishments.

Strengths

OpsMAX framework to empower employees: CSS Corp delivers a comprehensive digital operations framework that enables and empowers its employees with training programs. Agent personas are defined by competencies, proficiencies and cultural alignment and extensive training programs are delivered by leveraging gamification, simulations and hyper analytics. This framework for digital transformation addresses the three critical pillars of customer experience, namely talent management, quality management and client engagement.

DCC 2.0 to drive transformation: Digital Contact Center 2.0 (DCC 2.0) is suite of advanced AI-based solutions. This intelligent ecosystem has more than 100 cognitive automation and robotic process automation (RPA) plugins to streamline customer engagement workflows. It also offers the Agent 360 dashboard to provide AI-enabled customer context and predictive insights. Other features include an intuitive AI training engine, speech, text, image, customer logs, sentiment analytics for improving customer engagement and many more solutions. CSS Corp's DCC 2.0 is a well-rounded ecosystem of solutions that improves customer interactions, agent interactions and brings automation and analytics to clients.

Exhibiting traits of partnership: CSS Corp has partnered with a client to reduce the total cost of ownership (TCO) and drive digital transformation. In order to address the digital needs of clients, it has introduced automation-led delivery by bringing virtual assistant, mobile assistant, process automation, cognitive search and Agent 360 to boost agent performance with AI-enabled smart case analytics and other functionalities. In addition to introducing multiple technologies, CSS Corp offers pricing linked to TCO, year-on-year productivity along with a commitment to achieve significant savings over a period of 3 years and a 9 percent reduction on TCO.

2020 ISG Provider Lens™ Leader

CSS Corp has put AI and analytics to effective use across enterprise clients. The company has exhibited skin in the game with its differentiated pricing models and significant business outcomes that have enabled growth for clients.

Methodology

METHODOLOGY

The research study "2020 ISG Provider Lens™ Contact Center - Customer Experience Services" analyses 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 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 and use cases
4. Use of ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and 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

Namratha Dharshan, Author

Director of Research and Principal Analyst

Namratha Dharshan brings more than 16 years of extensive research experience to lead the delivery and operations of the program called ISG Provider Lens™ that is designed to deliver research on service provider intelligence. She heads a team of analysts and is responsible for delivery of research reports for the Provider Lens™ program. Additionally, she is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO and horizontals like customer experience in contact centres and finance and accounting services. She has also authored vertical focused reports for insurance. Namratha has authored several research papers on topics such as Omnichannel, PCI in Customer Experience – BPO Contact Centers, Digital transformation in BPO, Automation in the areas of BPO.

Praveen Nair, Co-Author

Team Leader

Praveen is a lead analyst with ISG Research, with a focus on market and industry research across emerging technologies. He is responsible for authoring thought papers on trends in the BFSI industry with a focus on impact of emerging technologies on businesses. Praveen authors ongoing ISG Momentum Insight research reports, IPL study and thought leadership white papers. He is responsible for giving actionable insights through his research and analysis in bringing technology and business together along with identifying revenue driving opportunities.

Authors and Editors

Bharti Nagraj, Co-Author

Team Leader

Bharti Nagraj is currently part of the Workshops team that falls under the Momentum Provider Services division. In her current role, she is responsible for workshop requests, understanding the scope, setting right expectations with the consultant and managing the internal delivery timelines. She has also worked on the Insurance BPO and Contact center quadrant and archetype studies. Bharti has been part of many consulting engagements in areas of account profiling, captive research, competitive intelligence and others. She provides key insights to our consultants and help them close the engagement successfully.

Jan Erik Aase, Editor

Director, Principal Analyst 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.

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ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.