Communication & Collaboration

SPARK Matrix™:
Contact Center Outsourcing Services, 2023

Market Insights, Competitive Evaluation, and Vendor Rankings

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Executive Overview

This research study includes a detailed analysis of the global contact center outsourcing services market dynamics, vendor landscape, and competitive positioning. The study provides competition analysis and ranking of the leading contact center outsourcing services vendors in the form of the SPARK Matrix. This research provides strategic information for technology vendors to better understand the market supporting their growth strategies and for users to evaluate different vendors' capabilities, competitive differentiation, and market positions.

MARKET DEFINITION AND OVERVIEW

Contact center outsourcing services refer to the business practice of using third-party service providers to manage customer interactions and communication channels through phone and VOIP calls, email messages, social media channels, chatbots, and live chat. This third-party service provider takes on the operational responsibilities, resources, and infrastructure, such as telephony systems, customer relationship management (CRM) software, workforce management tools, and reporting mechanisms, to improve customer experiences.

The primary objective of outsourcing is to enable organizations to concentrate on their core duties and simultaneously cut operating costs. Traditionally, outsourcing mostly included assigning customer service and post-sale assistance to outside suppliers through telecalls managed by humans. However, the rise in customer expectations for quick and convenient connections enabled the development of different communication channels and technological platforms. The efficacy of outsourcing was undermined by lengthy phone wait times and poor customer service, which exacerbated customer churn among organizations.

In order to improve customer experiences, contact centers work as crucial hubs for consumer interactions and communications, utilizing various channels, such as phone calls, live chats, social media, and emails. By combining human and virtual agents while using technological solutions, brand integration, and platform consolidation, the platform can quickly address consumer pain points, enhancing customer experiences.

Contact center outsourcing partners offer robust infrastructure and technology, including omnichannel communication platforms, IVR systems, and CRM tools, enabling seamless customer interactions and efficient processes. Additionally, it offers the automation of procedures, CX analytics, and digital transformation consulting. With the help of outsourcing services, businesses can invest their resources in other activities while the outsourcing partners focus on the assigned tasks to improve the overall productivity of the employees within organizations. It can be concluded that today's businesses are slowly realizing the benefits associated with contact center outsourcing and its ability to meet the growing customer demands. The contact center outsourcing market is very competitive, driven by technological advancements. The growing demand for seamless, omnichannel customer experiences, the adoption of advanced technologies, such as AI and chatbots, and the expansion of companies looking to serve customers in

new markets are major growth drivers for the contact center outsourcing market. Contact center outsourcing services continue to grow quickly to meet changing business demands. Importantly, contact centers prioritize the portrayal of various brands and their fundamental principles in all service products and services using a smart combination of human skills and technical innovations. This well-balanced mix ensures that the services offered by contact centers are in perfect harmony with brand identities, promoting brand loyalty and sustaining excellence in customer-centricity.

The rise of digital customer experience is one of the crucial factors ensuring the success of contact centers. Customers are now accessible across multiple platforms due to digital transformations, so a seamless, hassle-free experience is essential to retain customers. Personalized content and accessibility across all platforms have been identified as key factors in choosing multi-channel customer engagement.

A detailed description of the key capabilities of contact center outsourcing services has been presented below:

- **Omnichannel CX services:** Omnichannel CX services play a crucial role in helping customers or users communicate with organizations on their preferred channels. This capability offers the customers a personalized customer experience consistent across all communication channels. In order to provide a robust omnichannel CX service, it is important for the contact center outsourcing service providers to offer a unified agent desktop, conversational messaging, intelligent routing, predictive journey orchestration, case management and orchestration, an omnichannel telephony platform, and self-service solutions. These services collectively enable users to provide a consistent omnichannel CX service.

- **Multilingual support:** Multilingual support plays a vital role, especially when dealing with a diverse customer base across various locations. Users can effectively expand their market reach, leading to greater success in the global marketplace by capitalizing on this crucial aspect. Moreover, fostering consistent and culturally aware communication upholds users' brand image and values and reinforces a strong and positive brand representation, resonating with customers globally.

- **Hybrid CX delivery model:** The hybrid CX delivery model encapsulates the capabilities of onshore and offshore operations to

offer a combined solution to improve the existing CX for users. This is possible by identifying and utilizing resources and capabilities from domestic and offshore locations. It should be noted that the hybrid CX delivery model helps agents manage work from home and access their organization's global network to interact with customers. To build a comprehensive hybrid CX delivery model, contact centers must have a good onshore presence, appreciable and profitable offshore operations, multilingual support for international customers, skill-based routing, a collaborative workforce environment, and performance analytics & reporting.

- **Smartshoring services:** The objective of offering Smartshoring services is to combine the onshore and offshore capabilities of an organization to optimize operating costs, improve quality, and improve business outcomes. Smartshoring services assist agents in agile service delivery by offering solutions at the required place on time. To offer smartshoring services, contact centers need work-at-home solutions, digital solutions, and self-service components.

- **Advanced analytics services:** The advanced analytics services model encompasses various capabilities and techniques to extract insights and make data-driven decisions. Advanced analytics services help agents interpret customer behavior and offer real-time insights to take appropriate action. Therefore, with the help of advanced analytics, organizations can identify end-customer needs by forecasting their requirements, saving valuable time. Further, advanced analytics enables users to mitigate potential risks. Advanced analytics services can also help suggest new products as per customers' historical data, improving customer satisfaction and offering personalized marketing. Advanced analytics services include data collection & integration, statistical analysis, predictive analytics, and text & sentiment analysis, among others.

- **Intelligent automation:** Intelligent automation assists organizations to eradicate repetitive tasks from the to-do list of human agents to make them available for more complex operations. Intelligent automation can be found in the front and back offices. The primary components of intelligent automation include robotic process automation (RPA) and robotic desktop automation (RDA), self-service, chatbots & interactive voice assistants (IVAs), and transcription & translation.

- • **Employee experience:** In recent times, there has been a rise in the complexity of outsourcing services offered by contact centers. The contact centers require highly skilled and trained agents to improve customer experiences. Employee satisfaction experiences are important for organizations to sustain in the long run. Therefore, employee experience is a key deciding factor in determining the success of any endeavor to improve customer experience and customer satisfaction.

Competitive Landscape and Analysis

Quadrant Knowledge Solutions conducted an in-depth analysis of the major contact center outsourcing services vendors by evaluating their products, market presence, and customer value proposition. The evaluation is based on primary research with expert interviews, analysis of use cases, and Quadrant's internal analysis of the overall contact center outsourcing services market. The contact center outsourcing services market has several players in the market who are continuously evolving as per the global technology scenarios, faster adoption rates, and compelling developments happening around the clock, and the vendors need to keep up with the evolving requirements and business needs. This study includes the analysis of key vendors such as Alorica, Atento, Capita, CGI, Concentrix, Datamatics, EXL, Firstsource, Genpact, Hexaware, HCL, HGS, IntouchCX, NTT Data, Qualfon, Sitel, StarTek, Sutherland Global Services, Tech Mahindra, Teleperformance, Telus International, TTEC, Transcom, VXI, Webhelp, Wipro, and WNS.

Teleperformance, Concentrix, TELUS International, Sutherland Global, Foundever (formerly Sitel Group), Alorica, TTEC, Tech Mahindra, Transcom, and Firstsource have been positioned as the service excellence and market leaders in the Contact Center Outsourcing Services SPARK Matrix, 2023. The vendors in this group have been categorized based on their ability to offer a full spectrum of contact center outsourcing services with real-time monitoring, real-time data analytics, omnichannel services, AI-enabled IVR services, seamless integration with public API, AI chatbots, customized dialers, skill-based forwarding, talent development initiatives, knowledge management, design thinking, RPA/Automation systems, speech recognition, WAHA, virtual assistants, and back office services.

Teleperformance is positioned as a market and service excellence leader that helps users engage agents/employees via their contact center outsourcing service offerings. Among the many offerings of the organization's solution include the Cloud Campus Store, a dedicated platform for the existing workforce and newly recruited candidates offering services such as onboarding, orientation, training and development sessions, meetings, and collaborative working modules for employees. The company's sentiment analysis capabilities help it enhance customer segmentation to better identify customer requirements and reduce the potential risks of misidentification of end customers. The Teleperformance Cloud Campus and site-based teams offer a unique advantage by enabling businesses

to easily adjust their workforce size in response to evolving market demands. This level of accessibility sets Teleperformance apart, providing organizations with the flexibility and resilience necessary to swiftly scale up or down according to their specific business needs.

Concentrix has been positioned as a market and service excellence leader that facilitates organizations in the contact center outsourcing services market by offering a wide range of specialized customer experience services, including Concentrix Catalyst, ConcentrixCX, AnyPaaS, Customer Loyalty Solutions, and Content Trust & Safety. Concentrix Catalyst, specifically, is a team dedicated to experience design and engineering, leveraging a combination of human-centered design principles, powerful data analysis, and cutting-edge technology. Further, with its proprietary experience creation process, Concentrix Catalyst delivers user-centric experiences that drive CX transformation for users. Furthermore, Concentrix excels in mobile and web application development services, harnessing the expertise of Concentrix Catalyst.

TELUS International has been positioned as a market and service excellence leader in the Contact Center Outsourcing Services SPARK Matrix, 2023. The company offers contact center outsourcing services with several tools to improve CX, such as TELUS Digital, TELUS Omnichannel CX, and TELUS Insights. The company's Ground Truth Studios (GT) is a proprietary AI training data platform that serves as a comprehensive solution for project, people, and annotation management. The service leverages the expertise of the company's AI community and advanced data annotation capabilities. GT simplifies the process of creating high-quality training datasets for AI models.

Foundever (formerly Sitel Group) is positioned as a service excellence and market leader in the Contact Center Outsourcing Services SPARK Matrix, 2023. The company provides users with digital consulting, innovative creation & development, comprehensive training, and a robust set of IT services through its offerings. It provides a suite of products with its comprehensive EXP+™ platform, which enables users to assist customers in end-to-end CX transformation. Additionally, the organization offers My Associate Program (MAX) to elevate users' in-house agent experiences, which will be instrumental in improving the CX through the co-innovation of agents and end customers.

Sutherland Global is positioned as a service excellence and market leader in the SPARK Matrix report for Contact Center Outsourcing Services in 2023. The organization offers user-specific business solutions for experience-led digital transformation services. The solutions offered by Sutherland include Sutherland

Extract and Sutherland Robility, among others. The solutions work toward AI-enabled data extraction and business transformation through adaptive automation for identifying trends and insights from customer data to provide better suggestions to end customers.

Alorica has been identified as a service excellence and market leader in the SPARK Matrix research for Contact Center Outsourcing Services in 2023. The company's portfolio includes products that cover the entire customer lifecycle management, including acquisition, sales, support, and logistics. Alorica offers contact center outsourcing services, including agent assistance, automated delivery, content moderation, and virtual agent assistance. While the company's agent assistance service offers context-based solutions to agents as per customer needs, Alorica's AI discovery bot identifies the process that can be automated through the pattern of interaction studies. Further, the Alorica Virtual Agents (AVA™) provide an automated solution for handling routine to moderately complex interactions with end customers. By empowering consistent and regular customer interactions, AVA™ enhances efficiency and responsiveness while maintaining a high level of service quality. Furthermore, the organization offers content moderation services that censor clients' content for NSFW content, violence, or data privacy issues. This service ensures that the content shared by the organization aligns with appropriate standards and regulations.

TTEC has been positioned as a market and service excellence leader in the SPARK Matrix for contact center outsourcing services in 2023. The company offers comprehensive assistance in designing, implementing, and delivering transformative CX to its users. The company's Verticalized Intent Management framework helps agents understand customer issues from a contextual perspective, increasing customer satisfaction with a diminished cost of ownership. Further, the company offers RealPlay™, an AI learning platform that empowers agents with voice-based scenarios to rapidly develop skills and receive personalized coaching in a secure environment. This innovative tool significantly reduces employee training time and accelerates speed-to-proficiency. Furthermore, TTEC's CX Consulting and Analytics services help users optimize the CX strategy and operating models while leveraging data science and analytics to enhance customer and employee experiences.

HGS has been identified as a market and service excellence leader in the contact center outsourcing service research for the SPARK Matrix, 2023. The company primarily offers transformative CX and business process management services. One of its key offerings is the HGS Work Cloud, which enables users to track

their agents' interactions in real time and provide insights to improve their overall experience and efficiency.

Tech Mahindra has been identified as a service excellence and market leader for the SPARK Matrix Contact Center Outsourcing Services for 2023. The company offers business process outsourcing (BPO) services through its proprietary solutions and platforms, including Automation Anywhere, BluePrism, and SeeR. Tech Mahindra's SeeR offers insights into agent interactions with end customers over text messages, phone calls, and social media to provide customized customer assistance according to the offerings and products used by them. The company offers a holistic assortment of services that cover various customer experience aspects. Tech Mahindra invests in holistic progress programs, learning & development activities, and mentorship initiatives focusing on employee experiences. The company's financial stability enables prompt decision-making for customer betterment. Further, it emphasizes innovation and technology-led solutions. Tech Mahindra's digital philosophy drives business transformation, leveraging next-gen technologies and methodologies for problem-solving.

Transcom is placed as a leader in market and service excellence for the SPARK Matrix research on Contact Center Outsourcing Services in 2023. The company offers BPO services to leading companies in different industry verticals. It caters to user requirements through its suite of services known as T:Universe. T:Universe offers several services and valuable solutions extending beyond the contact center to benefit users. Using innovative translation tools enables the cost-effective management of high-cost languages, opening doors to new markets with minimal additional agent costs. Further, its omnichannel solutions consolidate customer details on one interface, promoting agent multiskilling, reducing expenses, and enhancing customer satisfaction. The company emphasizes comprehensive digital channels by offering client platforms aligned with user preferences, enhancing engagement, CX, and cost efficiency.

Firstsource is positioned as a market and service excellence leader in the SPARK MATRIX research for contact center outsourcing services in 2023. The company is a global BPO service provider and offers robust digitally enabled customer experiences through its target operating model, helping it deliver outcome-driven solutions. Further, Firstsource's GigCX offers a platform for part-time workers or freelancers, giving them real-time assistance and insights for improvement on the dashboard.

Webhelp, Atento, Capita, VXI, EXL, Genpact, HCL, Wipro, Qualfon, Hexaware, StarTek, WNS, NTT Data, and Datamatics are placed as Strong Contenders.

Webhelp offers key services in the contact center outsourcing services market, including B2B sales, CX consultancy, payment & KYC services, and digital marketing. Atento offers specific CX solution platforms through Atento@Home and FlexibleCX, which offer customized solutions for short-term and long-term growth. Wipro offers Dynamics 365, which combines the capabilities of CRM software with Microsoft's employee resource platform (ERP), offering seamless connectivity across different departments within organizations. Capita offers business process services for financial & accounting services, workplace administration, event management, and business intelligence in procurement services.

In contact center outsourcing services, VXI offers Talent Match Pro, Training Simulator, and Performance Pro 360, which are chatbot and AI-enabled platforms that optimize hiring efficacy, simulate real-life scenarios to improve teams' performance, and offer tailored training and assistance to agents. EXL offers CONNECx, Exelia.ai, and DIVA, a digital virtual assistant from EXL. These offerings help EXL's clients improve their CX and take informed decisions using the insights offered by the in-house AI-enabled platform and digital virtual assistant. HCL's contact center outsourcing service offerings leverage advanced technologies, such as intelligent automation, omnichannel integration, and real-time analytics, enabling organizations to optimize agent productivity, streamline customer interactions across multiple channels, and gain actionable insights for continuous improvement and enhanced customer satisfaction. Genpact's contact center outsourcing service offerings combine robust multichannel communication capabilities, AI-powered automation, and data-driven analytics to help organizations achieve operational efficiency, enhance customer engagement, and drive impactful business outcomes.

The contact center outsourcing services offered by Qualfon assist businesses with a versatile multichannel approach, leveraging phone, web, chat, email, text, and social media to provide personalized and seamless customer care experiences while utilizing advanced analytics and social media monitoring for proactive engagement and effective sales acquisition strategies. Hexaware's offerings stand out with its strong partnerships with industry leaders, harnessing the power of omnichannel interaction, cognitive solutions, such as conversational BOT, advanced IVR, and a pay-per-use model, enabling businesses to transform their call centers into future-ready experience centers that drive revenue while delivering superior end-user experiences. StarTek's contact center outsourcing services offer scalable, personalized customer experiences through its omnichannel capabilities, leveraging voice and non-voice channels while ensuring efficient and secure operations through the Startek Cloud. Additionally, StarTek's innovative

solution, Startek LISA, enables personalized social media experiences that foster customer loyalty and meaningful engagement. WNS's contact center outsourcing service offerings combine advanced CX capabilities with deep domain expertise, leveraging innovative technologies and data-driven insights with WNS Open Talent, HIFFI, and WNS' Digitally Simulated Training Environment (DSTE).

NTT Data's contact center outsourcing service offerings stand out with its focus on delivering standardized customer service processes, leveraging innovative technology, and deep domain knowledge with the help of its proprietary RPA, Automated Full-time Equivalent (AFTE). Datamatics strongly focuses on CX, driving all its services, training, and engagements toward delivering personalized client experiences. The company's unique position is fortified by innovative IP products such as TruBot, TruCap, TruBI, and TruAI, alongside future-fit technology solutions and deep expertise in the digital domain. The company helps enterprises enhance productivity, elevate customer experiences, and gain a competitive edge on a global scale by embracing a customer-centric approach. Further, by leveraging a blend of technology and essential values like empathy, commitment, sensitivity, and hospitality, the organization offers significant advantages to its clients. Datamatics's insight-infused, agile, and flexible customer management solutions enable seamless and personalized customer interactions.

IntouchCX and CGI have been positioned as Aspirants in the SPARK Matrix for contact center outsourcing services research for 2023. While IntouchCX's contact center outsourcing service offerings combine performance-enhancing technology, advanced automation, real-time analytics, workforce management methodologies, and innovative translation technology to optimize customer support across multiple channels, increase agent efficiency, and improve customer satisfaction, CGI's contact center outsourcing service offerings stand out with its smart operations approach, combining advanced technology, global delivery capabilities, and a blend of human-centered design and intelligent automation. Both organizations have a high potential for growth, given their robust service offerings.

It has been identified that the primary reason for maintaining contact centers earlier was to keep operating costs low due to economies of scale. Contact centers' proximity to operations helps users save costs. However, emerging evidence suggests that offering personalized services to end customers is crucial in achieving service excellence. Vendors in the contact center outsourcing services landscape are leveraging advanced technologies, such as AI and data analytics, to offer specialized solutions that enhance customer experience and loyalty.

Contact center outsourcing services organizations are expanding their capabilities and offering omnichannel services, including voice, email, chat, social media, and self-service alternatives, as customers anticipate more seamless interactions across various communication channels. This enables companies to offer dependable and useful customer service, increasing customer satisfaction. Contact center outsourcing services vendors deliver effective and efficient services by regularly investing in resources and upgrading technology and human capital. These periodic improvements ensure the provision of high-quality solutions to their users.

Key Competitive Factors and Technology Differentiators

The research on contact center outsourcing services (CCOS) identified that the majority of contact center outsourcing services users offer comprehensive functionalities comprising different use cases. However, the extent of the detailing of use cases depends on the organizations' clientele, verticals in which they are active, operating locations, their requirements, and the introduced customer value proposition for the product and services. The following are the top competitive differentiators for contact center outsourcing services:

- **Customer service excellence:** The concept of customer service excellence for contact center outsourcing services is their ability to deliver an exceptional customer experience. Customer service excellence is directly associated with customer satisfaction, improving customer loyalty, and positively affecting customer retention. To provide customer service excellence in contact center outsourcing services, vendors must have a deep understanding of client businesses, including their long- and short-term objectives and vision in the long run. Within the CCOS landscape, vendors prioritize elevating customer service excellence through various strategic initiatives. These include offering omnichannel customer experience services, adopting hybrid customer experience delivery models, and providing advanced analytics services, among others. Recognizing customer service excellence as a pivotal driving force in business, vendors are committed to enhancing overall customer experiences, a critical aspect of maintaining a competitive edge in the market. Hence, users must evaluate vendors based on the consistency of their customer service excellence.

- **Consultancy depth:** The consultancy depth in contact center outsourcing services goes beyond basic vendor-user communication, encompassing strategic advice tailored for business organizations. This aspect enables users to maximize the potential of the services and optimize their performance, enhancing customer experiences. Therefore, evaluating vendors based on their consultancy depth becomes essential for users seeking to make informed decisions and derive maximum value from the outsourcing partnership.

- **Content moderation services:** Content moderation services enable users to effectively monitor the content generated across various business communication channels, such as social media platforms, online forums, eCommerce sites, and online marketplaces. Leveraging this service involves reviewing content, monitoring content reactions, and managing user-generated content. Additionally, content moderation services aim to eliminate NSFW (not safe for work) content, hate speech, spam, and scam messages, streamlining response times for user issues. Consequently, users are advised to assess vendors based on the comprehensiveness of their content moderation service offerings.

- **Digital transformation services:** Contact center outsourcing services vendors provide digital transformation services that empower users to leverage available digital technologies within their organizations, enhancing customer services and achieving business objectives. These digital transformation services help businesses streamline their customer service processes, improving customer experiences and organic business growth. Technologies such as AI, chatbots, data analytics, and cloud computing play a crucial role in business development, reducing operational costs and enhancing agent efficiency. Evaluating vendors based on the scope of their digital transformation service offerings becomes essential for users seeking to optimize their customer service capabilities and embrace technological advancements.

- **CX transformation services:** CX transformation services comprise the outsourcing service supplier's ability to help consumers enhance customer experiences by elevating the quality of client interactions across all communication channels. These services offer an integrated approach to customer service, prioritizing customer happiness, loyalty, and retention while ensuring a seamless customer experience across all channels. Consequently, users are advised to thoroughly assess vendors offering CX transformation services before finalizing their selection.

- **Experience design services:** Integrating experience design services empowers users to collaboratively design and implement engaging customer experiences, making the brand more memorable and aligning its image with their business goals. These services adopt a customer-centric and personalized approach toward customer service,

encompassing identification of customer needs and preferences and interpretation of behavior, resulting in customer experiences that surpass customer expectations. Users are encouraged to assess vendors based on the comprehensiveness of their experience design service offerings before making a decision.

- **Unified agent desktop:** The unified agent desktop service enhances agent productivity by providing a single interface that integrates essential information, tools, and applications to address customer queries and issues. The primary goal of this service is to simplify agents' workflow and optimize their efficiency. Streamlining tasks through a unified interface reduces errors and elevates employee and customer experiences. This comprehensive solution enables agents to access various communication channels, including voice calls, website chats, email, and social media, all with access to historical customer data. Eliminating the need to switch between applications reduces the likelihood of errors and empowers agents to respond more promptly and accurately to customer inquiries. Furthermore, the unified agent desktop service offers agents a holistic view of customers, including their contact history, previous interactions, and preferences. Hence, users must evaluate the unified agent desktop service before finalizing a vendor.

- **Data security and compliance:** In contact center outsourcing services, data security and compliance bring confidence among users and protect vendors' and their customers' sensitive data. To secure sensitive client information, the service providers strongly emphasize data security procedures. The data security and compliance solution enable users to restrict data accessibility to authorized individuals, significantly reducing the risk of data breaches. Further, to prevent unauthorized access, advanced encryption techniques, secure data transfer protocols, and multi-factor authentication are used. Furthermore, compliance with industry rules and data protection legislation takes precedence alongside data security. Depending on the industry vertical, comprehensive training and awareness programs ensure that agents and staff adhere to pertinent regulatory obligations, such as Global Data Protection Regulation (GDPR) or the Health Insurance Portability and Accountability Act (HIPAA). Hence, users must investigate vendors' depth of data security and compliance offerings prior to finalizing one.

- **Proactive solutioning:** Proactive solutioning empowers users to anticipate end customers' pain points and preemptively address them before they escalate into major issues. Users can leverage these services to gain a competitive advantage through proactive issue identification and resolution, fostering customer trust in the organization. Agents engage with clients individually, offering personalized incentives based on their products or services. This approach results in a seamless customer experience supported by continuous process monitoring. Regular updates and alerts, such as order status or delivery delay messages, keep end customers well informed throughout their business interaction. As such, users are advised to assess vendors based on their proactive solutioning services offerings.

- **Cognitive automation platforms:** Cognitive automation platforms help users utilize the full potential of AI and machine learning (ML) to optimize organizational operations. These platforms incorporate critical technologies, such as natural language processing (NLP), enabling automated chatbots and virtual assistants to comprehend and interact with clients effectively. The primary focus of cognitive automation platforms is to leverage ML capabilities to derive insights from historical data, providing predictions based on these insights and offering recommendations for operational optimization. Users are encouraged to thoroughly explore the cognitive automation platform offerings provided by contact center outsourcing services vendors to capitalize on the benefits of AI-driven automation.

- **Scalability and flexibility:** In this evolving landscape of reshaped working models and heightened service delivery complexities, organizations increasingly emphasize the importance of flexibility in vendor offerings. They seek solutions that seamlessly support work-from-anywhere requirements, integrate smoothly with existing technologies, and are user-friendly. Modern vendors present comprehensive suites with several features, but users may encounter challenges in comprehending and utilizing these features independently. Further, scalability enables service providers to adjust and expand their operations in response to changing business needs and demands. This adaptability ensures cost-effectiveness by optimizing resources and capacity based on real-time requirements. Hence, users must explore the extent of flexibility and scalability offered by service providers before making a decision.

SPARK Matrix™: Strategic Performance Assessment and Ranking

Quadrant Knowledge Solutions' SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix provides a visual representation of market participants and provides strategic insights on how each supplier ranks related to their competitors concerning various performance parameters based on the category of technology excellence and customer impact. Quadrant's Competitive Landscape Analysis is a useful planning guide for strategic decision-making, such as finding M&A prospects, partnerships, geographical expansion, and portfolio expansion, among others.

Each market participant is analyzed against several parameters of Service Excellence and Customer Impact. In each of the parameters (see charts), an index is assigned to each supplier from 1 (lowest) to 10 (highest). These ratings are designated to each market participant based on the research findings. Based on the individual participant ratings, X and Y coordinate values are calculated. These coordinates are finally used to make SPARK Matrix.

Service Excellence	Weightage
Sophistication of Service Capabilities	25%
Competitive Differentiation Strategy	25%
Industry Experience & Domain Knowledge	25%
Global Reach & Service Capabilities	15%
Vision & Roadmap	10%

Customer Impact	Weightage
Diversity of Client Base	25%
Market Presence	25%
Proven Record	25%
Customer Service Excellence	15%
Unique Value Proposition	10%

SPARK Matrix™:
Contact Center Outsourcing Services

Strategic Performance Assessment and Ranking

Figure: 2023 SPARK Matrix™
(Strategic Performance Assessment and Ranking)
Contact Center Outsourcing Services

SPARK Matrix™: Contact Center Outsourcing Services, Q3, 2023

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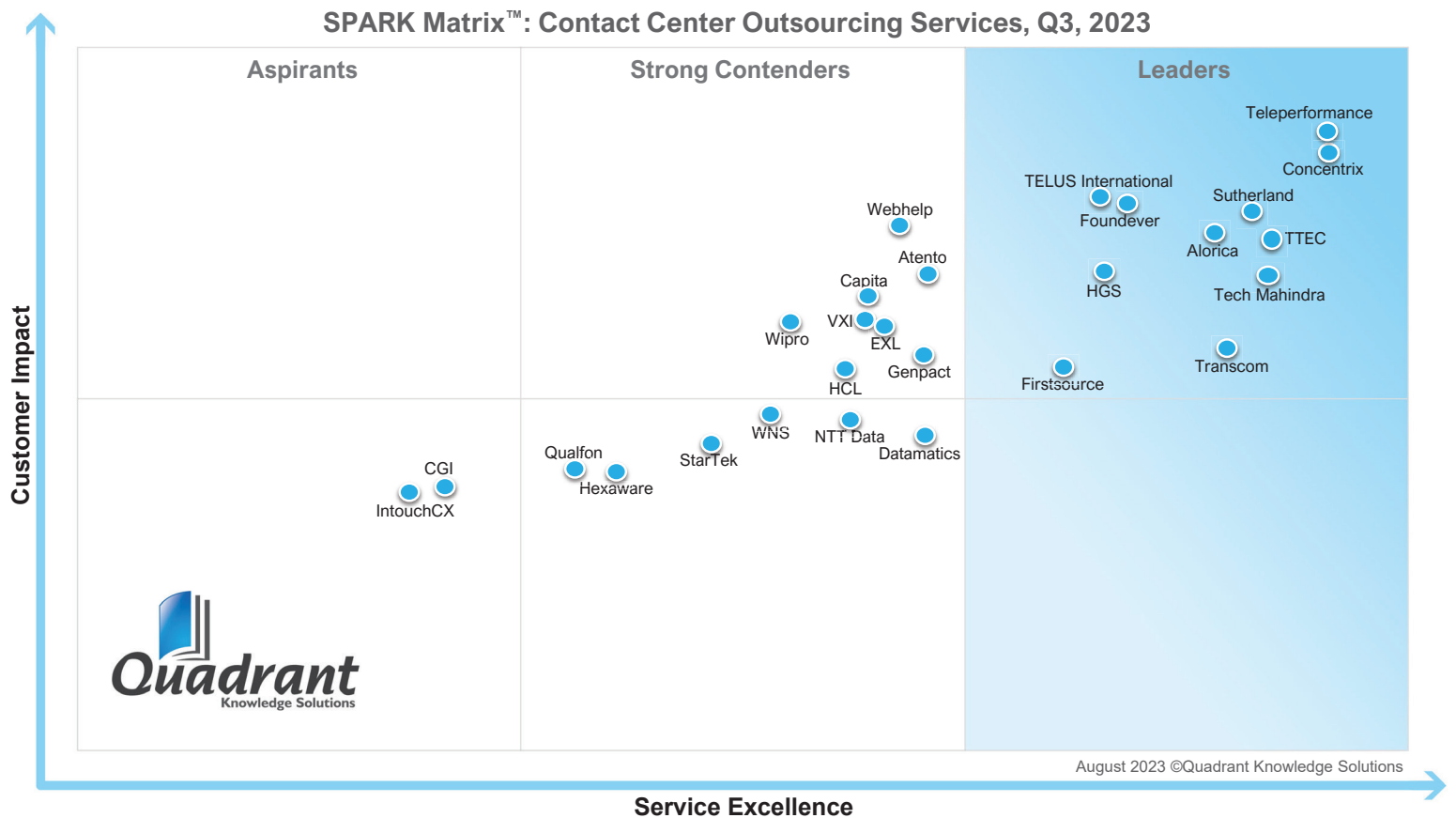
Vendor Profiles

Following are the profiles of the leading Contact Center Outsourcing Service providers with a global impact. The following vendor profiles are written based on the information provided by the vendor's executives as part of the research process. Quadrant research team has also referred to the company's website, whitepapers, blogs, and other sources for writing the profile. A detailed vendor profile and analysis of all the vendors, along with various competitive scenarios, are available as a custom research deliverable to our clients. Users are advised to directly speak to respective vendors for a more comprehensive understanding of their technology capabilities. Users are advised to consult Quadrant Knowledge Solutions before making any purchase decisions, regarding Contact Center Outsourcing Services vendor selection based on research findings included in this research service.

Transcom

URL: https://www.transcom.com/

Founded in 1995 and headquartered in Stockholm, Sweden, Transcom is a robust provider of digital CX solutions and services with global operations in 26 countries. The company has a significant presence in North America, Europe and Asia Pacific and has made several strategic acquisitions and expansions to grow its portfolio and presence across Europe and North America. Transcom offers comprehensive solutions for customer lifecycle CX services including customer care, sales operations, technical support, collections services, social media customer management and content moderation. Transcom with its indigenous T: Labs research and development division and Digital CX Advisory develops many sophisticated AI enabled solutions (T: Universe of solutions) for its clients through its comprehensive network of technology vendors and its Applied Insights methodology.

Analyst Perspective

Following is the analysis of Transcom's capabilities in the contact center outsourcing services market:

- Transcom offers contact center outsourcing services through call centers, emails, AI chatbots, and social media. Its commitment to automation drives cost reduction, lowers error rates, and improves the overall customer experience. It also provides digital channels that align with customer preferences, enhancing customer engagement, improving the customer experience, and reducing costs. Transcom further reduces costs and elevates the customer experience by developing self-service technologies. Their dedicated account management function focuses on adding value to client organizations, ensuring a trusted and strategic partnership.

- The company enables users to provide cost-effective translation tools for complex languages such as Nordic, Dutch, and German. This, in turn, helps users expand with minimal additional costs. Further, Transcom's omnichannel solutions streamline client contacts by consolidating them at a centralized data storage, allowing agents to acquire multiple skills, reducing costs, and enhancing customer satisfaction.

- The company offers consistent growth strategies for its clients and assists them

in expanding their operations with additional minimal costs. Transcom assists its user base by approaching contact centers around smaller contact centers and recruiting specialized teams for specific languages, focusing equally on large and small contact centers. Further, Transcom ensures resilience, flexibility, and a consistent pool of skilled agents through the virtual center across multiple sites. The organization has also implemented work-at-home agent models in various countries, which provides scalability and flexibility while utilizing digital tools to manage growth without extensive agent recruitment.

- The company provides a full suite of solutions under the umbrella term of T:Universe. It includes various services, such as T:Translate, T:Messaging, T:Omni, T:Automate, and T:Perform, for personalization & co-innovation assistance, consultancy, digital CX advisory, and customer success programs that are aligned with organizational needs and meets end-customer expectations.

- A key differentiator for Transcom in the contact center outsourcing services market is the real-time digital innovation through in-depth analysis of short-term revenue by implementing digital solutions that align with the client's strategy and objectives, the company establishes itself as a strategic partner focused on long-term success. Transcom optimizes its processes and ensures streamlined operations by integrating the latest tools, such as automation and data-driven insights. Further, Transcom's American subsidiary, Awesome CX, specializes in delivering dedicated and personalized customer experience solutions tailored to the needs of rapidly expanding internet services and e-commerce organizations. Powered by the flagship brand of Awesome CX, the users are empowered to concentrate on accelerated growth and provide value to end-customers through a workforce that is content and aligned with the core business principles. The Awesome CX is strengthened by nearshoring capabilities of its parent organization which helps it in placing significant emphasis on supporting the rapid growth of promising startups and mid-sized companies, achieving this by aligning their business ethos with the user's culture, values, and overarching vision.

- In terms of acquisitions, Transcom has acquired brands and organizations with robust omnichannel CX capabilities, namely CityConnect and Forcontact in the past two years for strengthening it's offerings and global footprint in the Middle East region. Further, Transcom has built strong alliances and partner relationships in various industry verticals, such as Conversational AI, Advanced Analytics, and CaaS, which include notable brands such as Google, NICE, Zendesk, AVAYA, Apple, Cisco, Qfiniti, and Microsoft, among others. The

company's strategic investments in contact center outsourcing services aim to strongly align business objectives and technology solutions.

• Some use cases of Transcom's contact center outsourcing services include improved agent experience for an Aviation organization through the Agent Effortless Experience Strategy, optimizing the login user interface of their customer relationship management (CRM) platform. Further, the company aided a digital streaming service organization in ensuring a seamless customer experience, regardless of their end-customers' diverse native languages, by implementing T: Translate, by integrating it to existing contact center platform. The T: Translate application was integrated into the agent workflows, facilitating the provision of customer support in eight different languages in a multitude of formats including eMail, live chat, and messaging. Furthermore, the company assisted a food procurement service in improving their CX and collections' services through reduction in agent handling time. Furthermore, the company assisted an energy provider organization for automating their daily front office work through Citrix work environment from Transcom.

• From a geographical presence perspective, Transcom has established a strong presence in North America, the United States, and Canada. Transcom's global footprint also extends to Latin America, the Middle East, Europe, and the Asia-Pacific region. It has demonstrated a constant and significant growth within the North American and European Union region through year-on-year growth and expansion of Awesome CX.

• To overcome the challenges in contact center outsourcing services, Transcom is incorporating a few strategies, such as constant investment in technologies and processes crucial for changing customer expectations. The adoption and integration of new technologies and the shift to hybrid working models pose many complexities. Transcom overcomes these complexities by employing a strategic and comprehensive approach that prioritizes investing in robust infrastructure, such as secure remote access, advanced communication tools, and scalable cloud-based solutions.

• The highlight of Transcom's contact center outsourcing services roadmap includes utilizing technology and providing clients with best-in-class customer experience solutions. Transcom realizes the importance of identifying new technologies to enhance its offering. The company, as one of the competent providers of customer experience solutions, recognizes the importance of identifying new technologies to enhance its offerings. The company is committed to improving its conversational AI offerings, de-languaging, and

agent augmentation to provide superior customer experience solutions to its clients. The company aims to invest in mergers and acquisitions that align with this approach, such as targeting low-cost English delivery centers in emerging markets in the South Asian region. Transcom intends to improve its offerings and broaden its presence in emerging regions through strategic mergers and acquisitions, all the while upholding its dedication to data protection and compliance implementing an experience design led, partner enabled strategy.

Research Methodologies

Quadrant Knowledge Solutions uses a comprehensive approach to conduct global market outlook research for various technologies. Quadrant's research approach provides our analysts with the most effective framework to identify market and technology trends and helps in formulating meaningful growth strategies for our clients. All the sections of our research report are prepared with a considerable amount of time and thought process before moving on to the next step. The following is a brief description of the major sections of our research methodologies:
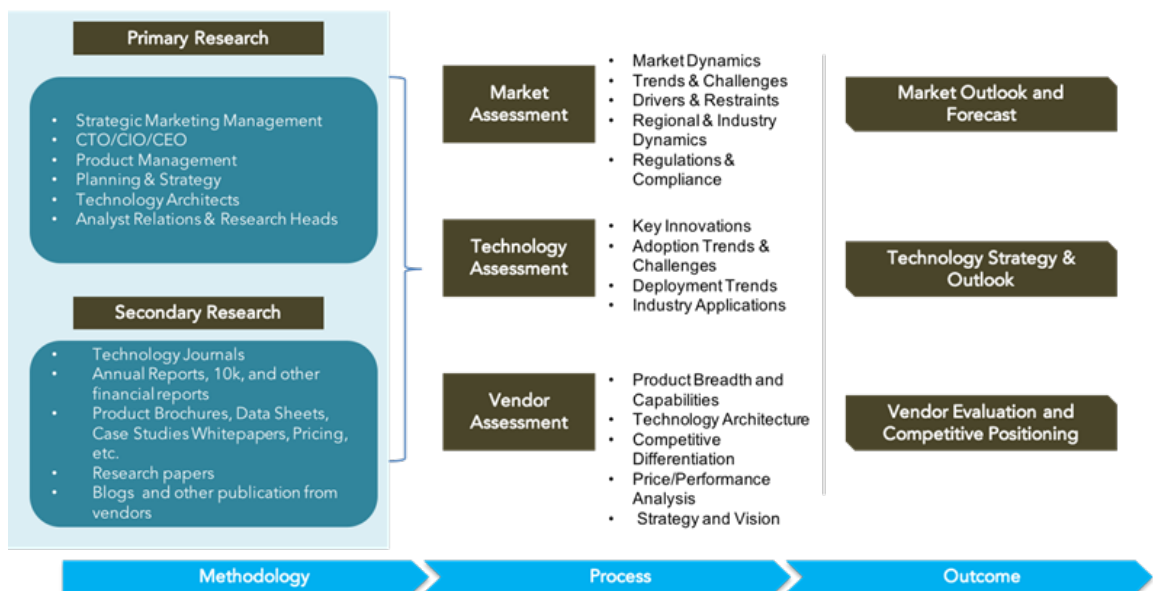
Secondary Research

The following are the major sources of information for conducting secondary research:

Quadrant's Internal Database

Quadrant Knowledge Solutions maintains a proprietary database in several technology marketplaces. This database provides our analyst with an adequate foundation to kick-start the research project. This database includes information from the following sources:

- Annual reports and other financial reports
- Industry participant lists
- Published secondary data on companies and their products

- Database of market sizes and forecast data for different market segments
- Major market and technology trends

Literature Research

Quadrant Knowledge Solutions leverages several magazine subscriptions and other publications that cover a wide range of subjects related to technology research. We also use the extensive library of directories and Journals on various technology domains. Our analysts use blog posts, whitepapers, case studies, and other literature published by major technology vendors, online experts, and industry news publications.

Inputs from Industry Participants

Quadrant analysts collect relevant documents such as whitepapers, brochures, case studies, price lists, datasheets, and other reports from all major industry participants.

Primary Research

Quadrant analysts use a two-step process for conducting primary research that helps us capture meaningful and accurate market information. Below is the two-step process of our primary research:

Market Estimation: Based on the top-down and bottom-up approach, our analyst analyses all industry participants to estimate their business in the technology market for various market segments. We also seek information and verification of client business performance as part of our primary research interviews or through a detailed market questionnaire. The Quadrant research team conducts a detailed analysis of the comments and inputs provided by the industry participants.

Client Interview: The Quadrant analyst team conducts a detailed telephonic interview of all major industry participants to get their perspectives on the current and future market dynamics. Our analyst also gets their first-hand experience with the vendor's product demo to understand their technology capabilities, user experience, product features, and other aspects. Based on the requirements, Quadrant analysts interview more than one person from each of the market participants to verify the accuracy of the information provided. We typically engage with client personnel in one of the following functions:

- Strategic Marketing Management
- Product Management
- Product Planning
- Planning & Strategy

Feedback from Channel Partners and End Users

Quadrant research team researches with various sales channel partners, including distributors, system integrators, and consultants, to understand the detailed perspective of the market. Our analysts also get feedback from end-users from multiple industries and geographical regions to understand key issues, technology trends, and supplier capabilities in the technology market.

Data Analysis:
Market Forecast & Competition Analysis

Quadrant's analysts' team gathers all the necessary information from secondary research and primary research to a computer database. These databases are then analyzed, verified, and cross-tabulated in numerous ways to get the right picture of the overall market and its segments. After analyzing all the market data, industry trends, market trends, technology trends, and key issues, we prepare preliminary market forecasts. This preliminary market forecast is tested against several market scenarios, including the most economically accurate forecast scenario for the overall market and its segments.

In addition to market forecasts, our team conducts a detailed review of industry participants to prepare a competitive landscape and market positioning analysis for the overall market as well as for various market segments.

SPARK Matrix:
Strategic Performance Assessment and Ranking

Quadrant Knowledge Solutions' SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix representation provides a visual representation of market participants and provides strategic insights on how each supplier ranks in comparison to their competitors concerning various performance parameters based on the category of technology excellence and customer impact.

Final Report Preparation

After the finalization of market analysis and forecasts, our analyst prepares the necessary graphs, charts, and tables to get further insights and preparation of the final research report. Our final research report includes information including market forecast; competitive analysis; major market & technology trends; market drivers; vendor profiles, and such others

Client Support

For information on hard-copy or electronic reprints, please contact Client Support at
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