ISG Provider Lens™

Contact Center - Customer Experience Services

Australia 2021

Quadrant
Report

A research report comparing provider strengths, challenges and competitive differentiators

September 2021

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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 June 2021 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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EXECUTIVE SUMMARY

Evolving Contact Centre Dynamics and Requirements

Since the COVID-19 pandemic, there has been a significant shift in the way contact centres in Australia are being managed, and how agents are responding to changing customer behaviours and needs. This trend is likely to continue over the next few years. Government regulations and restrictions during the pandemic have caused disruption in supply chains, both in Australia and globally. This has pushed many companies to adopt new technologies to accommodate changing working practices. With the shift to new working environments, the need for workforce engagement and management has become more important.

Australian companies are increasingly gravitating towards cloud-based contact centre solutions to protect their operations and ensure business continuity during times of crisis. They are implementing solutions that can better supervise agents by hosting contact centres centrally.

In Australia, over the next five years, contact centres will play a more strategic and central role in organisations and will be more integrated with other functions such as marketing. Companies are becoming more skilled at collecting, combining and leveraging customer data, and are using this in real time and in context to gain more meaningful insights. This will provide them with the tools to deliver more innovative experiences, opening up new revenue opportunities. Customer contact centres drive a business' success or failure based on the performance of the agents. To deliver this, organisations must have the right tools and information available to provide the optimal customer experience (CX).

Australian organisations are now beginning to adopt a more analytics-based approach to deliver a deeper level of service, as they seek to better understand individual customer needs and preferences and utilise data from a variety of sources to deliver a more personalised service.

Structured data such as customer feedback streams, customer transaction data and customer relationship management (CRM) data are most commonly collected, while unstructured data such as social media data, web browsing data, and data generated by connected devices and mobile devices continue to grow exponentially.

Digital solutions such as bots have become increasingly important to Australian organisations, as they help support human contact centre agents working remotely from any location. They are being supported by technologies built to manage AI-based solutions and analytics solutions that work collaboratively to improve employee experience. They also facilitate improved flexibility with human and digital agents. In addition, there is increasing investment in automation and analytics solutions. This enables the companies to streamline agent and work management, reducing time and costs.

Contact centres are increasingly engaging with business intelligence solutions. They further integrate customer interaction analytics software into processes and combine these with machine learning-driven AI models. This provides contact centre managers with access to real-time data insights and predictive behaviours.

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By improving the employee experience, organisations can offer a better overall experience for customers in Australia, thereby ensuring customer loyalty. In addition, contact centre managers now have better access to key insights on churn, propensity to buy, fraud and client vulnerability, allowing them to act on agent behaviours before they can negatively impact an organisation.

Key components of contact centre and CX services include digital operations, work from home services and social media CX services. Key trends and observations in Australia are as follows:

Digital Operations in Australia

Contact centres are evolving to become smart centres that have the ability to gain customer insight and predict human intent. Workforce optimisation, analytics and other advanced applications are assisting call centres to evolve into CX centres.

Australian companies are facing challenges associated with the sheer volume and flow of unstructured data within organisations. This provides an opportunity for call centre service providers to offer AI systems to collate, analyse and interpret unstructured data to provide actionable, real-time feedback.

Globally, and in Australia, some advanced adopters are now beginning to embrace AI as a part of their CX strategy using customer analysis, personalised insights, enhanced web search, fulfilment and logistics, and voice-powered applications. Other features that are being installed include customer-facing chatbots and virtual assistants and robotic process automation (RPA) in customer service to provide a predictive and personalised experience.

By successfully deploying AI, organisations can optimise their CX performance, reduce costs, increase revenue and profit, and deliver a greater level of shareholder value. AI enables companies to drive continuous improvement across the business, including a reduction in operational costs by decreasing headcount for more repetitive roles.

There is a significant opportunity for contact centre consultants to help organisations optimise and develop their AI systems.

Work From Home Services in Australia

The shift to new working environments across Australia is increasing the need for workforce engagement and management. There is a continued and growing demand for workers to work from anywhere, and at any time. More workforce management and engagement solutions will be needed to help people manage their own workloads more effectively. Contact centre agents are a key touchpoint between a business and its customers. Organisations that invest in the work from home model are likely to experience improved CX and increased productivity.

Australian organisations that have started to implement advanced CX strategies, especially since the COVID-19 pandemic, are now supporting their teams with more flexible working arrangements. They are realising that it is the best chance to attract qualified and experienced new staff. In addition, physical and digital channels are now becoming more integrated. They are also beginning to realise that CX and personalised and customised experiences will be important differentiators to achieving success.

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Increased flexibility and the ability to work from anywhere, at any time, are likely to expand the Australian gig workforce. This style of working can also be implemented into the contact centre model. It provides more opportunities for people who only want to work part time and remotely in a more flexible working arrangement and can help overcome resourcing limitations. A hybrid model of remote and office-based work is also becoming increasingly common for contact centres located in Australia.

Social Media CX Services in Australia

Over the next five years in Australia, there will be a shift from human point of contact channels such as phone and in-person towards lower-cost, digital, self-service channels such as smartphone apps, social media, chat bots and instant messaging. This will make it easier for Australian customers to interact with organisations at a time and place that is convenient to them. However, it could present them with new integration challenges in delivering a seamless multi-channel experience, thus providing growing opportunities for CX consulting companies. There is also a smaller sub-section of customers that prefer human contact, so organisations need to have the optimal balance in their channel mix to meet the needs of all customers.

Australian companies with well-developed CX strategies reap the benefits of an enhanced employee experience that breaks down organisational silos and results in compliant and responsible approach to the use and management of customer data. They also benefit from low operating costs, increased customer retention and reduced customer churn. In addition, improvements in customer satisfaction, operational efficiency and customer-lifetime value can be observed.

Introduction

Simplified illustration

Contact Center - Customer Experience Services		
Digital Operation	Work From Home Services	Social Media CX Services

Source: ISG 2021

Definition

The ISG Provider Lens™ quadrant report on Contact Center — Customer Experience Services focusses on outsourcing services and the associated aspects of enhancing CX. Providers are assessed based on their service offerings, delivery centres, language capabilities, full-time equivalents (FTEs) and digital transformation elements such as consulting, artificial intelligence (AI) and analytics capabilities. Contact centre 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 the CX strategy right to ensure high-quality services and improve employee experience, which can directly impact CX. As the buyer side matures, the supply side is also required to bring a variety of capabilities

Definition (cont.)

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

This study on Contact Center — Customer Experience Services 2021 Australia 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 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 for Australia, we are introducing the following three quadrants on Contact Centre – 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 provide to the clients to address modern CX requirements in each quadrant and each region. The criteria of evaluation used are detailed in the introduction to each following quadrant.

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 more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

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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	Product Challenger	Market Challenger	Contender
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 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 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.	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 both products and services and a 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 2

	Digital Operations	Work From Home Services	Social Media CX Services
Acquire BPO	● Leader	○ Not in	○ Not in
ASTIA	○ Contender	○ Not in	○ Not in
Cognizant	● Rising Star	● Product Challenger	● Product Challenger
Concentrix	● Leader	● Leader	● Rising Star
CPM	○ Contender	○ Not in	○ Not in
Datacom	● Leader	● Leader	● Leader
EXL	○ Contender	○ Contender	○ Not in
Forrest Marketing	○ Not in	○ Not in	● Product Challenger
Genpact	● Product Challenger	● Product Challenger	● Product Challenger
Infosys	● Product Challenger	● Rising Star	● Product Challenger
Merchants	● Product Challenger	○ Contender	○ Contender
Mindpearl	○ Contender	○ Contender	○ Contender
ProbeBPO	● Leader	● Leader	● Leader

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

	Digital Operations	Work From Home Services	Social Media CX Services
SERCO	● Product Challenger	● Product Challenger	○ Not in
Sitel Group®	○ Contender	○ Contender	○ Contender
Startek	● Rising Star	● Product Challenger	● Product Challenger
Sykes	● Leader	● Leader	● Leader
TCS	● Leader	● Leader	● Product Challenger
Tech Mahindra	● Product Challenger	● Product Challenger	● Product Challenger
Teleperformance	● Product Challenger	● Product Challenger	● Product Challenger
Telstra Purple	● Product Challenger	● Product Challenger	● Product Challenger
TSA	● Leader	● Leader	● Leader
TTEC	● Product Challenger	● Product Challenger	● Product Challenger
Unity4	○ Not in	○ Contender	○ Not in
Wipro	● Leader	● Leader	● Leader
WNS	● Product Challenger	● Product Challenger	● Product Challenger

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Contact Center - Customer Experience Services Quadrants

ENTERPRISE CONTEXT

Digital Operations

This report is relevant to enterprises across industries in Australia for evaluating digital operations services of contact centre providers. In this quadrant report, ISG highlights the current market positioning of contact centre digital operations service providers in the region based on their capability to delivering exceptional customer experiences and how they address key enterprise challenges.

Enterprises in Australia are looking to transform their functions with ease and minimal disruptions to their business. They have an urgent need to optimise the customer journey, which has a direct impact on annual savings. Due to the COVID-19 pandemic, they are experiencing high abandon rates, decrease in productive hours and poor customer services, resulting in a revenue decline. They are also at a higher risk of losing loyal customers. Some of them are experiencing significant business fluctuations during peak hours, leading to more errors and impacting client service-level agreements (SLAs). There is a need to improve the efficiency of back-office operations, deliver consistent reporting of key business metrics and strengthen the overall customer experience.

ISG has observed that enterprises want to redesign their customer relationship strategy and speed up the digitisation of contact centres to address the operational challenges arising from the pandemic. They are focusing on optimising the number of agent interactions and reducing the average handling time to manage the impact on annual expenses. They are also seeking sustained improvements on customer satisfaction (CSAT) through omnichannel routing and optimisation. They are increasingly investing in solutions that have AI based self-service capabilities and provide enhanced security frameworks.

Most services providers have deployed centres of excellence to map the end-to-end customer journey and identify pain points through process review and redesign. They have deployed robotics and optical character recognition (OCR)-based solutions to help enterprises read and transcribe data. They have also developed business continuity plans with a strong remote working delivery model to ensure that customer queries are handled in an efficient and customer-friendly manner while limiting the time and effort from IT. Another key observation is that strategic partnerships with platform providers have been an important part of the roadmap for service providers.

IT and technology leaders should read this report to understand how contact centre service providers integrate multiple technologies into their offerings and how the technical capabilities of these providers compare with the rest of the market.

Digital transformation professionals should read this report to know how providers of contact centre services enhance their digital transformation initiatives to improve the customer experience and how they compare with one another.

Business strategy and industry leaders should read this report to understand the global delivery and vertical capabilities of providers in the marketplace. This report also gives insights into the service provider's expertise, technology and innovation-led solutions. It differentiates providers on how they modernise their offerings for improved customer satisfaction and loyalty, increased process efficiency, and rapid response to changing market dynamics.

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DIGITAL OPERATIONS

Definition

Contact centre 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 and end-to-end engagement and managed services. Also, with the increased focus on enhancing CX, enterprises are juggling between finding the right partner and the right digital solutions. Thus, contact centre consulting services are evolving, with the changing nature of client engagements and expectations. Considering the end-user expectations, proliferation of channels, an organization's current infrastructure and increased usage of digital technologies, contact centre service providers design the transformation roadmap for enterprise clients. Service
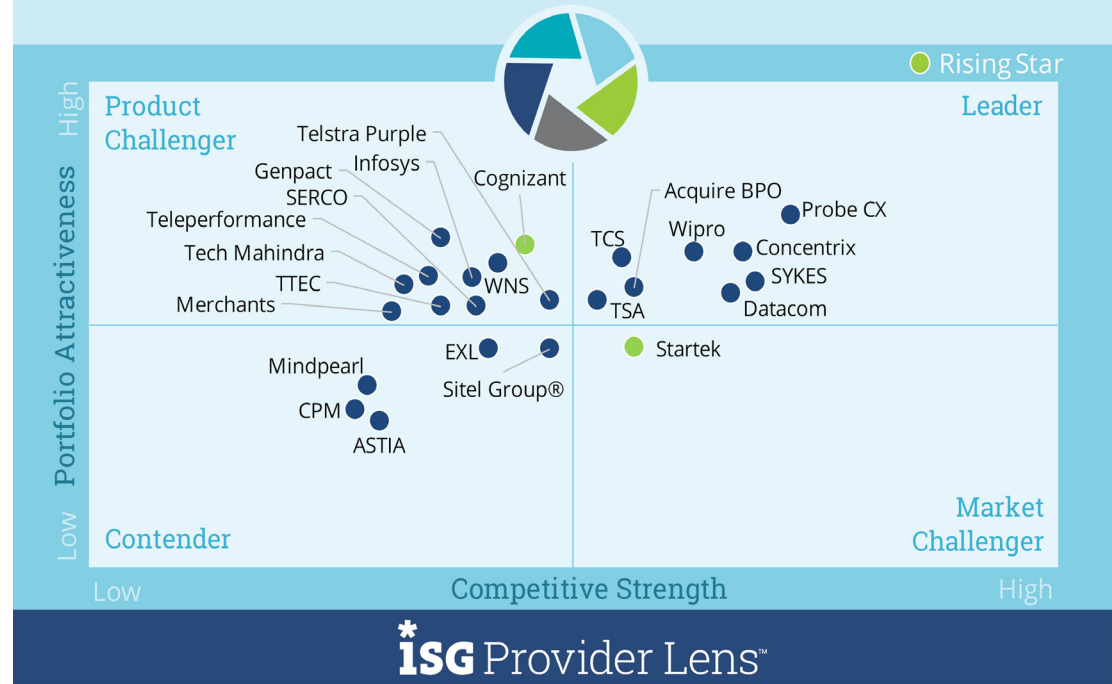
Source: ISG Research 2021

DIGITAL OPERATIONS

Definition (cont.)

providers leverage industry experience, research, vertical expertise, and nuances and benchmarks to define a client's transformation roadmap to support technology adoption, enable tangible business outcomes and ensure return on investment (ROI). Providers in this space have in-depth experience and conduct extensive research to understand the industry and changing customer behaviours. They also have the vertical knowledge to accommodate the nuances of each industry sector and either 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 and digital technology capabilities.

Eligibility Criteria

- Ability to offer contact centre services
- Ability to serve clients across different channels
- Ability to bring in digital capabilities such as automation, AI, cloud solutions and omnichannel
- Ability to offer nearshore, onshore and/or offshore services
- Ability to bring in deep domain expertise in this domain
- Trained FTEs
- Participants must offer contact centre consulting services and advise clients in this space
- Ability to demonstrate domain and vertical expertise with industry-specific solutions
- Participants must provide technology advisory services
- Ability to exhibit design thinking and customer journey mapping capabilities
- Participants must provide frameworks to define the transformation roadmap
- Strong partnerships and in-house transformation capabilities
- Consulting workforce
- Ability to offer change management services
- Ability to demonstrate referenceable transformation case studies.

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DIGITAL OPERATIONS

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Observations

Of the 24 providers assessed in Australia for this quadrant, eight are Leaders and two are Rising Stars.

- **Acquire BPO** is a full-scale outsourced contact centre and business process outsourcing (BPO) provider and operates from 16 locations, including Australia. In Australia, in particular, it has a broad range of partnerships and engagements in various industries, including telecommunications, insurance, e-commerce and technology, and retail and utilities.

- **Concentrix** is a global CX specialist company with a client base in 40 countries, including Australia. Its key services include CX strategy design, experience design, digital design, security, risk and compliance, digital self-service and cloud contact centre. It has an industry leading CX platform and strong AI capabilities.

- **Datacom** is one of Australasia's largest professional IT services companies. It offers a comprehensive and broad CX strategy through its Connect suite of experience management solutions, and has strong

investments in AI and automation. It also has a broad range of partnerships with technology vendors in the CX ecosystem.

- **Probe CX** is one of the largest CX providers in Australia. It has a broad range of clients across most industries in the region. Its financial services and fintech clients include two of Australia's four large banks, several major Australian insurers and many buy-now-pay providers.

- **SYKES** is a leading provider of multi-channel demand generation and customer engagement services. It has been in the market for 40 years and has operations across 65 locations in 20 countries. It offers comprehensive CX solutions and has advanced embedded AI functionality.

- **TCS** is a global IT services, consulting and business solutions company that has been present in the Australian IT market for over 30 years. It has a diverse range of CX clients in the region in a wide range of industries, including telecommunications, utilities, media, travel, financial services and resources.

- **TSA** is an Australia-based specialist in CX consultancy and services. It has built a network of CX centres across Australia and the Philippines and has about 3,000 employees.

- **Wipro** is a leading global IT, consulting and business process services provider, headquartered in India. Its CX services are supported by over 44,000 associates serving over 170 customers across

DIGITAL OPERATIONS

Observations (cont.)

a broad range of industries. Wipro has a strong presence in the Australian contact centre market.

- **Cognizant** (Rising Star) is a U.S.-based multinational technology company that provides business consulting, IT and outsourcing services. It has a contact centre located in Sydney. It also has a connected digital lab located in Australia. Cognizant offers contact centre solutions with strong AI capabilities. A recent acquisition strengthened its Australian operations.

- **Startek** (Rising Star) is a CX specialist with offices across 46 locations in 13 countries. Startek's CX strategy includes developing an AI-human-assist model, which offers process orchestration and continuous intelligence, with an on-demand service that includes multi-speed human and machine workforce interfaces.

PROBE CX

Overview

Probe CX (Probe) is a CX specialist, operating across Asia Pacific, North America and Africa, with more than 15,500 employees and over four decades of experience. Probe has evolved its outsourced contact centre services and collections management to become a leading CX management organization, operating across 32 delivery centres across four countries that include the U.S, the Philippines, Australia and New Zealand. It is the largest CX provider in Australia, with offices in Sydney, Melbourne, Wollongong, Gold Coast, Springfield, Maroochydore, Perth and Joondalup.

Strengths

Broad CX solution portfolio: Probe's CX solutions include customer management, consulting, intelligent automation and natural language processing. Its digital transformation practice specialises in process simplification, UX design, customer journey mapping, workforce optimisation, data analytics, customer sentiment analysis, digital deployment and automation. Probe also provides shared services such as accounts payable/ accounts receivable/payroll and help desk/support desks and specialised knowledge services such as SEO/SEM marketing, software and web development, health care and loan processing.

Next-generation-driven value proposition: Probe's CX strategy centres around global scale and expertise, coupled with local delivery and customisation for each client through six core themes. These include next-generation digital enablers to enhance client digital transformation and technology, and a unique high-engagement culture and end-to-end capabilities in terms of designing, building and delivering bespoke solutions to each client. Probe has a transparent and vested partnering model, and a robust, reliable and secure IT architecture.

Broad range of blue-chip Australian and global clients: Probe has a range of clients in Australia across most industries. Its financial services and fintech clients include two of Australia's four large banks, several major Australian insurers and many buy-now-pay-later providers. Its energy and utility client base is extensive and includes most of the major providers in Australia. Its telecommunications and government client list includes most major telco providers and many federal and state departments. Other major industries include retail; healthcare; infrastructure, logistics and transport; travel and technology; and education. Clients in these segments include Australia's largest retailers and airlines.

Caution

Probe has been acquisitive in the last 18 months, having acquired MicroSourcing, BEEPO and Stellar. Whilst integration activity is complete and Probe's reach and offerings have expanded, customers need to be assured that existing and future services delivered by the company will not be impacted by the rapid growth.

2021 ISG Provider Lens™ Leader

Probe is the largest CX provider in Australia, with offices in Sydney, Melbourne, Wollongong, Gold Coast, Springfield, Maroochydore, Perth and Joondalup. It is a leading provider of contact centre services and has a diverse base of blue-chip Australian and global clients, including most of the major players in the energy and utility industries in Australia.

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ENTERPRISE CONTEXT

Work From Home Services

This report is relevant to enterprises across Australia for evaluating work-from-home services of contact centre providers. In this quadrant report, ISG highlights the current market positioning of contact centre work-from-home service providers in the region based on their capability to deliver exceptional customer experiences and how they address key enterprise challenges.

With the ongoing pandemic, there is an immediate need among Australian enterprises to diversify their operational footprint to improve business continuity. They are seeking guidance in migrating to the virtual environment, including effective communication of the brand to their agents. This includes maintaining high levels of customer service in a highly secure environment to build ongoing business resilience. They also seek robust recruitment processes that are customised for a work-at-home environment to address staffing fluctuations. The main focus is to provide customer-centric multilingual support and deliver best-in-class service excellence.

ISG observes that service providers are introducing new and innovative cloudshoring solutions to deliver a virtual operating model that enables business continuity, agility and scalability. These solutions are designed to offer a socially rich working environment to improve remote interaction and talent management capabilities, including talent acquisition, learning, working, feedback, training and personal development. Providers are focusing on developing and deploying AI-based hiring solutions to help enterprises improve the hiring process. They have deployed best-in-class security monitoring tech-

nology and fraud detection practices that are in compliance with international regulations and data privacy policies. This covers workstation and network security, including fully encrypted voice over Internet protocol (VoIP), virtual desktop security and secure virtual private networks (VPNs). In certain cases, they have deployed bring-your-own-device (BYOD) software to ensure that the agent's device meets the security and technical requirements of the enterprise.

IT and technology leaders should read this report to understand how contact centre service providers are integrating multiple technologies for enabling the virtual workforce into their offerings and how the technical capabilities of these providers compare with the rest of the market.

Digital transformation professionals should read this report to understand how providers of contact centre services enhance their digital transformation initiatives for an agile, scalable and secure work-from-home environment and compare with one another.

Business strategy and industry leaders should read this report to understand the global delivery and vertical capabilities of providers in the marketplace. This report also gives insights into the service provider's expertise, technology and innovation-led solutions. It also differentiates them on how they modernise their offerings for improved customer satisfaction and loyalty, increased process efficiency, and rapid response to changing market dynamics.

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WORK FROM HOME SERVICES

Definition

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 at present. Embracing a hybrid model and preparing for unforeseen circumstances such as a pandemic will help providers demonstrate a highly resilient business model, instilling trust among their clients. From hiring, onboarding, training, technological implementations and delivery, everything has been virtualized in the past year. To enable a work from home model for

Contact Center - Customer Experience Services
Work From Home Services

2021
Australia
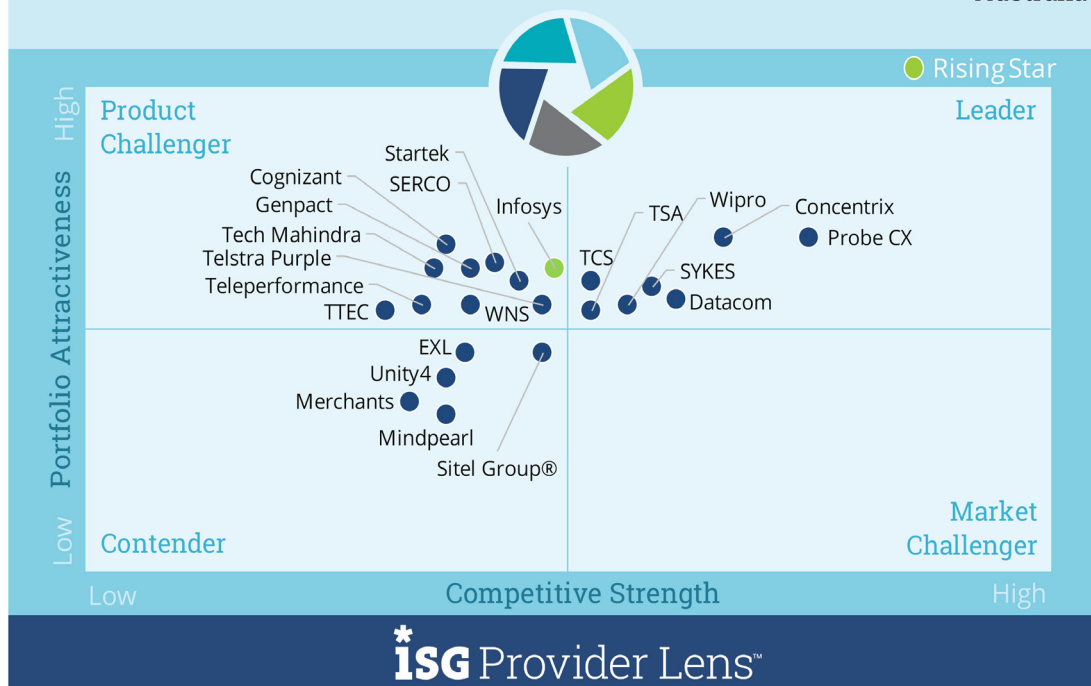
Source: ISG Research 2021

WORK FROM HOME SERVICES

Definition (cont.)

a large workforce, companies adopted new technologies and talent management tools and programs. With changing work environment, cybersecurity requirements are becoming a high priority. The new hybrid working model drives the adoption of the latest and updated security measures, as they are highly critical to enable successful work from home models.

This quadrant assesses a provider's capability to offer work from home services, including infrastructure, technology and reliable cybersecurity measures.

Eligibility Criteria

- Ability to enable work from home infrastructure

- Ability to offer remote workforce management facilities

- Ability to offer virtual onboarding, including interviews and training facilities

- Improved cybersecurity measures

- Collaboration tools

- Scale of implementations

- Ability to offer technological solutions such as homegrown platforms/partnership platforms

- Innovation

- Burstable capacity

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WORK FROM HOME SERVICES

Observations

Of the 22 providers assessed in Australia for this quadrant, seven are Leaders and one is a Rising Star.

- **Concentrix** is a global CX specialist headquartered in the U.S., with a client base in 40 countries, including Australia. It offers highly comprehensive work from home offerings and has strong expansion plans. Concentrix's work from home model focusses on which delivery option to implement — hybrid, pure work from home or gig economy.

- **Datacom** is one of Australasia's largest professional IT services companies. It delivers a hybrid work from home delivery services strategy through a close-to-hub model that enhances employee hiring and onboarding process. A geographically dispersed model offers service elasticity to clients with lower fixed costs.

- **Probe CX** is the largest CX provider in Australia, with offices across the country. It has strong internal and external work from home capabilities. In response to the global pandemic, its work from home offerings are now being deployed in 32 centres across five countries.

- **SYKES** is a leading provider of multi-channel demand generation and customer engagement services, with a strong presence in the Australian market, especially in the financial services industry. It offers a highly competitive customer intelligence solution, including work from home capabilities.

- **TCS** is a global IT services, consulting and business solutions company that has been present in the Australian IT market for over 30 years. It has a comprehensive work from home strategy and a strong CX offering in Australia incorporating work from home tools. Its CX strategy is applicable across the entire value chain.

- **TSA** is an Australia-based specialist in CX consultancy and services, with a comprehensive work from home offering. It supports several of its clients to rapidly implement remote working voice and messaging solutions and potentially implements a work from home trial with leading CCaaS platforms.

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WORK FROM HOME SERVICES

Observations (cont.)

- **Wipro** has a highly developed work from home framework that helps enterprises and businesses enhance their contact center operations. Work-from-office/Work from many places (WFM) systems include an intelligent, fully integrated contact centre workforce optimisation suit in the cloud, on-premises or in a hybrid environment.

- **Infosys** (Rising Star) operates in 46 countries, providing business consulting, IT and outsourcing services. It has a strong work from home solution and strategy with advanced employee engagement initiatives. The majority of its employee connect programs have shifted to the virtual mode.

PROBE CX

Overview

Probe CX (Probe) is a CX specialist operating across the Asia Pacific, North America and Africa, with more than 15,500 employees and over four decades of experience. Probe has evolved its outsourced contact centre services and collections management to become a leading CX management organization operating across 31 delivery centres across four countries that include the U.S, the Philippines, Australia and New Zealand. It is the largest CX provider in Australia, with offices in Sydney, Melbourne, Wollongong, Gold Coast, Springfield, Maroochydore, Perth and Joondalup.

Strengths

Strong internal and external (client) work from home capabilities: In response to the global pandemic, work from home capabilities have now been deployed in 32 centres across five countries. Ninety percent of Probe's total global workforce is eligible to work from home, and the remaining 10 percent was transitioned to a hybrid model. For clients categorised as essential services, Probe deployed hybrid work from home and in-office solutions. Probe has a mature cloud based SD Wan infrastructure coupled with Genesys Cloud omnichannel contact management, which enabled the rapid global work from home rollout. In addition, the company procured more than 5,000 Internet devices across five countries to supplement local Internet delivery and invested in creating a virtual support platform including Facebook Workplaces for social connectivity, and remote agent support hubs, leveraging e-learning, online coaching, gamification and knowledge support along with wellness and health programs.

Advanced reporting and insight and analytics functionality: This includes a single data model to rapidly add attributes to the existing reports and offer multipurpose business insights, automation, decision support and ETL optimisation. Probe's on-premises solutions adhere to strict IT security regulations, including those for government, banking and finance. The company's data warehouse framework is built and managed internally. Okta integration is provided for single sign-on (SSO) and internal user-provisioning and is automated to reduce support footprint. A single view for current and historical trends is provided for added ease of use.

Caution

Although Probe was able to grow rapidly by quickly providing a business continuity planning (BCP) version of work from home in response to COVID-19 and various lockdowns, the major competitors in the market have now implemented their own offerings. The company must aggressively work on maintaining its leadership position and growth as a more permanent hybrid work from home model is adopted.

2021 ISG Provider Lens™ Leader

Probe is a strong leader and one of the largest work from home service providers in Australia, with offices across Australia. It has robust internal and external (client) work from home capabilities.

ENTERPRISE CONTEXT

Social Media CX Services

This report is relevant to enterprises across industries in Australia for evaluating social media customer experience (CX) services of contact centre providers. In this quadrant report, ISG highlights the current market positioning of contact centre social media CX service providers in the region based on their capability to deliver exceptional customer experiences and how they address key enterprise challenges.

Enterprises are seeking strategic methods of responding to customer queries, concerns and mentions through social media channels such as Twitter, Facebook and Instagram as well as messaging apps, online reviews and chat. These channels provide them a combination of customer service and public relations. They also enable personalisation and mass communication techniques, provide context sensitivity, and encompass both local and corporate points of view. The focus is on mitigating negative sentiment and creating a positive brand image for their products and services. They want to utilise social analytics to gather deep insights into the market and strengthen their market positioning.

Service providers in this space offer comprehensive end-to-end social media intelligence solutions with expert social media customer service agents and analysts, enabling cost optimisation and scalability. They provide real-time monitoring of digital content through social media listening, enabled by the deployment of dedicated enterprise-shared services centres. They have integrated social analytics and data into these

facilities, bringing together quantitative and qualitative data from internal and external sources to deliver critical business insights for enterprises. They help clients improve the customer experience through a range of automation technologies with specific industry vertical solutions to enable rapid customisation across social channels. They also leverage partnerships with third-party platforms, mainly for providing social media analytics solutions across multiple channels of communication.

IT and technology leaders should read this report to better understand the strengths and improvement areas of these providers in terms of their social media CX offerings. The report also helps them analyse multiple offerings and select the right solutions that align well with their business needs.

Digital transformation professionals should read this report to understand the broad range of social media CX solutions offered by providers and how they implement these solutions at scale to realise the desired outcome.

Business strategy and vertical leaders should read this report to understand the industry specific solutions offered by these providers backed by social media technologies and partners.

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SOCIAL MEDIA CX SERVICES

Definition

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 gaining traction. Also, resolving issues is faster through social media channels, with no waiting time. 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. These platforms have also helped enterprises garner immediate feedback from customers, thereby enabling enterprises to quickly take appropriate measures and improve customer service. With the adoption of AI, these platforms can help enterprises with their marketing and sales processes significantly. Service providers are ramping up social media services and adopting the necessary technology to rapidly tap into this market.

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

Contact Center - Customer Experience Services
Social Media CX Services

2021
Australia
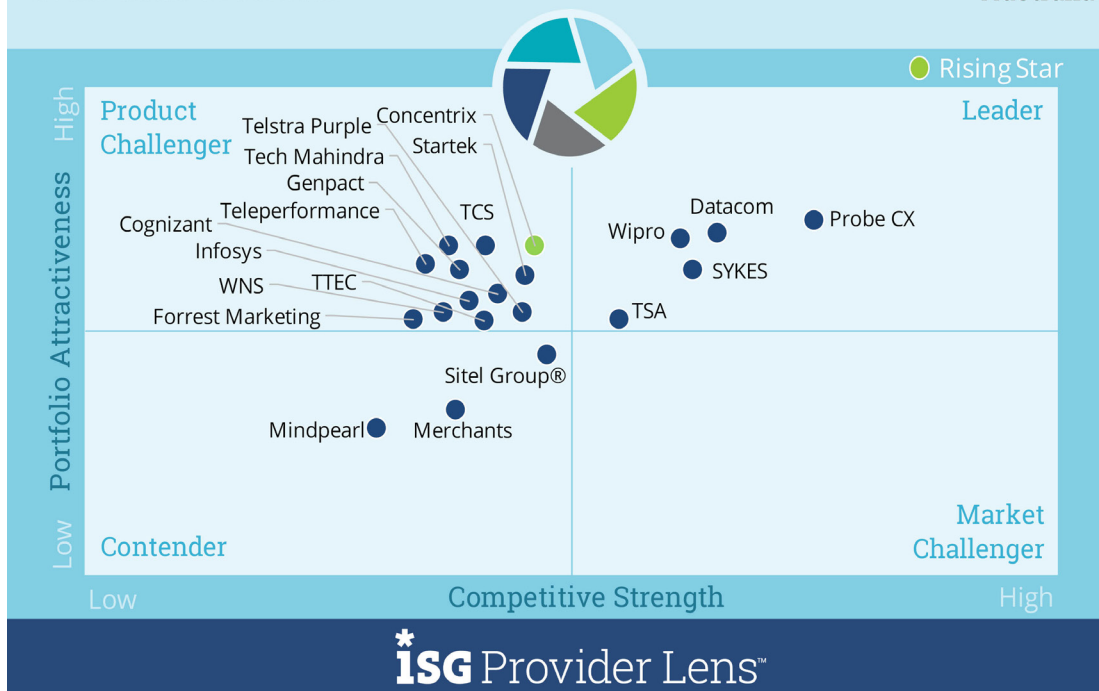
Source: ISG Research 2021

SOCIAL MEDIA CX SERVICES

Eligibility Criteria

- Ability to provide social media services

- Content management

- Trained FTEs

- Digital technologies such as AI implementations to manage content

- Applying analytics such as sentiment analysis and VOC

- Ability to offer marketing and sales support

- Scale of implementations

- Ability to help customers achieve business outcomes such as CSAT, NPS, cost savings and revenue generation

- Partnership ecosystem or proprietary solutions

- Ability to demonstrate referenceable case studies

Observations

Of the 20 providers assessed in Australia for this quadrant, five are Leaders and one is a Rising Star.

- **Datacom** is one of Australasia's largest professional IT services companies. Its Connect suite of experience management solutions offer service design that leverages smart technology to optimise customer engagement and include a strong social media offering.

- **Probe CX** is the largest CX provider in Australia, with offices located across the region. It has a comprehensive, end-to-end suite of CX solutions, including social media.

- **SYKES** is a leading provider of multi-channel demand generation and customer engagement services and has a comprehensive and cost-effective social media offering. It has a fast-growing presence in the Australian market, especially in the financial services industry.

- **TSA** is an Australia-based specialist in CX consultancy and services. It offers a broad range of CX social media offerings. It has onshore delivery centres in Perth, Adelaide, Melbourne, Brisbane and Manila and has an innovation lab in Melbourne.

SOCIAL MEDIA CX SERVICES

Observations (cont.)

- **Wipro** has strong CX presence in Australia. It has a broad social media functionality as part of its CX offering. It uses a wide range of social media channels for CX. Wipro offers a scalable social media management tool, Sprinklr, for optimising operations, reporting and CX.

- **Concentrix** (Rising Star) is a global CX specialist, with clients in 40 countries, including Australia. It has eight delivery sites, including two client sites, in the region. Social media is core to Concentrix's CX delivery strategy, with its social media care and moderation offerings being the first to be introduced in the market in 2005.

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Caution

The provision of strong social media CX relies on high-volume, localised service delivery. To maintain its leadership position in this space, Probe may need to augment its partner ecosystem with a number of smaller local partners.

Strengths

Highly comprehensive end-to-end suite of CX solutions, including social media: These solutions operate under three operating segments, namely, CX, Enterprise Shared Services and Digital. CX includes customer acquisition and reservations, customer service and care, customer retention and loyalty and CX consulting. Enterprise Shared Services include social media and digital marketing, content moderation, knowledge curation and web and software development. Probe is a leading provider of advanced digital solutions, which include advanced analytics, RPA, chatbots and intelligent virtual agents, AI and NLP, and biometric verification.

Strong digital capabilities before, during and after client contact: Before client contact, intent-based routing provides conversational AI and contact avoidance, while intelligent automation leverages virtual assistants as a part of intuitive self-service around the customer during client contact. Intelligent process automation provides rules-based process flows, while augmented agent capabilities include live conversational monitoring and next base response and action. This functionality assists the agent with real-time insights and suggestions.

2021 ISG Provider Lens™ Leader

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Methodology

METHODOLOGY

The research study "ISG Provider Lens™ Contact Centre - Customer Experience Services 2021" Australia analyzes the relevant software vendors/service providers in the US 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 Centre - 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. Leverage 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

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Distinguished Lead Analyst - Australia

Distinguished lead analyst and author Craig Baty has extensive research and thought leadership experience in the Asia Pacific and Japan ICT markets. Craig is Principal and Founder of DataDriven, an Asia Pacific-based research and advisory firm that is an ISG Research partner. Craig has over 30 years of executive and board-level experience in the ICT industry, including as a Group VP and Head of Gartner Research AP/J, CEO of Gartner Japan, Global VP Frost & Sullivan, EGM Marketing and CTO Fujitsu ANZ, GM Marketing Strategy and Alliances at BT Syntegra Australia, and more recently as VP Global Strategy and VP Digital Services in Fujitsu Tokyo HQ. As a well-known ICT commentator and analyst, Craig has written more than 200 research pieces and presented at over 1,500 events globally. He is also regularly quoted in regional media. Craig is actively involved in the ICT community as a board member of the Australian Information Industry Association (AIIA) and other appointments. He is currently pursuing a Doctor of Business Administration by Research (DBA) in the area of national culture impact on IT Strategic use and investment (Japan compared to Australia).

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Senior Analyst

Venkatesh B 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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Authors and Editors

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Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation. She is responsible for authoring the enterprise content and the global summary report, which includes market trends and insights.

Jan Erik Aase, Editor
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.

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