



# The Aragon Research Globe™ for Intelligent Contact Centers, 2020

The race to deliver better customer experiences.

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**Topic:** Intelligent Contact Center

**Issue:** Who are the intelligent contact center providers and how will they evolve?

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## SUMMARY

Aragon Research releases its second Aragon Research Globe™ for intelligent contact centers. It examines 15 major providers in a market that is shifting to become more automated, integrated, and infused with digital labor. With virtual agents coming online, the opportunity for enterprises is to solve customer problems faster than ever before.

### Key Findings:

**Prediction:** By YE 2021, virtual agents (e.g., digital labor) will become a key feature of intelligent contact center offerings. This will force enterprises to do planning for the ratio of human labor to digital labor.

### Cost per Case Humans vs. Bots:

Virtual Agents: \$1-\$4

Human Agents: \$15-\$100

**Prediction:** By YE 2022, AI-based contact centers will be able to identify the real issue a customer is facing 50% faster than traditional approaches.

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## Introduction

The contact center market has continued to grow mainly due to adoption and buying activity by small and large enterprises that either want to expand or replace existing offerings. The demand for cloud contact center support is at an all-time high and many providers are growing at double digit rates.

The shift to intelligent contact centers that are powered by artificial intelligence is underway. Last year, we profiled and identified what we called digital labor, which is the insertion of computer-based chatbots and digital assistants to support both agents and customers directly with faster ways to get answers to questions and solve problems, such as the need for a refund. This research note evaluates the trends in the market and identifies 15 key providers that are making a difference in intelligent contact centers.

The contact center market is evolving to address changes in customer expectations and more stringent enterprise requirements by leveraging emerging AI technologies. This research note identifies the new elements of an intelligent contact center and how enterprises can plan for the shift to a seamless customer experience.

The communications market will continue to shift over time to standardize multi-modal interactions and seamless integration with business applications. Communications and collaboration are driving this change and will shape the future of the contact center. Newer technologies, like mobile messaging, are already carving out places for themselves within the structure of the contact center, just as these technologies gained a large presence in enterprise communications.

The need for better customer experiences has put pressure on both contact center operators and the providers that supply them. The need to offer omnichannel communication options is important to enable individualized customer service experiences. Since incoming customer service requests will widely vary in context and technology used (laptop, smartphone, etc.), contact centers must have a sufficient communications framework in place to support variations in customer experiences.

## The Current State of the Contact Center

During COVID-19, enterprises have realized the strategic nature of customer support and the role that contact centers play. This has become even more important as physical contact centers have had to close, and call center associates have begun to work virtually. Many providers have been able to react to the current crisis and support their current and new customers with the new reality of remote agents.

Additionally, contact center buyers have become more sophisticated and have realized that while cloud is one deployment choice, hybrid cloud may be a better choice for large deployments where a combination of both SaaS and on-premise applications may be needed.

Today, the race to intelligent contact centers includes being able to offer choice to buyers about whether the offering is on-premise or in the cloud. This report covers both sets of providers, most of which are in the process of augmenting their offering to provide more choice.

### **Understanding Customer Behaviors: Customer Data Platform vs. CRM**

While being able to communicate via multiple channels is important, what is more important is understanding the customer who is on the phone or in a chat session. While many contact center knowledge bases have customer records, it is the CRM that holds most of the master customer data. In many cases, the CRM does not have enough data attributes needed for the contact center.

The new battle is to understand buyer behaviors and be able to predict what the next best action might be for that particular customer in that situation. This suggests that marketing platforms and, in many cases, contact center deployments that have built-in customer data platforms (CDPs) will be able to create a richer buyer profile (see Note 1). There is not a hard and fast answer here but for the intelligent contact center, having more customer data often means that better customer service can be delivered.

### **Building the Universal Customer Profile**

One of the key factors that ties into omnichannel communications is understanding the profile of the prospect or current customer. Profiles are not new, but CDPs enable the creation of an enhanced profile that can feed into what the human agent or the digital agent can do.

#### **Note 1: Customer Data Platform Definition**

Customer data platforms collect information and attributes about customer or prospect activity. The long-term goal of a CDP is to predict behaviors so that the right offer can be made at the right time to close a deal. In some cases, a CDP may be the core knowledge base of a contact center offering, but in a number of growing cases, more data is needed to build enhanced customer experiences.

CDPs leverage machine learning-based analytics systems and other data-driven insights to help provide a clear and instructive picture of customer activity. The goal of a CDP-enhanced contact center platform is to understand buyer journeys to enable the right offer to be made at the right time.

Increasingly, these enhanced profiles will become vital in the contact center and for marketing campaigns for both new and existing customers.

### **Omnichannel Communications Powered by Profiles**

The old way of doing outbound communications was to use a power dialer and call everyone. With new universal profiles in place, providers have the potential to help contact centers understand the type of communication the buyer prefers, including the right time of day for that communication. Today, many providers do not offer this level of communication fidelity, however, we expect that over the next two years this will become a must-have set of capabilities.

**Prediction:** By YE 2023, 50% of ICC providers will know the right type of communication channel to use for outbound campaigns (70% probability).

Optimally, outreach efforts must be omnichannel and acknowledge the technology that customers increasingly want to use, such as messaging and video. While still valuable, phone calling and emailing are only a part of the communications landscape. A digital communications platform equips businesses with multiple forms of outreach capabilities to successfully compete in the digital world and optimize efforts.

### **Analytics Will Assist Both Human and Digital Agents**

The role of analytics in the contact center cannot be understated. Understanding the sentiment of the caller or the person chatting can help to determine the next best action to solve the customer's problem. The big shift in analytics is the real-time nature of natural language processing (NLP). We expect to see a significant increase in usage of NLP and natural language understanding (NLU) to streamline and to help automate customer journeys.

For example, a customer who is upset would be recognized right away and the chatbot might realize it cannot solve this customer's problem and transfer the call to a high-level agent who is highly trained in solving the particular problem. On the other hand, in a growing set of cases, chatbots actually can have the right response to deal with an upset customer, such as offers or refunds that can calm a customer down right away.

For contact center, voice analytics means optimization. Sentiment analysis—the ability to detect emotion from voice input—is key for customer service requests where a rep must effectively address a customer's needs and, ideally, maintain that customer's loyalty. Sentiment analysis can offer call reps insights into the consumer's experience, which can then be used to tailor the remaining interaction to enhance or correct anything undesired. Higher quality analytics can ensure that proper adjustments are made in real time. The “real-time” element of analytics is invaluable because interactions must be

optimized in a (usually) very short window of time. This length of time can either make or break a customer for life.

## **Key Trends Driving Digital Transformation**

From a consumer or enterprise user's perspective, digital transformation represents an enterprise's efforts to provide visibility and connectivity throughout their personal customer journey. Two technology trends—the adoption of cloud computing and the maturation of artificial intelligence technologies—are responsible for creating, and to some extent fulfilling, these expectations.

### **Cloud Demand Is Growing**

Just like the other market segments of communications and collaboration, demand for cloud contact centers (CCaaS) is outpacing on-premise alternatives. However, that does not mean that every enterprise will migrate. Many cloud providers are focused on the small and midsize markets where cloud makes sense. However, we do expect the growth of the cloud segment to continue, but for large enterprises it may be a managed cloud service that runs on managed hardware.

While cloud ICC providers are growing faster than their on-premise counterparts, nearly every large ICC provider now supports cloud. Given certain sets of issues in contact center, we don't expect all large enterprises to be making a move to cloud anytime soon. That said, some want parts of their operation to be cloud-based and providers are stepping up to meet these needs.

### **Cloud Computing—the Shift to Hybrid Cloud**

Last year was the year of cloud-based contact centers, and the demand in the SMB segment continues to grow. However, with the rise of managed containers, powered by Kubernetes, even cloud-based ICC providers can now offer their service in a buyer's data center.

Cloud is really a deployment mechanism, and with hybrid cloud, enterprises can actually have multiple contact centers using different deployment models. This means that a large contact center may want to continue to have its application run locally, but have it managed by the vendor. It also means that smaller, regional contact centers can be completely cloud-based.

This shift to hybrid cloud represents a maturation of the market, and that is why we only view contact center as one market, not multiple markets. As contact centers become more intelligent, we expect the use of hybrid cloud to grow even more, as many

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enterprises will continue to want their data to be resident either in their data center or in a cloud data center in their country.

### **Building the Virtual Contact Center**

Aragon estimates that 40% of the workforce will work remote permanently and contact centers are not immune to this trend. This means that providers need to have virtual agent capabilities. For some enterprises, that has meant upgrading legacy contact centers to enable agents to work remotely. Going forward, contact center managers will need to adapt to the new reality that not all agents will be in the same center at the same time.

### **The Convergence of UCC and ICC**

More buyers want a one-stop-shop when it comes to their communications and contact center infrastructure. The trend of having unified communications and collaboration (UCC) and ICC bundled together cannot be ignored. More providers are offering this and more buyers want this, along with unified clients.

It is important to note that buying the UCC and ICC offering together does not mean it is an integrated offering. However, it may mean that customer support is from one primary provider.

### **Building a Knowledge Base for ICC**

For a modern consumer or enterprise user with an app-centric view of the world, obtaining product information or solving a problem with a product requires contact with the enterprise and they expect to be:

- Recognized—Authenticated.
- Remembered—An intelligent contact center (ICC) customer profile should include historical data about their account and any previous ICC interactions.
- Understood—The ICC agent(s) should identify the issue, articulate it to the customer, and get confirmation to ensure understanding.
- Satisfied—An ICC should ensure that the issue has been resolved by requesting confirmation after presenting the results, findings, or recommendations to the customer.

The opportunity comes in the form of options to differentiate by providing more personalized services and more automated, yet engaging, customer journeys. These app-savvy customers are digital-ready: they have used consumer and enterprise apps in the cloud and expect to consume functionality in manageable units, and to mix and match functions from different vendors when necessary. They want integration without



becoming integrators. This is why the need for an enhanced profile, powered by customer data is vital.

**Prediction:** *By YE 2023, 50% of contact center providers will enable the development of an enhanced customer profile that will enable more a personalized customer experience (70% probability).*

## The Current State of Artificial Intelligence

There is a race to build intelligent contact centers. Much of the focus today is on automation—both scripted workflows and now automated ones. The other focus is on overall intelligence, which is where AI comes into play. Most ICC providers are partnering for AI, which is what normally happens when new technologies emerge. With any sufficiently complex technology or system, early adopters generally require specialized knowledge. Much of the focus is on digital agents (chatbots) and we expect there to be a large set of mergers and acquisitions as the digital labor market matures.

## Intelligence: Virtual Agents and Conversational AI—A Cost Advantage

The need to quickly handle inbound customer calls and chat sessions is critical to continued customer loyalty. For customer support, digital agents (chatbots) have been proven to be able to answer questions and close out tickets very quickly. The challenge today is that many contact center providers are only now launching their digital agents. In many cases, the enterprise ends up going with a third-party provider to power their growing set of virtual agents (digital labor). Some enterprises who have deployed virtual agents have seen a reduction in costs. One firm had the following ranges of costs per case (humans vs. virtual agents):

### Cost per Case

Virtual Agents: \$1-\$4

Human Agents: \$15-\$100

## Deploying Virtual Agents Now

Virtual agents will increasingly help to define the customer or user experience (CX/UX) and are often used as the first touchstone in customer service communications, especially requests initiated online. Conversational AI, which is what is used to create chatbots/digital agents, can be added to an existing application to improve its performance and extend its life without requiring a complete re-write. Adding conversational AI is simpler, quicker, and more economical than creating a new natural language interface for an application.



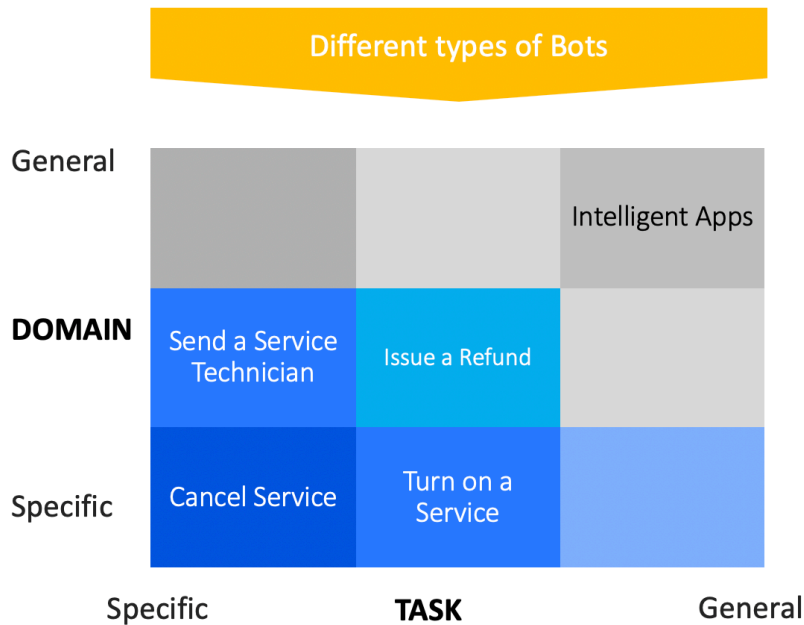


Figure 1: AI chatbots—the more specific, the better.

Figure 1 depicts the sweet spot for conversational AI: acting as the conversational interface for an application that has a specific domain, such as a customer service request, and a well-defined set of potential actions, such as “provide a refund,” or “initiate a service/repair request.”

## Preparing for the Rise of Digital Labor

There is no doubt that human agents and digital agents will coexist. Last year, Aragon introduced the concept of digital labor, which represents the body of computer-based chatbot agents that we see growing at a 10x rate between now and 2025.

There is no doubt that digital agents are cheaper and more efficient, but they are usually good at single tasks, such as answering questions. This is why enterprises actually need to have a plan for digital labor and the different types of agents they will deploy in a contact center.

Some of the different types of digital agents we see that are being deployed now, and on the horizon, include:

- Greeting and triage bots (IVR replacement)
- Troubleshooting bots
- Q&A bots
- Refund bots
- Scheduling bots

**Prediction:** *By YE 2021, virtual agents (e.g., digital labor) will become a key feature of intelligent contact center offerings. This will force enterprises to do planning for the ratio of human labor to digital labor.*

## Contact Center Feature Wars—More Providers Innovate

More ICC providers added more features to their portfolio than in previous years. This is due to two things: market demand and competition among vendors.

While SaaS cloud offerings are now a given, the ability to offer multi-cloud deployments (using different public cloud providers in different geographic regions) is still a work in progress for many providers. This type of offering is only being done by larger providers.

### Note 2: Digital Labor Defined

Digital labor is a term that applies to the automation of tasks that are performed by computer applications. These tasks were formerly performed by humans.

Digital labor can be used for data entry, for warehouse operations by a robot, or in call centers to solve the problems that humans are having with a particular product or service.

One thing is clear: digital labor is here to stay.

When it comes to features, the focus on features often outweighs the focus on the ability to streamline an inbound journey. Omnichannel channels is now a given, as is CRM integration.

### Workforce Optimization—Integrated vs. Best of Breed

Additionally, the market has begun to transition from best of breed workforce optimization capabilities to native capabilities. One of the challenges of workforce optimization (WO) is the need to balance human and digital labor. Increasingly, we expect to see WO offerings by 2025 with a combination of bot and human scheduling.

### Voice Analytics

Voice quality and global availability continue to be critical issues, no matter what the size of the enterprise. While some of the largest ICC providers offer their own global voice network, many actually use another provider's infrastructure. It is important to understand whose voice platform is actually being used to have a true understanding of the quality being delivered.

The big shift in analytics is that real-time understanding is needed. Gone are the days of offline transcription. Voice conversations need to be monitored in real-time and processed so that the customer can be assisted faster. It is important to understand if your provider actually has NLP and NLU deployed as part of their voice analytics.

While feature wars are part of the battle, the next big wave for the contact center is adding intelligence to applications so that customer journeys can be sped up. This is where artificial intelligence comes into play and paves the way for the shift to what Aragon calls the intelligent contact center.

### Building the Intelligent Contact Center

Last year saw continued efforts to build the intelligent contact center. The focus is still predominantly on the human agent. That said, many enterprises have added chatbots, often not

#### Note 3: The Benefits of Digital Labor

Contact center providers will need to focus on the new way of working and justify further investments by meeting specific requirements:

- Faster first call resolution—Improves customer satisfaction, saves the cost of rework.
- Lower customer effort/time—Improves customer satisfaction, reduces contact center resource requirements.
- Reduced customer churn—A result of meeting the first two requirements.
- Lower costs for every function—Call handling, escalations, etc.
- Improved agent experience—A result of reduced stress and frustration through prescriptive insight.

from the same provider that they procure the ICC from. We are still in the learning phase of digital labor, but it is clearly here.

There are clear benefits to leveraging digital agents (e.g., chatbots) and as more get deployed the benefits will become more apparent.

Frequent updates are a benefit of a SaaS-based ICC deployment. This means more providers are using agile development to deliver quarterly updates. As their business-critical applications—including contact centers—move from on-premise solutions to cloud-based solutions with distributed resources (like remote human agents), they expect an ongoing innovation stream and interoperability with market-leading products in adjacent or complementary spaces to add functionality or data.

From a business viewpoint, this implies a need for product innovation and partnerships. From a technology viewpoint, it demands systems that can improve over time—learning from experience—to help customers extract value from their own data rather than relying on the vendor for constant insights. That requires practical applications of AI.

**Prediction:** By YE 2022, AI-based contact centers will be able to identify the real issue a customer is facing 50% faster than traditional approaches.

The shift to intelligent contact centers will be gradual, but not without bumps along the way. The use of AI is not without problems and not all providers will be successful in the transition.

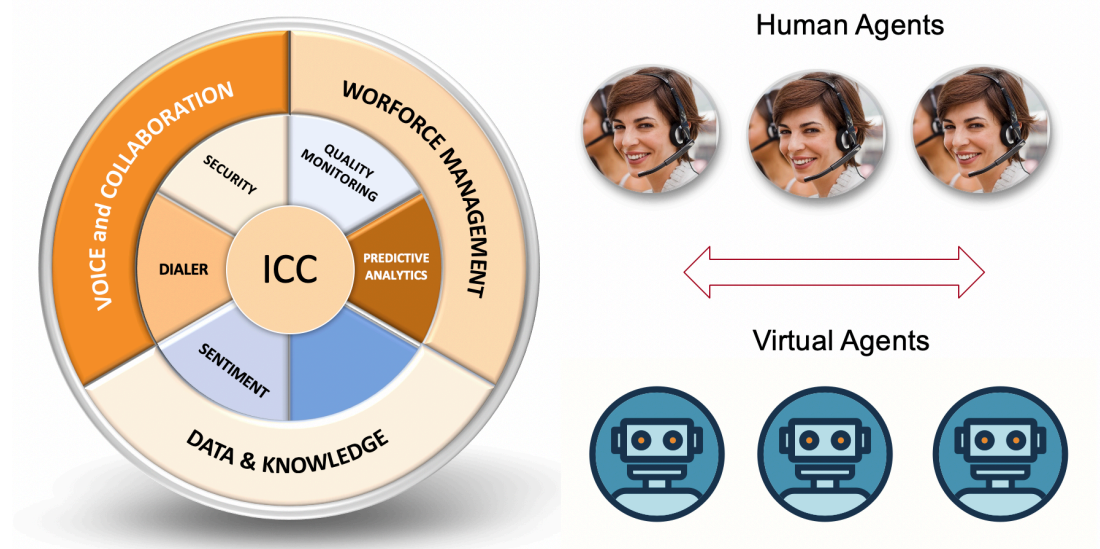


Figure 2: The intelligent contact center will be increasingly composed of human and digital labor.

## Google Contact Center AI

As we indicated last year, many providers opted to partner with Google for contact center AI capabilities (see Note 4). Google made its offering available in 2019. It also enhanced its core Dialogflow offering with new capabilities, including a new agent validation feature. Dialogflow now supports Health Insurance Portability Act (HIPPA) and payment card industry (PCI) data security and privacy standards.

While this partnership and the rollout of production bots has been slow, many enterprises have turned to third-party conversational AI providers who can deploy bots faster. As with workforce optimization, the move to digital labor and towards a series of bots may be a separate procurement. There are many emerging providers who can augment contact center deployments and go beyond basic chat to question and answer bots and more (see Note 5).

## The Slow Roll to Machine and Deep Learning

The market has shifted toward deep learning (DL) offerings that can learn on the fly. DL is a biologically-inspired subset of machine learning (ML) that can perform complex learning and identification tasks by successive refinement from concrete digital representations to abstract concepts.

ML requires more training, but it has been successfully applied to problems ranging from speech recognition to recommendation engines to diagnostic assistants. Because of open source deep learning algorithms such as TensorFlow, the ability to have bots learn faster as they are exposed to data is a reality. The increasing reality is that “machines” should be able to identify customers as individuals, remember relevant information about previous interactions with them (contextual, historical data), and choose an appropriate next action when supplied with sufficient data. There are three key reasons for AI now (see Note 6).

In an ICC, the customer may be routed to an AI chatbot if it appears that the issue can be resolved automatically

### Note 4: Google Contact Center AI Partners

Google has a growing set of partners that are planning to leverage the forthcoming Google Contact Center AI offering. These include:

- 8x8
- Accenture
- Avaya
- Cisco
- Deloitte
- Five9
- Genesys
- KPMG
- Mitel
- Salesforce
- Talkdesk
- Twilio
- Vonage

### Note 5: Alternatives to Google Contact Center

- Airin.ai
- Avaamo
- Expressive
- IBM
- Invoca
- IPsoft
- LivePerson
- Pypestream
- Quiq
- Rayon.ai
- Rul.ai
- Voca
- Zoovu

based on historical data and the initial input from the customer. The ICC should monitor progress towards problem resolution and seamlessly hand-off the session to a human agent if the AI chatbot isn't making progress towards the goal or if the customer exhibits signs of frustration or other negative emotions.

## Four Important AI Augmentation Opportunities

Modern AI technologies excel at natural language understanding (NLU) and classification problems. Almost any contact center customer interaction will benefit from advanced NLU to capture more contextual data, and most processes can be improved by leveraging historical data and machine learning to identify better outcomes. With so many opportunities to leverage AI, no ICC solution—new or enhanced—is likely to realize its full potential for some time. Buyers should evaluate AI claims carefully. As they begin to evaluate ICC solutions, at least four AI-infused processes should be on the buyers' checklist and vendor roadmap.

### Note 6: Why AI Now?

#### 1. Customer Expectations Are Evolving Faster Than Enterprises Can Respond:

The need to resolve problems faster and streamline customer journeys is one of the reasons enterprises are looking for ways to automate contact center processes to resolve customer issues with faster rates of productivity and resolution.

#### 2. Consumers Expect Personalized and Consistent Experiences:

Consumers have very high expectations today. They expect fast customer service, regardless of their age. This growing set of expectations is what will fuel the race to the intelligent contact center. It will drive acquisition of AI firms by contact center providers and overall consolidation in the market.

#### 3. NLP Means Understanding Sentiment and Predicting the Reason for Customer Engagement:

Due to technologies such as natural language processing (NLP), software applications can now participate in mobile messaging conversations in the form of a chatbot.

For practical purposes, chatbots define the customer or user experience (CX/UX). This partitioning of functionality makes it possible to retrofit an artificial intelligence (AI) chatbot to an existing application, which can improve its performance and extend its life without requiring a complete re-write.



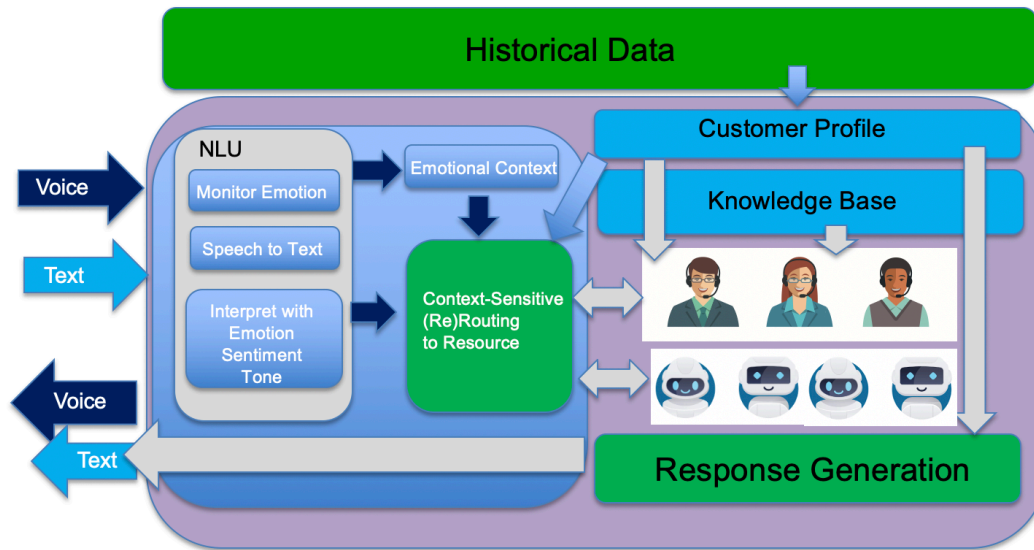


Figure 3: Intelligent augmentation scenarios.

These use cases include:

1. **Issue Identification:** Using a combination of natural language understanding and emotion/sentiment/tone analysis, an ICC can more accurately represent or classify the current request in context.

**Prediction:** By YE 2022, intelligent contact centers will be able to identify the real issue a customer is facing 50% faster than traditional approaches.

2. **Intelligent Routing:** Some ICC providers have deployed intelligent routing, and this helps to speed up resolution.
3. **Guided Agent Assist:** Once the appropriate agent, human or bot, has been matched with the customer, the ICC can continue to provide value by guiding the agent towards a successful outcome based on experience with similar inquiries. It all comes down to expertise and empathy—the ability to provide an appropriate response with the right tone for the situation.
  - **Human agents:** In many cases, a human agent may be the fastest way to assist the customer, particularly for issues that are not part of the knowledge base a bot can triage. The ICC can still use emotion-detection AI—examining what is said and how it is said—to provide ongoing insights about the current context to the agent and guide them to an appropriate response.
  - **Virtual Agents (Bots):** Virtual agents are extremely good at getting to the ‘answer’ that the customer needs. Not all bots will be enabled for sentiment,



but over time they will be able to monitor the customer response to watch for and react to any changes in emotion or behavior.

- 4. Next Best Action:** Beyond guiding the agents as they answer inquiries from clients, there are opportunities to leverage predictive analytics and ML to offer additional options, products, and services (upselling) appropriate to the current context, or to trigger events in the system that will follow up at a later date.

## Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

## Dimensions of Analysis

The following parameters are tracked in this analysis:

**Strategy** reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

**Performance** represents a vendor's effectiveness in executing its defined strategy. This

includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer experience:** Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

**Reach** is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

## The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators* or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.

- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

### **Inclusion Criteria**

The inclusion criteria for this Aragon Research Globe is

- a minimum of \$6 million in primary revenue for contact center or a minimum of \$8 million in revenue in a related market (voice, video conferencing, collaboration, and team collaboration/messaging).
- **Shipping product.** Product must be announced and available.
- Customer References. **Vendor must produce customer references in each hemisphere that the vendor participates in.**

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process. This determination was not applied to this report as all vendors participated in the Globe process.

### **New vendors included in this report:**

- **Fuze**
- **Intermedia**

### **Noteworthy vendors not included in this report:**

The following vendors were not included in the report but are notable:

- **Amazon**
  - Amazon offers its Amazon Connect Contact Center which focuses on enabling enterprises to build their own applications using Amazon AWS services.
- **Google**
  - Google is a leading provider of unified communications and collaboration. Its Contact Center AI offering is leveraged by a number of ICC providers in this report.

- **Nextiva**
  - Nextiva is an innovator in unified communications and collaboration and resells Cisco's contact center offering that works with its own native CRM.
- **RingCentral**
  - RingCentral resells the NICE inContact contact center offering.
- **Serenova**
  - Serenova has a cloud contact center offering.
- **Twilio**
  - Twilio launched Twilio Flex Contact Center in October 2018. It is currently focused on acquiring customers.

## The Aragon Research Globe™ for Intelligent Contact Centers, 2020 (As of 6/16/2020)

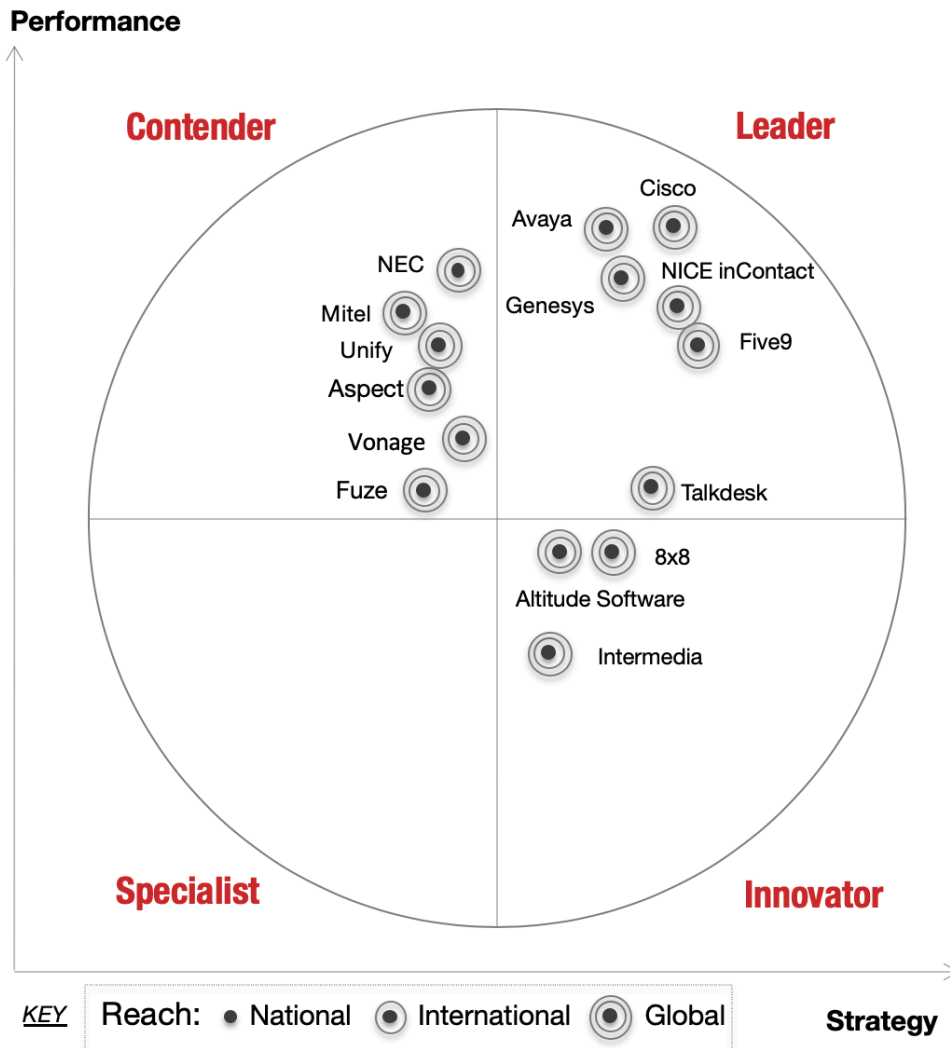


Figure 4: The Aragon Research Globe for Intelligent Contact Centers, 2020.

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## **Leaders**

### **Avaya**

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Avaya has one of the largest install bases of contact center deployments, offering private, public, and hybrid cloud, and it has continued to push the envelope with Avaya Contact Center. In September 2019, Avaya announced a series of enhancements for Avaya Contact Center, including Avaya Team Spaces for messaging between agents, managers, and customers. It also introduced a new Scripting platform to help automate inbound and outbound call flows. Finally, it also added a new dashboard engine that provides real-time understanding of customer journeys.

In June 2020, Avaya announced a streamlining and simplification of the company's cloud portfolio branding structure under the Avaya OneCloud banner. Avaya OneCloud CCaaS will be offered and described in multiple cloud deployment models (public, private, and hybrid). While Avaya has assets from its Spoken Communications acquisition in February 2018 that have been spun into the Avaya OneCloud CCaaS Public offering, Avaya indicated that it plans to roll out a native cloud contact center later in 2020. This would complement its Avaya Cloud Office UCC offering, which it launched in March 2020. In April 2019, Avaya deepened its AI relationship with Google to add to its existing strengths in AI.

Avaya has two approaches to AI. It has its own R&D center for AI, which brought Avaya Mobile Experience to market. Its A.I.Connect offering connects ecosystems of partners and enables customers to integrate new capabilities with leading vendors in the speech technology and AI-enabled customer engagement market.

#### **Strengths**

- Contact center platform
- Large deployment expertise
- Install base
- Native AI expertise
- AI partner network
- Partner network and ecosystem

#### **Challenges**

- Balancing its on-premise and emerging cloud offerings

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## Cisco

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Cisco, a leader in UCC, has made a series of announcements in 2019 that strengthened its overall focus on contact center, with AI at the center. Cisco Webex Contact Center Enterprise enables large contact centers to migrate to the cloud with low pain of adoption via common features and an agent desktop environment that works with its premises solution. Cisco also offers Webex Calling as an option that can be offered in conjunction with Webex Contact Center. It has also focused on hybrid cloud options, making it one of the providers that can offer both cloud and on-premise offerings. In 2019, Cisco announced the acquisition of Voicea and made the Voicea founder Omar Tawakol its general manager. One of Cisco's biggest moves this past year was its launch of a unified client that brings Cisco Webex (cloud collaboration) and its on-premise Cisco Unified Communications Manager capabilities together as one common user experience.

With Voicea, Cisco now has significant capabilities for voice analytics, including real-time transcription, wrap-up notes, and action items. On top of Voicea, Cisco announced in January 2020 that Webex Experience Management was being rolled out. Webex Experience Management is based on the Cisco acquisition of Cloud Cherry in 2019. This solution captures real-time customer sentiment and presents key insights to Cisco's integrated agent desktop.

Cisco also continues with Google for its contact center AI program, which will result in a branded solution known as Cisco Answers. With the combination of Voicea Voice Transcription and Analytics and Google Contact Center, Cisco is well-positioned for the shift to the intelligent contact center.

### Strengths

- Cisco brand
- Contact center install base
- Focus on AI
- Flexible cloud, premises, and hybrid deployment options
- End-to-end encryption
- Overall UCC capabilities

### Challenges

- Balancing multiple CC offerings



## Five9

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Five9 has continued its industry-leading growth rate and has doubled in size in the last two years. With the new Five9 management team firmly in place, it has done several acquisitions and put forth a crisp roadmap that focuses on both intelligence and automation. In 2019, Five9 announced the acquisition of Whendu, which enhances its overall workflow and automation capabilities. Since purchasing Whendu, Five9 has announced four different prepackaged applications leveraging the Whendu technology. In January 2020, Five9 acquired workforce engagement management provider Virtual Observer. This now allows Five9 to have a complete product offering, although it will still allow clients to use the WEM provider that best fits their needs.

Five9 is focusing on AI as one of its innovation strategies and it is partnering with Google for some of its contact center AI capabilities. Five9 supports both inbound and outbound use cases and has global call support and routing. In 2020, Five9 enhanced its integration between Zoom and the Five9 Intelligent Cloud Contact Center platform. Five9 also offers integrations with CRM providers Microsoft, Oracle, Salesforce, Zendesk, and ServiceNow. Five9 offers its own implementation service that has helped it win many new customers. Five9 is continuing to expand internationally and that, along with its crisp execution in North America, should see it continue its growth.

### **Strengths**

- Cloud offering
- Inbound and outbound focus
- Omnichannel features
- Salesforce integration
- Customer support
- Growing focus on AI

### **Challenges**

- Awareness outside of North America

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## Genesys

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Genesys, under the leadership of CEO Tony Bates, has refined its product line and expanded its cloud footprint by leveraging multi-cloud. The two offerings are now Genesys Cloud, which is a public cloud offering leveraging microservices, and Genesys Engage, which is a multi-cloud offering (public cloud, private cloud, on-premises, or hybrid) leveraging containerization. Genesys has embraced partnerships with the large cloud providers Microsoft, Amazon AWS, and Google, to enable customer choice. In addition to its native AI capabilities, Genesys has partnerships with Google and Amazon. It also has partnerships with Microsoft and Zoom to offer choice in the area of unified communications and collaboration.

In March 2020, Genesys announced that its Genesys Cloud offering was available on the Amazon AWS marketplace. Genesys still offers PureConnect for existing customers and select on-premises opportunities. In March 2020, Genesys announced it acquired long standing partner and Montréal-based nGUVU to enhance overall employee engagement. nGUVU provides machine learning-based gamification capabilities that will allow Genesys to bolster its WEM workforce engagement management offering. Genesys acquired Altocloud in 2018—now called Genesys Predictive Engagement—giving it more cloud-based customer journey analytics and machine learning, as well as a growing AI R&D center in Galway, Ireland.

### Strengths

- Broad ICC platform capabilities
- Management team experience
- Install base
- Large enterprise deployments
- Growing AI expertise
- Strong partnerships
- Usage-based pricing
- FedRAMP Authorized

### Challenges

- Maintaining and enhancing multiple product offerings

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## **NICE inContact**

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NICE inContact has continued to grow thanks in part to its offering and to its broad partner network. As a response to COVID-19, NICE inContact announced CXone@home, which enables more human agents to work remotely. CXone is its flagship ICC offering. It also offers its own native workflow management, workforce optimization, and analytics solutions which are part of a complete, unified, and intelligent cloud customer experience platform.

In January 2020, NICE announced that it was adding its Nexidia AI-based sentiment analysis to enable predictive behavioral routing. NICE inContact has enhanced its partnerships over the past year with vendors such as RingCentral and also a new partnership with Zoom. Both of these partnerships show the demand for combined ICC and UCC solutions. In 2019, NICE inContact continued to enhance its partnership with Salesforce to include a new native Lightning user interface, which enables tight integration between Salesforce digital channels and CXone Voice. One of the strengths of CXone is its integration capabilities with providers such as Salesforce and other leading CRMs and UCaaS providers.

### **Strengths**

- Cloud offering
- Integrations
- AI focus
- Partner network
- Endpoints
- Global partner ecosystem

### **Challenges**

- Balancing between direct and third-party partners for implementation

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## Talkdesk

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Talkdesk continues to offer its cloud-native enterprise contact center platform that has evolved over the last year with a series of new features, including AI-based Agent Assist and native Workforce Management. This focus on innovation has allowed Talkdesk to grow and win a significant number of new accounts. Talkdesk IQ is its native AI platform. In 2019, Talkdesk announced Talkdesk Guide, which is an intelligent knowledge base powered by Talkdesk IQ. Talkdesk Callbar is a freestanding app that allows agents to make and receive phone calls anywhere on the desktop. In March 2020, Talkdesk announced its own native Predictive Dialer for outbound calling. The Talkdesk Predictive Dialer works natively in the Salesforce Sales and Service Clouds.

Talkdesk Workforce Management—which was announced in 2019 and is a cloud-native, microservices architecture fully unified with its CCaaS platform—is now being rolled out to customers. Mitel is one of Talkdesk’s first major resellers: its Mitel’s MiCloud Connect CX is powered by Talkdesk. Talkdesk makes deployments easier through built-in integrations with 40+ help desk and CRM applications that are powered by its APIs. Talkdesk continues to push the envelope in the intelligent contact center.

### Strengths

- Cloud contact center
- APIs
- Focus on AI
- Workforce management
- Partner ecosystem
- Analytics

### Challenges

- Brand awareness outside of the U.S.

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## **Contenders**

### **Aspect**

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Aspect, which is now owned by Vector Capital, continues to push the envelope on offering its large install base new capabilities. Its Aspect Via® Platform cloud contact center offering supports omnichannel capabilities with support for chat, including social media chat, such as Facebook. Its full platform supports inbound voice and outbound voice, including a full predictive dialer. In 2019, Aspect announced its Infinity support program that will allow on-premise customers to continue to get support for the current offering and also prepare for a move to the cloud. Aspect also has strong expertise in vertical markets, including education, government, financial services, healthcare, hospitality, utilities, and transportation.

In 2019, Aspect announced that its Aspect Via Workforce Management offering expanded support to include Microsoft Azure in addition to the existing Amazon Web Services option. Supporting up to 15 thousand users, features include full scheduling and forecasting, shift bidding, agent self-service, and mobile app support for iOS and Android. Besides workforce management, the Aspect Via Platform includes performance management, quality management and voice and text analytics.

#### **Strengths**

- Full CC platform
- Large install base
- Cloud partnerships with Amazon and Microsoft
- Full workforce optimization offering
- Partner network

#### **Challenges**

- Focus on AI

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## Fuze

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Fuze reorganized in Q4 and named CFO Brian Day as CEO. It has shifted focus to the enterprise, where it has seen significant success in medium and large accounts. One thing that many have not known is that, besides partnering, Fuze has had its own contact center offering for years. With the recent update to the Fuze Contact Center, supervisor functionality is now available directly within the Fuze applications. The combined experience reduces the friction of switching between UCaaS and CCaaS platforms for contact center agents and supervisors as they service customers, while also collaborating cross functionally within their organization. This ultimately provides enterprise contact centers with a holistic view of their organization and deeper insights into contact center performance, boosting productivity and the ability to provide support internally and externally. Fuze also offers a complete UCC platform that offers a seamless user experience across all UCC modalities, making Fuze one of the providers that has combined UCaaS and CCaaS into a single platform.

Fuze has two approaches to the contact center based on enterprise size and need. For enterprises that need scale, Fuze partners and has integrations with both Five9 and NICE inContact. However, for small enterprises, Fuze has been quietly selling its own native contact center for years. The Fuze contact center is integrated with the Fuze native client; it also leverages the robust Fuze UCC platform. Fuze can integrate with a number of leading enterprise applications, such as Salesforce Service Now, NetSuite, Zendesk, Bullhorn, and others. As enterprises realize the need for an integrated ICC and UCC offering, Fuze offers those buyers a significant set of capabilities.

### Strengths

- UCC platform
- Voice and video quality
- Large global enterprise deployments
- Mobility experience
- Unified client

### Challenges

- Balancing multiple products for contact center

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## Mitel

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Mitel, which has been private since 2018, named Mary McDowell as its new CEO. Mitel continues to lead with voice and is transitioning to a cloud-first focus in the U.S. with unified communications as its primary solution story elsewhere. Mitel offers a complete UCC portfolio for both its cloud and on-premise UC offerings, including omnichannel contact center and endpoints. In 2019, it announced live virtual agent technology, which is powered by Google Contact Center AI to enable conversational self-service experiences. Its homegrown cloud contact center, MiCloud Connect Contact Center, is an optional add-on to the MiCloud Connect UCaaS while its contact center-as-a-service, MiCloud Connect CX, started shipping in Q4 2019. This solution leverages Mitel's call control capabilities with Talkdesk's CCaaS platform.

The partnership with Talkdesk and its Google partnership have helped to add new capabilities to its contact center portfolio. These solutions, which are part of the Mitel marketplace, are powered by Mitel's CloudLink technology, which enables on-site enterprises to access cloud-based APIs and applications and is a key catalyst for enterprises that want to leverage hybrid cloud deployments.

### Strengths

- Cloud and on-premise support
- Global cloud infrastructure
- Hybrid cloud API marketplace accessible to on-site customers
- Mid-market expertise
- Global partner ecosystem

### Challenges

- Balancing two distinct contact center offerings



## NEC

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NEC, which has a large global presence, offers a family of contact center offerings that give enterprises choice for an on-premise deployment. Its contact center offerings include its Business Connect, UNIVERGE SV8100, SV9000 series, and UNIVERGE Cloud Services Contact Center. NEC segments its offerings for small (five agents) and medium/large (up to 2000 agents). NEC also offers a full set of capabilities including cloud communications (UCaaS), messaging, meetings, and contact center.

In April 2020, NEC announced a partnership with Intermedia that allows NEC to resell Intermedia's cloud UCC and contact center offerings. NEC UNIVERGE BLUE Engage is the new cloud contact center based on the Intermedia platform. This offering will provide many NEC customers with a migration path from on-premise contact center to the cloud. NEC partners with DVSA Analytics for workforce optimization (WFO). Its WFO includes forecasting, scheduling, recording, speech analytics, and live monitoring. With an increased focus on cloud, NEC can offer more choice to its large install base of on-premise clients.

### Strengths

- Cloud and on-premise voice support
- Global cloud infrastructure
- Partnerships
- Analytics
- Global presence

### Challenges

- Balancing multiple contact center offerings

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## Unify

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Unify, which is the division of Atos that offers collaboration solutions, has been adding more partnerships to differentiate its offering. In August 2019, Atos announced it was partnering with NICE inContact and will offer its new Cloud Contact Center, powered by CXone, as its lead Cloud Contact Center. Unify continues to offer its OpenScape Contact Center Platform for on-premise and hosted cloud use cases. OpenScape CC capabilities work in conjunction with its portfolio of UCC solutions, led by the OpenScape Enterprise, OpenScape 4000, the Atos CPaaS orchestration platform, as well as Circuit, Unify's mobile collaboration platform. Circuit also supports messaging, voice, screen sharing and video, and integration with OpenScape.

Unify offers two editions of OpenScape Contact Center: OpenScape Agile focused on agent populations of under 100 agents, and OpenScape Contact Center Enterprise for single or multiple sites with up to 1500 concurrent agents per system, 7500 agents per cluster. Virtual agents (chatbots) in OpenScape Contact Center Enterprise provide self-service options to customers with enhancements that enable integration with Google's Contact Center AI solution, as well as any other 3rd party AI provider. Unify offers WFM via partners including Verint and ASC, as well as OpenScape Contact Center Life of Call Analytics.

### Strengths

- Contact center capabilities
- On-premise and cloud support
- Vertical industry solutions
- PaaS platform with Circuit
- Cloud deployment options

### Challenges

- Balancing multiple product offerings for contact center

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## Vonage

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Vonage has continued to expand its product portfolio and made a major move in 2019 by relaunching its portfolio and branding everything as Vonage. Its unified communications offering was renamed Vonage Business Communications. Vonage offers a complete contact center (Vonage Contact Center, formerly branded NewVoiceMedia), UCaaS (Vonage Business Communications), and a complete API platform in one portfolio, on a single stack. Vonage has seen strong growth powered by its CCaaS, UCaaS, and CPaaS technology.

Vonage has integrated Vonage Contact Center and its Vonage Business Communications into a single, intuitive interface that connects agents with back office workers with common call controls, single sign-on, professional presence and availability, and a common directory. Vonage Contact Center has a long heritage of being deeply integrated with Salesforce, providing core contact center functionality such as omnichannel and dynamic contact routing, ACD, self-service IVR, speech analytics, WFO, PCI compliance, automated outbound dialing, click-to-dial, screen pops, and associated real-time CRM updates. Its omni-channel capability enables enterprises to route voice and interactions through email, chat, chatbots, SMS, and video and social channels, including Salesforce digital channels.

In April 2020, Vonage launched its contact center AI virtual assistant that is seamlessly integrated with Vonage Contact Center. The Vonage Contact Center solution can also identify a "stuck" chatbot and route it to the best available agent in the voice or chat channel. Vonage has extended its leading integration with Salesforce to ServiceNow. Vonage Contact Center now integrates with ServiceNow's enterprise-level customer service management solution to deliver a powerful, all-in-one unified platform.

### Strengths

- Contact center offering
- Fully integrated UCaaS and CCaaS
- Deep integration and focus on Salesforce
- Integration with Salesforce HVS
- Vonage brand recognition
- Integration extended to ServiceNow
- CPaaS API flexibility

### Challenges

- Awareness in contact center outside Europe

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## **Innovators**

### **8x8**

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8x8 based in Campbell, CA, offers a complete UCC platform with its fully featured contact center offering. 8x8 Contact Center is attractively priced with options for both voice only and omnichannel. 8x8 offers full workforce optimization capabilities as well, including workforce management, quality management, surveys, and call and screen recording. The 8x8 Contact Center integrates with the X Series Communications platform.

The X Series was enhanced in 2019 with the launch of a new meeting service—8x8 Video Meetings—that now has a freemium offer to attract new clients. 8x8 Video Meetings is integrated with the X Series, which integrates all of its capabilities for voice, video, team collaboration, and contact center into one platform. 8x8 has continued to grow its core UCaaS offering with X Series, and now it has more of a complete offering, which includes the 8x8 Team Messaging solution. This offering is integrated within the X Series desktop and mobile app, providing voice, meetings, and messaging in a single experience.

8x8 Contact Center integrates with Microsoft Dynamics, NetSuite, Salesforce, and Zendesk. Its growing global cloud footprint includes data centers in North America, the UK, Amsterdam, APAC, and Brazil.

#### **Strengths**

- UCaaS offering
- Contact center features
- Brand awareness
- Partner integrations
- CRM integration

#### **Challenges**

- Overall focus on AI

## **Altitude Software**

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Altitude Software, based in Lisbon, Portugal offers a full cloud-based contact center along with a growing set of partners. Altitude Xperience Contact Center is a modular solution that grows with the needs of the enterprise. A consultative team helps to define the solution based on the requirements of each organization. One of the unique aspects of Altitude Xperience is that it enables agents to conduct video calls. It supports self-service through bots for any channel, such as WhatsApp, Twitter, or Facebook Messenger. It gathers all channels and joins bots with human agents to enable a truly omnichannel customer journey. Xperience Contact Center also supports remote agents. Agents only need to have access to the Internet via a web browser to access Xperience Contact Center features.

Altitude Software continues to offer its Experience Hub, which leverages its growing set of partners. Partner integrations include productivity, AI & analytics, CRM (Salesforce and Dynamics), and security. Altitude has done well acquiring customers in Europe and part of this is due to its industry focus, which includes finance, insurance, telecommunications, healthcare, BPO, and retail. Besides customer service and helpdesk, Altitude Software has solutions for debt collectors, sales, and marketing teams.

### **Strengths**

- Cloud-based contact center
- Video support
- Industry focus
- Modularity
- Platform and APIs

### **Challenges**

- Brand awareness outside of EMEA

## **Intermedia**

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Intermedia, based in Sunnyvale, California, and led by CEO Michael Gold, offers Intermedia Unite, its full UCC platform, and Intermedia Contact Center. In 2019, Intermedia acquired contact center provider Telax, which will now allow Intermedia to offer both UCC and CCaaS solutions. In April 2020, Intermedia announced a strategic partnership with NEC, in which NEC will resell the full Intermedia communications portfolio, including Intermedia Contact Center.

Intermedia Unite offers cloud-based telephony, messaging, and meetings. Intermedia has been shifting its focus from email to focus on both voice PBX and web and video conferencing via its AnyMeeting service. Besides NEC, Intermedia sells Unite, AnyMeeting and its contact center via resellers, some of whom white label the offering with their brand. With its UCC, contact center, and other collaboration offerings, Intermedia is well-positioned for the SMB market.

### **Strengths**

- Cloud PBX
- Call center
- Mobile app
- Partnerships
- White label offering for partners

### **Challenges**

- Market awareness

## Getting Started With ICC

With COVID-19 and the possibility of future pandemics, contact centers will be forced to change and become more virtual. This has helped to accelerate the major transformation the contact center market is undergoing—a transformation that will see more and more virtual agents (chatbots) helping customers. AI is real and it is becoming an evaluation criterion.

Finally, the era of digital labor is here. Making the right AI and chatbot decisions is critical to success with digital labor. Enterprises should pilot chatbots in 2020 and build out a virtual agent roadmap. In some cases, multiple vendors may be involved. In many cases, basic task-specific bots will do better in the short term and have a higher ROI.

Roadmaps from providers matter. Enterprises should ask for detailed product roadmaps for the next 12-24 months.

## Aragon Advisory

- Enterprises need to start to evaluate contact center providers for their current and future automation and digital labor capabilities.
- Enterprises should set clear goals and objectives for buyer journeys. Understanding how customer experiences will change with a particular provider is important due diligence to conduct.
- Digital labor is here. Pilot chatbots now and then expand the number and type of chatbots. Measure their performance.

## Bottom Line

The contact center market is shifting, and it is becoming understood to be a vital way to keep and grow customer relationships. The contact center of 2020 is far different than what it was just five years ago. Today the focus needs to be on the customer experience. As a result, we expect that more digital assistants will come online to assist with internal and external use cases. The race to innovate and deliver AI capabilities means products and the vendors who provide them must evolve. Enterprises need to carefully evaluate the market they are in and understand customer expectations for a modern customer experience. This more than anything will drive the decision on which ICC provider to select.