iSG Provider Lens™

Contact Center– Customer Experience Services

Guide for enterprises assessing providers to enhance CX in evolving digital landscapes

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Introduction

In an era defined by constant disruption, delivering exceptional CX needs a comprehensive and flexible transformation strategy. Rapid technological advancements, evolving workforce dynamics and heightened customer expectations compel enterprises to reevaluate their operational models, enhance agility and address emerging security and compliance challenges. This shift is driving significant transformation in the contact center sector, leading organizations to pursue strategic partnerships to navigate these complexities and achieve sustainable growth.

Providers are increasingly investing in expanding their solution offerings to stay competitive, transitioning beyond conventional models to deliver holistic end-to-end CX capabilities. This evolution necessitates extensive technological expertise, skilled personnel and the ability to leverage AI-driven innovations. Generative AI (GenAI) and agentic AI are revolutionizing the landscape, propelling advanced automation, hyperpersonalization and intelligent decision-making. With its autonomous decision-making and adaptive learning capabilities, agentic AI is setting new benchmarks in agent support, self-service and predictive analytics, enabling proactive and context-aware customer interactions.

To remain relevant in this evolving environment, providers must adopt agility, drive innovation and build domain expertise while integrating AI-driven solutions effectively. This strategic focus is crucial for helping enterprises redefine their operational frameworks, optimize KPIs and achieve impactful business outcomes. As the contact center industry evolves, empowering people, processes, data and technology will be vital to this transformation journey.

The study focuses on **people, process, data and technology as the key catalysts to CX transformation.**

Simplified Illustration Source: ISG 2025

Digital Operations

Intelligent Agent Experience

Intelligent CX (AI & Analytics)

Scope of the report

The ISG Provider Lens™ Contact Center - Customer Experience Services 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the global, Australia, Brazil and Europe markets.

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 engagements.

Contact Center – Customer Experience Services 2025

Quadrants | **Areas Covered**

Digital Operations

Vision and Investments
- Vision to build portfolio
- Growth strategy story
- Strategic Investments
- Expansion Plans
- ESG Goals
- Innovation

Consulting
- Domain Expertise
- Tech consulting
- Industry Knowledge
- Transformation framework/maturity self-assessment
- Change Management

Conventional Infrastructure
- CC Infra – software and hardware
- Channel strategy and implementations
- Solutions and accelerators

Digital Infrastructure
- Automation
- Cloud Capabilities
- AI
- Analytics
- Emerging – GenAI
- Security

Talent
- Talent retention
- Employee wellbeing
- Talent onboarding and training

Delivery
- Right shoring models
- Remote working
- Gig CX/Hybrid/contractor model
- Pricing Models

Intelligent CX (AI & Analytics)

Advisory
- AI Advisory Offering
- Maturity assessment framework
- Transformation framework/maturity self-assessments

AI Tools and Technology
- CX AI Offerings/applications
- AI homegrown/partnerships solutions
- GenAI (LLM) investments and strategies

Data Strategy and Analytics
- Analytics offerings
- Data strategy/synthetic data
- Solutions homegrown and Partnerships

Measurement Metrics
- Defining KPIs (Churn Rate, CSAT, NPS)
- Measurable business outcomes – revenue generation, customer retention

Talent
- Certified professionals
- Training curriculums and partnerships

Intelligent Agent Experience

Agent Growth Investments
- Training curriculum
- Gamification
- Security Trainings
- Career Growth Programs

Agent Management
- Realtime quality monitoring
- Workforce management
- Knowledge Management
- Agentic AI

Digital Strategies
- AI and Analytics implementation
- Agent Assist
- Unified and integrated agent desktop

Measurement Metrics
- Establishing KPIs (AHT, FCR, ESAT, utilization)
- Measurable outcomes – quality, service level

Digital Operations

Definition

This quadrant assesses providers' capabilities to address the end-to-end value chain of contact center services. It evaluates their consulting services, domain and industry knowledge and technological expertise. Providers must demonstrate their ability to assess clients' maturity through their maturity assessment framework. They must have expertise in designing tailored solutions with optimal operating models, technology capabilities, scalable infrastructure and flexible delivery models. Digital infrastructure, including cloud and AI, and analytical capabilities are crucial. Digital technology proficiency also serves as a key measure to help clients achieve their ESG goals. Companies also focus on onboarding, training, employee engagement and retention programs. They use AI, GenAI and analytics to manage the talent landscape within organizations. Providers' growth depends on strategic initiatives such as proprietary solutions, partnerships, M&As, innovation centers, CoEs and thought leadership.

Eligibility Criteria

1. Demonstrate strategic **vision and investments** to build capabilities and solutions portfolios

2. Offer **consultation** backed by domain expertise, industry leadership and maturity assessment frameworks

3. Provide essential **contact center infrastructure** to offer agents and customers multichannel/omnichannel capabilities and industry solutions

4. Develop various **digital capabilities** such as AI, analytics, GenAI, cloud and security

5. Highlight capabilities around **contact center infrastructure (software and hardware), omnichannel strategy and proprietary solutions or accelerators** that enhance scalability, efficiency and innovation

6. Showcase capabilities around **governance frameworks for data security, regulatory compliance and responsible AI** adoption

7. Demonstrate commitment to **ESG** through sustainable contact center operations, energy-efficient infrastructure, ethical AI practices and inclusive workforce strategies

8. Adopt **talent onboarding and training** approaches, employee well-being programs and talent retention strategies

9. Focus on delivery centers, **right shoring models,** innovation, pricing models, **employee engagement models** (GigCX or contracting models) and hybrid working strategies

Intelligent Agent Experience

Definition

This quadrant assesses the technological and non-technological aspects crucial for successful CX. Technology advancements such as unified communications enable a single interface, allowing interactions across channels. AI-based agent assistance empowers agents with real-time insights to make informed decisions. Automated interaction summaries alleviate burdens and improve efficiency with real-time performance monitoring and analytics, helping supervisors and agents effectively manage challenges. Gamification, with its various analytical techniques, improves agent experience by fostering employee engagement. Agent experience is key to success, with analytics, collaboration tools and best practices driving loyalty, CX excellence and performance.

Non-technological elements such as training curriculum, supportive work environments, continuous feedback mechanisms, work-life balance, career development opportunities and programs to upskill employees increase efficiency and productivity gains.

Eligibility Criteria

1. Have structured programs, including **career development programs,** training curriculums, tools such as gamification for effective employee engagement, security training and education

2. Offer tools and technologies for real-time quality monitoring and workforce management, including remote **work management and knowledge management**

3. Use **AI-based coaching tools** that analyze agent interactions, offer personalized training and provide performance insights

4. Offer **employee engagement and wellness programs** to improve employee satisfaction and retention

5. Use **AI and analytics** to enhance agent experience, including AI-driven assistance, unified desktops and various types of analytics (speech, text, predictive and sentiment) for personalized conversations

6. Offer **agent assist tools,** including real-time transcription, AI-driven recommendations, sentiment analysis and knowledge retrieval, to enhance agent efficiency and reduce handling time

7. Use **agentic AI for autonomous decision-making,** contextual recommendations and real-time agent support to enhance efficiency and reduce cognitive load

8. Include case studies with metrics such as **AHT, ESAT and FCR** to improve productivity, quality deliveries and customer satisfaction and engagements

Intelligent CX (AI & Analytics)

Definition

The contact center landscape is transforming with advancements in AI and analytical technologies, enhancing operational efficiency and improving customer satisfaction and productivity. With the ability to augment an agent's capabilities by analyzing vast amounts of customer data in real time, AI systems offer valuable insights into customer preferences, past interactions and potential pain points. AI-driven tools such as sentiment analytics and voice recognition help contact centers understand customer sentiments and behavior. Analytics plays a significant role in redefining CX and offers cross-selling and upselling opportunities to help companies retain customers and grow businesses.

GenAI has immense capability to transform CX. AI-powered algorithms analyze vast amounts of data, study patterns and offer suggestions and linguistic capabilities to simplify customer service. Developers can further enhance conversational AI platforms to provide contextual conversations.

Eligibility Criteria

1. Offer **advisory services** with automation maturity and benchmarking assessments, backed by a qualified consulting team to help enterprises in their AI journey

2. Include AI and analytics technology applications, partnerships, homegrown solutions and investments in **GenAI and future strategies**

3. Demonstrate effective data **strategies and frameworks,** partnerships and analytics implementations such as sentiment analytics, voice of customer (VoC), speech or text analytics, homegrown tools and solutions

4. Showcase capabilities around **predictive analytics, sentiment analysis** and AI-based intent recognition to anticipate customer needs and offer proactive support

5. Demonstrate capability in integrating **unified CX (omnichannel excellence)** across voice, chat, email, social and messaging platforms with enterprise CRM, ERP and CX platforms

6. Implement **advanced agentic AI** and **self-service solutions, including AI chatbots, voice assistants and intelligent virtual agents,** to enhance CX and reduce operational costs

7. Possess **certified AI professionals** and training and curriculum partners

8. Highlight case studies that demonstrate measurable business outcomes such as revenue generation, customer retention and **KPIs such as CSAT and churn rate**

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants in the Contact Center - Customer Experience Services 2025 study:

Quadrant	Global	Europe	Brazil	Australia
Digital Operations	✔	✔	✔	✔
Intelligent Agent Experience	✔	✔	✔	✔
Intelligent CX (AI & Analytics)	✔	✔	✔	✔

The research phase falls in the period between April and May 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2025.

Milestones	Beginning	End
Survey Launch	April 10, 2025	
Survey Phase	April 10, 2025	May 15, 2025
Sneak Preview	August 2025	September 2025
Press Release & Publication	October 2025	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to the instructions in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Contact Center - Customer Experience Services 2025 IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens 2025 – Contact Center–Customer Experience Services research study analyzes the relevant service providers in the Australia, Brazil, Europe and Global markets, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Namratha Dharshan

Lead Author:
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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

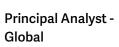All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

Wayne Butterfield

Partner

Robert Stapleton

Partner

Jarrod Magill

Director and Regional Manager, NSW

Himanshu Chawla

Director

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

[24]7.ai*	Cognizant*	Genpact*	Liderança Serviços Financeiros
Acquire BPO*	Concentrix*	Grupo KSL	Localcred
Actionline*	Conduent*	Grupo Redebrasil*	Merchants*
AeC*	Connvert (Flex)	Grupo Renac	Mindpearl*
Alert Brasil	Contax (Liq)	Grupo Services	minsait
Algar Tech*	CPM*	HCLTech*	Motiva
AlmavivA*	CSU*	Hexaware*	Movate*
Alorica*	Datacom*	HGS*	Mphasis*
ASTIA*	Datamatics*	HOM	Mutant
Atento*	DBM Contact Center	Home Agent*	NEO*
Averbach*	EXL*	IGT Solutions*	Olos
Bellinati Perez*	Firstsource*	Infosys*	Parla! (ABAI Brasil)
Callink*	FIS*	Intervalor*	Paschoalotto*
Capgemini	Forrest Marketing	Kainos BPOTECH*	Pluris Mídia*
Capita*	Foundever®*	Konecta*	Plusoft

Invited Companies

Probe Group*

Proxis

Quantiphi*

ResultsCX*

Serco*

Sercom*

Shapiro*

SoftMarketing

Sollo Brasil

SoluCX

Startek®*

Stefanini*

Sutherland*

Tahto

TaskUs*

TCS*

Tech Mahindra*

TEL (Contact Center)

Teleperformance*

Telstra

TELUS International

Transcom*

TSA*

TTEC*

VGX

Voxline

Winover*

Wipro*

Wittel

WNS*

Xceedance*

yoummday*

Zanc*

iSG Provider Lens™

About Our Company & Research

ïSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ïSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens™