Everest Group
RESEARCH

Contact Center Outsourcing (CCO) – Service Provider Compendium 2016

Contact Center Outsourcing (CCO)
Market Report: August 2016 – Preview Deck

Our research offerings for global services

- ▶ **Market Vista™**
  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

- ▶ **BFSI[1] Information Technology**
- ▶ **BFSI[1] Business Process**
- ▶ **Healthcare & Life Sciences ITS**
- ▶ **Healthcare & Life Sciences BPS**
- ▶ **Application & Digital**
- ▶ **Cloud & Infrastructure**
- ▶ **Global Sourcing**
- ▶ **Locations Insider™**
- ▶ **PricePoint™**
- ▶ **Finance & Accounting**
- ▶ **Procurement**
- ▶ **Human Resources**
- ▶ **Recruitment & Talent Acquisition**
- ▶ **Contact Center**
- ▶ **Service Optimization Technologies**
- ▶ **Transaction Intelligence**

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
  - Contact Center Outsourcing (CCO)
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**

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1 Banking, financial services, and insurance

Everest Group's CCO research is based on multiple sources of proprietary information (page 1 of 2)

1

- Proprietary database of **2,500+ CCO contracts** (updated annually)
- The database tracks the following elements of each CCO contract:
  - Buyer details including industry, size, and signing region
  - Contract details including Total Contract Value (TCV), Annualized Contract Value (ACV), term, start date, service provider FTEs, and pricing structure
  - Scope including buyer geography and functional activities
  - Technology including Customer Relationship Management (CRM) technology, communication technology, and enabler technology ownership & maintenance
  - Global sourcing including delivery locations and level of offshoring

2

- Proprietary database of **operational capability of 25+ CCO service providers** (updated annually)
- The database tracks the following capability elements for each service provider
  - Key leaders
  - Major CCO clients and recent wins
  - Overall revenue, total FTEs, and contact center employees
  - Recent contact center-related developments
  - CCO revenue split by geography, industry, and client size
  - CCO delivery locations
  - CCO service suite
  - Contact center-related technology capability

Service providers covered in the analysis

AEGIS, alorica, CGI
CONCENTRIX, CONDUIT GLOBAL, DELL, EGS
EXL, firstsource, GENPACT
HCL, Hexaware TECHNOLOGIES, HGS
Hewlett Packard Enterprise, Infosys, intelenet, Knoah
minacs, SITEL, SUTHERLAND GLOBAL SERVICES
TATA CONSULTANCY SERVICES, Tech Mahindra
Teleperformance, TeleTech, Transcom
webhelp, WIPRO, WNS, xerox

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information, which is contract specific, will only be presented back to the industry in an aggregated fashion

Everest Group's CCO research is based on multiple sources of proprietary information (page 2 of 2)

3

Buyer surveys and interactions

Global survey and one-on-one executive-level interviews are undertaken to understand how organizations perceive performance of their CCO provider. The survey/interviews focus on different aspects of an outsourcing relationship including:

- Key drivers for outsourcing CCO
- Contract details (including process scope, signing year, and duration)
- Overall performance of the service provider including key strengths and improvement areas
- Detailed assessment of service provider performance across different elements, such as:
  - Performance against key CCO metrics
  - Performance across various contact center processes
  - Performance during the implementation and transition phases
  - Governance and relationship management

Table of contents (page 1 of 2)

Topic **Page no.**

Section I: CCO service provider landscape snapshot **7**
- Definition of CCO 8
- CCO service provider landscape 10
- Market size and growth 11
- PEAK Matrix for CCO 12

Section II: Service provider profiles **13**
- Aegis 14
- Alorica 19
- CGI 24
- Concentrix 29
- Conduit Global 34
- Dell Services 39
- EGS 44
- EXL 49
- Firstsource 54
- Genpact 59
- HCL 64
- Hexaware 69
- HGS 74
- HPE 79

Table of contents (page 2 of 2)

Topic **Page no.**

Section II: Service provider profiles (continued)

- Infosys 84
- Intelenet 89
- Knoah Solutions 94
- Minacs 99
- Sitel 104
- Sutherland Global Services 109
- TCS 114
- Tech Mahindra 119
- Teleperformance 124
- TeleTech 129
- Transcom 134
- Webhelp 139
- Wipro 144
- WNS 149
- Xerox 154

Appendix **159**

- Glossary of key terms 160
- CCO research calendar 162
- References 163

ABC (page 1 of 5)

CCO overview

Company overview
<Business description>

Key leaders
<Name>, <Designation>

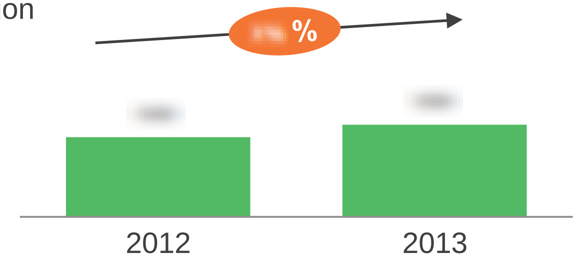
Headquarter: <City>, <Country>

Website: <Link to company website>

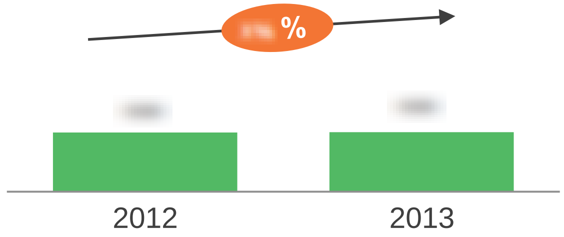
Recent developments

- XXX
- XXX
- XXX
- XXX
- XXX
- XXX

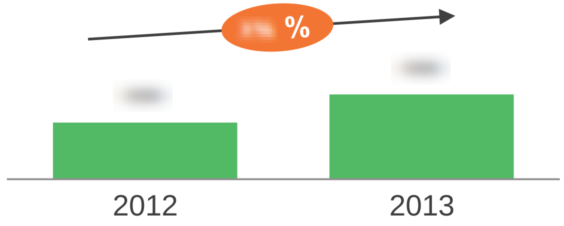
CCO revenue
In US$ million



Scale of CCO
Number of FTEs



CCO client base



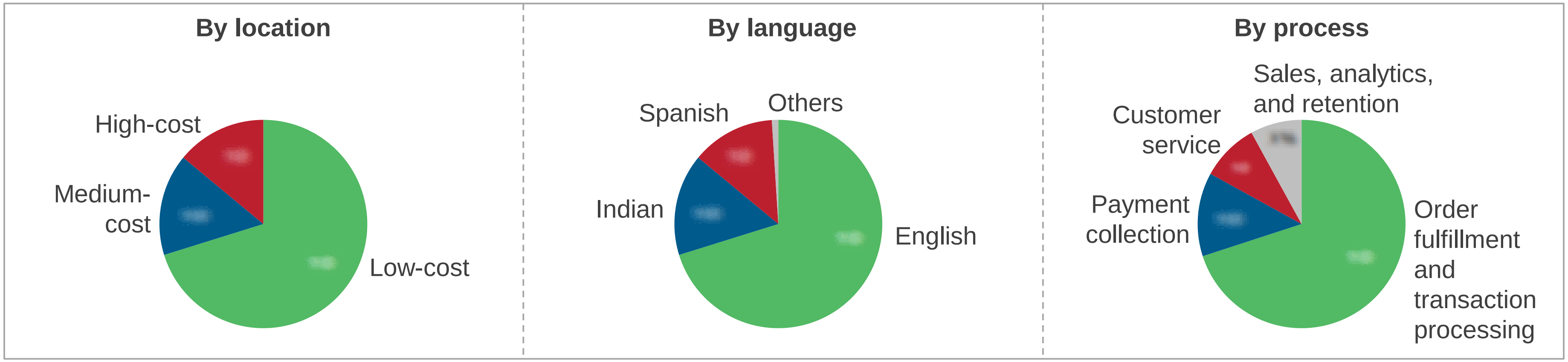
Source: Everest Group (2016)

ABC (page 2 of 5)

CCO capabilities

Split of CCO FTEs

Number of FTEs



By location

By language

By process

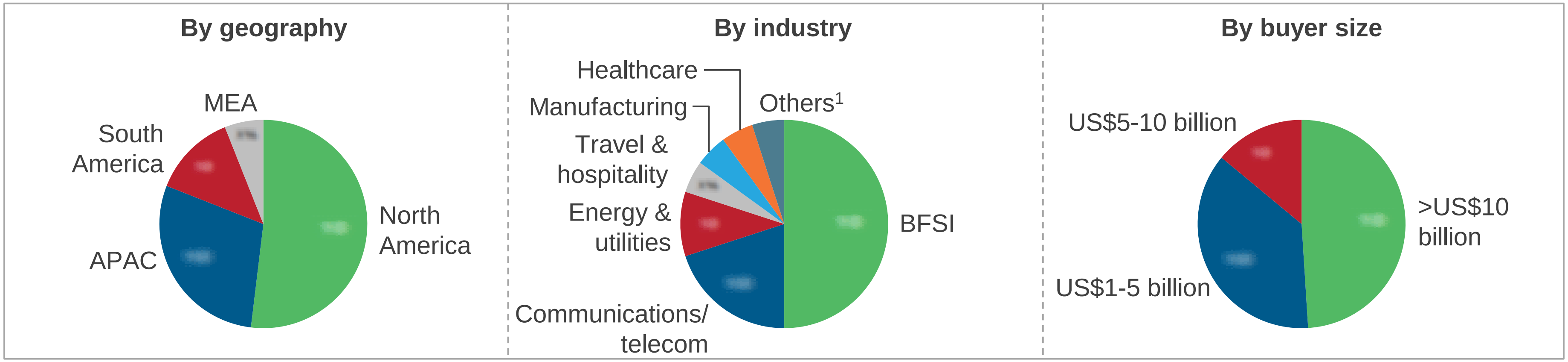
Key CCO investments

Description	Investment type	Year of investment	Comments
XXX	Acquisition	20XX	XXX
XXX	Partnership	20XX	XXX
XXX	Internal	20XX	XXX

Source: Everest Group (2016)

ABC (page 3 of 5)
CCO client portfolio

CCO revenue mix
US$ million



Key contact center engagements

Client name	Region	Client since
XXX	North America	20XX
XXX	North America	20XX
XXX	Asia Pacific	20XX
XXX	Latin America	20XX
XXX	North America	20XX

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[1] Includes media and public sector industries

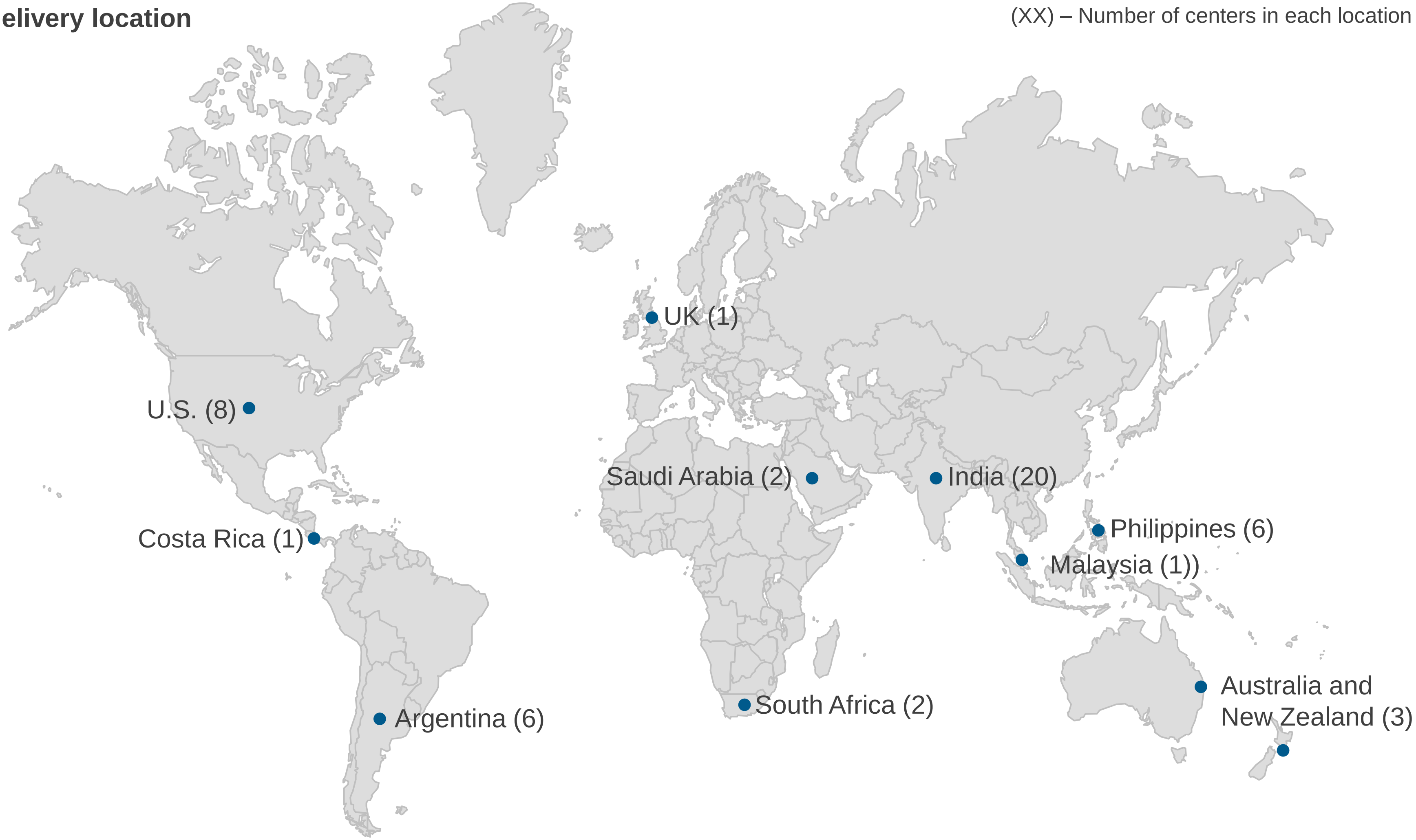
Source: Everest Group (2016)

ABC (page 4 of 5)

CCO location landscape

CCO delivery location

(XX) – Number of centers in each location


UK (1)
U.S. (8)
Saudi Arabia (2)
India (20)
Philippines (6)
Malaysia (1))
Costa Rica (1)
Argentina (6)
South Africa (2)
Australia and New Zealand (3)

Source: Everest Group (2016)

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ABC (page 5 of 5)

Everest Group assessment

Measure of capability: ● Best-in-class ◔ Not matured

🟦 Leaders 🟧 Major Contenders ⬜ Aspirants

Delivery capability						Market success
Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall	
◕	◕	◕	◑	◕	◕	◕

Strengths

- [illegible]
- [illegible]
- [illegible]

Areas of improvement

- [illegible]
- [illegible]
- [illegible]

Source: Everest Group (2016)

CCO research calendar

🟦 Published 🟩 Current

Topic	Release date
CCO Pricing Trends: The Realities of Outcome-Based Pricing Adoption	January 2016
Clever Machines at Your Service	February 2016
Analytics Business Process Services (BPS) – Annual Report 2016	March 2016
Service Delivery and Demand Dynamics in Latin America	March 2016
Heralding a New Era of Transformative Business Process Services through Technology	April 2016
Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2016	April 2016
Contact Center Outsourcing (CCO) – Service Provider Landscape with PEAK Matrix™ Assessment 2016	May 2016
Analytics BPS – Service Provider Profile Compendium 2016	June 2016
Making the Work-At-Home-Agent (WAHA) Model Work: A Buyer's Perspective	June 2016
Achieving Maximum BPO Value: How Smart Buyers Structure Contact Center Relationships	June 2016
The Dynamics Behind the Alorica - EGS Deal	June 2016
Unlocking Next-Generation Value through Technology-Embedded Business Process Services | Part 1	July 2016
Technology in BPS - Market Landscape Refresh	July 2016
Contact Center Outsourcing (CCO) - Annual Report 2016	August 2016
Contact Center Outsourcing (CCO) – Service Provider Profile Compendium 2016	August 2016
Technology in BPS – Service Provider Compendium 2016	Q3 2016
Healthcare CCO: An Updated Market Overview and PEAK Matrix	Q4 2016
RPA and Technology Innovation in CCO	Q4 2016
SDA in Business Process Services (BPS) – Service Provider Landscape	Q4 2016
SDA in BPS - Service Provider Profile Compendium 2016	Q4 2016

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Additional CCO research references

The following documents are recommended for additional insight into the topic covered in this report. These documents either provide additional details or complementary content that may be of interest

1. **Contact Center Outsourcing Annual Report 2016: The Rise of Digital Contact Centers – Clear Evidence that Real Change is Underway** (EGR-2016-1-R-1823); 2016. The CCO market grew at ~4% in 2015 to reach US$75-78 billion. This report provides an overview of the CCO market, including market size & adoption trends, key solution characteristics, service provider landscape, and areas of service provider investment.

2. **Contact Center Outsourcing (CCO) – Service Provider Landscape with PEAK Matrix™ Assessment 2016** (EGR-2016-1-R-1771); 2016. This report focuses on service provider positioning in the CCO market, changing market dynamics & emerging service provider trends, and assessment of service provider delivery capabilities.

3. **Making the Work-At-Home-Agent (WAHA) Model Work: A Buyer's Perspective** (EGR-2016-1-R-1801), 2016. With the evolution of recent technological advancements over time, WAHA has emerged as an attractive option through which buyers can significantly reduce cost of operation and also increase the service quality. This whitepaper analyses the key drivers for adoption, as well as adoption pattern of Work-At-Home Agents (WAHA) model in contact center strategy.

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From **insight** to ***action***.

About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com and research.everestgrp.com.

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