Contact Center Outsourcing (CCO) – Service Provider Compendium 2017

Contact Center Outsourcing (CCO)
Market Report – July 2017 – 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

▶ **Application Services**

▶ **BPS | Banking Financial Services**

▶ **BPS | Healthcare & Life Sciences**

▶ **BPS | Insurance**

▶ **Catalyst™**

▶ **Cloud & Infrastructure**

▶ **Contact Center**

▶ **Digital Services**

▶ **Engineering Services**

▶ **Finance & Accounting**

▶ **Human Resources**

▶ **ITS | BFSI***

▶ **ITS | Healthcare & Life Sciences**

▶ **IT Services Forecaster™**

▶ **Locations Insider™**

▶ **PricePoint™**

▶ **Procurement**

▶ **Recruitment & Talent Acquisition**

▶ **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

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Subscription information

- This 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**

* Banking, financial services, and insurance

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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 35+ 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 capabilities

Illustrative list of service providers covered in CCO research

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

3

Annual buyer surveys and interactions

Global surveys and one-on-one executive-level interviews are undertaken annually with roughly **80-100 organizations** to understand how buyers perceive the performance of their CCO providers. The surveys/interviews focus on different aspects of an outsourcing relationship including:

- Key drivers for outsourcing CCO
- Contract details (including process scope, year of signing, 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:
  – Key CCO metrics
  – Various contact center processes
  – Implementation and transition phases
  – Governance and relationship management

Illustrative list of buyers' feedback included in our research

AT&T · Citi · dish · Google

macy's · Microsoft · NETFLIX · PayPal

Prudential · TalkTalk Group · Unilever · USAA

verizon · vodafone · WELLS FARGO

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CCO overview

Company overview
<Business description>

Key leaders
<Name>, <Designation>

Headquarter: <City>, <Country>

Website: <Link to company website>

CCO revenue
In US$ million

| 2015 | 2016 |
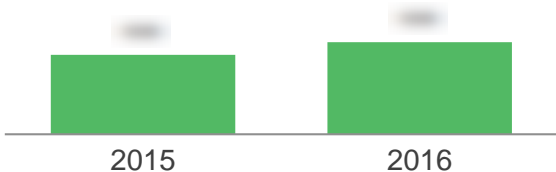
Scale of CCO
Number of FTEs

| 2015 | 2016 |

CCO client base

| 2015 | 2016 |
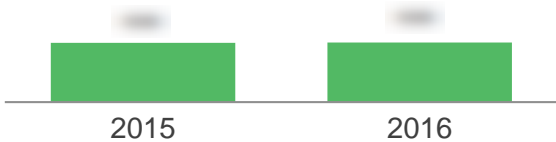
Recent developments
- XXX
- XXX
- XXX
- XXX
- XXX
- XXX

CCO capabilities

Split of CCO FTEs
Number of FTEs

By location	By language	By process

By location

High-cost (X%)

Medium-cost

XX%

Low-cost

XX%

By language

Others

XX%

Spanish & Portuguese

XX%

English

XX%

Hindi

XX%

By process

Payment collections

Order fulfillment & transaction processing

Inbound sales service (X%)

Outbound sales service

XX%

X%

X%

Customer service

XX%
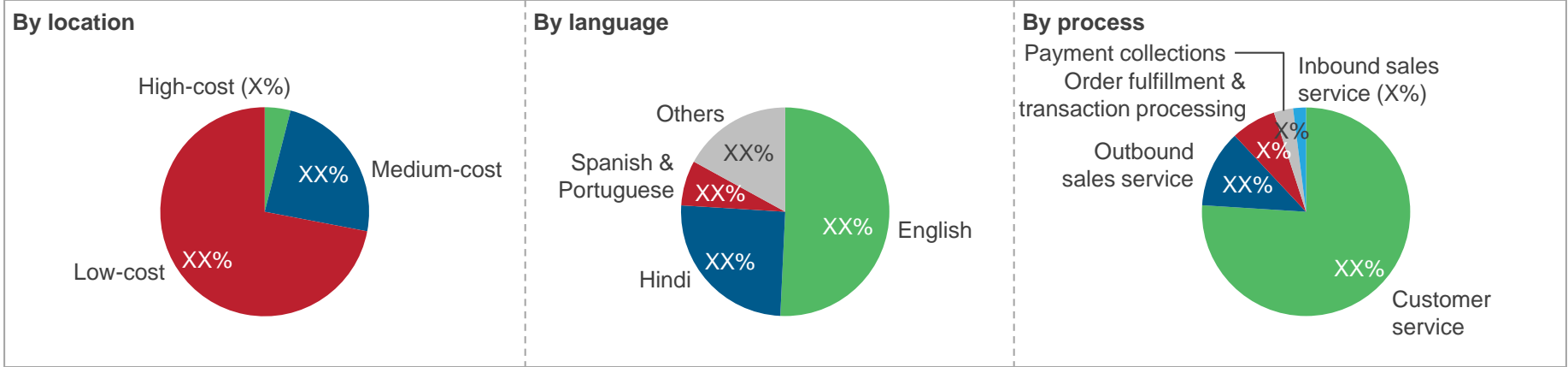
Key CCO investments			
Description	**Investment type**	**Year of investment**	**Comments**
XXX	Acquisition	20XX	XXX
XXX	Partnership	20XX	XXX
XXX	Internal	20XX	XXX

Note   High-cost regions include North America, Western Europe, Japan, Singapore, and Australia & New Zealand; medium-cost regions are Latin America, Central Europe, and Middle East & Africa, while low-cost regions are India, the Philippines, and Rest of Asia
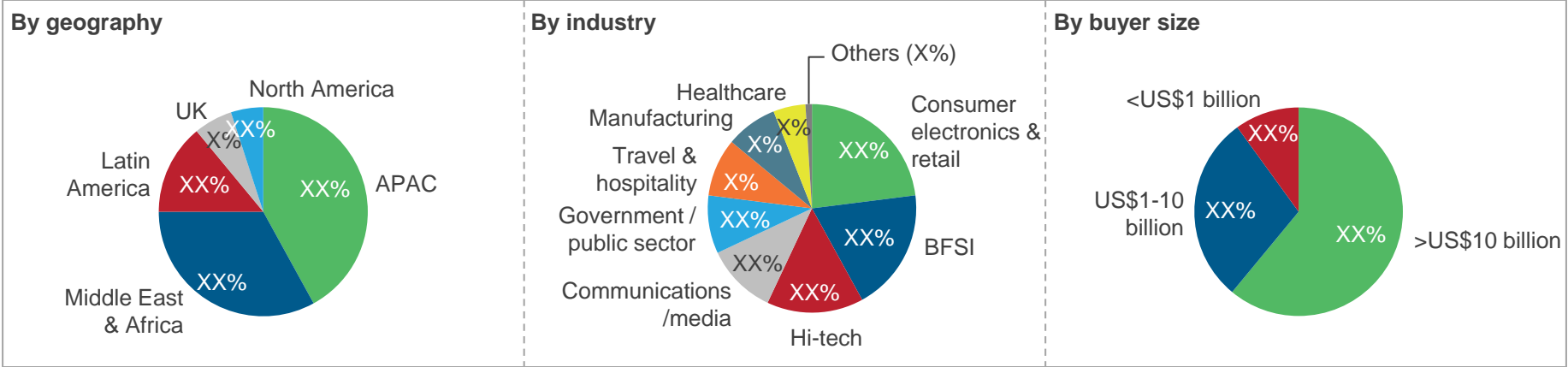
Source: Everest Group (2017)

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CCO client portfolio

CCO revenue mix
US$ million

By geography

North America
UK
Latin America
Middle East & Africa
APAC

By industry

Others (X%)
Healthcare
Manufacturing
Travel & hospitality
Government / public sector
Communications /media
Hi-tech
BFSI
Consumer electronics & retail

By buyer size

<US$1 billion
US$1-10 billion
>US$10 billion

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

Source: Everest Group (2017)

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CCO location landscape

CCO delivery locations

(XX) – Number of centers in each location

- United Kingdom (1)
- Saudi Arabia (2)
- India (29)
- Sri Lanka (1)
- Malaysia (2)
- Peru (1)
- South Africa (2)
- Australia (2)
- Argentina (6)

Source: Everest Group (2017)

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Everest Group assessment – Major Contender

Measure of capability: ● Best-in-class ◕ Very high ◑ High ◑ Medium high ◑ Medium ◔ Medium low ◔ Low ○ Not mature

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

Strengths

- Accenture invested in expanding Healthcare Payer BPO through strategic investments across Accenture's growth platforms including technology, outsourcing, and digital and within their health industry vertical

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Areas of improvement

- Accenture invested in expanding Healthcare Payer BPO through strategic investments across Accenture's growth platforms including technology, outsourcing, and digital and within their health industry vertical

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Source: Everest Group (2017)

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CCO research calendar

	Published	Planned	Current release

Flagship CCO reports	Release date
Contact Center Outsourcing (CCO) Market for the Healthcare Industry – SPL with PEAK Matrix™ Assessment 2017	January 2017
Contact Center Outsourcing (CCO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	June 2017
Contact Center Outsourcing (CCO) – Service Provider Profile Compendium 2017	**July 2017**
Contact Center Outsourcing (CCO) – Annual Report 2017	Q3 2017

Thematic CCO reports	
Achieving Maximum BPO Value: How Smart Buyers Structure Contact Center Relationships	June 2016
Making the Work-At-Home-Agent (WAHA) Model Work: A Buyer's Perspective	June 2016
Dynamics of Contact Center Outsourcing (CCO) in Asia Pacific (APAC): Special Focus on China	March 2017
Are There Productivity Differences Across Locations?	May 2017
From Multi-channel to Omnichannel Customer Experience	May 2017
UK CCO market & Impact of Brexit	Q3 2017
Chatbots and their Role in defining the Future of Customer Experience	Q3 2017
How good are service providers in delivering digital customer experience : Buyers perspective	Q4 2017
Automation in CCO: Assessing the Business Impact	Q4 2017

Note: For a list of all CCO reports published by us, please refer to http://www2.everestgrp.com/reports?Cat0=827

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 (CCO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017** (EGR-2017-1-R-2219); 2017. This report examines the global Contact Center Outsourcing (CCO) market and evaluates the positioning of service providers on the Everest Group PEAK Matrix. It provides insights on the changing market dynamics, service provider delivery capabilities, and Everest Group's remarks on service providers' key strengths and areas of improvement

2. **From Multi-Channel to Omnichannel Customer Experience** (EGR-2017-1-V-2161); 2017. This viewpoint is the first of a two-part study on omnichannel contact centers, and answers some basic questions related to omnichannel adoption. It provides insights on how omnichannel is different from multi-channel contact centers, value-proposition of pursuing an omnichannel strategy, key technology and human capital considerations to be kept in mind, and a checklist for organizations looking to pursue an omnichannel strategy to help them assess organizational readiness

3. **Dynamics of Contact Center Outsourcing (CCO) in Asia Pacific (APAC): Special Focus on China** (EGR-2017-1-R-2119); 2017. This report will assist key stakeholders (buyers, service providers, and technology providers) understand the changing dynamics of the CCO market in APAC, with a detailed assessment of attractiveness of China for the CCO market. It provides insights on the APAC CCO market including an in-depth analysis of the market size & growth, buyer adoption trends, CCO value proposition & solution characteristics, and detailed assessment of the CCO market in China

For more information on this and other research published by Everest Group, please contact us:

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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 empower 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.

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From **insight** to *action*.