



Enablers of a Unified Customer Experience (CX) – Omnichannel CX Trailblazers

Customer Experience Management (CXM) Services
Market Report – June 2019: Complimentary Abstract / Table of Contents

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- Data cuts
- Pinnacle Model™ reports
- PriceBook
- Virtual Roundtables
- Workshops

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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Background and scope of the research

Background of the research

- In this age of digital innovation, consumers can reach out to organizations using any of the multiple channels at their disposal. While this proliferation of communication and support channels provides companies the opportunity to engage with their customers and build deeper relationships, the challenge is to integrate these channels to create a more seamless experience
- Indeed, while the market is abuzz with plenty of talk around omnichannel, and despite many years of effort, it is still difficult for most organizations to achieve a true omnichannel customer experience
- Recognizing this as an opportunity, companies have started making pointed investments to better enable an omnichannel customer experience. In this research, we present an assessment of start-ups building capabilities in the omnichannel customer management space, primarily focusing on their capability, growth story, and investor confidence. The assessment is based on Everest Group's ongoing research in the CXM space

Scope of this report

- **Geography:** Global
- **Total number of start-ups identified:** Ninety start-ups delivering services across multiple channels
- **Trailblazers identified:** Fourteen leading omnichannel CX start-ups

We analyzed 90 start-ups, delivering customer experience services across multiple channels, to shortlist the top 14 trailblazers enabling an omnichannel CX delivery

Dimensions used for prioritizing start-ups



Solution capability



Novelty of solution



Clientele and market traction



Investor confidence

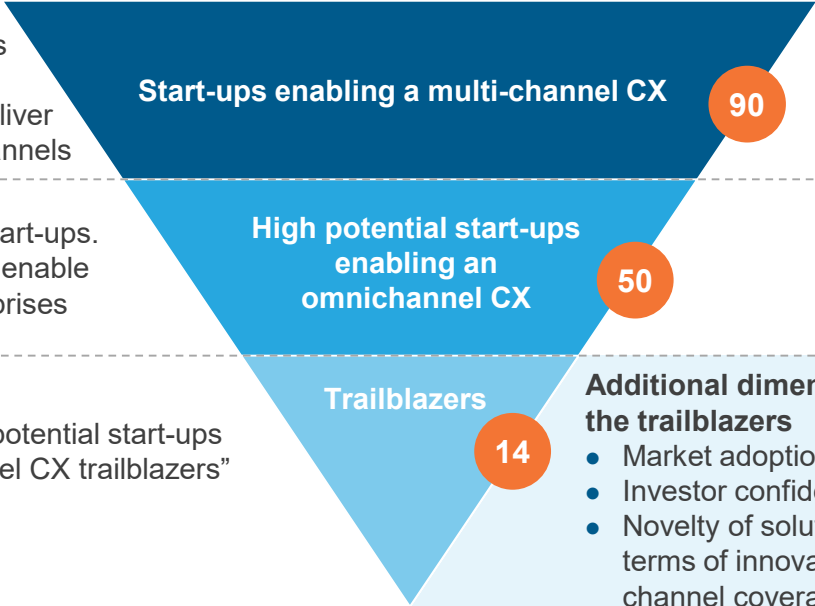


Strength of management team

Initial data of 90 start-ups was collected based on market interactions and existing research. These are the start-ups that enable enterprises to deliver customer services across multiple channels

Then we identified 50 high potential start-ups. These start-ups have the capability to enable an omnichannel CX delivery for enterprises

Further comparative analysis of high-potential start-ups has led to identification of “omnichannel CX trailblazers”








































Additional dimensions used for identification of the trailblazers

- Market adoption
- Investor confidence and profile
- Novelty of solutions they bring to the table (in terms of innovation in underlying technology or channel coverage)
- Profiles of key executives
- Partnership ecosystem (with technology vendors as well as with service providers)

Startups evaluated (page 1 of 2)

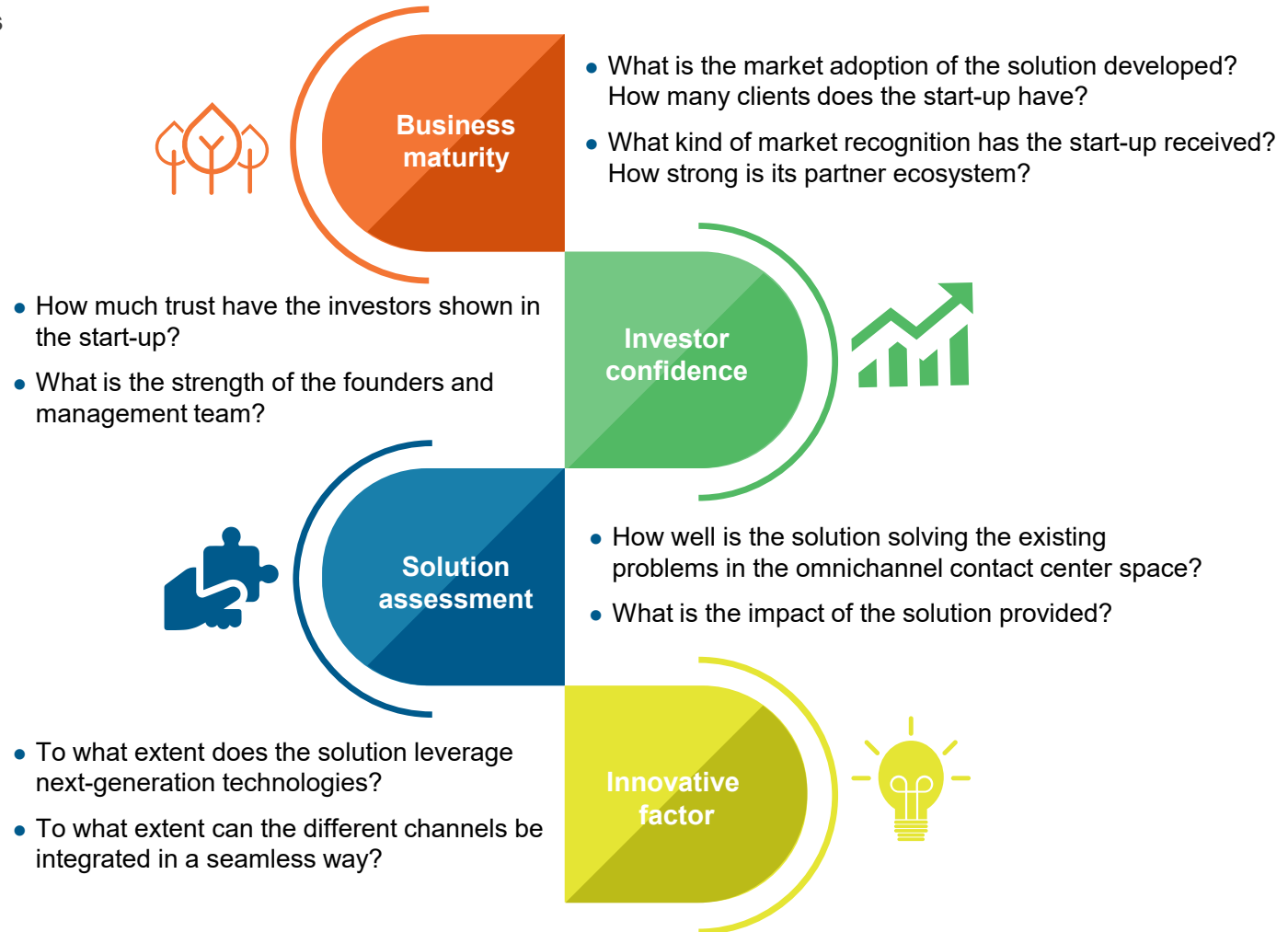
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|  aircall |  CallTrackingMetrics |  EpiAnalytics |  integrate.ai |  NECTAR DESK |
|  ALOWARE |  cogito |  EVALUAGENT |  interactcrm |  next IT |
|  amplifAI |  contactspace |  Fondesk |  keatext |  OBSERVE-AI |
|  AI ASSIST |  CORE AXIS |  fondo |  Kustomer |  OWNERLISTENS |
|  AVOXI |  CUSTOMERS FIRST NOW |  GENROE Analyze - Strategize - Implement - Accountable |  Kylie.ai |  OZONETEL CONNECT . COMMUNICATE . ENGAGE |
|  BehaviorMatrix |  DIALER 360 |  GreenRope |  LOOM.AI |  people.ai |
|  BEYONDVERBAL |  DigitalGenius |  helpware |  MaestroQA |  PhoneBurner |
|  bontact |  DREAM SUPPORT |  HoduSoft Redefine Communication |  MiaRec CALL RECORDING SOLUTION |  phone call |

Startups evaluated (page 2 of 2)

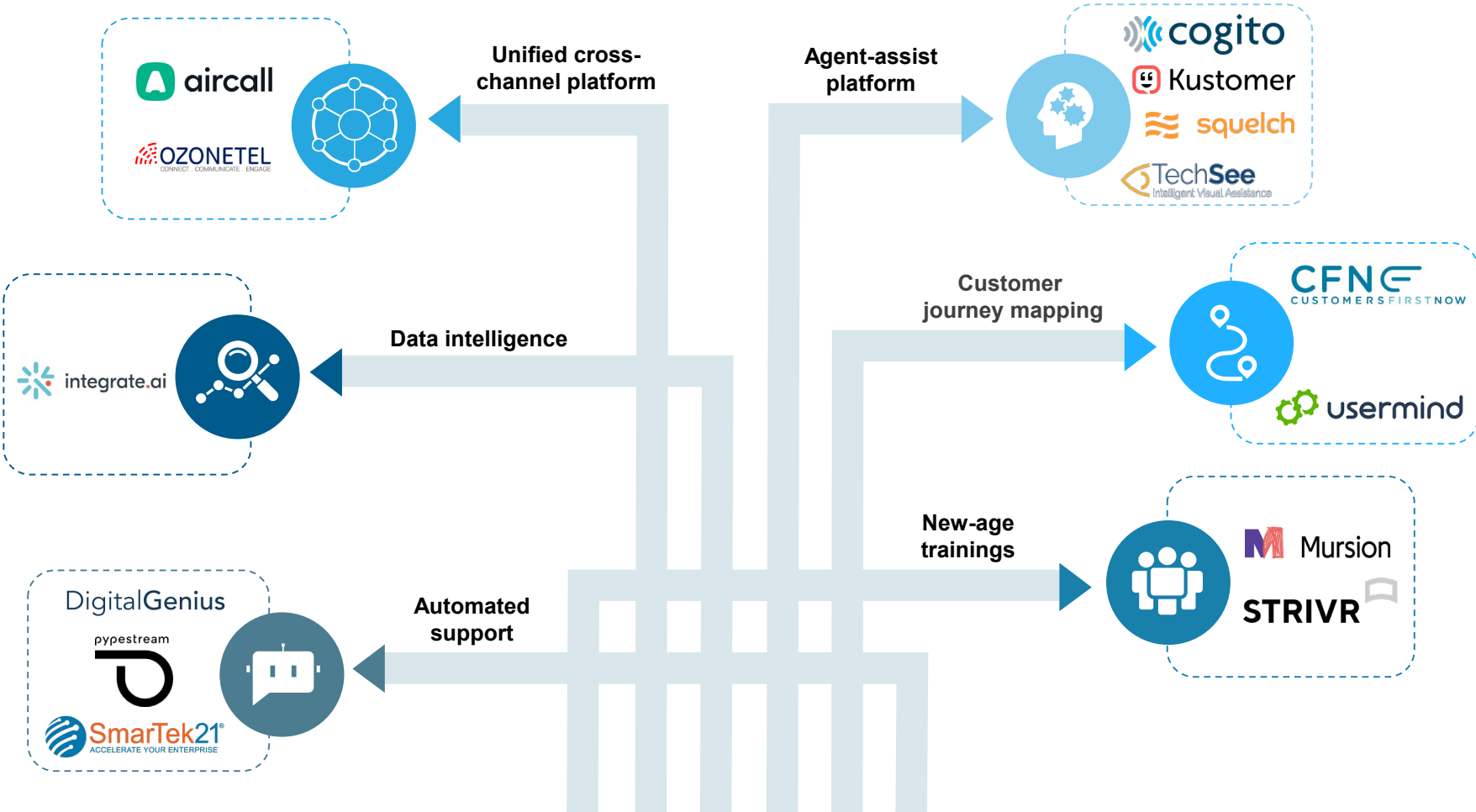
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The start-ups were assessed based on their capability, nature of innovation, market growth, and confidence demonstrated by investors

Evaluation parameters



After a detailed assessment, the following 14 start-ups were identified as omnichannel CX trailblazers

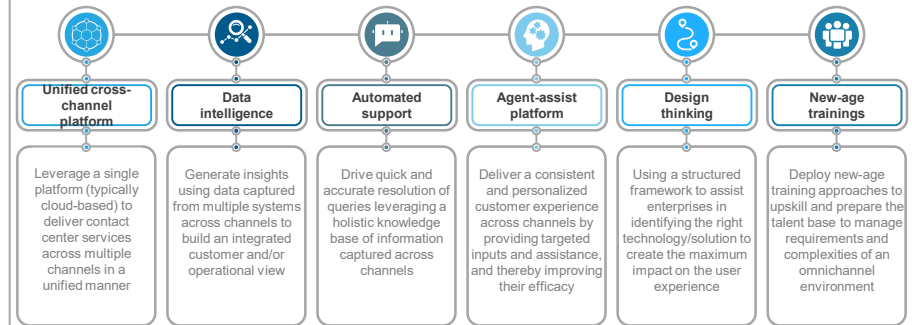


This study offers three distinct chapters providing a deep dive into key aspects of omnichannel CX delivery; below are four charts to illustrate the depth of the report

Difference between multi-channel and omnichannel

| Solution characteristics | Multi-channel | Omnichannel |
|----------------------------------|---|--|
| Key objectives | Engage customers through various contact points – voice, email, chat, social media, or self-service | Engage customers across multiple channels, while ensuring seamless and consistent delivery of a unified experience across all channels |
| Consumer information/data | Stored and managed separately for each channel | An integrated view of customer-related information |
| Analytics | Tends to be channel-specific | A 360-degree view of all customer touchpoints |
| Agent alignment | Tends to be channel-specific | Able to support multiple channels, either directly or in collaboration with other agents |

Key enablers of an omnichannel CX



Evaluation of data intelligence start-ups

| Shortlisted start-ups | Business maturity | Investor confidence | Solution capability | Innovation |
|-----------------------|-------------------|---------------------|---------------------|------------|
| Start-up 1 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 2 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 3 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 4 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 5 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 6 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 7 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 8 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 9 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 10 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |
| Start-up 11 | ★★★★ | ★★★★ | ★★★★ | ★★★★ |

Trailblazer profile

Company overview

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Website: xxx

Everest Group assessment

| | |
|---------------------|-------|
| Business maturity | ★★★★★ |
| Investor confidence | ★★★★★ |
| Solution capability | ★★★★★ |
| Innovation | ★★★★★ |

Fact sheet

| Year of incorporation | Headquarters | Number of employees |
|-----------------------|--------------|---------------------|
| | | |
| Key executives | | Key investors |
| | | |

Key differentiators

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Market growth

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Investor confidence

| Feb 2017 | Sep 2017 | Sep 2018 |
|-----------------------------|----------------------------------|----------------------------|
| Seed round US\$5 million | Venture round US\$4.6 million | Series A US\$30 million |

Research calendar – Customer Experience Management (CXM) Services

Published
 Planned
 Current release

Flagship CXM Services reports

Release date

| | |
|--|----------------|
| Contact Center Outsourcing (CCO) – Service Provider Profile Compendium 2018 | August 2018 |
| Contact Center Outsourcing Annual Report 2018: Transforming Customer Experience through a Digital-First Approach | September 2018 |
| Contact Center Outsourcing (CCO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019 | Q2 2019 |
| Contact Center Outsourcing (CCO) – Service Provider Profile Compendium 2019 | Q3 2019 |
| Contact Center Outsourcing (CCO) – Annual Report 2019 | Q3 2019 |

Thematic CXM Services reports

| | |
|--|----------------|
| Role of AI and Cognitive in Delivering Customer Experience of the Future | March 2018 |
| Contact Center Services for the U.S. Market: Location Strategies for the Digital World | March 2018 |
| Decoding Digital Customer Experience Management | September 2018 |
| Market Report on Chatbots/Intelligent Virtual Agents (IVAs) | November 2018 |
| Accelerating CX through an optimized CCO model Pinnacle Model™ Analysis Excerpt 2019 | March 2019 |
| Growth of BPO in Travel & Hospitality – Delivering Customer Experience Takes Centerstage | March 2019 |
| CX Analytics – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018 | May 2019 |

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| | |
|--|---------|
| Intelligent Virtual Agent – Vendor Landscape with PEAK Matrix™ Assessment 2019 | Q4 2019 |
| Current State of Work-at-Home-Agent (WAHA) | Q4 2019 |
| Role of Consulting in the Evolving Buyer Service Provider Relationship | Q4 2019 |

Note: For a list of all CXM reports published by us, please refer to our [website page](#)

Additional CXM Services 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. **Redefining Innovation in CXM: Buyers' Perspective** ([EGR-2018-21-R-2885](#)); 2018. This report is meant to provide insights on what CX innovation means to enterprises and get deeper understanding of their outsourcing relationship. As part of this report, we look at need for innovation in CXM services, focus on digital-led innovation in CXM, role of CXM providers in driving innovation, assessment of CXM providers' innovation capabilities and way forward for enterprises and service providers to derive maximum value from engagement
2. **Conversing with AI – Intelligent Virtual Agents (IVA) Market Report 2019** ([EGR-2018-38-R-2869](#)); 2018. This report is meant to provide IVA buyers, IVA technology vendors, and third-party enablers (for e.g. service providers) a detailed view of the current state of the market. As part of this, the current report provides insights into key developments in the IVA market, adoption trends by geographies, industries & business functions, solution characteristics, vendor landscape overview, and future outlook for 2019-2020
3. **Decoding Digital Customer Experience Management** ([EGR-2018-21-R-2791](#)); 2018. This report aims to provide detailed insights into the role of digital solutions in delivering customer experience of the future. It establishes the scope of digital in Customer Experience Management (CXM) services, overview of the digital CXM market, adoption characteristics for digital solutions, and investments required for a successful digital transformation of CXM for enterprises. It concludes by providing a future-oriented outlook of the digital CXM market

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