

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021

November 2020: Complimentary Abstract / Table of Contents



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Membership information

- This report is included in the following research program(s)
 - [Customer Experience Management \(CXM\) Services](#)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- 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 methodology of the research

Background of the research

The Customer Experience Management (CXM) market in Europe, Middle East, and Africa (EMEA) has experienced steady growth over the last few years, driven by increasing adoption of digital services and by emerging verticals and countries. While economic uncertainty created by COVID-19 has impacted the market, enterprises are trying to overcome the challenges presented by the pandemic and ensure superior customer experience. To this end, they are looking at areas such as digital CX and alternate delivery models such as Work At Home Agents (WAHA). Enterprises in the region expect service providers to help them fast-track digital adoption and transform their businesses. As a result, many service providers are experiencing a steep rise in the demand for digital services and are investing in digital capabilities such as analytics, automation, Artificial Intelligence (AI), and omnichannel solutions to support evolving client expectations. They are also offering value-added services beyond technology, in the form of CX consulting and design thinking-led customer journey orchestration. To effectively cater to these requirements, providers are developing capabilities through internal investments, their partnership ecosystem, and acquisitions.

In this research, we present detailed assessments of 21 CXM service providers in EMEA featured on the CXM Services PEAK Matrix® Assessment 2020. Each assessment provides a comprehensive picture of the service provider's market success, vision and strategy, service focus and capabilities, digital and technological solutions, domain investments, and buyer feedback. The assessment is based on Everest Group's annual RFI process for the calendar year 2020, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

The scope and methodology of this report includes:

- Relative positioning of 21 service providers on Everest Group's PEAK Matrix® for CXM Services in EMEA
- Service provider capability assessment across key dimensions
- Everest Group's analysis of service providers' strengths and areas of improvement

Scope of this report:



Geography
EMEA

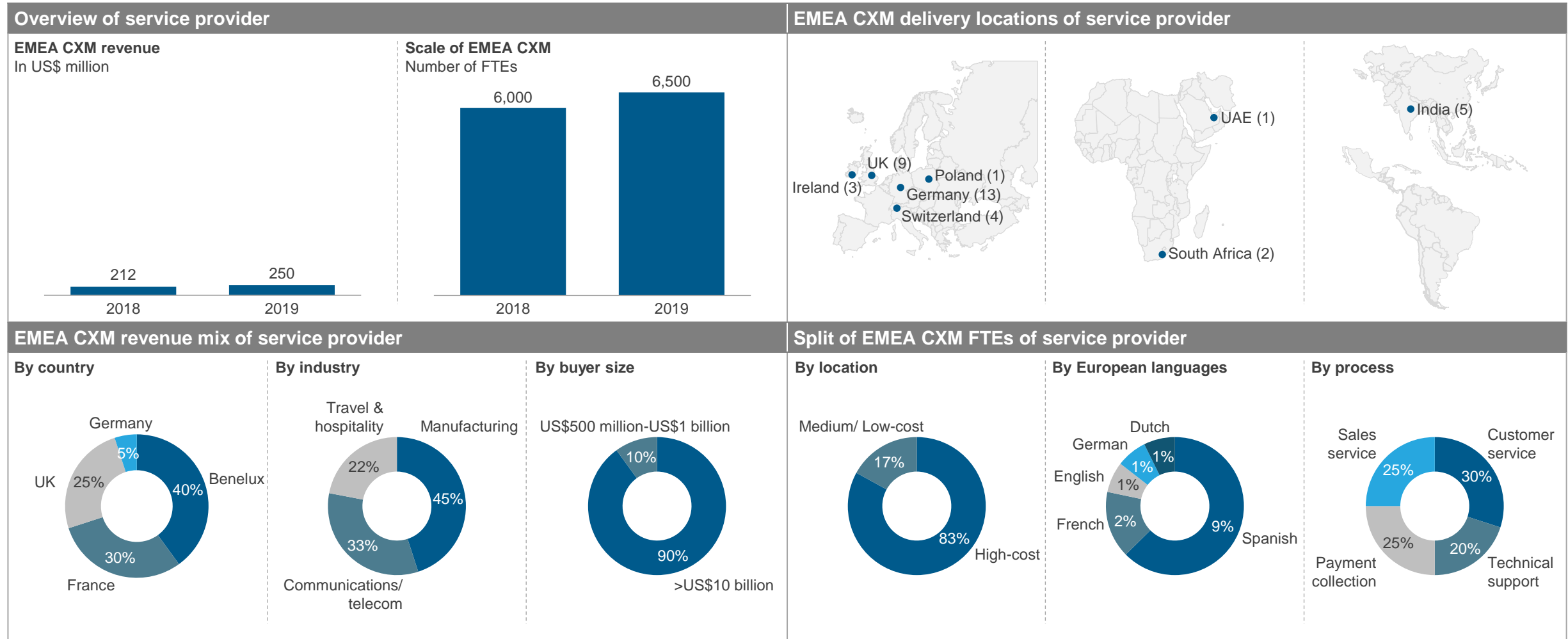


Service providers
21



Services
CXM

This study offers 21 distinct chapters providing a deep dive into key aspects of CXM market; below are four charts to illustrate the depth of the report



The study provides detailed view of 21 CXM service providers offerings & capabilities as well as key strengths & areas of improvement | Snapshots to illustrate the depth of report

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021

SP | EMEA CXM profile (page 1 of 5)

Overview

Company overview
SP is a provider of Customer Relationship Management (CRM) and Business Process Outsourcing (BPO) services in Spain. Since 1999, the company has developed its business model in X countries in Europe, to whom it offers a wide range of CRMBPO services through its subsidiaries.

Key leaders

- XX, EMEA's Managing Director
- XX, Commercial Director
- XX, Technology Director
- XX, Managing Digital Director
- XX, Delivery Director
- XX, Shares Services & Operational Excellence Director

Headquarters: Madrid, Spain
Website: www.sp.com

Recent developments

- 2020: Launched XX, an end-to-end digital solution
- 2020: Launched Inside Sales Business Model using analytics, AI, and ML
- 2019: Opened new customer relationship center in X, Y, and Z
- 2019: Opened an Efficiency and Transformation Center (ETC) in XX to support automation offer
- 2019: Launched new company strategy based on next-generation services
- 2019: Opened center of innovation and products factory including labs for

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021

SP | EMEA CXM profile (page 2 of 5)

Capabilities

Split of EMEA CXM FTEs
Number of FTEs

By location

Key EMEA-specific CXM investments

Description	Investment type	Year of investment
XX	Internal	2020
XX	Partnership	2019
XX	Partnership	2019
XX	Partnership	2019
XX	Internal	2019
XX	Investment	2017-19

1 Includes channel management and customer retention management
Note: High-cost regions include the United Kingdom and Western Europe, medium-cost regions include Eastern Europe and the Middle East, and low-cost regions include India, China, and Latin America.

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021

SP | EMEA CXM profile (page 3 of 5)

Client portfolio

EMEA CXM revenue mix
US\$ million

By country

Key contact center engagements

Client name
A large entertainment content platform company
A leading internet search company
A leading global technology company (one of the Big Four technology companies)
A leading social media giant
A large company for renting vehicles and taxis through mobile applications
A leading global high-tech company

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021

SP | EMEA CXM profile (page 4 of 5)

Location landscape

EMEA CXM delivery locations

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021

SP | EMEA CXM profile (page 5 of 5)

Everest Group assessment – XX

Measure of capability: ● High ● Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
●	●	●	●	●	●	●	●	●

Strengths

- SP caters to the Spanish CXM market in Europe across industries such as telecom, energy & utilities, and public sector. Within Spain, it has experience catering to diverse client demands, working with buyers across different segments and size
- With a focus on digital, SP has made significant investments in areas such as AI/cognitive capabilities, NLP, sentiment/emotion analytics, self-service, and voice-of-customer analytics. It has made proprietary investments, as well as developed partnerships with Avaya, Keepcon, Microsoft, and Amazon Alexa
- It has seen good success with outcome-based pricing models in this region, highlighting its ability to partner as a key stakeholder in their clients' business growth
- It also offers services around CX consulting and customer journey orchestration & planning, which are increasingly being demanded by buyers as they look to engage in more strategic partnerships with service providers
- Strategic vision, quick adaptability, service orientation, and proactive problem-solving capabilities have been highlighted by buyers as key strengths, for SP

Areas of improvement

- SP's client base in other European nations beyond Spain is negligible
- It has relatively limited experience catering to buyers from domains such as retail, travel & hospitality, media & entertainment, and technology
- While it has made significant progress in adoption of its digital solutions at a global level, adoption within Spain remains limited
- It recently announced a change in ownership, which might impact the firm's future ability to drive change initiatives
- EMEA clients recommended that SP needs to continue innovating and improving its digital offerings and invest in diversifying its workforce by recruiting new talent

Research calendar

Customer Experience Management (CXM)

■ Published ■ Planned ■ Current release

Flagship CXM reports

Release date

Intelligent Virtual Agents Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	March 2020
Intelligent Virtual Agents (IVA) State of the Market Report 2020: Conversing with AI	June 2020
Customer Experience Management (CXM) Service Provider Landscape with Services PEAK Matrix® Assessment 2020	June 2020
Customer Experience Management (CXM) Service Provider Compendium 2020	September 2020
Customer Experience Management (CXM) Service Provider Landscape in EMEA with Services PEAK Matrix® Assessment 2020	September 2020
Navigating Uncertainties and Building Operational Resiliency: Customer Experience Management (CXM) State of the Market Report 2021	October 2020
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021	November 2020
Customer Experience Management (CXM) Market Report on Europe, Middle East, and Africa (EMEA) 2021	Q4 2020
WAHA Customer Experience Management (CXM) Service Provider Landscape with PEAK Matrix® Assessment 2021	Q1 2021

Thematic CXM reports

Release date

Achieving High Value through a Total Cost of Operations (TCO) Pricing Model	November 2019
Orchestrating Successful WAHA-based Delivery	January 2020
Impact of Recession on the Business Process Services (BPS) Industry	January 2020
WAHA Adoption Trends – Impact of COVID-19	August 2020
Real-time Listening, AI, and Automation in CXM	Q4 2020
Contact Center as a Service (CCaaS) Market Report	Q1 2021

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



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