

Work at Home Agent (WAHA) Customer Experience Management (CXM) – Service Provider Landscape with Services PEAK Matrix[®] Assessment 2021

January 2021: Complimentary Abstract / Table of Contents



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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

With the COVID-19 pandemic hitting the world in early 2020, economies across the globe came to a standstill. Customer experience took a hit as organizations responded to social distancing and the lockdown measures implemented around the world. This resulted in the Work at Home Agent (WAHA) business model for delivering Customer Experience Management (CXM) services becoming a crucial part of business continuity planning. Over the past years, service providers have pursued the WAHA business model, albeit on a limited scale. Elevated demand for virtual workforce, coupled with the need to ensure superior customer experience, has necessitated investments in technology, security, and talent management. Due to expectations that WAHA will become an embedded part of most organizations' CXM service delivery models post-COVID-19, an increasing number of service providers are scaling their WAHA business by fast-tracking the development of virtual hiring, onboarding, training, security solutions, workforce management, and technology capabilities to meet increased demand.

In this research, we present detailed assessments of the WAHA capability of 16 CXM service providers featured on the CXM Services PEAK Matrix® Assessment 2021. Each assessment provides a comprehensive picture of the service provider's market success, vision and innovations, service focus and capabilities, technology and security solutions, talent management capabilities, 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.

This report includes the following 16 leading CXM service providers featured on the PEAK Matrix :

- **Leaders:** Arise, Concentrix, and Teleperformance
- **Major Contenders:** Alorica, Conduent, KellyConnect, Liveops, Sitel Group, Sutherland, SYKES, TTEC, and Webhelp
- **Aspirants:** Everise, HGS, Tech Mahindra, and Transcom

Scope of this report:



Geography
Global



Service providers
16



Services
Customer Experience
Management (CXM)

Overview and abbreviated summary of key messages

This report examines the Work at Home Agent (WAHA) Customer Experience Management (CXM) market and evaluates the positioning of service providers on the Everest Group PEAK Matrix. It provides insights on the market dynamics, service provider technology, security and talent management capabilities, and Everest Group's remarks on service providers' key strengths and considerations. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, among others, are:

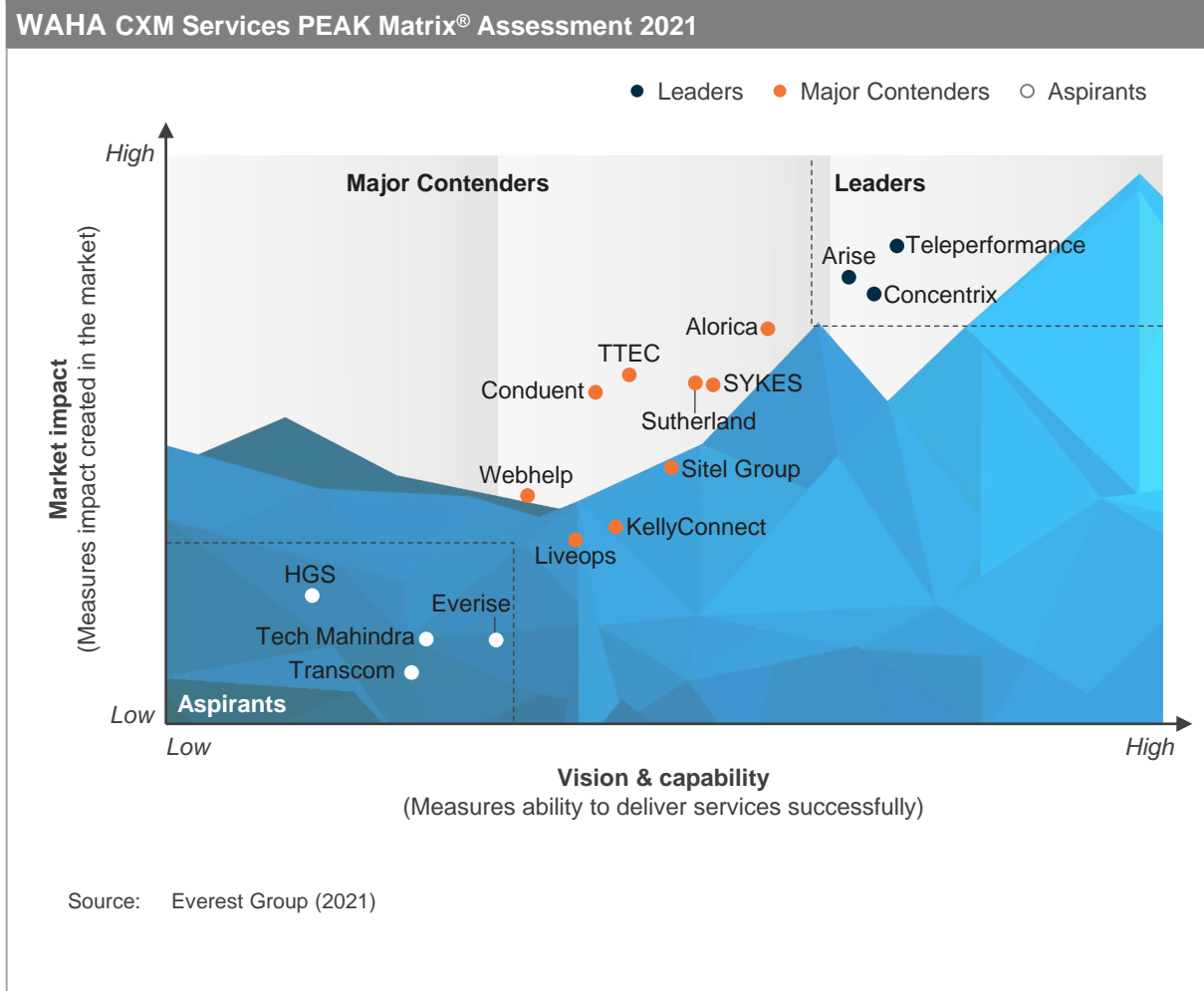
WAHA CXM service provider landscape and PEAK Matrix 2021

- Everest Group classifies 16 WAHA CXM service providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework to assess the relative market impact and vision & capability of service providers
- Arise, Concentrix, and Teleperformance have emerged as the Leaders
- Alorica, Conduent, KellyConnect, Liveops, Sitel Group, Sutherland, SYKES, TTEC, and Webhelp are the Major Contenders
- Everise, HGS, Tech Mahindra, and Transcom have emerged as aspirants
- Alorica, Sitel Group, Sutherland, and Teleperformance have the largest WAHA client base
- Teleperformance is the only provider to rank among the top service providers across all region

Key insights on PEAK Matrix dimensions

- Leaders have developed more advanced technology and security capabilities in areas such as cloud-based omnichannel platforms, agent-assist solutions, real-time agent monitoring systems, facial recognition solutions, and virtual workforce management tools to enhance their WAHA capabilities and deliver greater value to clients
- Leaders have also been more successful in leveraging next-generation talent management solutions in areas of hiring & onboarding, learning & development, performance management, and agent engagement & cultural integration
- Driving innovation beyond technology, security, and talent management, Leaders have a robust roadmap for expanding their WAHA CXM services. They have been also more consistent in targeting a wider spectrum of innovation to offer more compelling propositions to their clients instead of focusing on select areas

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



Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and innovation	Scope of services offered	Technology and security	Talent management	Delivery footprint	Overall
Service provider 1	●	○	●	●	●	○	●	●	●	●
Service provider 2	○	○	○	○	○	○	●	○	○	○
Service provider 3	○	●	●	●	●	○	○	○	●	●
Service provider 4	○	○	○	○	●	○	○	○	○	○
Service provider 5	●	●	○	●	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	●	○	○	○
Service provider 8	○	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and innovation	Scope of services offered	Technology and security	Talent management	Delivery footprint	Overall
○	○	●	○	●	○	○	○	○	○

Strengths

- Service provider caters to buyers from North America and Europe through its full- and part-time employee base to serve retail, BFSI, telecom, and government sectors
- It has also made inroads in CX consulting, where it is supporting a considerable number of clients in effective scaling of their remote workforce

Limitations

- It has not deployed next-generation agent engagement solutions (e.g., gamification, support bots, and virtual communities) to support its growing number of work-at-home agents
- It has relatively limited experience in catering to buyers from industries such as manufacturing, banking, media & entertainment, energy & utilities, and the government sector

Research calendar

Customer Experience Management (CXM)

Published Planned Current release

Flagship CXM reports

Release date

Navigating Uncertainties and Building Operational Resiliency: Customer Experience Management (CXM) State of the Market Report 2021

October 2020

Customer Experience Management (CXM) State of the Market Report on Europe, Middle East, and Africa (EMEA) 2021

December 2020

Work at Home Agent (WAHA) Customer Experience Management (CXM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2021

January 2021

Customer Experience Management (CXM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2021

Q2 2021

Customer Experience Management (CXM) – Service Provider Compendium 2021

Q3 2021

Customer Experience Management (CXM) – Service Provider Landscape in EMEA with Services PEAK Matrix® Assessment 2021

Q3 2021

Customer Experience Management (CXM) – Service Provider Landscape in APAC with Services PEAK Matrix® Assessment 2021

Q3 2021

Customer Experience Management (CXM) – State of the Market Report 2022

Q4 2021

Thematic CXM reports

Release date

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

Q1 2021

Contact Center as a Service (CCaaS) Market Report

Q1 2021

Evolution of Transition, Engagement, and Governance Models in BPS

Q1 2021

Work at Home Agents (WAHA) Platforms

Q2 2021

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



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