

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

October 2021: Complimentary Abstract / Table of Contents



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- ▶ Service Optimization Technologies
- ▶ Supply Chain Management (SCM) Services
- ▶ Talent Excellence GBS
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- ▶ Technology Skills & Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)
- ▶ Workplace Services

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custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

CXM pyramid, multi-process CXM definition, Total Value Equation (TVE), PEAK Matrix®, market maturity

02

Primary sources of information

Annual contractual and operational RFIs, service provider briefings and buyer interviews, web-based surveys

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers

Proprietary contractual database of 5000+ CXM contracts (updated annually)

Year-round tracking of 40+ CXM service providers

Large repository of existing research in CXM

Over 30 years' experience of advising clients on CXM related decisions

Executive-level relationships with buyers, service providers, technology providers, and industry associations

This report is based on four sources of proprietary information

- Proprietary database of CXM contracts of major CXM service providers with workplace services in scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including service provider, contract type, TCV & ACV, service provider FTEs, start & end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed
 - Customer Relationship Management (CRM) technology, communication technology, and enabler technology ownership & maintenance
 - Global sourcing including delivery locations, number of FTEs, and shoring mix
- Proprietary database of CXM service providers (updated annually)
- The database tracks the following for each service provider:
 - Key leaders
 - Revenue and number of FTEs
 - Major clients and recent wins
 - Recent customer experience-related developments
 - Revenue split by geography, industry, and client size
 - Key delivery locations and languages
 - Customer experience service suite
 - Customer experience-related technology capabilities
- **Service provider briefings**
 - Vision and strategy
 - Annual performance and future outlook
 - Key strengths and improvement areas
 - Emerging areas of investment
- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Global surveys and one-on-one executive-level interviews are undertaken annually with approximately 80-100 organizations to understand how buyers perceive the performance of their providers. The surveys/interviews focus on different aspects of an outsourcing relationship including:
 - ◆ Key drivers for outsourcing customer experience management
 - ◆ 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
 - ◆ Key customer experience metrics
 - ◆ Various customer experience-centric processes
 - ◆ Implementation and transition phases
 - ◆ Governance and relationship management

Note: The source of all content is Everest Group unless otherwise specified

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

Service providers assessed



Background and scope of the research

The Customer Experience Management (CXM) market in Europe, Middle East, and Africa (EMEA) has experienced growth due to increased demand for outsourcing as enterprises look to cut costs, balance risks, and overcome the challenges presented by the pandemic, while ensuring superior customer experience. They have turned to service providers to digitalize their operations, shift to non-voice channels, and migrate to cloud services, while complying with regulatory and security norms and ensuring agent well-being. Service providers have shown resiliency by setting up Work-At-Home-Agent (WAHA) models, designing hybrid offices and operating frameworks, and establishing instant scaling options, as well as invested in digital offerings such as conversational AI, intelligent automation, cloud-based contact centers, and omnichannel delivery to ensure business continuity for clients. Providers are also forging more strategic partnerships through consultative engagements, risk-sharing through outcome-based pricing models, and agent engagement through advanced learning and collaboration platforms to effectively cater to the requirements of the enterprises.

In this research, we present detailed assessments of 25 CXM service providers in EMEA featured on the CXM Services PEAK Matrix® Assessment 2021. 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.

This report includes the following 25 leading CXM service providers in EMEA featured on the CXM PEAK Matrix:

- **Leaders:** Capita, Comdata Group, Majorel, Sitel Group®, Teleperformance, and Webhelp
- **Major Contenders:** Atento, Bosch Service Solutions, Cognizant, Concentrix, Conduent, Covisian, EXL, Genpact, Infosys, Startek, SYKES, Tech Mahindra, TELUS International, Transcom, and TTEC
- **Aspirants:** Conectys, IGT Solutions, Merchants, and RAYA CX

Scope of this report:



Geography
EMEA



Service providers
25



Services
CXM

This study offers 25 distinct chapters providing a deep dive into key aspects of CXM market; below are five charts to illustrate the depth of the report

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022

Service Provider | EMEA CXM profile (page 1 of 6)

Overview

Company mission/vision statement
Service provider customer experience division is a business pro... It provides front-office customer experience services and back... UK, Germany, and Ireland, across industries such as telecom, f...

Headquarters: London, UK

Key leaders

- ABC, Group Chief Executive Officer
- AAA, Divisional Finance Director
- ABA, HR Director

Recent developments

- 2020: established XXX lab to showcase technical ability and
- 2020: created agent-assist integrated dashboard to drive aut
- 2020: introduced real-time conversational analytics engine, s
- 2020: received Amazon Connect accreditation to partner lev
- 2020: partnered with XXX for patented contact center data g
- 2020: introduced innovation function to build MVP solutions i
- 2020: established a secure work-from-home technology and

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022

Service Provider | EMEA CXM profile (page 2 of 6)

Capabilities

Split of CXM FTEs
Number of FTEs

By location

Location Type	Percentage
Medium-/low-cost	44%
High-cost	56%

1 Includes channel management, customer analytics, customer retention
Note: High-cost regions include the United Kingdom and Western Europe; m

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022

Service Provider | EMEA CXM profile (page 3 of 6)

Key CXM investments | proprietary solutions and partnerships

Key partnerships

Key customer experience engagements

Client name
XXX
XXX
XXX
XXX
XXX

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022

Service Provider | EMEA CXM profile (page 4 of 6)

Client portfolio

CXM revenue mix
US\$ million

By geography

Geography	Percentage
Germany & Switzerland	22%
UK and Ireland	78%

Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022

Service Provider | EMEA CXM profile (page 5 of 6)

Location landscape

EMEA CXM delivery locations

(XX) – Number of centers in each location

Research calendar

Customer Experience Management (CXM) Services

Published Planned Current release

Flagship reports

Release date

Work at Home Agent (WAHA) CXM – Service Provider Landscape with PEAK Matrix® Assessment 2021	January 2021
Work at Home Agent (WAHA) CXM – Service Provider Compendium 2021	March 2021
Customer Experience Management (CXM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2021	July 2021
Conversational AI Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	August 2021
Customer Experience Management (CXM) in EMEA – PEAK Matrix® Assessment with Service Provider Landscape 2021	September 2021
Customer Experience Management (CXM) – Service Provider Compendium 2021	September 2021
Conversational AI Technology Vendor Compendium 2021	October 2021
Customer Experience Management (CXM) State of the Market Report 2021	October 2021
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021	October 2021
Customer Experience Management (CXM) – Service Provider Landscape in Asia Pacific with PEAK Matrix® Assessment 2021	Q4 2021

Thematic reports

Release date

Business Process Services (BPS) 4.0: Heralding the Start of a New Era	February 2021
Building a Conversationally Intelligent and Automated Contact Center of the Future	April 2021
Is Your Remote Working Strategy Built to Last?	April 2021
Customer Experience as a Service (CXaaS): Winning in the Experience Economy	June 2021
Demystifying Contact Center-as-a-Service (CCaaS): Customer Experience Management (CXM) Market Report 2021	August 2021

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



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