

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

February 2022: Complimentary Abstract / Table of Contents



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

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custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: 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 limitations
 - 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 limitations
 - ◆ 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 the APAC region has experienced steady growth in last few years due to increased demand for outsourcing as enterprises aspired to leverage digital solutions, balance risks, and grow their businesses, while ensuring superior customer experience. Despite, the APAC region being one of the hardest hit regions by the pandemic, it has given rise to several avenues for demand, especially from emerging countries and first-time outsourcers who are now more open to leveraging the expertise of third-party service providers. Consequently, service providers have shown commendable resiliency by setting up Work-At-Home-Agent (WAHA) models, designing hybrid offices and operating frameworks, establishing instant scaling options, as well as investing in digital offerings such as conversational AI, intelligent automation, cloud-based contact centers, and omnichannel delivery to ensure business continuity for their clients. The APAC region is uniquely characterized by service providers with strong regional presence and local language capabilities, given the heterogenous nature of this market. 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 this region.

In this research, we present detailed assessments of 11 CXM service providers in APAC featured on the [Customer Experience Management \(CXM\) in APAC – PEAK Matrix® Assessment with Service Provider Landscape 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 2021, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

This report includes the following 11 leading CXM service providers in APAC:

- **Leaders:** Probe Group, Teleperformance, and transcocosmos
- **Major Contenders:** CONNEQT, Genpact, Startek, Tech Mahindra, TTEC, and Webhelp
- **Aspirants:** Cognizant and IGT Solutions

Scope of this report



Geography
APAC



Service providers
11



Services
Customer Experience
Management (CXM)

Note: Profiles of Acquire BPO, Bell System24, Relia, TMJ, and VXI have been excluded from this report, as our assessments was made without their RFI participation, and information was therefore limited. Our assessments of those companies are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers.

This study offers 10 distinct chapters providing a deep dive into key aspects of CXM in APAC market; below are five charts to illustrate the depth of the report

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

Service provider | APAC CXM profile (page 1 of 6)
Overview

Company description
Service provider launched its operations in XXX. It currently offers services that support clients on sales expansion and cost optimization through XX centers across XX countries/region and aims to be the global digital transformation partner of its clients, supporting the clients' digital technology, and responding to the ever-changing business environment.

Headquarters: Tokyo, Japan

Key leaders

- XXX: Founder & Group CEO
- XXX: Chairman & CEO
- XXX: President & COO

Recent developments

- 2021: released XXX, its proprietary diagnostics & analytics services that help maximize sales
- 2021: offered a CRM connect solution with the power of XXX as a digital communication professional
- 2021: with the aim of further spreading home-based contact center services, service provider operations for home-based contact center agents
- 2021: released a packaged service combining a COVID-19 vaccination booking system and an online chatbot service for filling out a pre-vaccination screening form

Note: The 2021 APAC CXM revenue, agents, and clients are for the first half of 2021 (January to June 2021)

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

Service provider | APAC CXM profile (page 2 of 6)
Capabilities

Split of APAC CXM FTEs
Number of FTEs

By location

Location	Percentage
Japan	56%
Rest of Asia	16%
South Korea	13%
China	11%
Philippines	1%
Taiwan	1%

Chinese language
Other Asian language

1 Includes channel management and customer retention management.

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

Service provider | APAC CXM profile (page 3 of 6)
Key CXM investments | proprietary solutions and partnerships

Key partnerships

Note: List of key partners is representative and not exhaustive.

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

Service provider | APAC CXM profile (page 4 of 6)
Client portfolio

APAC CXM revenue mix
US\$ million

By country

Country	Percentage
Japan	81%
Rest of Asia	4%
South Korea	6%
China	9%

Healthcare
Energy & utilities
Government / Public sector
Technology (including FGI)

Key customer experience engagements

Client name	Region
XXX	China
XXX	Japan
XXX	Japan
XXX	Japan
XXX	Japan

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

Service provider | APAC CXM profile (page 5 of 6)
Location landscape

APAC CXM delivery locations

(XX) – Number of centers in each location

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Research calendar

Customer Experience Management Services

Published Planned Current release

Flagship reports

Release date

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) – Service Provider Landscape in EMEA with PEAK Matrix® Assessment 2021	September 2021
Customer Experience Management (CXM) – Service Provider Compendium 2021	September 2021
Conversational AI Technology Vendor Compendium 2021	October 2021
The Aftermath of COVID-19: Customer Experience Management (CXM) State of the Market Report 2022	October 2021
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022	October 2021
Customer Experience Management (CXM) in APAC – PEAK Matrix® Assessment with Service Provider Landscape 2021	December 2021
Customer Experience Management (CXM) in APAC – Service Provider Compendium 2022	February 2022

Thematic CXM 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 Customer Experience Management Services reports, please refer to our [website page](#)



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