

Customer Experience Management (CXM) in the Americas – Service Provider Landscape with PEAK Matrix® Assessment 2022

August 2022: Complimentary Abstract / Table of Contents



Our research offerings

This report is included in the following research program(s):

Customer Experience Management Services

- ▶ Application Services
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Conversational AI
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms (DAP)
- ▶ Digital Engineering Services
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Engineering Services
- ▶ Enterprise Platform Services
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ Global Business Services
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ Human Resources Outsourcing
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing (IDP)
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Executive Insights™
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Outsourcing Excellence
- ▶ Pricing-as-a-Service
- ▶ Process Mining
- ▶ Procurement
- ▶ Recruitment
- ▶ Retirement Technologies
- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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

Learn more about our
custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

Contents

1. Introduction and overview	6
• Research methodology	7
• Detailed description of processes within CXM	8
• Key sources of proprietary information	9
• Background and scope of research	10
2. Executive Summary	11
• Summary of key messages	12
3. Americas PEAK Matrix® characteristics	14
• PEAK Matrix framework	15
• Everest Group PEAK Matrix for Americas	17
• Characteristics of Leaders, Major Contenders, and Aspirants	18
• Other notable providers in the region	19
• Provider capability summary dashboard	20
• Enterprise feedback summary	25
4. Enterprise sourcing considerations	27
• Leaders	27
– Alorica	28
– Concentrix	29
– Sitel Group®	30
– Teleperformance	31
– TELUS International	32
– TTEC	33

For more information on this and other research published by Everest Group, please contact us:

Shirley Hung, Partner

David Rickard, Vice President

Sharang Sharma, Practice Director

Aishwarya Barjatya, Senior Analyst

Anubhav Das, Senior Analyst

Contents

• Major Contenders	34
– [24]7.ai	35
– Arise	36
– Atento	37
– Cognizant	38
– Comdata Group	39
– Conduent	40
– EXL	41
– Genpact	42
– HGS	43
– IBM	44
– Infosys	45
– Majorel	46
– Qualfon	47
– ResultsCX	48
– Startek®	49
– Sutherland	50
– TaskUs	51
– TCS	52
– Tech Mahindra	53
– Transcom	54
– VXI	55

Contents

• Major Contenders (continued)	
– Webhelp	56
– Working Solutions	57
• Aspirants	58
– CCI	59
– Datamark	60
– Datamatics	61
– DXC Technology	62
– GlowTouch	63
– IGT Solutions	64
– itel	65
– Liveops	66
5. Appendix	67
• Glossary	68
• Research calendar	69

Background and scope of the research

The Customer Experience Management (CXM) market in the Americas region has shown significant resilience throughout the post-pandemic phase in 2021, as enterprises across the board continued their investments in this space to retain existing customers and attract new ones. These investments were primarily driven by digital CX implementations in areas such as automation, analytics, conversational AI/chatbots, agent-assist solutions, omnichannel delivery, and cloud-based contact center platforms to modernize their contact centers and provide the frictionless experience that modern-age customers expect from brands. There has been an increased demand for the Work at Home Agent (WAHA) service delivery model from enterprises that are especially looking for onshore support for their end customers. Also noticeable was a strong demand for transformation consulting services such as customer journey mapping and design thinking by enterprises to accelerate their digital transformation initiatives and achieve business continuity leading to a scope expansion within existing CXM contracts. The LATAM market grew slightly faster than the North American market, albeit on a smaller base.

In this research, we present detailed assessments of 37 CXM service providers in the Americas featured on the CXM Services PEAK Matrix® Assessment 2022. 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 2022, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

This report includes the profiles of the following 37 leading CXM service providers featured on the CXM PEAK Matrix®:

- **Leaders:** Alorica, Concentrix, Sitel Group®, Teleperformance, TELUS International, and TTEC
- **Major Contenders:** [24]7.ai, Arise, Atento, Cognizant, Comdata Group, Conduent, EXL, Genpact, HGS, IBM, Infosys, Majorel, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, VXi, Webhelp, and Working Solutions
- **Aspirants:** CCI, Datamark, Datamatics, DXC Technology, GlowTouch, IGT Solutions, itel, and Liveops

Scope of this report



Geography
Americas



Providers
37



Services
Customer Experience
Management (CXM)

Overview and abbreviated summary of key messages

This report examines the 2022 Customer Experience Management (CXM) service provider landscape in the Americas region and provides an analysis of providers' key strengths and limitations. It focuses on provider position and growth in the CXM market, changing market dynamics and emerging provider trends, and assessment of provider delivery capabilities. It also identifies the key implications of the research findings for buyers and providers.

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

CXM service provider landscape in the Americas and PEAK Matrix® 2022

The 2022 Americas CXM PEAK Matrix® positioning is as follows:

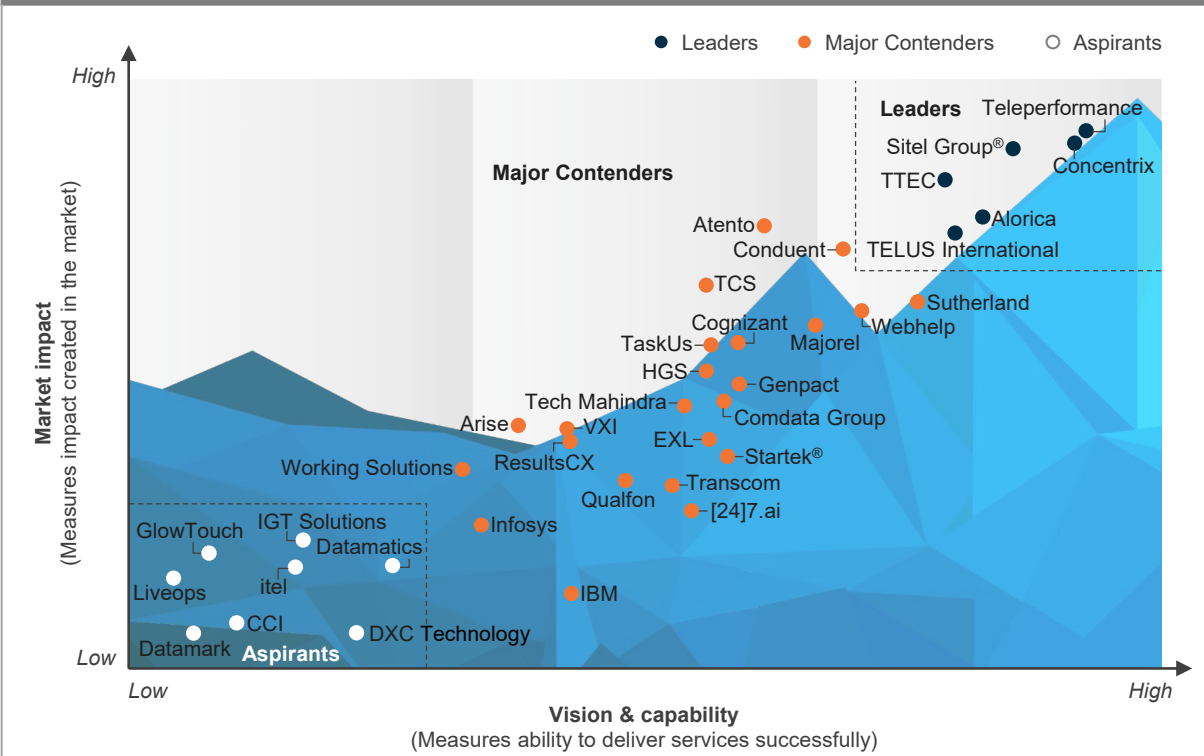
- **Leaders:** Alorica, Concentrix, Sitel Group®, Teleperformance, TELUS International, and TTEC
- **Major Contenders:** [24]7.ai, Arise, Atento, Cognizant, Comdata Group, Conduent, EXL, Genpact, HGS, IBM, Infosys, Majorel, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, VXI, Webhelp, and Working Solutions
- **Aspirants:** CCI, Datamark, Datamatics, DXC Technology, GlowTouch, IGT Solutions, itel, and Liveops

Key insights on PEAK Matrix® dimensions

- Digital disruption induced by the pandemic has brought about a drastic shift in enterprise behavior with an enhanced focus on digital CXM and Business Continuity Planning (BCP). There is also a surge in demand for CX consulting services such as digital transformation consulting, design thinking, process consulting, workforce optimization, and customer journey mapping
- To cater to the demands of this evolved CXM market, service providers are increasingly investing in partnerships to fill capability gaps across traditional areas such as automation, AI, and analytics, as well as new areas such as cloud-based contact centers, remote workplace support, and security solutions
- Leaders have been able to develop more sophisticated digital solutions and have been more successful than their peers in driving agent engagement and talent management initiatives and process innovation. However, there is low differentiation in the adoption of output- and outcome-based pricing models between Leaders and the Others in the Americas

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

CXM in the Americas – Service Provider Landscape with PEAK Matrix® Assessment 2022¹



¹ Assessment for Sutherland excludes provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2022)

Capability assessment Illustrative example

Measure of capability: 🟡 Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Technology and innovation	Delivery footprint	Overall
Provider 1	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 2	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 3	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 4	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 5	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 6	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 7	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 8	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 9	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡

Everest Group's remarks on providers Illustrative example

Measure of capability: 🟡 Low ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Technology and innovation	Delivery footprint	Overall
🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡

- | | |
|---|---|
| <p>Strengths</p> <ul style="list-style-type: none"> Service provider 1 has developed a strong Americas footprint with experience serving clients in geographies such as the US, Canada, Mexico, and Brazil. It caters to clients across telecom, BFSI, retail, and energy & utilities Service provider 1 has made investments in areas such as omnichannel solutions, interaction analytics, customer acquisition platforms, and conversational assistants | <p>Limitations</p> <ul style="list-style-type: none"> It has low adoption of outcome-based pricing constructs, which may inhibit its value proposition for buyers looking for risk-sharing options, especially in deals involving a significant component of digital transformation Clients in the Americas region emphasized the need to be proactive, employing a skilled workforce, and boosting more collaboration in their engagement as focus areas for Service provider 1 |
|---|---|

Research calendar

Customer Experience Management (CXM) Services

Published Planned Current release

Reports title	Release date
Delivering Happy Customers in the Experience Economy	March 2022
The Increasing Role of Bring Your Own Device (BYOD) in CXM – Trends, Challenges, and Opportunities	April 2022
Enterprise Technical Support	June 2022
Transforming Customer Experience (CX) Operations	July 2022
Catering to Global Customer Experience Management (CXM) Requirements: What It Means to Be a Truly Global Service Provider	July 2022
Customer Experience Management (CXM) in the Americas – Service Provider Landscape with PEAK Matrix® Assessment 2022	August 2022
Customer Experience Management (CXM) in APAC – Service Provider Landscape with PEAK Matrix® Assessment 2022	Q3 2022
Customer Experience Management (CXM) in EMEA – Service Provider Landscape with PEAK Matrix® Assessment 2022	Q3 2022
Navigating the Digital CXM Transformation Journey	Q3 2022
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2022	Q3 2022
Customer Experience Management (CXM) in the Americas – Service Provider Compendium 2022	Q3 2022
Customer Experience Management (CXM) in APAC – Service Provider Compendium 2022	Q3 2022
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022	Q3 2022
Conversational AI State of the Market Report 2022	Q4 2022
Customer Experience Management (CXM) State of the Market Report 2022	Q4 2022
Customer Experience Management (CXM) in Healthcare – Service Provider Landscape with PEAK Matrix® Assessment 2022	Q4 2022

Note: [Click](#) to see a list of all of our published CXM reports



Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our research also covers the technologies that power those processes and functions and the related talent trends and strategies. Our clients include leading global companies, service and technology providers, and investors. Clients use our services to guide their journeys to maximize operational and financial performance, transform experiences, and realize high-impact business outcomes. Details and in-depth content are available at www.everestgrp.com.

Stay connected

Website

everestgrp.com

Social Media

-  @EverestGroup
-  @Everest Group
-  @Everest Group
-  @Everest Group

Blog

everestgrp.com/blog

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto

canada@everestgrp.com
+1-647-557-3475

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.