



Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2024 – Americas

Month 2024: Complimentary Abstract / Table of Contents

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- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
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Locations: costs, skills, sustainability,
portfolios

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Background and scope of research

The Customer Experience Management (CXM) market in the Americas experienced decent growth, buoyed by bullish sentiments, particularly in the United States, due to stronger economic conditions. This environment has prompted service providers to increase investments in their Americas operations. Enterprises in the region are advancing digital transformation, leading service providers to offer a wide range of digital CX solutions, including automation, analytics, conversational AI, chatbots, self-service, omnichannel delivery, and cloud-based contact center solutions.

To support the ideation, development, and implementation of various digital CX tools including gen AI solutions, a considerable number of service providers have established Centers of Excellence (CoEs). Many gen AI solutions are being deployed including knowledge-as-a-service tools, learner co-pilots, QA&QC co-pilots, conversational gen AI chatbots, and agent-assist tools. Additionally, almost all service providers are partnering with hyperscalers and AI start-ups to deliver gen AI-centric offerings, further enriching their service portfolios.

In this report, we present an assessment and detailed profiles of 43 CXM service providers featured on the CXM Services in the Americas PEAK Matrix® Assessment 2024. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2024, 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 43 leading CXM providers featured on the CXM Services in the Americas PEAK Matrix®:

- **Leaders:** Alorica, Concentrix, Foundever, Teleperformance, TELUS Digital, and TTEC
- **Major Contenders:** Arise, Atento, CCI, Cognizant, Conduent, Datamatics, eClerx, Etech, EXL, Firstsource, Genpact, GlowTouch, HCLTech, HGS, ibex, IGT Solutions, Infosys, Intelcia, IntouchCX, Konecta, ProbeCX, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, and VXI
- **Aspirants:** Auxis, Centro, Conectys, Ignition CX, MerchantsCX, Pentafon, and Welsend

Scope of this report

Geography: Americas

Industry: All

Services: Customer Experience Management (CXM)

Overview and abbreviated summary of key messages

This report examines the Customer Experience Management (CXM) Americas market and its service provider landscape. It provides a deep-dive analysis of how the service providers shape up in terms of their market impact and vision & capability. Based on the comprehensive Everest Group PEAK Matrix®, 43 CXM service providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and limitations

CXM provider landscape in the Americas Peak Matrix® 2024

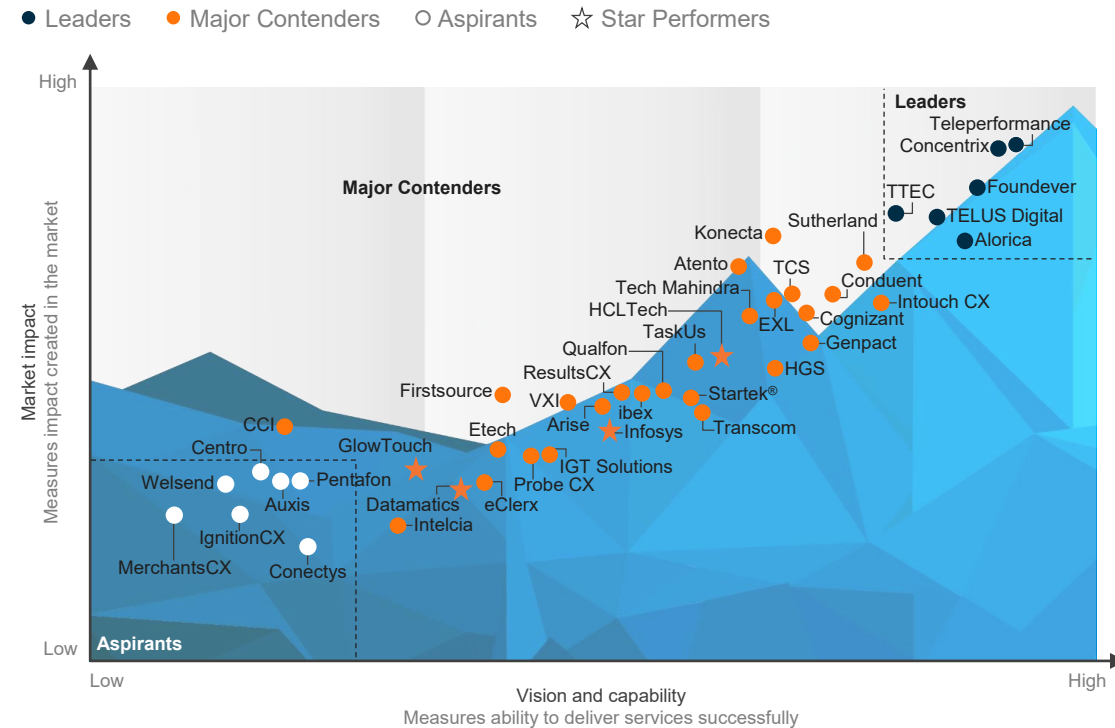
Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 43 established CXM providers evaluated are segmented into three categories (in alphabetical order within each category):

- Leaders: Alorica, Concentrix, Foundever, Teleperformance, TELUS Digital, and TTEC
- Major Contenders: Arise, Atento, CCI, Cognizant, Conduent, Datamatics, eClerx, Etech, EXL, Firstsource, Genpact, GlowTouch, HCLTech, HGS, ibex, IGT Solutions, Infosys, Intelcia, IntouchCX, Konecra, ProbeCX, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, and VXI
- Aspirants: Auxis, Centro, Conectys, Ignition CX, MerchantsCX, Pentafon, and Welsend

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

Everest Group PEAK Matrix® Assessment 2024

Everest Group Customer Experience Management (CXM) PEAK Matrix® Assessment 2024 – Americas¹



¹ Assessments for Intelcia excludes service 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 (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

| Providers | Market impact | | | | Vision and capability | | | | |
|------------|-----------------|---------------|-----------------|---------|-----------------------|---------------------------|----------------------------|--------------------|---------|
| | Market adoption | Portfolio mix | Value delivered | Overall | Vision and strategy | Scope of services offered | Innovation and investments | Delivery footprint | Overall |
| Provider 1 | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Provider 2 | ● | ○ | ● | ● | ● | ○ | ● | ○ | ● |
| Provider 3 | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Provider 4 | ○ | ○ | ● | ● | ● | ○ | ● | ● | ● |
| Provider 5 | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Provider 6 | ○ | ○ | ● | ○ | ● | ○ | ○ | ● | ○ |

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

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

Strengths

- Provider 1, employs over XYZ agents to serve the Americas region, primarily providing services to the US, while also extending services to clients across other countries in the region such as Canada and Mexico
- Buyers highlighted proactive communication, ability to handle complexities, and ease of doing business as key strength areas

Limitations

- Provider 1 has limited experience in serving clients from manufacturing, government, and CPG verticals may restrict its ability to support a broader audience
- Provider 1 predominantly serves midsize and large enterprises with revenues exceeding US\$1 billion. Its experience in serving small enterprises remains limited

Research calendar

Customer Experience Management Services

| | Published | Current release | Planned |
|---|--------------|-----------------|---------------|
| Reports title | Release date | | |
| Achieving Digital Customer Experience Management's (CXM) Full Potential with the Generative AI Revolution | | | December 2023 |
| Conversational AI – State of the Market Report 2023 – Update | | | December 2023 |
| Customer Experience Management (CXM) – Provider Compendium 2023 | | | December 2023 |
| Strategic Keys: Unlocking the Potential of Customer Experience Management | | | February 2024 |
| Customer Experience Management (CXM) Services CXO Insights: Key Issues Report 2024 | | | February 2024 |
| Generative AI in CXM: Assessing Enterprise Readiness for this Disruptive Transformation | | | March 2024 |
| Lead with Empathy: Handle Care with Care | | | May 2024 |
| Future-ready Customer Experience Management (CXM): Trends Driving the BFSI Industry | | | June 2024 |
| Consumer Readiness for Generative AI Adoption in CXM | | | June 2024 |
| Navigating AI Adoption: Transforming CX in Regulated Industries | | | July 2024 |
| Conversational AI Products PEAK Matrix® Assessment 2024 | | | July 2024 |
| Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2024 – Americas | | | August 2024 |
| Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2024: APAC | | | Q3 2024 |
| Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2024: EMEA | | | Q3 2024 |
| Contact Center-as-a-Service (CCaaS) PEAK Matrix® Assessment 2024 | | | Q3 2024 |
| Customer Experience Management (CXM) – Provider Compendium 2024 | | | Q3 2024 |

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