

Magic Quadrant pour le centre de contact en tant que service

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Par **et 2 autres** Drew Kraus, Steve Blood,

Les solutions CCaaS sont utilisées par les centres de contact avec des sièges allant de dizaines à des milliers, car elles peuvent répondre à des exigences complexes et multirégionales. Cette recherche aidera les responsables d'applications responsables du service client à trouver le bon fournisseur pour leurs besoins géographiques et fonctionnels.

Définition/description du marché

La vision de Gartner du marché des centres de contact en tant que service (CCaaS) se concentre sur les technologies et les approches transformationnelles pour répondre aux besoins futurs des utilisateurs finaux. Il ne se concentre pas sur le marché tel qu'il est aujourd'hui.

Gartner définit le CCaaS comme une application SaaS (Software as a Service) qui permet aux organisations de service client de gérer les interactions client multicanal de manière holistique en termes d'expérience client (CX) et d'expérience employé.

Les solutions CCaaS sont en grande partie des systèmes de différenciation. Ils permettent un modèle de livraison adaptatif et flexible avec des capacités natives couvrant les quatre piliers d'un excellent service client (voir les descriptions des fonctionnalités principales et facultatives ci-dessous) et des intégrations produites avec des solutions partenaires via des marchés d'applications.

La capacité de base d'une solution CCaaS concerne :

- **Se connecter** - en mettant l'accent sur la fourniture d'une conception architecturée indépendante des canaux pour créer des parcours de service client, y compris un libre-service intelligent. Les services sont consommés par poste, par utilisateur simultané ou transaction.

Les fonctionnalités optionnelles d'une solution CCaaS sont les suivantes :

- **Orchestration des processus** : prise en charge d'engagements clients de plus en plus complexes et personnalisés.

- **Gestion des ressources** – développer et maintenir en poste un personnel engagé et responsabilisé en partant du principe que les employés engagés alimentent une expérience client plus forte.
- **Connaissances et connaissances** : fournir des informations sur les clients et les opérations et recommander les meilleures actions à prendre dans tous les groupes fonctionnels.

Les solutions CCaaS sont utilisées par les centres de service client et de télémarketing, les centres de service et de support aux employés, les centres de service d'assistance et d'autres types d'opérations de communication structurées centrées sur le client. Ils sont maintenant la technologie incontournable pour la plupart des organisations qui achètent des environnements de centre de contact de moins de 500 sièges, en particulier lorsque le routage des interactions vocales joue un rôle essentiel. De plus en plus, ils sont déployés dans des environnements avec des milliers de postes d'agents, bien que ces environnements puissent être composés de plusieurs centres plus petits. Cela reflète le désir des organisations de service à la clientèle de consolider les environnements autonomes et d'aller de l'avant avec un fournisseur unique et stratégique. Les solutions CCaaS sont généralement déployées en tant que partie intégrante d'un écosystème plus large de technologies de service et de support client.

Le marché a connu une augmentation notable de la demande de systèmes capables de prendre en charge des niveaux de sophistication plus élevés en matière de canaux numériques, de libre-service, d'analyse d'interaction et de parcours, d'intelligence artificielle (IA) et d'apprentissage automatique (ML) pour fournir des niveaux d'automatisation améliorés. Cependant, la prise en charge de ces capacités par les fournisseurs CCaaS manque souvent de maturité fonctionnelle pour répondre aux demandes des clients. Par conséquent, les fournisseurs CCaaS doivent généralement s'appuyer sur des partenaires technologiques pour fournir les solutions approfondies demandées par les clients.

Dans les évaluations des fournisseurs qui suivent, nous distinguons deux principaux types d'offres CCaaS. La première que nous décrivons comme des offres « spécialisées », une désignation indiquant que la fonctionnalité CCaaS est au cœur de l'offre principale de communication et de collaboration d'entreprise du fournisseur. Le deuxième type combine les communications unifiées en tant que service (UCaaS) et les fonctionnalités CCaaS et, dans certains cas, une plate-forme de communication en tant que service (CPaaS), généralement dans le cadre d'une offre groupée.

Magic Quadrant

Figure 1 : Magic Quadrant pour le centre de contact en tant que service





Source : Gartner (août 2022)

Forces et mises en garde des fournisseurs

8x8

8x8 est un joueur de niche dans ce Magic Quadrant. Son centre de contact 8x8 est fourni via la plate-forme de communication eXperience 8x8, qui intègre CCaaS, UCaaS et CPaaS. Il est proposé dans le cadre de la suite de licences X Series, qui comprend les communications UCaaS et CCaaS en tant qu'offre groupée. 8x8 Contact Center est également disponible en tant que solution autonome. L'acquisition de Fuze par 8x8 au 1T22 élargit nominalement la base installée de clients des centres de contact de la société.

8x8 a une forte empreinte mondiale en raison de son leadership sur le marché UCaaS. Son point fort pour le CCaaS est les entreprises de taille moyenne, mais il peut également répondre aux besoins des grandes entreprises dans des environnements qui ne nécessitent pas beaucoup de fonctionnalités sophistiquées.

8x8 est bien en mesure de répondre aux quatre piliers d'un excellent service client grâce à la fois à des fonctionnalités natives et à des partenariats pour la gestion de l'engagement de la main-d'œuvre (WEM), les assistants clients virtuels (VCA) et la gestion des connaissances.

Forces

- **Stratégie de service** : 8x8 peut fournir UCaaS, CCaaS et CPaaS sur une seule plate-forme, et est bien capable de s'intégrer nativement à 8x8 Voice for Microsoft Teams, une solution de routage direct.
- **Stratégie géographique** : la présence mondiale de 8x8 en tant que fournisseur UCaaS lui permet de répondre aux besoins des utilisateurs de centres de contact des organisations dans plusieurs régions, en particulier lorsqu'il est nécessaire de prendre en charge à la fois UCaaS et CCaaS.
- **Offre de service** : Les clients indiquent que l'interface utilisateur de l'agent récemment repensée de 8x8 est facile à utiliser.

Précautions

- **Stratégie de service** : le point fort de 8x8 est les centres de contact de taille moyenne, généralement ceux qui comptent moins de 500 agents. Les clients potentiels ayant des exigences importantes en matière de service client doivent vérifier que l'ensemble des fonctionnalités de 8x8 répondra aux besoins de leur unité commerciale de service client.
- **Opérations** : Certains clients indiquent que les capacités de reporting de 8x8 n'ont pas la granularité et la flexibilité attendues par les grandes organisations de service à la clientèle.
- **Stratégie de vente** : 8x8 se concentre sur la vente de ses capacités CCaaS avec UCaaS, mais une grande partie de cette activité provient de canaux de vente tiers, qui ne disposent pas tous d'une solide expertise en matière de centre de contact.

Amazon Web Services

Amazon Web Services (AWS) est un visionnaire dans ce Magic Quadrant. Amazon Connect est une offre CCaaS spécialisée qui s'appuie sur l'infrastructure et les capacités logicielles plus larges d'AWS. Il est vendu à la fois directement et par l'intermédiaire d'un ensemble croissant de grands partenaires de distribution, notamment Salesforce (suite au lancement en 2020 de Service Cloud Voice, qui intègre une version d'Amazon Connect).

AWS a lancé Amazon Connect en 2017, après l'avoir développé en interne pour servir Amazon.com clients de détail. Il a depuis été adopté par des entreprises de toutes tailles, des startups aux très grandes entreprises mondiales, mais surtout par les clients qui utilisent AWS dans le cadre d'une stratégie DevOps pour la prestation de services.

Amazon Connect offre une bonne couverture des quatre piliers d'un excellent service client, avec une gestion native des connaissances, des analyses vocales et une gestion de la main-d'œuvre, ainsi qu'un solide écosystème de partenaires pour les centres d'engagement client CRM, WEM et les analyses d'engagement client.

Forces

- **Stratégie de service** : les solutions Amazon Connect peuvent être configurées pour exploiter le vaste portefeuille de capacités innovantes d’AWS dans des domaines tels que l’IA, la compréhension du langage naturel (NLU), le ML et l’analyse. Ses capacités analytiques comprennent un moteur de conversation (Amazon Lex), la transcription et l’analyse vocales (Contact Lens pour Amazon Connect) et l’identification de l’appelant en temps réel (Amazon Connect Voice ID), entre autres.
- **Tarification agile** : l’approche de tarification basée sur la consommation d’Amazon Connect est la plus agile du marché CCaaS. Il permet aux organisations d’expérimenter la voix, le chat et le libre-service à faible coût sans engagement de licence, et il n’y a pas de paiement pour la capacité, la capacité ou les postes inutilisés.
- **Stratégie géographique** : AWS s’appuie sur la portée mondiale de son infrastructure cloud et de ses partenaires de conseil et de revente pour fournir des solutions globales avec des niveaux de disponibilité très élevés.

Précautions

- **Stratégie de service** : les organisations qui peuvent avoir besoin d’étendre ou de personnaliser Amazon Connect au-delà de ses capacités natives et de maintenir ces personnalisations peuvent avoir besoin d’embaucher des développeurs formés aux services AWS, ou de faire appel aux services professionnels d’AWS ou à un partenaire certifié.
- **Offre de service** : certains clients indiquent que les fonctionnalités de création de rapports d’Amazon Connect au sein de l’interface utilisateur n’ont pas la granularité et la flexibilité dont elles ont besoin, ce qui les oblige à exporter des données vers des outils d’analyse tiers pour améliorer la visualisation des données.
- **Tarification** : la tarification basée sur la consommation d’Amazon Connect exige que les organisations comprennent et puissent prévoir les volumes de contacts pour s’assurer qu’elles peuvent prédire leur coût total de possession sur l’ensemble des services « pay as you go » d’Amazon Connect.

Cisco

Cisco est un acteur de niche dans ce Magic Quadrant. Son offre Webex Contact Center est une plateforme CCaaS spécialisée proposée aux clients via des canaux directs et indirects.

Webex Contact Center a été lancé en 2020 à l’aide de centres de données basés aux États-Unis, mais a récemment étendu sa présence pour inclure des centres de données en Europe et en Australie. Webex Contact Center gagne le plus de terrain auprès des centres de contact de taille moyenne, bien qu’il soit parfois vendu à des centres de contact plus grands dans la base installée Unified Contact Center Enterprise (UCCE) héritée de Cisco.

Bien qu’il s’agisse d’une offre relativement nouvelle sur le marché, Webex Contact Center offre une bonne gamme de fonctionnalités de base.

Forces

- **Offre de services** : Cisco dispose d'une large base installée de clients de centres de contact sur site à qui vendre. Webex Contact Center peut être déployé avec une intégration étroite au portefeuille de collaboration de Cisco (UCaaS) et Webex Connect (CPaaS).
- **Opérations** : Cisco a rajeuni son activité de centre de contact ces dernières années avec des investissements dans la recherche et le développement, les ventes, le support client et le marketing. Cela contribue à accroître la confiance des clients dans son offre.
- **Stratégie de service** : Le centre de contact Webex de Cisco offre de bonnes fonctionnalités sur les quatre piliers d'un excellent service client en termes de gestion des ressources, d'analyse et d'un nombre croissant de partenaires de l'écosystème technologique.

Précautions

- **Offre de service** : Certains utilisateurs indiquent que les fonctionnalités de Webex Contact Center sont plus adaptées aux environnements de petites et moyennes entreprises (PME) qu'aux centres de contact d'entreprise plus grands et plus complexes. Le système n'a actuellement pas la profondeur et l'étendue des fonctionnalités que l'on trouve dans d'autres offres concurrentes.
- **Stratégie de service** : Webex Contact Center est basé sur une plate-forme différente et n'offre pas le même ensemble de fonctionnalités que les anciens produits sur site de Cisco. Cela crée des défis pour les clients des produits de centre de contact hérités de Cisco qui s'attendent à une migration transparente.
- **Exécution des ventes** : Certains partenaires de distribution de Cisco ont été lents à adopter Webex Contact Center, préférant concentrer leur activité de centre de contact Cisco sur les offres héritées de l'entreprise. Cela peut créer des défis pour les clients traditionnels qui cherchent à migrer vers Webex Contact Center à leur rythme préféré.

Gourou du contenu

Content Guru est un challenger dans ce Magic Quadrant. Son offre storm CONTACT est une plateforme CCaaS spécialisée proposée aux clients via des canaux directs et indirects.

Depuis son lancement au Royaume-Uni en 2005, Content Guru a étendu sa présence principalement en Europe, bien qu'il ait également une présence limitée sur les marchés nord-américain et Asie/Pacifique. Il est favorisé par les organisations ayant des exigences de centre de contact importantes et complexes, en particulier les organisations multinationales ayant leur siège en Europe. Cependant, la société propose également une offre storm Lite pour les PME.

La vision de Content Guru se concentre sur les grandes organisations ayant des besoins profonds d'intégration et de personnalisation.

Forces

- **Offre de services** : l'offre storm CONTACT de Content Guru est une plateforme cloud hautement évolutive qui offre de vastes capacités d'intégration et d'automatisation via le portail storm FLOW Service Builder.

- **Exécution des ventes:** Content Guru possède une vaste expérience dans la satisfaction des besoins de service client des déploiements importants et complexes.
- **Stratégie de service:** Content Guru a de solides références pour les environnements avec des exigences strictes de résilience du système, y compris ceux fournissant des services médicaux d'urgence.

Précautions

- **Opérations:** La plupart des opérations de Content Guru sont centrées en Europe. Le support dans d'autres régions est limité, une lacune qui oblige de nombreuses organisations à investir davantage dans la gestion de leur relation avec le fournisseur.
- **Exécution marketing:** Content Guru manque de forte reconnaissance de la marque. Cela pourrait limiter sa capacité à financer la croissance sur le marché CCaaS face à la concurrence croissante de nouveaux entrants bien financés.
- **Prix :** Les clients de Gartner indiquent qu'il peut être difficile de comprendre la complexité des composants de licence « à la carte » de storm CONTACT et leurs frais, qui s'ajoutent au coût total de possession.

Cinq9

Five9 est un challenger dans ce Magic Quadrant. Son Intelligent Cloud Contact Center est une plateforme CCaaS spécialisée proposée aux entreprises par le biais d'une équipe commerciale dédiée et de quelques partenariats clés d'intégrateurs de systèmes.

Five9 a plus de 20 ans d'expérience sur le marché CCaaS. La région d'activité la plus forte de l'entreprise est l'Amérique du Nord, mais elle étend activement sa capacité à vendre à des clients en Europe et en Amérique latine.

Avec sa présence sur une plate-forme multirégionale et une présence commerciale croissante, l'exécution de Five9 favorise les organisations de toutes tailles dans les Amériques, y compris les organisations multinationales américaines, en particulier celles axées sur l'augmentation des taux d'automatisation.

Forces

- **Stratégie de service :** Five9 développe des compétences dans les ventes et les déploiements d'IA et de NLU, avec une capacité accrue à fournir des références clients pour ces fonctionnalités sur une variété de marchés verticaux et de cas d'utilisation.
- **Exécution du service :** Les clients de Five9 félicitent fréquemment l'entreprise pour avoir fourni un support après-vente solide, ce qui les aide à tirer pleinement parti de leur investissement.
- **Réactivité au marché :** Après avoir historiquement vendu principalement aux centres de contact de taille moyenne, Five9 déploie maintenant de plus en plus sa plate-forme dans des centres de contact avec des centaines ou des milliers d'agents.

Précautions

- **Stratégie géographique** : La croissance internationale de Five9 est, historiquement, venue de sa stratégie d'extension du service aux clients basés aux États-Unis. Les organisations non américaines qui envisagent Five9 doivent s'assurer que le déploiement de leur plate-forme de centre de contact multirégion s'aligne sur la stratégie géographique de Five9.
- **Offre de services** : Certains clients de Five9 ont indiqué qu'ils n'étaient pas satisfaits de la fonctionnalité de ses interactions numériques et de son libre-service numérique.
- **Opérations** : Five9 n'a investi que récemment dans l'extension du support régional pour les clients en dehors de l'Amérique du Nord. Certaines organisations qui choisissent Five9 peuvent trouver que le service et le support nécessitent un investissement interne plus important pour gérer la relation avec les fournisseurs que ce n'est le cas avec certains fournisseurs alternatifs.

Genesys

Genesys est un leader dans ce Magic Quadrant. Genesys Cloud CX est une plateforme CCaaS spécialisée qui est proposée aux organisations par le biais d'une combinaison de ventes directes et de relations avec les partenaires de distribution, qui varient d'une région à l'autre.

Genesys was founded in 1990 and has since established a global sales, marketing and operations presence. It has been successful at using this business foundation to sell and support Genesys Cloud CX, which it launched in 2015.

With Genesys Cloud CX, the vendor demonstrates a strong commitment to the four pillars of great customer service, with a vision for more agile, on-demand service.

Strengths

- **Geographic strategy**: Genesys has an extensive operational and channel presence in multiple regions. This wide geographic reach makes it a strong contender for consideration by organizations interested in contact center platform consolidation.
- **Service offering**: Genesys offers strong tools and processes to migrate customers either from other Genesys offerings or from competitors' premises-based platforms to Genesys Cloud CX.
- **Service offering**: Genesys' strong growth enables the company to fund further growth, R&D and acquisitions to deliver on its strong vision for the evolution of CX management.

Cautions

- **Service offering**: Some Genesys Cloud CX customers have indicated dissatisfaction with the functionality of the system's support for digital interactions and digital self-service.
- **Service offering**: Some Genesys Cloud CX customers have reported challenges with its native reporting and analytics. They find that they need to work with Genesys AppFoundry partners to overcome these challenges.

- **Support execution:** Some Genesys Cloud CX customers have reported delayed responses from Genesys' support staff.

NICE

NICE is a Leader in this Magic Quadrant. CXone, its specialized CCaaS platform, is offered both directly and through a channel program that involves international partners.

CXone started out in 2002 as a product of inContact, which was acquired by NICE, a perennially strong player in the WEM market, in 2016. This acquisition provided the foundation for further investment, acquisitions and international growth. It also gave CXone a stronger service proposition by enabling the integration of contact center and WEM functionality. NICE offers a strong vision for customer service analytics, AI and automation.

NICE's commitment to the four pillars of great customer service has been bolstered by its 2021 acquisition of MindTouch (a vendor of knowledge management software) and its vision for a more integrated approach to service delivery.

Strengths

- **Service vision:** NICE's Enlighten AI capability can draw on the company's vast amount of data about customer intents and actions, gained through its WEM interaction recordings, to build and refine self-learning customer interaction models. Though still maturing, this capability can quickly discover and execute AI-driven customer journeys and workflows.
- **Sales strategy:** NICE can provide consulting services for its CXone offering to a wide range of customer sizes and vertical markets.
- **Geographic strategy:** NICE's geographic reach – with operational presence and channel partnerships across the globe – make it an attractive choice for organizations planning to consolidate contact center platforms.

Cautions

- **Service offering:** NICE's CCaaS offering includes a full cloud-native suite with WEM capabilities, but there are also optional specialized WEM capabilities, not fully integrated into the CXone platform, that can be added to it. In some cases, these best-of-breed capabilities may require additional resources to manage, if chosen. Organizations that need more capabilities than the CXone platform provides should ensure they understand the service proposition differences of NICE's best-of-breed products.
- **Service execution:** Some large Gartner clients have reported challenges with replicating highly complex routing scenarios previously deployed on legacy on-premises systems.
- **Operations:** Some Gartner clients that have experience of working with NICE's legacy WEM offerings have been hesitant to consider CXone because of poor experiences with NICE's sales and support. Prospective clients should be aware, however, that CXone-related operations

generally do not pose the same challenges – indeed, customers generally express strong satisfaction.

Talkdesk

Talkdesk is a Leader in this Magic Quadrant. CX Cloud, the vendor's specialized CCaaS platform, is offered both directly and through channel partners.

Founded in 2011 in Portugal, Talkdesk focused initially on the U.S. market, before investing further in international expansion. Talkdesk has a strong service proposition for multiregion organizations headquartered in North America or Europe.

Talkdesk demonstrates a strong commitment to the four pillars of great customer service, with both native and partner capabilities across all four.

Strengths

- **Sales execution:** Talkdesk continues to achieve strong customer growth, fueled by attractive prices and strong commitment to postdeployment success.
- **Vertical strategy:** Talkdesk offers prepackaged industry-specific products and solutions for key vertical markets, including financial services and healthcare. It plans to release offerings for additional vertical markets over time.
- **Service strategy:** Talkdesk continues to strengthen its commitment to the four pillars of great customer service, with investments in areas such as native CRM, knowledge management and resource management.

Cautions

- **Geographic strategy:** Although Talkdesk has platform capability in multiple regions, its sales and support organizations are primarily based in the U.S. and Europe. Organizations with users outside these regions should ensure there is adequate support for their needs.
- **Operations:** Most customer reviews of Talkdesk CX Cloud on Gartner's Peer Insights platform are from businesses with annual revenue of less than \$1 billion. Prospective customers migrating from a large-scale legacy environment may experience challenges in terms of project duration and parity of functionality.
- **Marketing execution:** Despite notable growth in recent years, Talkdesk still lacks the brand recognition of some other vendors in this market. This may limit its ability to fund growth in the CCaaS market in the face of increasing competition from well-funded new entrants.

Vonage

Vonage is a Niche Player in this Magic Quadrant. In July 2022, Ericsson, the Swedish telecom equipment manufacturer, acquired Vonage as a wholly owned subsidiary that continues to operate under the Vonage brand. Vonage Contact Center (VCC) is part of a broad "programmable communications platform" strategy incorporating UCaaS, CCaaS and CPaaS capabilities.

VCC was established via Vonage's acquisition of NewVoiceMedia — a U.K.-based CCaaS provider — in 2018. VCC's largest market is still Europe, but it is using its global coverage and Salesforce channel to increase its growth in the Americas and Asia/Pacific. It most often fulfills the needs of European multinational organizations.

Consistent with other UCaaS players, Vonage's vision is for an integrated platform to meet a broad spectrum of its customers' communications requirements, not just customer service needs.

Strengths

- **Service offering:** VCC has an integrated user and administration interface. Customers consistently give it very high ratings on the Salesforce AppExchange.
- **Product strategy:** Vonage's October 2021 acquisition of Jumper.ai helps accelerate its support for digital channels. Analytics capabilities help make its offering more interesting to increasingly sophisticated contact centers.
- **Marketing strategy:** Vonage's repositioning of its solutions as an integrated, programmable communications platform to meet an organization's full communications requirements is likely to be received positively by midsize contact centers.

Cautions

- **Market understanding:** Ericsson's intention to expand its CCaaS market presence by selling VCC through communications service providers is an unproven strategy in the industry. This creates uncertainty regarding the company's long-term plans for VCC.
- **Customer experience:** Some users indicate that the support Vonage offers for contact center capabilities outside Europe is weak. Organizations with operations in the Americas and Asia/Pacific may need to invest more resources in managing service issues, if they choose Vonage.
- **Marketing execution:** Vonage's all-encompassing programmable communications platform approach is unlikely to resonate with application leaders responsible for customer service. Before choosing Vonage, they should ensure they are sufficiently confident that Vonage will maintain its focus on the CX.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- **Cisco:** This vendor's Webex Contact Center offering now meets the inclusion criteria.

Dropped

- **Evolve IP:** This vendor did not meet the updated inclusion criteria for financial achievement.
- **Lifesize:** This vendor did not meet the updated inclusion criteria for financial achievement.
- **Odigo:** This vendor did not meet the updated inclusion criteria for market presence in three regions.
- **Worldline:** This vendor did not meet the updated inclusion criteria for market presence in three regions.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, providers needed to fulfill all of the following requirements:

- A minimum of \$50 million total revenue, as of 31 December 2021, composed of concurrent licenses, named-user licenses and application consumption. This revenue had to come from enterprise customers and could not include business process outsourcing or contact center outsourcing business. We required a letter of attestation from the business leader responsible for the profit or loss of the provider's CCaaS offering to certify that the minimum revenue requirement was met.
- Demonstrated sales, market and operational presence in at least three of the following regions:
 - North America
 - Europe
 - South America (including Central America)
 - Asia/Pacific
 - Middle East and Africa
- Services must primarily be offered on multitenant platforms and on multiple instances of software, as required to meet the needs of customers across multiple geographies. ("Multitenant" describes how a service provider operates a single software instance on which multiple customers can be supported.) To be included in this Magic Quadrant, vendors needed to show how their CCaaS platform is designed to support organizations with customer service teams ranging from 25 users up to many thousands of users, and how it can support both voice and nonvoice channels. This had to be evidenced in the vendor's strategic intent for the CCaaS platform, contract reviews evaluated by Gartner analysts, and analysis of company size in Gartner Peer Insights and Gartner Digital Markets platforms. CCaaS providers needed to demonstrate how, irrespective of the architecture employed, their software inherently provides all customers with transparent access to the same set of services, irrespective of location. Software updates must be simultaneously "pushed" to all customers regardless of location,

thus avoiding the traditional “major upgrade” cycles typical of on-premises or single-tenant hosted/managed deployments.

- Contact center seat license ownership must be retained by the service provider. Customer contracts must allow for elasticity of usage (enabling customers to scale agent licenses or consumption up or down as usage demands change).
- At least 50% of CCaaS service revenue must be from inbound voice agent licenses (automatic call distribution [ACD]). Other licenses may include outbound voice (predictive, progressive or preview dialing) or routing of digital interactions (including email, web chat, SMS, social media, video or other channels). They may also include interactive voice response (IVR)/voice portal, WEM, call and/or desktop recording and analytics, knowledge management, workflow routing of noninteraction work items, integration with customer tracking (CRM) and other enterprise databases, and real-time and historical tracking and analytics. The service must provide prepackaged agent, supervisor and reporting applications, although their environments may be extended using a GUI-based interface or open APIs.

Gartner’s definition of CCaaS excludes:

- Hosted contact center services, in which system hardware and software are dedicated to individual customers.
- Managed services, in which hardware and software are dedicated to a particular customer and run on that customer’s premises or in a third-party data center, but are managed by a third-party service provider.
- Enterprise server software repurposed as CCaaS offerings.

Evaluation Criteria

Ability to Execute

Product or Service: The product platform should include the ability to offer (on a subscription basis) all contact center services expected in a suite platform (for example, IVR and speech recognition, inbound and outbound multichannel contact routing, WEM, virtual customer assistants and analytics) either as a suite of natively built functionality or with augmentation through technology partners. It should include a self-service capability to implement, manage, revise and report on operational performance.

Overall Viability: Several cloud service providers have yet to achieve profitability, as rapid growth and business expansion plans require investment in technology, people and infrastructure to fulfill business growth plans. Many CCaaS providers are private entities or business units of larger companies, and thus do not report detailed balance sheets that enable examination of their financial viability. Revenue indications and growth are important factors for this criterion, as is the overall business strategy for success, which is more readily available for assessment.

Sales Execution/Pricing: The market for CCaaS is not close to saturation, so there are plenty of opportunities for continued growth. We expect suppliers to be able to demonstrate better than

30% annual growth year over year (though figures for 2021 to 2022 will likely be somewhat lower), with a good selection of references from large and well-known organizations, including those with more than 300 agents. Cloud services are elastic and licensing terms should reflect this, enabling a customer to scale up and down in line with business requirements. Although minimum commitments to licenses are to be expected, customers should have the flexibility to vary consumption. Usage-based licensing (per minute/per transaction) is a useful addition that is emerging from some providers.

Market Responsiveness/Record: With several new entrants to the CCaaS market taking market share, being an established player in the on-premises market is often not a major advantage in terms of securing new business. COVID-19 represents an opportunity for CCaaS providers to demonstrate their agility in responding to unprecedented demand for their services.

Marketing Execution: CCaaS providers with strong brand awareness tend to be invited to tender for more opportunities than those without. This helps them win more business. A comprehensive marketing program is important to attract invitations to bid for opportunities. Brand awareness is also key to developing channels with system integrators, which are less likely to go to market with providers unknown to their customers.

Customer Experience: Developing a reputation for consistently delivering reliable services and delivering a differentiated CX can help suppliers maintain and grow a CCaaS business. This is especially important as customers commit to strategic CCaaS providers for multiple regions, but still expect to be supported in a timely fashion by local support organizations.

Operations: Contact centers provide critical front-office operations, and customers need to be confident that their CCaaS will be supported by talented, experienced and motivated staff. As customers select strategic suppliers for multiregional needs, CCaaS operations will need to be localized.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium

Evaluation Criteria ↓	Weighting ↓
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (August 2022)

Completeness of Vision

Market Understanding: Understanding the role that a cloud contact center plays in an organization’s customer service and broader CX strategy – and how it relates to other capabilities – is important for success. Market understanding includes anticipation of market consolidation and new competitors, such as CRM players, and knowing how to defend and increase one’s relevance.

Marketing Strategy: Communicating a differentiated strategy in a market where technologies are largely similar is crucial to win mind share. Gartner clients are increasingly asking about using a single provider across multiple geographies, which should be reflected in a CCaaS provider’s marketing strategy.

Sales Strategy: Striking the best balance between direct and indirect approaches to the market is important when the cost of sale can be very high and compensation impacts cash flow. As customers select a strategic provider for CCaaS, providers must balance customers’ desire to deal directly and centrally for contract terms but be managed locally for regional needs. Managing internal conflict between local sales offices is key to developing strategic relationships with customers.

Offering (Product) Strategy: Vendors should be able to demonstrate an approach to product and service development and delivery that highlights industry requirements and the speed at which differentiated or innovative services are added to their platforms. Customer communities will be increasingly important as sources of information to influence product development as vendors scale up their operations.

Business Model: An important criterion is the relevance of the commercial model to how a vendor proposes to use a combination of direct sales and channel distribution to scale the availability of its service. Partners also need recurring revenue, and the model by which they can profitably resell and support CCaaS customers will be key to a CCaaS provider’s success.

Vertical/Industry Strategy: A focus on specific industries or other segments, such as contact centers of a certain size, creates opportunities to increase mind share in key target markets, in contrast to a horizontal, all-encompassing market vision. For CCaaS providers with lower marketing budgets and reduced overall mind share, the best opportunity to compete and win against larger providers lies in a differentiated vertical/industry strategy.

Innovation: This requires the vision to see opportunities to differentiate services for customers, through in-house development or collaboration with innovative partners. Providers' innovations should reflect the future of applications as APIs and marketplace strategies.

Geographic Strategy: A vendor's strategy for growth outside its home market in order to attract a larger audience is key to meeting the contact center needs of global and multiregional organizations. A CCaaS provider needs a sound geographic strategy to ensure profitable growth.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	Medium
Marketing Strategy	Medium
Sales Strategy	High
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	Medium
Geographic Strategy	High

Quadrant Descriptions

Leaders

Leaders are best described as suppliers with strong support for the four pillars of great customer service, and an ability to serve multinational organizations with local sales and support organizations. Leaders are more likely to serve customers through channel partners and have strong brand recognition, which has resulted in a large installed base or above-average market growth as a result of customer demand. Leaders also benefit from being able to support varying levels of deployment complexity, including integrations with partners through established marketplaces.

Challengers

Challengers may have large installed bases of customers, but do not necessarily have the brand awareness or adoption of Leaders. Challengers are often less mature than Leaders in their multiregional market approach, preferring to focus on strengths in a subset of markets. They may have recognized strengths in serving certain customer-size segments or specific vertical markets. But they are also likely to have less-developed product capabilities than Leaders, or to lack marketplace representation.

Visionaries

Visionaries have strong multichannel product and service capabilities and a clear strategy for sales, marketing and business development. They differentiate themselves by adding unique or innovative functionalities and/or delivery capabilities, which gives them some brand awareness in target markets. Visionaries tend to be smaller than Leaders and Challengers overall, and have more limited investment potential for international expansion.

Niche Players

Niche Players may be quite large or experiencing relatively strong growth, but have decided to focus on a particular market opportunity, a particular set of solutions or certain vertical markets. Their products and services may still be undergoing development, or they may rely heavily on partners to complete their service proposition. Niche Players are likely to be either new or relatively recent market entrants, or suppliers that have yet to build a large customer base.

Context

As CCaaS solutions continue to be sold to larger and more complex accounts, client organizations are increasingly consolidating their contact center platforms across multiple regions with a single provider. In this year's Magic Quadrant, we focus on the ability of providers to address the needs of global organizations by requiring evidence of demonstrable sales, market and operational presence in at least three regions, as defined earlier in this document. This is a shift from previous years' focus on the ability of providers to meet the needs of organizations headquartered in North America and Western Europe, along with their ability to support those organizations' regional operations outside these two markets.

Market consolidation will enable customer service organizations to meet their technology needs across the four pillars of great customer service with a smaller number of providers. Over the past 12 months, CCaaS providers have continued to acquire adjacent technology in order to offer a broader suite of capabilities.

Market Overview

After a spike in demand for CCaaS in 2020 related to high demand for supporting work-from-home agents, demand remained strong in 2021 (the financial year evaluated for this document). Continued growth was driven by two main factors. The first was the ongoing effort to replace premises-based and server-based contact center infrastructure with SaaS-based capabilities. The second was a desire to deliver an agile, elastic capability for the telephone channel, as well as the ability to support digital channels, WEM, and knowledge and insight management. Additionally, the opportunity to reduce the number of vendor relationships for the entire stack of customer service technologies proved highly attractive. CCaaS providers offer this opportunity as part of a differentiated approach to premises-based technology providers, thereby fueling continued double-digit growth (see [Forecast Analysis: Contact Center, Worldwide](#)).

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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