



# The Aragon Research Globe™ for the Intelligent Contact Center, 2022

The Race to Intelligence in the Contact Center Heats Up

---

**Author:** Jim Lundy

**Video Producer:** Adam Pease

**Topic:** Intelligent contact center

**Issue:** Who are the intelligent contact center providers and how will they evolve?

November 3, 2022 | Research Note 2022-36



## SUMMARY

Aragon Research releases its fourth Aragon Research Globe™ for intelligent contact centers (ICCs). The ICC market is in transition as the race to intelligence and integration with UC&C platforms drive consolidation. As digital labor continues to grow, the 15 major vendors in this report are offering different levels of virtual agent capabilities.

### Key Findings:

**Prediction:** By YE 2023, 60% of ICC providers will know the right type of communication channel to use for outbound campaigns (70% probability).

**Prediction:** By 2025, 40% of ICC providers will offer and integrated hybrid workforce optimization that can manage both humans and virtual agents (50% probability).

**Prediction:** By YE 2024, 55% of contact center providers will enable the development of an enhanced customer profile that will enable a more personalized customer experience (70% probability).

**TABLE OF CONTENTS**

Introduction.....	3
The Intelligent Contact Center Is Here .....	3
Personalization Via Customer Data Platforms Will Improve Customer Experiences.....	5
Universal Customer Profile Is the Key to Personalization .....	5
Omnichannel Communications—Voice, Email, Chat, and Video.....	6
Key Trends Driving Digital Transformation.....	6
Cloud Growth in Mid-Market .....	6
Hybrid Cloud and Why it Makes Sense in Large Enterprises .....	7
Understanding Differences in Public Vs. Hybrid Cloud .....	7
UC&C and ICC—Demand continues to grow.....	8
Building a Knowledge Base for ICC—Profiles and Graphs.....	9
The Evolution of Conversational AI.....	11
No-Code Goes Mainstream.....	13
Virtual Agents Are Making Human Agents Better.....	13
Business Buyers Need Contact Centers that deliver outcomes .....	14
Workforce Optimization—The Digital Labor Challenge .....	14
Coaching: Conversational Intelligence Challenges Quality Management.....	15
The Aragon Research Globe™ for the Intelligent Contact Center, 2022.....	17
Leaders .....	18
Contenders .....	25
Innovators .....	31
Getting Started With ICC .....	33
Aragon Advisory .....	33
Bottom Line .....	33
Dimensions of Analysis.....	34
The Four Sectors of the Globe .....	35
Inclusion Criteria .....	36

Copyright © 2022 Aragon Research Inc. and/or its affiliates. All rights reserved. Aragon Research and the Aragon Research Globe are trademarks of Aragon Research Inc. All other trademarks are the property of their respective owners. This publication may not be distributed in any form without Aragon Research's prior written permission. The information contained in this publication has been obtained from sources believed to be reliable. Nevertheless, Aragon Research provides this publication and the information contained in it "AS IS," without warranty of any kind. To the maximum extent allowed by law, Aragon Research expressly disclaims all warranties as to the accuracy, completeness or adequacy of such information and shall have no liability for errors, omissions or inadequacies in such information.

This publication consists of the opinions of Aragon Research and Advisory Services organization and should not be construed as statements of fact. The opinions expressed here-in are subject to change without notice. Although Aragon Research may include a discussion of related legal issues, Aragon Research does not provide legal advice or services and its research should not be construed or used as such. Aragon Research is a private company and its clients may include firms or financial institutions that have financial interests in entities covered by Aragon Research. Further information about the objectivity of Aragon Research can be found at [aragonresearch.com](https://aragonresearch.com)

---

## **Introduction**

With customer experience (CX) being one of the top priorities for the enterprise, contact centers and the experience that they offer has become more center stage than ever. The focus on contact centers started during the pandemic when providing better virtual engagement became vital. Now, the new normal is about higher quality experiences with a focus on customer outcomes vs. traditional tracking metrics.

With increased focus on CX comes the realization that contact centers need to be modernized. Analog contact centers are becoming a thing of the past. The race to the intelligent contact center became more heated in 2022 as most providers now offer bot-based agent assist, and going forward, the base capabilities for ICC will be assumed.

The challenge will be for automation and intelligence, both for human agents and now, increasingly, for the computer-based virtual agents. This Research Note evaluates the trends in the market and identifies 15 key providers that are making a difference in intelligent contact centers.

When it comes to contact center, being able to communicate across multiple channels (omni-channel) is now much more of a given. Voice-only providers are not the way to go.

The need for better customer experiences has caused more stakeholders to look closer at contact centers and how they help or hinder customer experience. This puts more pressure on both contact center operators and the providers to show innovation in their product roadmaps. Moreover, remote work has also put even more pressure to ensure that the contact center operation can still deliver the same or higher levels of service from many remote locations. Communications becomes a critical success factor.

## **The Intelligent Contact Center Is Here**

The march to the contact center continues and it is speeding up. If 2021 was the year of adding virtual agent or agent assist capabilities, Aragon is predicting that 2023 will be the year of more personalization via customer data platforms.

On the customer side there has been adoption of virtual agents with agent assist being the primary use case. There's a wide disparity of capabilities as far as building virtual agents for either agent assist or customer facing support.

The bigger challenge of customer experience gets at the crux of the intelligent contact center. Providers that are investing in automation and intelligence will be able to

demonstrate to buyers that their product knows more and can react quicker to support a growing number of use cases.

The good news is that it is not hard to add a virtual agent to a legacy platform. While many providers continue to partner, more providers have invested in acquiring conversational AI platforms that enable the building of virtual agents. Aragon feels that for many enterprises, we are still in the early stages of adoption.

There is now a race to show improvements in employee and customer experience. Virtual agents are one of the ways to speed up the overall experience—not for everything but for many mundane things such as basic questions and answers.

There is also a need to offer multiple cloud options. Private cloud via containerization is desired by large enterprises and more providers are beginning to offer that.

**Prediction:** By YE 2022, AI-based contact centers will be able to identify the real issue a customer is facing 50% faster than traditional approaches.

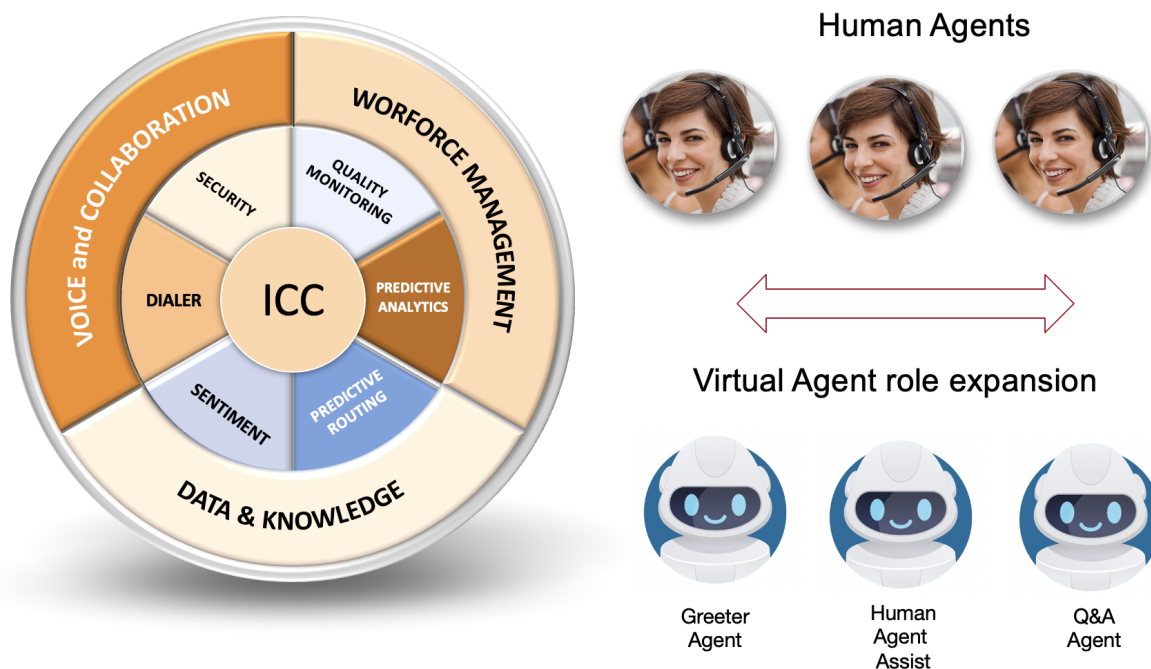


Figure 1: The intelligent contact center will be increasingly composed of human and virtual agents.

---

## Personalization Via Customer Data Platforms Will Improve Customer Experiences

The question has always been about the efficiencies of contact centers and the relationship between the contact center and the customer relationship management platform. Last year, we talked about customer data platforms and their importance.

In 2022, there is more of a need for personalization, which means accessing more data about customers via a customer data platform. While more providers are starting to focus on the need for personalization it is still in the early days. So far, CRM providers have taken the lead in this area, as for many ICC providers, they are still in the process of building out virtual agent and agent assist applications.

Customer relationship management providers are not standing still when it comes to personalization. Salesforce is a good example. Its Einstein sales and service cloud provides the ability to allow for new contacts to be automatically added to a case or an opportunity. All the human agent needs to do is click 'yes,' and that information can be automatically updated or added to the account or case record.

One of the key evaluation criteria is how well the contact center provider integrates with the de facto CRM platform in the enterprise. One of the key things that need to be evaluated is what type of information can be added to the account profile.

## Universal Customer Profile Is the Key to Personalization

The secret to better customer experiences is personalization. Data is key to personalization and building out a universal customer profile that has more information about the customer than in the past will be essential in this area. Data that builds out these profiles comes from the ICC, the CRM, and increasingly from customer data platforms.

One of the key things to consider when designing a contact center or upgrading one is ensuring that the customer profile has enough data that a good experience can be provided. Looking for specific information about customer preferences and past experiences can be done through customer profiles. This will enable better interactions, as the system automatically knows that a particular customer only wants to communicate via SMS messages, for example.

Salesforce just unveiled Salesforce Genie and with that, the focus was on customer profiles and the data that builds out an advanced profile.

---

## Omnichannel Communications—Voice, Email, Chat, and Video

Omnichannel communications, which means going beyond voice, is very much a work in progress. The four areas of omnichannel include voice, email, video, and chat. As mentioned above, intelligent contact centers need to have basic capabilities that include traditional voice, email, and chat.

Video communications represents a small but growing trend. Some providers are now offering video communications as a way to enhance the interaction with the customer. Just as with remote work and the shift from voice conferencing to video conferencing, there is an opportunity for some providers to differentiate themselves by offering video-based support. The key thing is to understand what the customer desires and be able to offer that interaction either on a regular basis or on-demand.

Telehealth is one of the reasons that video-based ICCs will come online. In many cases, sophisticated routing will be needed in hospital and urgent care telehealth use cases. Today, many telehealth solutions do not offer that level of sophisticated routing with video capabilities.

Enterprises need to evaluate ICC providers for their omni-channel communications, including the ability to tailor those interactions based on customer preferences.

**Prediction:** By YE 2023, 60% of ICC providers will know the right type of communication channel to use for outbound campaigns (70% probability).

## Key Trends Driving Digital Transformation

During the pandemic, the need to transform was forced upon many enterprises. Along the way, technology also improved so that more personalized interactions could occur. Two technology trends—the adoption of cloud computing and the maturation of artificial intelligence technologies—are responsible for creating, and to some extent, fulfilling these expectations.

## Cloud Growth in Mid-Market

For many midsize enterprises, cloud contact centers represent a perfect state for them given that they don't have a large agent population, and they also don't have a large IT department. This is one of the reasons that many mid-sized ICC providers have seen growth rates in the 15-30% range. However, now that hybrid cloud has matured, the issues of data residency in the cloud have become a top issue in many countries.

There has been a significant surge in both the small and midsize contact center markets. We are also seeing smaller providers starting to go into larger contact center deals. This

---

is because of the fact that many of these SaaS providers can do a faster deployment than traditional on-premise. Large providers have responded to this by offering modern cloud options as well as hybrid cloud, which leverages containers.

### **Hybrid Cloud and Why it Makes Sense in Large Enterprises**

Large enterprises often have many contact centers in many countries. They also have complex requirements, including e-commerce and integration with existing legacy systems. The idea of hybrid cloud, which often means a managed service run in a local datacenter is very appealing to both midsized and large enterprises. With Kubernetes-based containers becoming a de-facto standard, Aragon feels that enterprises should ask providers about what is holding them back from offering a hybrid cloud deployment.

While there is strong growth in the ICC cloud segment, full SaaS cloud deployments are not for every enterprise, particularly large ones, or ones where data governance is vital. Data residency continues to be the number one issue for large enterprises, particularly those that compete against existing cloud providers such as Amazon AWS. Keeping control of enterprise data is a top priority, and containerized applications go a long way towards solving that issue.

The hybrid methodology is about looking at a combination of offerings between SaaS, a service run in the public cloud, and a private cloud offering. Combinations of these, particularly for telephony and meetings, make sense often due to security and compliance needs. In some cases, advanced telephony and data governance is only possible with a private cloud instance.

### **Understanding Differences in Public Vs. Hybrid Cloud**

It is important to fully understand what each ICC provider offers when it comes to cloud vs. hybrid cloud options. There are differences in data governance, overall manageability, and features that all will play a role in selecting the right deployment scenario.

Table 1 below should provide a starting point for your assessment of where best to place your workloads that don't easily fit in the public cloud.



Table 1 – Cloud Characteristics			
	SaaS	Hybrid Cloud	
		Public Cloud	Private Cloud
Full Support for Telephony Features	Limited Features	Varies	Full Features
Video Conferencing	Full Features	Full Features	Full Features, AND full control
Infrastructure	Shared	Shared	Dedicated
Data Governance	Very Limited	Limited	Full Control
Infrastructure access	None	None	Full Control
Security	Inherited	Inherited	Full Control
Regulatory Compliance	Inherited	Inherited	Full Control
Control	Limited	Limited	Full Control
Resource Access	Shared	Shared	Dedicated

Table 1: Key characteristics to consider when evaluating ICC cloud options.

## UC&C and ICC—Demand continues to grow

In small and midsize enterprises, the idea of one communications stack that serves both the communication and collaboration needs of users for knowledge work, frontline work, and contact center work, makes a lot of sense. In these enterprises, particularly in small businesses, it is often common to see either finance or business owners making decisions on their tech stack, which is one of the business drivers causing increased demand for the uber-suite. So, the demand for an integrated stack that combines UC&C and intelligent contact centers is growing.

Sales is one of the use areas where advanced contact center-like capabilities are needed, but often, teams don't know what a contact center is. While there are many growing providers that only focus on the sales use cases, and are not included in this report, we also see many ICC vendors in this report realizing that sales organizations often need the strength and power of a contact center service.

One way to look at this is that the contact center is an advanced communications application and that some teams need more than just basic telephony and messaging. There is no denying that UC&C and ICC are on a collision course, and this is emerging as a set of buying criteria.

A number of providers in this report offer a combined UC&C and contact center offering. This includes 8x8, Atos Unify, Avaya, Cisco, Mitel, NEC, Vonage. Note that it is the



combination of an integrated client with growing capabilities in intelligence, which will bring new levels of automation to a combined offering.

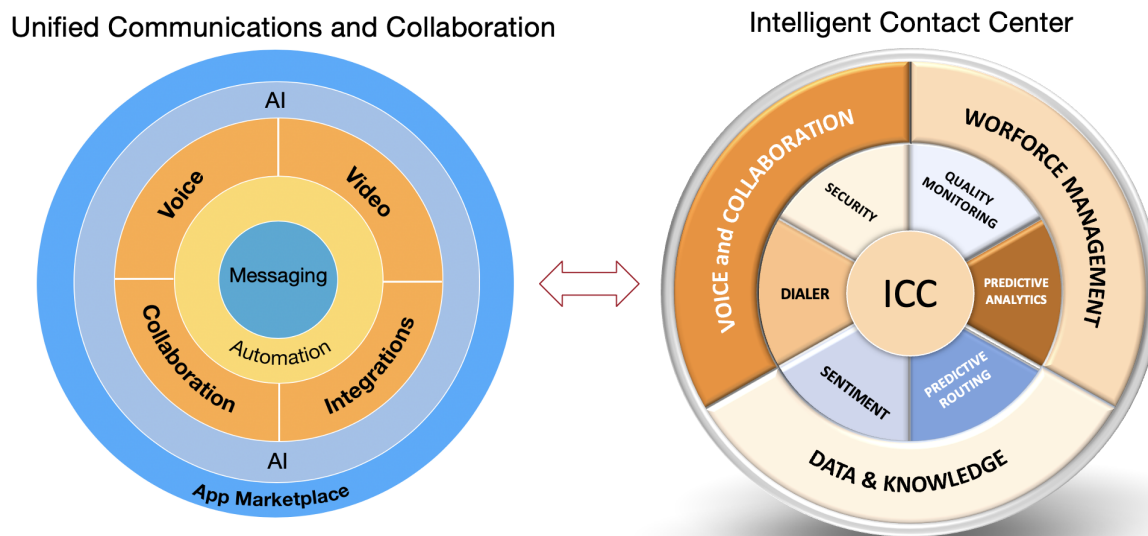


Figure 2: Enterprises are increasingly looking for an integrated communications stack that can blend UC&C with intelligent contact centers.

### Building a Knowledge Base for ICC—Profiles and Graphs

There are two critical knowledge issues that contact centers need to address to be truly intelligent. First, they need to know the people that are calling them, and this is where the idea of an intelligent profile comes into play. This is also a battleground between contact centers and CRM platforms for where that intelligence on the customer will be housed.

The other key part of intelligence is understanding the needs of either a buyer or a customer that needs support. The idea of a knowledge corpus that provides agents with information that will answer questions is also one of the dilemmas that exists out there, which is where information is stored, how frequently it is updated, and how easily it can be accessed by agents.

---

For a modern consumer or enterprise user with an app-centric view of the world, obtaining product information or solving a problem with a product requires contact with the enterprise, and they expect to be:

- Recognized—Authenticated.
- Remembered—An intelligent contact center (ICC) customer profile should include historical data about their account and any previous ICC interactions.
- Understood—The ICC agent(s) should identify the issue, articulate it to the customer, and get confirmation to ensure understanding.
- Satisfied—An ICC should ensure that the issue has been resolved by requesting confirmation after presenting the results, findings, or recommendations to the customer.

The opportunity comes in the form of options to differentiate by providing more personalized services and more automated yet engaging customer journeys. These app-savvy customers are digital-ready: they have used consumer and enterprise apps in the cloud and expect to consume functionality in manageable units and to mix and match functions from different vendors when necessary. They want integration without becoming integrators. This is why the need for an enhanced profile powered by customer data is vital.

***Prediction:*** By YE 2024, 55% of contact center providers will enable the development of an enhanced customer profile that will enable a more personalized customer experience (70% probability).

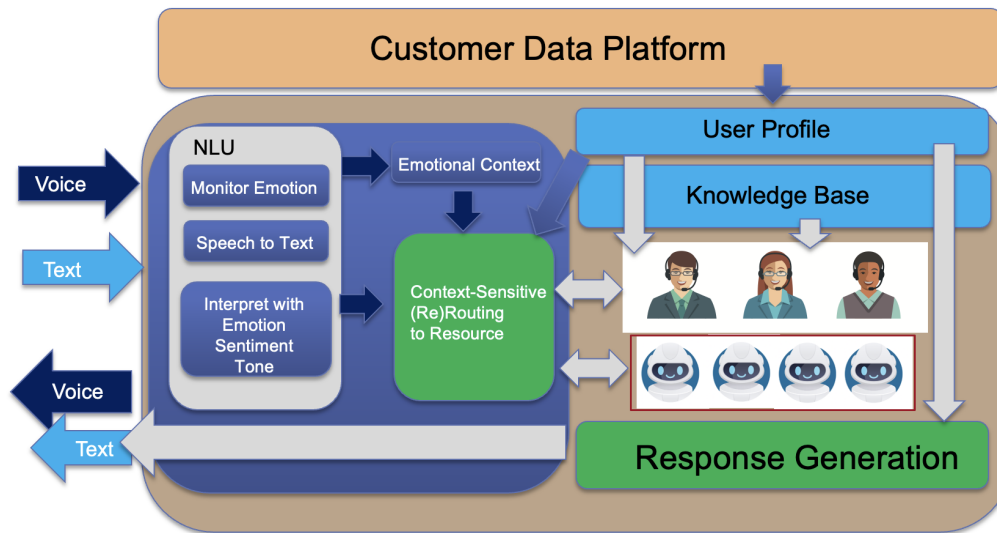


Figure 3: Intelligent contact centers will leverage customer data platforms for increased personalization.

# The Evolution of Conversational AI

The first wave of AI chatbots was introduced several years ago with an overabundance of enthusiasm followed almost immediately by user dissatisfaction. Early chatbot implementations relied on scripted answers to resolve user questions since AI technology wasn't mature enough at the time to enable chatbot conversations to be fluid and dynamic.

Since then, there have been major improvements in AI software algorithms and the hardware that powers them. The introduction of modern transformer neural network models that take into account all the words in a sentence at once provided significant improvements in accuracy, and applying a technique called attention helped the model to focus on the words that are important, making it more efficient. The result is a model that is highly accurate in understanding the intent or meaning of the entire sentence and that works very efficiently if provided enough parallel compute resources and training data.

There have also been major improvements in the hardware used to run AI workloads, specifically GPUs, FPGAs, and TPUs. GPUs and FPGAs are very good at processing AI workloads due to their ability to run many tasks in parallel. As an example, a high-end CPU might have dozens of cores while a high-end GPU can have thousands of cores, enabling massive parallelization of AI workloads. TPUs are ASICs designed by Google and optimized for running TensorFlow-based AI workloads. Each of these hardware solutions run AI algorithms much faster than traditional CPUs and are able to deliver these improved algorithms in real-time.

Modern AI chatbots have the ability to identify and keep track of multiple intents within a sentence and refer back to them throughout an entire disjointed, multi-threaded naturalistic conversation. This capability has enabled these chatbots to provide a more human-like contextual understanding, which provides for real intelligent conversations between people and machines. Refer to Figure 4 below as an illustration of how conversational AI technology continues to mature over time.

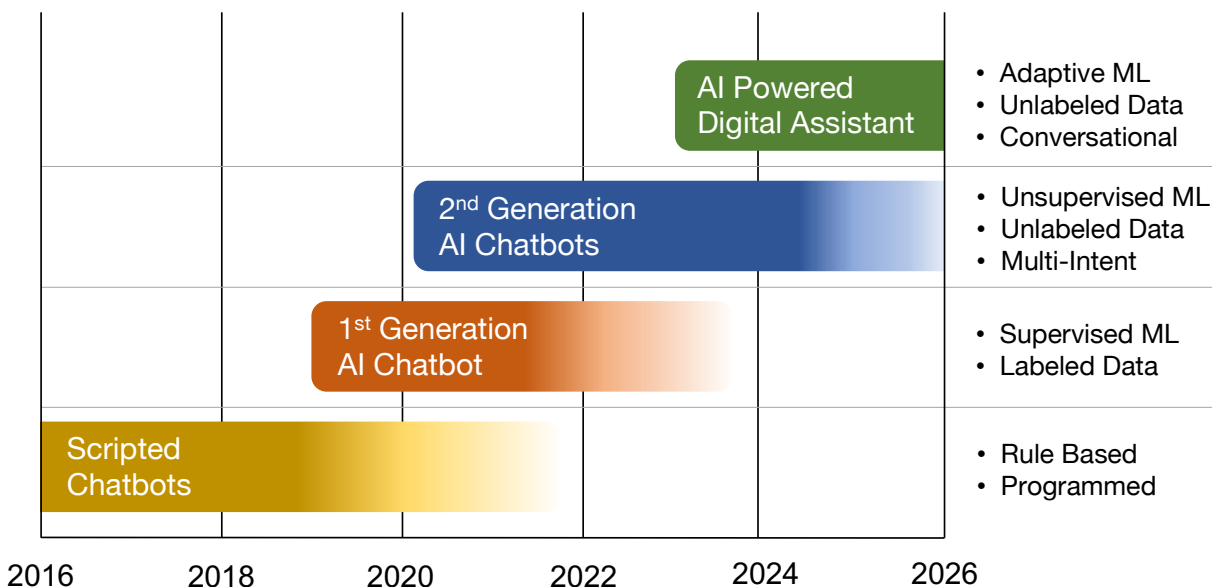


Figure 4: Conversational AI maturity model.

## **No-Code Goes Mainstream**

Last year's Globe called out the low-code building of chatbots as a feature differentiator between providers. Aragon also observed that this capability was where the technology needed to go, and within just one short year, no-code is now almost universal among providers. Business users within enterprises can easily design and deploy conversational AI solutions that enhance the overall experience for their users without needing deep coding or data science skills.

Not only does this empower business users to build, update, and test their virtual agents on their own, it also provides them the flexibility to make changes on demand to respond to changing business requirements. Even if an IT or implementation team is assisting with the building and roll-out of a chatbot, having the visualization of the conversational flow built into the solution gives the business user the ability to review and approve the conversation flow in an intuitive way.

## **Virtual Agents Are Making Human Agents Better**

As IVAs are independently resolving many of the simpler tasks in the contact center, the more complex issues are being passed on to human agents for investigation and resolution. IVAs are now working side-by-side with human agents in an agent-assist role to enable the human agents to resolve these issues easier. These IVAs act as personal coaches and assistants to human agents, understanding the intent of the caller in real-time, and providing the human agent with guidance on the next best action.

This real-time agent assist is also incredibly valuable when onboarding or training new human agents, especially during the era of remote onboarding. With agent assist, new human agents can become proficient much faster and avoid rookie mistakes, thanks to having a real-time digital coach that can guide them in their interactions with users.

The IVA can also transcribe the interaction, providing complete documentation of the entire conversation, but, more importantly, it can leverage AI technologies to analyze the call and identify specific areas where the agent excelled or may be able to improve. This information can be provided to the agent as real-time or summary feedback and provides supervisors with information to accurately assess their agent's performance.

---

## Business Buyers Need Contact Centers that deliver outcomes

As more business decision makers focus on technology to drive outcomes there's a growing realization by both buyers and suppliers that advanced communications capabilities are often needed for a growing number of use cases.

Sales is a great example where need for a contact center is becoming clearer. However, the name of the product offering often is not actually a “contact center.” It often uses terms such as sales communications or in the case of Salesforce, high velocity selling.

So, while there continues to be a focus on selling features to contact center buyers, Aragon feels that the market is shifting and that it is more about experiences and outcomes and not just features.

However, to deliver better experiences there is severe pressure on technology providers to add more intelligence into their platforms so that more personalization can be offered to deliver those better experiences

## Workforce Optimization—The Digital Labor Challenge

There's no doubt that contact centers need the ability to manage their workforce and now, more contact center vendors are offering workforce optimization capabilities.

Looking forward, however, balancing both human and virtual agent optimization is going to be a challenge sooner rather than later (see Note 1).

***Prediction:*** By 2025, 40% of ICC providers will offer and integrated hybrid workforce optimization that can manage both humans and virtual agents (50% probability)

### Note 1: The Benefits of Digital Labor

Contact center providers will need to focus on the new way of working and justify further investments by meeting specific requirements:

- Faster first call resolution—Improves customer satisfaction, saves the cost of rework.
- Lower customer effort/time—Improves customer satisfaction, reduces contact center resource requirements.
- Reduced customer churn—A result of meeting the first two requirements.
- Lower costs for every function—Call handling, escalations, etc.
- Improved agent experience—A result of reduced stress and frustration through prescriptive insight.

---

## Coaching: Conversational Intelligence Challenges Quality Management

The big shift in analytics is that real-time understanding is needed. Gone are the days of offline transcription. Voice conversations need to be monitored in real-time and processed so that the customer can be assisted faster. It is important to understand if your provider actually has NLP and NLU deployed as part of their voice analytics.

Conversational intelligence, often called voice or speech analytics, is really about enabling coaching. Coaching has often been part of quality management offerings for contact centers.

Today, a lot of coaching is post call. However, there is a shift to real-time listening so that real-time feedback and micro-coaching can be delivered in the moment. While many providers in this report have begun to offer their own conversational intelligence capabilities, there are others who tend to offer it in the form of quality management.

New providers in conversational Intelligence are challenging the traditional quality management offerings. The result is higher quality coaching—either during the call or the traditional post call. While a number of ICC providers now have their own conversational AI platform, there is a growing set of independent providers (See Note 2).

## Building a Roadmap for Virtual Agents

It is now clear that virtual agents can do many of the things that humans do. Depending on the conversational AI platform chosen, the ability to deploy different types of virtual agents may vary.

Task-specific virtual agents can be trained faster and can be deployed in production in hours, days, or weeks because they only do very specific tasks.

### Note 2: Conversation Intelligence Providers focus on Agent Coaching

There are a number of Conversational Intelligence providers that offer coaching capabilities

- AmplifAI
- Balto
- Chorus.ai
- Cresta
- Gong
- Gryphon.ai
- Invoca
- RingDNA

### Note 3: The different type of Virtual Agents

There are a number of different virtual agents that should be evaluated for development and deployment in an ICC.

#### Greeting Agents

Client greeting and issue identification

#### Agent Assist

These agents guide the agent towards a successful outcome with suggestions on what the human agent should say in a given situation.

#### Questions and Answer Virtual Agents

Virtual agents are ideal at handling basic questions and answers, and they can do it very quickly.

#### Refund Agents

Refund agents are trained to be able to look up a customer account and determine if the customer is owed a refund or not. There are a growing number of examples of Refund Agents in production.



There are many types of virtual agents that should be explored by the enterprise. See Note 3 above for an overview.

### The ICC Maturity Model

Making sense of all of these shifts in the intelligent contact center market, Aragon has developed a maturity model that will assist enterprises in evaluating ICC providers.

It is important to note that for many existing providers, a contact center instance can be made to be intelligent by adding third-party applications, such as virtual agents (chat bots) or intelligent coaching.

However, the long-term play is a fully intelligent contact center and that means providers will have to make significant investments to deliver the promise of understanding needs and behaviors and being able to react in real-time. Aragon is introducing the Maturity Model for ICC here but will be diving deeper into this model in future Research Notes (see Figure 5).

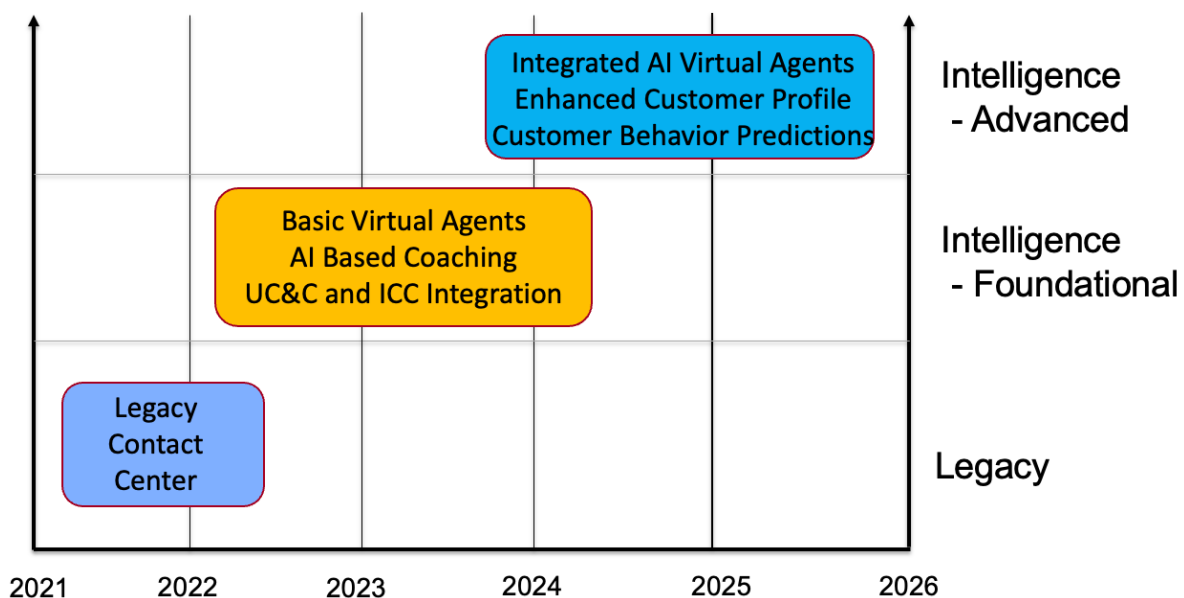


Figure 5: The ICC Maturity Model.

The Aragon Research Globe™ for the Intelligent Contact Center, 2022  
(As of 11/3/2022)

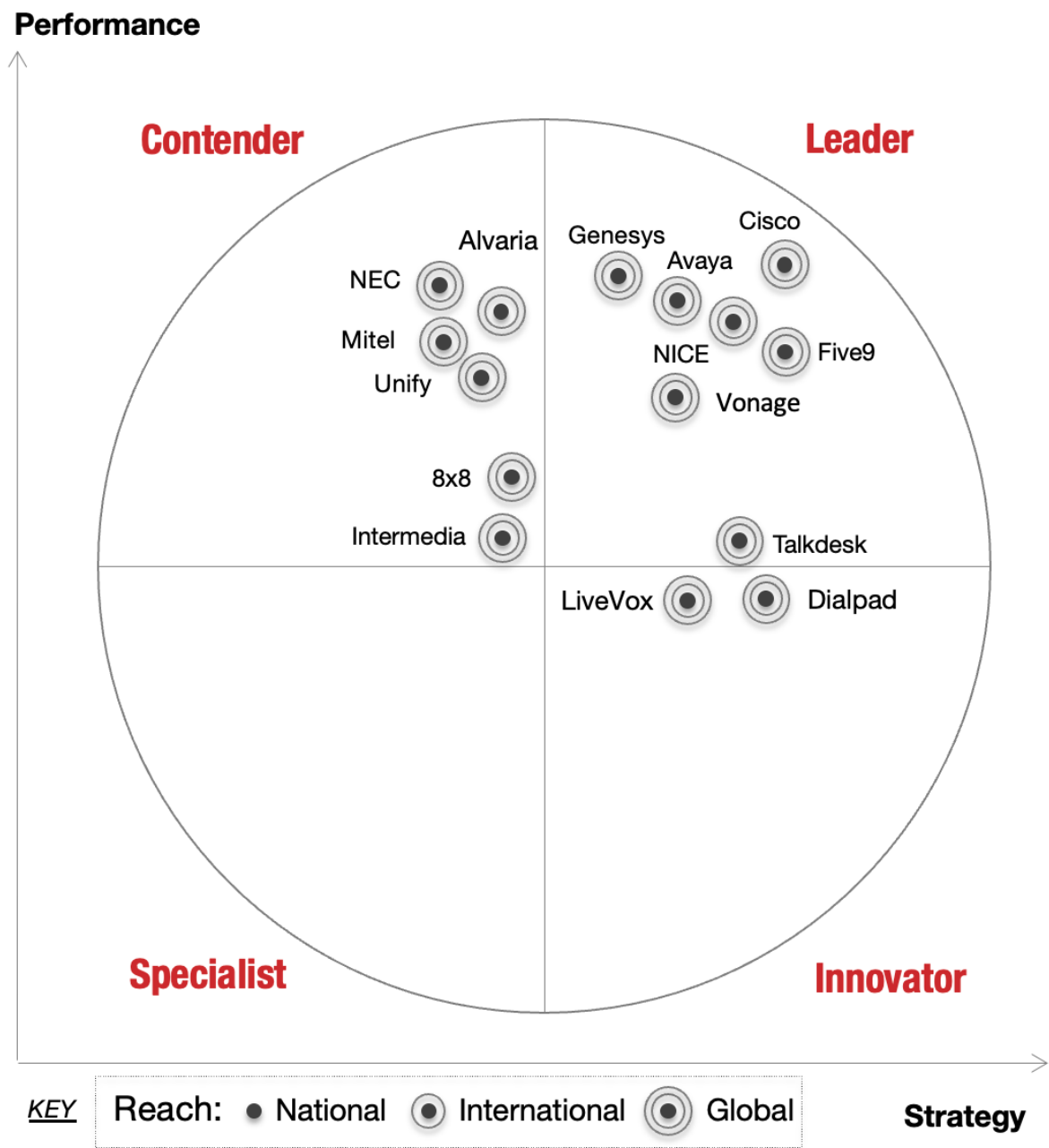


Figure 6: The Aragon Research Globe for Intelligent Contact Centers, 2022.

---

## Leaders

### Avaya

---

Avaya announced a new CEO Alan Masarek, who has significant experience in the UC&C market. Prior to Alan's announcement, the company secured \$600M in financing commitments. Avaya, which offers a full UCC platform that is offered with its ICC platform Avaya OneCloud CCaaS. Avaya has one of the largest contact center install bases, offering private, public, and hybrid cloud.

Avaya offers its OneCloud CCaaS, an AI-powered, multi-cloud experience platform that enables organizations to create and deliver in-the-moment experiences. It is designed to provide the foundational, rich capabilities required to meet sophisticated customer needs while offering organizations the speed and agility to innovate and change on demand. Among others, Avaya has a strategic partnership with Microsoft. Avaya OneCloud CCaaS, which runs on Microsoft Azure, integrates with Microsoft Nuance AI capabilities.

Avaya has partnered with a number of conversational AI partners over time. Avaya AI Workflow capability enables the building of new virtual agents that can integrate Google IBM Watson, Nuance, and other conversational AI offerings into custom or pre-built solution virtual agents.

Avaya supports a multi-cloud application ecosystem, combining the Avaya portfolio together with a variety of cloud platforms, including Microsoft Azure, Amazon Web Services, Google Cloud, and IBM, along with market leaders such as Verint, Google, Afiniti, and Nuance. When integrated with Avaya OneCloud CCaaS, Avaya Spaces provides a complete unified communications and collaboration solution with collaboration, meetings, messaging, and calling backed by both its enterprise and midmarket platforms.

#### Strengths

- Avaya OneCloud portfolio that includes not just CCaaS but UCaaS and CPaaS capabilities
- Large deployment and cloud migration expertise install base
- Native AI expertise and AI partner network
- Extensive partner network and ecosystem
- Path to cloud for every customer to minimize cost and risk
- Composable communications platform architecture focused around CCaaS to provide agility, speed & value

#### Challenges

- Balancing its on-premise and cloud offerings

---

## Webex by Cisco

---

Cisco, under the leadership of Jeetu Patel and GM Javed Khan, has doubled down on its Webex business unit, with a complete pivot to make its overall Webex platform intelligent. Cisco offers an integrated UC&C portfolio with support for both on-premise and cloud offerings that has a significant focus on AI and automation.

Cisco offers a full cloud-based native intelligent contact center offering. Besides SaaS Cloud, Cisco supports hybrid cloud by leveraging Kubernetes containerization and microservices. Due to a number of acquisitions (IMImobile, Cloud Cherry, Vocea and Babble Labs), Cisco is now a full intelligent contact center that supports a growing array of digital channels and a robust drag-and-drop flow builder.

As part of its focus on intelligence, Cisco has fully integrated its Cloud Cherry acquisition and now has branded it as Webex Experience Management, which offers advanced customer profiles, predictions on how customer experience will be impacted, and sentiment analysis. Cisco also offers Webex Workforce Optimization.

Cisco also has significant capabilities for conversational intelligence, including real-time transcription, wrap-up notes, and action items. Cisco continues to partner with Google for speech-based AI, and in 2021, it announced the availability of its own organic Agent Answers solution based on proprietary AI technology.

The Webex Platform also focuses extensively on security, including support for privacy, encryption, data loss prevention, mobile security, and regulatory and legal compliance. With 47 data centers, it also supports data residency and sovereignty requirements globally. Cisco offers one of the most complete voice and video collaboration platforms, now fully integrated within the Webex app, its integrated cloud-based collaboration experience. Webex Contact Center also integrates with Salesforce Service Cloud, Microsoft Dynamics, and Zendesk.

Given its strong focus on automation and native AI capabilities Cisco is well-positioned for the shift to the intelligent contact center.

### Strengths

- Cisco brand
- Contact center install base
- Focus on AI
- Flexible cloud, premises, and hybrid deployment options
- End-to-end encryption
- Overall UCC capabilities

### Challenges

- Balancing multiple CC offerings

---

## Five9

---

Five9, based in San Ramon, announced that Chairman Mike Burkland is returning as CEO after Rowan Trollope left to pursue another opportunity. Revenue growth has continued in the high 20s and Five9's march to be a global provider is seeing success. Five9 has led the shift to the Intelligent Contact Center with its integrated Intelligent Virtual Agent (IVA), which was part of its acquisition of Inference two years ago. That focus is helping it to land deals in legacy contact centers. Inference provides AI-based IVAs, and with these native capabilities, Five9 can offer conversational AI-based offerings to enterprises that have a separate contact center platform, whether that is on-premises or in the cloud.

Five9 has continued to make AI and automation part of its core product strategy, offering virtual agent capabilities to enterprises that invest in Five9 or have a third-party contact center solution. Five9 supports both inbound and outbound use cases and has global call support and routing alongside omni-channel support. Five9 continues to offer integrations into the Intelligent Cloud Contact Center platform, with over 300 APIs and SDKs, especially for the UC space with providers such as Zoom, Microsoft Teams, Mitel, and Nextiva.

As part of expanding its relationship with Salesforce, in September 2022, Five9 announced an integration with Salesforce Service Cloud Voice for Partner Telephony, an extension to the Five9 and Salesforce adapter already trusted by Five9 customers. Five9 provides its own workforce engagement management (WEM) offering. While it still partners with other WEM providers, enterprises can now get a complete ICC solution from Five9. Five9 also offers integrations, such as Microsoft, Oracle, Salesforce, Zendesk, and ServiceNow for CRM, UC, and workflow management.

Five9 offers its own white glove implementation service that continues to help it win new customers and retain existing ones. Five9's focus on its intelligent virtual agent platform and market expansion into Europe and LATAM are helping it to continue with its strong growth.

### Strengths

- Cloud offering
- Inbound and outbound focus
- Omnichannel features
- Salesforce integration
- Customer support
- Growing focus on AI

### Challenges

- Awareness outside of North America

---

## Genesys

---

Genesys, led by CEO Tony Bates, has continued to focus on the shift to the Experience as a Service. Genesys Cloud CX will be the single ICC offering from Genesys, with a continued focus on innovation and delivering a single experience orchestration engine. This shift will enable Genesys to deliver more efficient and effective end-to-end customer journeys, across both self-service and agent-assisted engagements on any channel and device. Aragon feels that focusing on one Core ICC offering is the right move for Genesys going forward.

For unified communications, Genesys has native capabilities as well as partnerships with Microsoft, 8x8 and Zoom to offer choice in the area of unified communications and collaboration.

In June 2022 Genesys announced its Pointillist Contact Center Optimization solution. Pointillist by Genesys provides insights into the entire customer journey across all contact center channels. By measuring and monitoring omnichannel experiences both within and beyond the contact center, the Pointillist Contact Center Optimization Solution enables contact center leaders to increase customer satisfaction and improve contact center performance.

In September 2022, Genesys announced Genesys Cloud AI Experience, which accelerates innovation and improves end-to-end journeys with turnkey personalization, automation, and prediction. AI Experience also allows the platform to listen to customers and employees. It also includes virtual agent capabilities (voicebots and chatbots) along with knowledge and predictive routing.

Genesys Cloud CX is available via 12 core AWS data center locations, and 1 AWS satellite region. In April 2022, Genesys received FedRAMP Moderate In Process status to better service government agencies and organizations working with those agencies. And in August 2022, launched its newest core region in Sao Paulo, Brazil. Genesys Cloud CX offers 5 consumption packages with the option for named, concurrent, or hourly pricing options.

### Strengths

- Broad ICC platform capabilities
- Management team experience
- Install base
- Conversational AI
- Large enterprise deployments
- Strong partnerships
- Usage-based pricing
- FedRAMP Authorized
- Integrated workforce optimization

### Challenges

- Maintaining and enhancing multiple product offerings

---

## **NICE CXone**

NICE has continued to lead with its flagship CXone ICC offering. Over the last year NICE has invested in conversational AI via partnerships and has introduced its CXone Smart Assist. NICE CXone is offered both direct and via NICE's growing partner network that includes UC&C providers such as Atos and RingCentral. NICE also offers its own native workflow management, workforce optimization, and analytics solutions.

CXone Smart Assist offers the ability to train virtual agents quickly, leveraging its Enlighten AI customer data. Enlighten AI offers sentiment analysis and agent behavioral scoring, which enables predictive behavioral routing, real-time interaction guidance on next-best agent behavior, and automatic quality scoring that includes soft skills. NICE continues to offer its CXone Expert, which is based on its acquisition of MindTouch, a knowledge management platform.

CXone provides solid CRM integration with providers such as Salesforce and Microsoft. NICE continues to offer an integration between CXone and Microsoft Teams. Now the CXone Agent can be embedded in Microsoft Teams. For Salesforce, NICE also offers a native Lightning user interface, which enables tight integration between Salesforce digital channels and CXone Voice.

NICE continued its partnerships with RingCentral and Atos/Unify. NICE continues to grow, and with its continued focus on intelligence, it is well-positioned for the future.

### **Strengths**

- Cloud offering
- Integrations
- AI focus
- Partner network
- Endpoints
- Global partner ecosystem

### **Challenges**

- Balancing between direct and third-party partners for implementation



---

## Talkdesk

---

Talkdesk, led by CEO Tiago Paiva, offers a full ICC Platform with WEM and its own virtual agent capabilities, powered by its Talkdesk AI platform. Talkdesk also bolstered its leadership team including the addition of Shane Evans as Chief Revenue Officer. Talkdesk also offers Talkdesk Workspace, a visual framework that allows the Talkdesk user interface to be personalized and unifies all CX applications and data on a single pane of glass for every role in the customer journey. Talkdesk Builder is a set of low-, no- and custom-code tools that allow the contact center to be customized across Workspaces, routing, reporting, automations, and integrations.

The Talkdesk AI platform also offers Talkdesk AI Trainer™ enabling agents with domain knowledge to improve AI models powering automations in the contact center, Talkdesk Agent Assist™ for next best actions during live interactions, Talkdesk QM Assist™ which utilizes transcription and speech analytics to automatically score interactions, Talkdesk Talkdesk Workforce Management™ which leverages AI-enhanced algorithms and smart automations to optimize staffing and scheduling decision, Talkdesk Interaction Analytics™ which identifies the issues causing customers to contact customer service, Talkdesk Identity™ to authenticate and connect customers to agents with voice biometrics, Talkdesk Guardian™, an AI-driven, compliance solution to mitigate the risks of a distributed workforce and Talkdesk Knowledge Management, an intelligent knowledge base.

Talkdesk continues to offer ICC-based industry-specific products, including Talkdesk Financial Services Experience Cloud™ for Banking, Talkdesk Healthcare Experience Cloud™ for Providers, and Talkdesk Retail Experience Cloud™. In April 2022, it expanded its Financial Services Cloud offering with a focus on Insurance, introducing Talkdesk Financial Services Experience Cloud™ for Insurance. This expanded offering includes a partnership with Guidewire and preconfigured insurance workflows and intent libraries.

Talkdesk continues to offer its app marketplace, AppConnect, that extends Talkdesk CX Cloud capabilities with 1-click access to over 80 contact center offerings. Talkdesk continues to push the envelope in the intelligent contact center.

### Strengths

- Cloud contact center
- APIs
- Focus on AI
- Industry products & solutions
- Workforce management
- Partner ecosystem
- Analytics

### Challenges

- Brand awareness outside of the U.S.

---

## Vonage

---

Vonage, led by CEO Rory Read, is now a wholly-owned subsidiary of Ericsson as of July 2022. This marks Ericsson's re-entry into the communications market due to the growing demand for applications that will be powered by 5G wireless networks. The Vonage Contact Center (VCC) solution is a cloud-native, multitenant, global CCaaS solution. VCC is an intelligent communications platform that integrates messaging, communication, and customer/back-office data via built-in connectors, modern web services, and a web API gateway with a customer engagement engine. Core contact center functionality such as omnichannel contact routing, self-service IVR, automated outbound dialing, screen pops, and associated real-time CRM updates are provided globally across clustered data centers in each region.

In September 2022, Vonage announced the Vonage AI Studio, a conversational AI platform that enables virtual agents and bots to be built that can leverage all channels for conversations including chat, voice and SMS applications including WhatsApp. Vonage also offers visual engagement features that work inside of Salesforce, Microsoft Dynamics, and ServiceNow. Agents can escalate any call into a video session on the fly.

Built on top of the Vonage Communications Platform (VCP), the Vonage Business Communications (VBC) unified communications solution integrates with the Vonage Contact Center through a single pane of glass and leverages Vonage's CPaaS/Communications APIs, along with integrated AI capabilities. This leads to enhanced engagement and better employee and customer experiences. Vonage continues to do well with its Vonage Communications Platform—both in the sale of pre-packaged applications but also by leveraging its APIs that power many applications for partners and can be used to customize their own VBC and VCC applications.

Vonage Contact Center has integrations with VBC, Salesforce CRM, ServiceNow, Microsoft Dynamics, Zendesk, and Microsoft Teams for improved collaboration between front office and back office. Part of the way that Vonage offers integration across its UC&C platform is via the Vonage App Center, which has pre-built integrations with applications such as Google G Suite, Microsoft Office 365, Slack, Oracle, Salesforce, and Zendesk for desktop and mobile users. Furthermore, the VCC ContactPad Anywhere browser extension provides click-to-dial and screenpop functionality from most web-based CRMs and databases.

With a full portfolio and an increasing focus on intelligence and AI, Vonage is positioned well to take advantage of the growing demand for contact center.

### Strengths

- Contact center offering
- Fully integrated UCaaS and CCaaS
- Deep integration and focus on Salesforce
- Vonage brand recognition
- Integration extended to ServiceNow and Microsoft Dynamics
- CPaaS API flexibility

### Challenges

- Balancing focus on UC&C and contact center

---

## **Contenders**

### **8x8**

---

8x8, led by CEO David Sipes, continues to grow by focusing on an integrated approach to UC&C and intelligent contact center. The 8x8 eXperience Communications (XCaaS) platform includes contact center, voice, video, chat, and API solutions. In January 2022, 8x8 closed its acquisition of Fuze, known for its large customer base of enterprise-size organizations. The acquisition provided additional engineering talent and resources to back the company's 8x investment in contact center, as announced during the company's earnings call for the fourth quarter of fiscal year 2022 ended March 31, 2022.

As an example of the company's XCaaS commitment to empowering customer experience across the organization, in March 2022, 8x8 introduced Conversation IQ, which makes native AI-infused quality management and speech analytics solutions available to smaller, informal contact center operations. This unique approach enables superior coaching and feedback for managers across any organization

8x8 Contact Center is a certified Microsoft Teams solution. The integration can be used in conjunction with 8x8 Voice for Microsoft Teams, a direct routing solution used to support high quality voice calling to Teams users in 56 countries.

In addition to Microsoft Teams, 8x8 Contact Center is a Chrome Enterprise Recommended (CER) solution. The highly extensible XCaaS platform features a Dynamic Integration Framework, making it easy to add and deploy new channels, as well as offering out-of-the-box integrations with over 50 business and productivity apps including Microsoft Dynamics 365, Salesforce, and Slack.

8x8 provides full cloud voice calling in over 50 countries and has an extensive global cloud footprint. A combination of public and private data centers, covering 35 geographic locations/regions, provide reliability, quality of service, and local data residency. 8x8 is also the only vendor in the industry to offer a platform-wide, financially-backed 99.999% uptime SLA across UC&C and contact center.

#### **Strengths**

- 8x8 Voice for Microsoft Teams direct routing solution
- Agent Workspace
- Single platform delivering cloud-native UCaaS, CCaaS and CPaaS
- Remote/hybrid approach to QM/Coaching/Interaction Analytics
- Customer support and satisfaction
- Integration friendly, either through APIs, pre-built or partner network
- Service Management options
- Brand awareness

#### **Challenges**

- Platform-wide AI

---

## Alvaria

---

Alvaria, based in Atlanta, announced a new CEO Jeff Cotton in June 2022. Alvaria is majority-owned by Arby Partners, with Vector Capital continuing as a minority partner. Alvaria now offers the Alvaria Cloud Contact Center solution. The offerings include the Alvaria CX Customer Experience Suite and Alvaria WEM, its workforce engagement management Suite, which includes the Aspect Via® Platform cloud contact center offering that supports omnichannel capabilities with support for chat, including social media chat, such as Facebook.

In January 2022, Alvaria announced the the Alvaria Real-time Optimizer, an AI based optimizer to enhance the productivity of contact center agents. In September 2022, Alvaria also just expanded the cloud choices for customers by adding the option of deployment of Alvaria Cloud in the Google Cloud Platform.

In July 2022 Alvaria completed the acquisition of Cicero, which offers Activity, Process Intelligence, as well as Robotic Process Automation. This offering provides more automation capabilities for the overall Alvaria offering.

### Strengths

- Full CC platform
- Large install base
- Cloud partnerships with Amazon and Microsoft
- Full workforce optimization offering
- Partner network

### Challenges

- Overall focus on AI

---

## Intermedia

---

Intermedia, led by CEO Michael Gold, continues to grow its market share in the cloud business communications space. Intermedia offers Intermedia Contact Center and Intermedia Unite, its full UC&C platform. Intermedia now offers a fully integrated Contact Center and UC&C Platform to meet the needs of enterprises looking to increase employee productivity, improve their customer experience, and reduce costs by consolidating their communications tech stack.

Intermedia offers two different Contact Center offerings: Contact Center Pro and Elite. Each can be purchased with Intermedia Unite or bought standalone. For a majority of enterprises, Contact Center Pro and Elite offer the most robust set of features for an intelligent contact center.

Intermedia continues to leverage its large partner network, including its partnership with NEC, in which NEC resells Intermedia Unite as the NEC UNIVERGE BLUE CONNECT and Contact Center as ENGAGE. The services have been rolling out since the announcement in 2020. The NEC partnership provided Intermedia a major OEM partner and a large upgrade install base of NEC on-premise PBXs and Contact Centers.

Intermedia offers a growing App marketplace for both its UC&C Unite platform and for Contact Center. Contact Center integrations include Salesforce, Microsoft Dynamics 365, ServiceNow, Slack, and Zendesk.

Intermedia sells Unite and Contact Center via resellers, some of whom white label the offering with their brand. With focus on both UC&C and Contact Center offerings, its NEC OEM relationship and a growing partner base through its differentiated CORE reseller program, Intermedia is well-positioned for the growing demand in SMB and mid-market.

### Strengths

- Cloud PBX
- Call center
- Mobile app
- Partnerships
- White label offering for partners
- Global Reach

### Challenges

- Overall focus on AI

---

## Mitel

---

Mitel named a new President and CEO, Tarun Loomba, in November 2021. At nearly the same time, Mitel announced a major new UCaaS partnership with RingCentral. The Mitel portfolio of offerings now includes applications, collaboration, contact center, unified communications platforms and solutions + cloud UCaaS via the RingCentral partnership. Mitel is focused on providing an extensive range of unified communications choices to customers who require a “dedicated instance” (vs. multi-tenant) for their unified communications platforms and applications.

To serve different customers, Mitel offers depth and breadth in deployment options: public cloud (AWS, Azure, Nutanix), private cloud (partner or customer datacenters) and of course on-premises for all its Unified Communications solutions. It also offers flexible CapEx and OpEx/Subscription commercial models for every solution to serve every company’s unique needs. This positions Mitel well to take advantage of the growing demand for hybrid cloud needs of enterprises that want to take advantage of both cloud and on-premise offerings.

As of June 2022, Mitel stopped offering new contracts for its UCaaS product, MiCloud Connect. Mitel will continue to support MiCloud Connect for existing customers. Mitel offers its in-house MiCloud Connect Contact Center CCaaS solution as well as RingCentral’s CCaaS for customers migrating to RingCentral MVP as well as MiContact Center Business and Enterprise for its UC platforms.

Mitel launched a new Developer Program that provides its open communication and collaboration APIs to technology partners, channel partners and customers who choose to develop upon them to build enhanced and tailored comms and collaboration applications and integrations.

Mitel leverages its growing partner network to offer a variety of solutions in education, government healthcare, and hospitality. The new UCaaS partnership with RingCentral in combination with Mitel’s UC&C, as well as public, private, and hybrid cloud deployment options makes Mitel a provider to watch.

### Strengths

- Cloud and on-premise support
- Global cloud infrastructure
- Hybrid cloud API marketplace accessible to on-site customers
- End-to-end offerings
- Mid-market expertise
- Global partner ecosystem

### Challenges

- Balancing multiple distinct contact center offerings

---

## NEC

---

NEC, one of the largest multi-national providers of IT infrastructure and communications continues to win in the SMB segment with its UNIVERGE communications portfolio. UNIVERGE BLUE ENGAGE, powered by Intermedia, is a complete cloud-based contact center. Besides UNIVERGE BLUE ENGAGE its portfolio of contact center offerings includes Business Connect and the UNIVERGE SV8100 and SV9000 series. NEC segments its offerings for small (five agents) and medium/large (up to 2,000 agents).

NEC also offers a full set of capabilities, including cloud communications (UCaaS), messaging, meetings, and contact center. NEC partners with DVSA Analytics for workforce optimization (WFO). Its WFO includes forecasting, scheduling, recording, speech analytics, and live monitoring.

NEC also offers a hybrid set of UC&C offerings, including its SL, SV and 3C premise-based offerings, as well as its UNIVERGE BLUE Cloud offering, which is powered by its partner Intermedia. UNIVERGE BLUE CONNECT offers a full set of capabilities, including cloud communications (UCaaS), messaging, and meetings.

NEC focuses on a number of vertical industries, including education, government, healthcare, and retail. Besides its UC&C platform, NEC continues to offer a full set of handsets for large and small enterprises. Additionally, NEC has been investing in computer vision and offers its NeoFace analytics NeoFace Welcome and NeoFace Watch for facial recognition. Combined with UNIVERGE BLUE CONNECT, these offerings will help NEC expand its solution portfolio in its vertical markets, especially government, healthcare, and retail.

The demand for hybrid cloud-based UC&C offerings continues to grow. NEC is well-positioned to continue to win in the SMB market. Aragon expects to see many NEC on-premise customers opt in for the UNIVERGE BLUE CONNECT offerings.

### Strengths

- Cloud and on-premise voice support
- Global cloud infrastructure
- Partnerships
- Analytics
- Global presence

### Challenges

- Balancing multiple contact center offerings



---

## Atos Unify

---

Atos announced its intent to split into two operating units in the next fiscal year. It named two Deputy CEOs in the process. Nouridine Bihmane was named as CEO of Tech Foundations and Philippe Oliva is CEO of SpinCo, which will focus on transformation, big data, and cybersecurity. Atos Unify, which is a wholly-owned subsidiary of Atos, is providing remote and distributed work solutions, connecting the entire workforce. Unify Office, which is powered by its partnership with RingCentral is the flagship cloud offering, including Unify Video, which is the sub-offering that works in conjunction with the Atos Unify OpenScape hardware and software hybrid cloud options.

Atos Unify offers two editions of the Atos Unify OpenScape Contact Center: Atos Unify OpenScape Contact Center Agile focused on agent populations of under 100 agents, and Atos Unify OpenScape Contact Center Enterprise for single or multiple sites with up to 1500 concurrent agents per system, 7500 agents per cluster. Atos Unify offers WFM via partners including Verint and ASC, as well as OpenScape Contact Center Analytics from Softcom.

Atos partners with NICE and offers the NICE CXone as its lead cloud contact center offering. Atos Unify continues to offer its OpenScape Contact Center Platform for on-premise and hosted cloud use cases. For virtual agents, Atos Unify works with Google's contact center AI solution, as well as other 3rd-party AI providers. In November 2020, Atos announced a partnership with Colt Technology Services, which will have Colt offering the Atos cloud-based contact center offering in conjunction with its Colt IQ worldwide network of telephony and omnichannel communications offerings.

One of the key focus areas of Atos Unify is industry verticals, including Financial Services and Insurance, Healthcare and Life Sciences, Public Sector and Defense, Telecom, Media and Entertainment, Manufacturing, Energy and Utilities, as well as Transport, Logistics and Retail. The overall shift by Atos to focus on industries will help Atos offer more tailored solutions to business buyers that are more focused on results versus just the technology. The Atos Unify historical strengths in Healthcare and Government bodes well for the other industry verticals.

The alignment with Atos go-to-market will complement existing Unify OpenScape offerings and the Atos CPaaS orchestration platform. It will be a part of the growing Atos digital workplace portfolio.

### Strengths

- Contact center capabilities
- On-premise and cloud support
- Vertical industry solutions
- CPaaS platform
- Cloud deployment options

### Challenges

- Balancing multiple product offerings for contact center

## Innovators

### Dialpad

Dialpad, based in San Ramon, California, and led by Founder and CEO Craig Walker, has continued to focus on product innovation. Dialpad raised its Series F round of \$170 Million in December 2021 at a \$2.2 Billion valuation, bringing its total funding raised to \$418 Million.

In 2021, Dialpad launched its TrueCaaS platform, providing a single AI-powered platform with Dialpad AI Contact Center (inbound) and Dialpad AI Sales (outbound dialer), along with its UCaaS offerings, Dialpad Talk and Dialpad Meetings for voice, video and messaging. All CCaaS and UCaaS offerings are natively integrated with Dialpad's artificial intelligence at the core to empower employees and agents with pre-, during and post-call insights and analytics.

Dialpad AI Contact Center offers a fully intelligent omni-channel platform that includes voice, digital (12+ channels including web messaging, social, & in-app messaging), and intelligent chatbots. In 2022, Dialpad launched Customer Intelligence with AI-CSAT, which analyzes every customer call to develop a richer picture of the customer and takes immediate action to improve the CX. AI CSAT predicts customer satisfaction scores across every customer interaction.

Also launched in 2022 was Dialpad's Agent Empowerment with new AI Agent Assist, which supplies customer support staff suggestions and information during an interaction to establish accurate information and processes. AI Agent Assist searches through all unstructured data, including web pages, support docs, knowledge bases, ticketing systems, and transcripts from past support calls to immediately locate the solutions and answers needed to address customer inquiries and issues.

Through an OEM partnership with Playvox, Dialpad AI Contact Center offers additional workforce engagement capabilities such as real-time agent forecasting, scheduling, and quality management as part of its existing suite of WEM/WFO capabilities. Dialpad also integrates with Google, Microsoft, and Salesforce, among others.

Dialpad's ease of use, onboarding, and scalability have always been some of its most touted differentiators. Dialpad now has a fully expanded TrueCaaS platform that includes an all-in-one, integrated web and desktop app for integrated CC + UC services. With Google Cloud Platform (GCP), Dialpad's full product portfolio can be quickly scaled worldwide.

#### Strengths

- Cloud-based, real-time syncing across devices
- Integrated Contact center
- Ease of deployment
- Voice Intelligence AI Capabilities
- Simplified User Management
- Pricing Simplicity
- HD-Quality Voice and Video
- CRM integration
- Sales use case

#### Challenges

- Focus on team collaboration

---

## LiveVox

---

LiveVox, based in San Francisco, California, and led by CEO Louis Summe, offers an entirely cloud-based intelligent contact center platform that includes a number of pre-integrated product modules. LiveVox offers Inbound and Outbound Voice, Digital Messaging, a dynamic CRM, and Workforce Engagement built on a shared data model. The company's data framework is built such that other systems, data, and processes can be easily orchestrated to craft the desired customer and agent experience.

LiveVox includes a large suite of solutions designed to support contact centers in the mid-market and enterprise ranging from speech analytics with embedded quality management, to inbound and outbound calling support, to intelligent virtual agents, two-way messaging, and more. Its platform is geared towards optimizing customer experience and engagement by providing a unified environment where voice, messaging, email, SMS, and virtual agent communication can be centralized and streamlined to drive self-service opportunities for customers and performance for contact center agents and deliver insights to leaders across the organization.

LiveVox offers its AI virtual agent bundle that covers a number of use cases, such as payments, FAQs, appointment scheduling, order status inquiries, and lead generation. Personalization is easily enabled by its purpose-built CRM which also facilitates smooth escalations to agents who have all previously entered information at their fingertips. LiveVox also offers SpeechIQ with automated Quality Management, which provides unified insights about the customer experience by combining speech analytics with omnichannel intelligence and the ability to improve agent performance and customer experience. SpeechIQ uncovers customer intentions through an analysis of sentiment to surface hidden pain points and drive a more efficient agent experience. SpeechIQ's comprehensive search allows agents to filter and query omnichannel data for keywords and other vital information.

LiveVox serves various industries including Contact Center BPO, Financial Services, Healthcare, Telecom, Teleservices, Retail, and Travel & Transportation. Given LiveVox's focus on its growing intelligence capabilities and ability to easily integrate other systems and data, it is one to watch in ICC.

### Strengths

- Cloud contact center focus and expertise
- Pre-integrated omnichannel and AI capabilities
- Easy orchestration of data, apps, and workflows
- Purpose-built CRM and unified data model
- Robust risk mitigation tools and controls
- Strong end-to-end SLA with high availability

### Challenges

- Market awareness outside of North America

---

## **Getting Started With ICC**

The ICC is real, and intelligence has become the next battlefield, enterprises will need to re-evaluate their current providers if they fail to show a compelling roadmap for intelligence. The reason is simple—it is about innovation and providing better customer experiences.

The need to augment humans with digital labor is here and so is the era of personalization—also driven by AI. So, a plan to develop and deploy knowledge specific virtual agents is needed.

The need for better profiles that are derived from behavioral data is also here. This is all about the race to a more personalized customer experience.

Enterprises should continue to ask for detailed product roadmaps for the next 12-24 months.

## **Aragon Advisory**

- Enterprises should look at their contact center provider and determine their approach to intelligence. This means evaluating current capabilities and looking at how to automate with virtual agents.
- Enterprises should develop a plan to have multiple knowledge-based virtual agents.
- Better customer experience is also a new race. Using intelligence to parse customer behavioral data will eventually lead to better experiences.

## **Bottom Line**

The intelligent contact center is here. As more virtual agents are added to the labor pool, continual training of both humans and virtual agents will be needed. Many more ICC providers have adopted virtual agent technology so there is more choice for buyers. Finally, UC&C and contact center are becoming more integrated, and this will drive more consolidation in the market.

---

## Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

## Dimensions of Analysis

The following parameters are tracked in this analysis:

**Strategy** reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

**Performance** represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer experience:** Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?

- 
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
  - **R&D:** Investment in research and development as evidenced by overall architecture.

**Reach** is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

### The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators* or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

---

## Inclusion Criteria

The inclusion criteria for this Aragon Research Globe is

- a minimum of \$6 million in primary revenue for contact center or a minimum of \$8 million in revenue in a related market (voice, video conferencing, collaboration, and team collaboration/messaging).
- **Shipping product.** Product must be announced and available.
- Customer References. **Vendor must produce customer references in each hemisphere that the vendor participates in.**

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process. This determination was not applied to this report as all vendors participated in the Globe process.

## New vendors included in this report:

- **Dialpad**
- **LiveVox**

## Noteworthy vendors not included in this report:

The following vendors were not included in the report but are notable:

- **Altitude Software**
  - *Altitude is now part of Enghouse which also has its own Contact Center offering.*
- **Amazon**
  - Amazon offers its Amazon Connect Contact Center which focuses on enabling enterprises to build their own applications using Amazon AWS services.
- **Google**
  - Google announced it is offering its own Cloud Contact Center in March 2022. Google also offers its contact center AI offering for virtual agents.
- **Nextiva**
  - Nextiva is an innovator in unified communications and collaboration and resells Five9's contact center
- **RingCentral**



- 
- RingCentral resells the NICE contact center offering.
  - **Twilio**
    - Twilio launched Twilio Flex Contact Center in October 2018. It is currently focused on acquiring customers.