IDC MarketScape

IDC MarketScape: Worldwide Contact Center Infrastructure and Software 2015 Vendor Assessment

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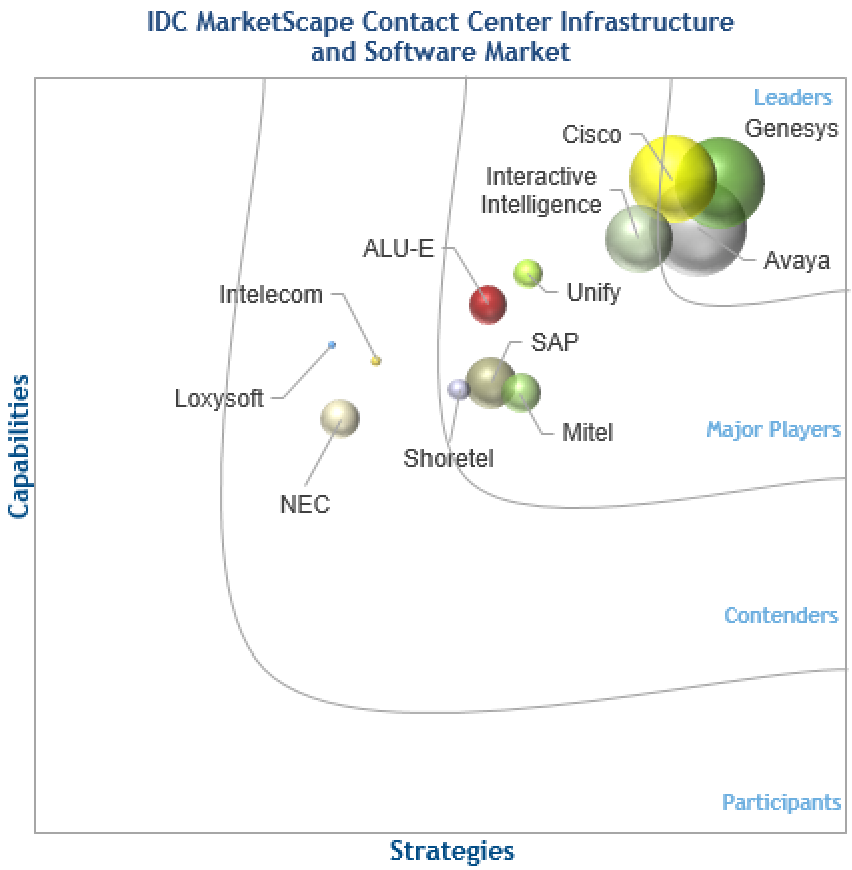
THIS IDC MARKETSCAPE EXCERPT FEATURES: GENESYS

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Contact Center Infrastructure and Software Vendor Assessment



Source: IDC, 2015

Please see the Appendix for the detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Contact Center Infrastructure and Software 2015 Vendor Assessment (Doc #I05X). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Customer service has always been a key issue for companies operating in competitive markets. But even among organizations that are not competitive, it has been a strategy albeit from a different perspective. Sometimes, customer experience is viewed as a way of technology providers to change the perception and market their own solutions (in telephony, this would mainly be contact center solutions). But many other vendors such as enterprise resource planning (ERP) systems manufacturers talk about customer experience.

This IDC MarketScape study examines the key players in the worldwide contact center infrastructure and software (CCIS) market, analyzing their current capabilities as well as longer-term strategies that impact their ability to service customers and gain market share going forward.

The CCIS market includes voice and digital media contact distribution, management, and agent-software clients, as well as self-service solutions for voice, web, and mobile devices used to offer customer service solutions as part of a customer experience strategy. We also examine the ecosystem and cloud (public/private) deployment, customer experience solutions, and mobile customer care solutions, as well as go-to-market models used by vendors to achieve these.

To assist in the vendor selection process, organizations and end users are encouraged to use the graphic in this IDC MarketScape research, along with the vendor text profiles, to help in developing a short list of potential CCIS vendors that might be a good fit for their CCIS deployment project(s). This research presents IDC's view of the critical success factors for this market in the short and long term, along with a ranking of how technology suppliers fare against those success factors.

Key criteria that contribute to a successful CCIS offering include:

- The ability to present a strategy that comprises key technologies that focus on the 3rd Platform of IT, including cloud (public and private), Big Data and business analytics, mobility, and social business functionality.
- Vendors that present innovative strategies around partner management, pricing, and product packaging.
- Vendors that can provide flexible delivery options for partners and customers as part of their video portfolios (on-premises, managed, hosted, cloud).
- Business partnerships and sales channels that open up new markets for the vendor's offering, yet still maintain a high level of support and customer care.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This study includes an analysis of 12 worldwide product vendors selling to end users and service providers, which in turn provide contact-center-as-a-service (CCaaS) or hosted solutions. We include global vendors active in several countries with direct sales or indirect partner strategies. However, we do not include vendors with activity in only a few countries in a region but include those that have a leading influential position in the region. Vendors that deliver solutions in more than one model (on-premises/hosted/cloud) are covered, as well as those focusing on 3rd Platform contact center delivery models.

Contact center applications automate functions relating to the operations of the customer service or engagement installation. These applications, although enabling in function, include a customer service representative (CSR) or agent desktop interface, management software, administration clients, and media servers. Products included in this category are automatic call distribution (ACD), predictive dialing, telephony integration, universal queuing, administration and management applications, and desktop clients. Basic capabilities of the vendor offering should include automatic lead selection or lead intended to improve efficiency, both for inbound and outbound calls to be directly routed to the appropriate agent for the task, minimizing wait times for people calling in, but they may include other types of customer contact as well, including email, web chat, and mobile text messaging. The solution also provides the ability to generate historical reports and supervisory capabilities.

Vendors should also be able to describe their current and long-term go-to-market strategies across a region, or across several worldwide geographic regions, as well as their overall capability to conduct businesses globally, innovate efficiently, and grow revenue viably.

The 12 worldwide contact center infrastructure and software vendors profiled here are:

- ALE (formerly Alcatel-Lucent Enterprise)
- Avaya
- Cisco
- Genesys
- Interactive Intelligence
- Intelecom
- Loxysoft
- Mitel
- NEC
- SAP
- ShoreTel
- Unify

ESSENTIAL BUYER GUIDANCE

In the two sections that follow, IDC offers guidance for vendors and buyers of contact center infrastructure and software solutions.

Some of the key challenges for customers investing in contact center infrastructure and software are the identification of technologies, features, and applications that are most appropriate for their organizations, and more importantly, which source(s) they should turn to for deployment and expertise. The three primary sources of CCIS functionality are:

- IP PBX/unified communications and collaboration (UC&C) vendor solutions and the enterprise network, such as Cisco, Avaya, ShoreTel, Unify, ALU Enterprise/Huaxin, NEC, Mitel, and Huawei.
- Standalone contact center solution environments from vendors such as Genesys, Interactive Intelligence, and SAP.

- Hosted/managed and cloud service provider solutions offered by facilities-based providers such as Genesys, inContact, Verizon, and 8x8.

Since there is no one-size-fits-all solution for contact center solutions, customers can choose from an assortment of features from these sources, which may require a little, or a lot, of integration to make the solution run on customers' network infrastructure and/or within the bounds of their existing services/carrier contracts.

- Many organizations find CCIS solutions complex and are not sure how they would go about managing and maintaining the environment. Therefore, having a solution managed by a third-party provider would help remove the complexity for them and alleviate the need to make internal investments in hiring appropriately skilled IT staff to manage and maintain it.
- Businesses are looking at ways to reduce the amount of real estate to lessen operational costs and lower their carbon footprint generated by existing premises-based equipment. As a result, businesses are reducing the amount of hardware equipment they have on-premises.
- Cloud environments can provide greater levels of automation, orchestration, provisioning, and deployment. Transitioning to the cloud can help organizations reduce operating costs, improve application performance, and better allocate their resources. However, contact centers are generally more strategic than, for example, unified communications (UC) solutions so the transition is slower and the ability for customization can be less than a system on-premises or hosted by a service provider.
- Businesses reliant on high levels of security will be more inclined to move existing solutions to hosted and private cloud deployments. In addition, many providers still need to do more work in terms of updating or bringing in adequate security policies to reassure companies that the transition to a cloud-based environment will provide them with the proper level of security.

VENDOR SUMMARY PROFILES

This section explains IDC's key observations resulting in a vendor's position on the IDC MarketScape. Although every vendor is evaluated against each of the criteria outlined in the Appendix, the description here also provides a summary of each vendor's strengths and opportunities.

Genesys

Headquartered in the U.S., Genesys is a privately held company with a major private equity investment from Permira. It started in 1990 focusing only on the contact center and customer service market. From the start, it created an architecture allowing it to run on top of other voice infrastructures. In 2012, the ownership of Genesys was transferred from Alcatel-Lucent to a company controlled by Permira with participation from Technology Crossover Ventures. Today, Genesys operates as a standalone company. IDC positioned Genesys as a leader in this IDC MarketScape.

Genesys has packaged its portfolio around three primary offerings, all based on the same platform called the Customer Experience Platform. The Customer Experience Platform enables enterprises to orchestrate and monitor multimodal omni-channel interactions. These three offerings are called the Premier Edition, Business Edition, and Enterprise Edition.

The Genesys Premier Edition is for small to midsize contact centers supporting up to 250 agents. It is a pure cloud offering that is designed to be flexible, quick to deploy, and easy to use. It includes integrated analytics that provide operational insights, mobile-accessible supervisor application for real-time analytics, reporting, and call monitoring. The Genesys Business Edition is for customers that require an all-in-one functionality with rapid deployment while capable of scaling as the contact center grows. It supports up to 1,000 agents and is available as a cloud service, on-premises with a pre-configured appliance, or in a hybrid configuration mixing different deployment models. The on-premises appliance comes in multiple configurations to match customer needs. Hybrid cloud options allow customers to rely on existing telecommunications providers, store sensitive data locally, or add features to existing Genesys on-premises deployments. The Enterprise Edition is designed for large organizations that require highly scalable and customized contact center solutions from any type of deployment model. It is also the package that supports Genesys Mobile Engagement and business process automation using its Work Item Routing.

The focus of Genesys is to provide an integrated suite of products that allow organizations to deliver customer experience across touch points. Since being acquired, the company has expanded its solution through several acquisitions and partnerships (in 2013 alone, it acquired five companies). UTOPY increased its speech analytics capabilities; Angel was a developer of cloud-based IVR and contact center software for SMB; SoundBite provided proactive communications software for cloud-based collections and payments, mobile marketing, and customer service software; and Echopass remained a cloud-based contact center software developer for enterprises.

In 2014, it continued its strategy by adding Canada-based Ventriloquist Voice Solutions International — previously a Genesys partner, which delivered persona-based, branded customer interactions over voice, SMS, email, and mobile to improve customer experience — and Solariat, a social customer care and analytics company. This was followed by OVM Solutions, a provider of on-demand, automated messaging for proactive communications, which also used to be a Genesys partner. To grow its regional presence, Genesys acquired workforce optimization vendor Voran Tecnologia to expand into Brazil and Latin America and Singapore-based CanaPlus Consulting to expand into the Asia/Pacific.

Strengths

- Genesys is highly rated in its offering capabilities and has increased its cloud focus over time through several acquisitions and organic growth. Its strategy is clearly to be a leading provider not only through packaged products but also by innovating the space and adding new technologies to the market.
- Genesys' vision is to provide contact center applications separated from telephony infrastructure and employ contact center functionality across the organization by integrating into UC environments. Its investments in cloud-related services show intent to offer fully capable contact center solutions in a non-capex investment environment with the purpose to redesign the many random end-customer journeys starting in any channel, including social media and web-based interactions into orchestrated, monitored, and efficient customer engagements.
- Its strategy includes both innovation of the product line and go-to-market strategies and growth of the partner base. Genesys has partners involved in offering systems integration services and business consulting supported by its own consulting organization.
- Its go-to-market strategy is to combine both direct and indirect models. Its partner strategy is to extend its market reach through a select group of channel partners that support multiple deployment models. The direct model includes a global sales and services organization. Genesys has common products across its offering and offers good capabilities to support global customers.

Opportunities

Contact center solutions from Genesys have been seen before as costly investments requiring heavy customization for each customer, making initial installations expensive, time-consuming, and challenging.

- Upgrading to later releases has been challenging with many customized features.
- Genesys' competitors have increased their ability for customization without losing out on their packaged benefits, and this is clearly what Genesys is attempting to remedy with its new Premier and Business Edition packages.
- Genesys is privately funded and with that comes the obligation to offer a return on investment for investors. Future expectations, albeit not known, will set the agenda for future acquisitions. The string of pearls they have added to the company over the past two years is impressive, and integrating them into a cohesive portfolio is an ongoing project.

End-User Advice

Genesys' contact center spans both basic and complex. Consider using Genesys especially in situations where multiple call managers are used as they can integrate into many of them as an over-the-top solution. Its new cloud-based and on-premises editions provide a packaged software solution targeted at midsize companies, and the Enterprise Edition can cater to customers with high customization requirements while maintaining the option to choose deployment models.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned it is with customer needs. The "capabilities" category focuses on the competencies of the company and product today, here and now. In this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or "strategies" axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. It focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores present well-researched IDC assessments of the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

This IDC study extends the vendor assessment model called the IDC MarketScape to the worldwide contact center infrastructure and software market. The methodology behind this model uses both quantitative and qualitative assessments of vendors' characteristics to explain success in the marketplace and will help anticipate their ascendancy. This study covers 12 vendors that provide CCIS equipment and services solutions, which are key components of customer experience and customer care departments among organizations today.

This evaluation is based on a comprehensive framework that examines vendors across a wide variety of technical and operational criteria, weighted by factors IDC expects will be the most influential for short- and long-term CCIS market success.

The IDC MarketScape is designed to provide an overview of the competitive fitness of the global solution providers in the CCIS market. A single chart displays each given company's market share and indicates whether it is over- or underperforming and how well it is suited to compete in the market today and in the future (three to five years from now). The accompanying text explains each contender's major strengths and opportunities/challenges.

IDC employs the following to arrive at each company's ranking:

- **Sources.** This study is based on a model populated with data provided to IDC from a vendor questionnaire, companies' quarterly and annual reports, earnings calls, industry-analyst events, interviews with company representatives, IDC research, and news coverage.
- **Market shares, growth rates, and revenue numbers.** This IDC MarketScape primarily covers the worldwide CCIS market, including automatic call distribution (ACD), predictive dialing, telephony integration, universal queuing, administration and management applications, and desktop clients. For companies that do not publicly disclose this revenue, IDC estimates revenue and growth rates based on public information, vendor discussions, and industry knowledge.
- **Competitive fitness.** Each major competitor's preparedness for current and future market conditions is expressed as a set of two scores. One score expresses a given vendor's current capabilities, while the other expresses the appropriateness of its strategies for the future. IDC bases its assessment of future market conditions on what most likely will be the market's major trends and disruptors. Each of the two scores is broken down into three criteria (product offering, go-to-market, and business), each of which in turn is broken down into several subcriteria. Both criteria and subcriteria are weighted by importance for a particular market. For each company, we score its qualities with regard to each of the subcriteria, assigning a numeric value. The IDC MarketScape model uses these values to calculate each company's score for each of the criteria and rolls these values up to arrive at the described set of two scores.

Market Definition

The CCIS market includes voice and digital media contact distribution, management, and agent-software clients, as well as self-service solutions for voice, web, and mobile devices used to offer customer service solutions as part of a customer experience strategy.

Included in the evaluation are the ecosystem, deployment options such as on-premises and cloud (public/private), concepts such as customer experience and mobile customer care solutions, and the go-to-market models used by vendors.

This is a global MarketScape focusing on product vendors selling to end users and service providers, which in turn provide CCaaS or hosted solutions.

We include vendors that deliver solutions in more than one model (on-premises/hosted/cloud) as well as those focusing on the 3rd Platform contact center functionality. These vendors are active in several countries/regions with direct sales or indirect partner strategies. However, we do not include vendors with activity in one or a handful of countries in a region, but we include those that have a leading influential position in that region.

Contact Center

Contact center applications automate functions relating to the operations of the customer service or engagement installation. These applications, although enabling in function, include a customer service representative (CSR) or agent desktop interface, management software, administration clients, and media servers. Products included in this category are ACD, predictive dialing, telephony integration, universal queuing, administration and management applications, and desktop clients.

Interactive Voice Response

Interactive voice response (IVR) is a solution that can be embedded in the contact center software or run as a standalone feature. IVR allows human interactions through the use of voice and DTMF tones input via telephone keypad, text messages, email, or web messages. An IVR solution can grow from single information, simple question structures to include multiple menu options, speech-recognition software, and database access options that can be read back using fixed recorded prompts that are concatenated to form a sentence or text-to-speech software. IVR systems can be used for self-service solutions, outbound contacting, and as part of the customer service journey. IVR can be made to support inbound and outbound voice calls, text messages (SMS), and even email and chat messages.

On-Premises Systems

On-premises systems are installed and run on infrastructure on the premises of the organization using the solution rather than a remote datacenter. The solution can be managed with the organizational staff or as a managed service.

Cloud Services

The cloud services market continues to be a very rapidly evolving part of the IT marketplace. Cloud is a model to deliver solutions through a web-based set of applications rather than a direct connection to a server. Data and software are stored in servers. Features can be accessed by users without being in a specific place or they can use specific software to access them. IDC identifies eight key attributes that, together, define a cloud service.

Market Analysis

IDC believes the following trends will shape the worldwide CCIS market over the next few years.

Customer Experience and Service Design

Customer service has always been a key issue for companies operating in competitive markets. But even among organizations that are not competitive, it has been a strategy albeit from a different perspective. Sometimes, customer experience (CX) is viewed as a way of technology providers to change the perception and market their own solutions (in telephony, this would mainly be contact center solutions). But many other vendors such as ERP systems manufacturers talk about customer experience.

CX is the sum of all experiences over the duration of the entire relationship a customer has with a company or organization. This can include the customer becoming aware of the organization, discovering its product or service, being attracted by it, interacting to find out more, making a purchase decision, using it, cultivating the relationship, and ultimately advocating its benefits or negative aspects. It can also be used to mean an individual experience over one transaction. The distinction is usually clear in the context of the description of the experience.

Customer experience has a wider scope than contact center and customer service solutions, especially when one takes into account eservices. It is increasingly important for companies that are responsible for a service to have a comprehensive view of their relationship with customers. Therefore, the contact center platform is not complete without involving other channels that are used in communicating with the customers.

In this socially connected market, customers are changing their behavior and turning into supporters that engage with the brand as a way to build their own image. This is a challenge for most organizations as customer service and marketing grow closer as a strategy, but the organizations are separated in siloes. With similar or identical products and services, there is a requirement to design unique customer benefits. Services that companies and organizations provide become the differentiators when products become commodities.

The need for holistic tools that allow the organization to build service offerings that engage customers and encourage brand image is needed from vendors, which mainly focus on administrating existing systems today. This is a major shift in focus from systems and technology to the process of engaging customers and providing an experience.

Service design involves planning and organizing people, infrastructure, communications, and other components of a service to improve its quality and the interaction between the service provider and customers. The purpose of service design methodologies is to design according to the needs of customers or participants, so that the service is user-friendly, competitive, and relevant. The backbone of this process is to understand the behavior of the customers, as well as their needs and motivations.

Mobile Customer Care

The need to communicate from anywhere at any conceivable time will continue to grow as millennials (those born between 1980 and 1995) enter the workplace and become consumers and customers. Millennials belong to the first generation to have grown up with the Internet and mobile technology. Many times this group has been called "digital natives." Customers are now spending a significant amount of time online via smart mobile devices, and they expect businesses to interact with them using these devices.

Millennials look at mobile and social technology as a natural phenomenon in their private and work lives. As we have seen over and over again with other consumer behavior around mobile, social, web, and ecommerce, the experience they have as consumers will influence the habits they bring into the workplace. If we view it historically, businesses used to drive technology adoption in solutions around telephones, fax machines, personal computers, mobile phones, and email, which were all first adopted by businesses and followed by consumers. However, consumerization is the leading trend in the enterprise ICT landscape today, and the speed at which consumers adopt new technology is faster than ever before. For example, it took Apple 74 days to sell 1 million iPhones and only 28 days to sell 1 million iPads. The iPhone 5 sold over 2 million units in less than 24 hours.

But customers are no longer only looking for access. They are looking for a greater experience and expect more intimacy. Organizations need to understand the context in which customers use the service, and this is where they should be using their customer relationship information. However, the existing contact center and CRM systems often become the chief obstacle in this. Contact center solutions are built for servicing the masses and only perceive groups of customers accessing a service via a specific medium, while legacy CRM systems focus on selling effectively to groups.

Furthermore, although most vendors have a strategy to support mobile device access into the contact center, their channel partners are struggling with how to get access to those functionalities and deliver them to customers. Many times a new type of partnership with the vendor is required to enable mobile customer care solutions as the competencies needed such as mobile app life-cycle management, platform development, and database integrations are new to the existing partners.

Big Data and Business Analytics

Customer service is a technology area in transition. The concept of customer experience is moving the bar higher and the goal is to surpass customer expectations. In the socially connected market, customers are changing their behavior and turning into supporters that engage with the brand as a way to build their own image. And with similar or identical products and services, there is a requirement to design unique customer benefits or experiences. In these situations, the service becomes the differentiator.

This challenge can only be met by companies that develop more intimate relationships by leveraging their CRM and business analytics to understand customers' behavior and anticipate their needs and requirements. Digital media can be a tool to introduce new levels of intimacy by providing more adaptive and better self-service options that are more social, connected, and accessible. But to create intimate relationships that can predict behavior, there is a need for greater analytical functionalities, and analysts should be able to deduce information from these tools.

The best way to encourage organizations to know their customers better is to understand the when, why, and how they choose to contact them. There is a reason they call or choose to send an email. There are also reasons for choosing to use a mobile device or a work computer. Perhaps the information that they choose to connect on their way to work is a clue in itself, whereas if they call in the evening, this might mean something else.

The behavior the system can observe across all the different touch points and devices will provide insights into how customers use each channel, why and for what purpose, and when they choose it. Answering these questions and merging the insights with other data sources will provide a customer view that can give a brand new way of looking at why and how customers interact with different channels. With these answers, in turn, service organizations are provided with an understanding that they need to be able to adapt their services to meet and exceed the needs of their customers more effectively.

When providing customer assistance through social networks, organizations must address additional issues. Social networks provide customers the opportunity to send feedback to businesses in real time and through which they can expect a response. But the feedback is not only provided in real time to the organization: it will also be available everywhere and wide-reaching, through communities and networks.

Big Data analytics help companies sort out which feedback to respond to and which to let go. By analyzing the data, the organization's staff can be notified of the extent of a conversation and what to say, not only to respond to customers but also to send the feedback to management for product and service improvements. This is crucial to be able to deliver efficient customer experience and constantly adapt to changes in customer behavior and needs.

Many times the contact center operates in its own silo with little or no interaction with the rest of the organization servicing parts of the customer journey together with the customer. But having the complete view of the customer journey and being able to describe this from a customer's perspective are essential to understand the context of how and why customers use a specific medium to interact with the organization. As vendors, the focus initially should be on growing the reporting and analytics features provided to give a view of the full customer journey, sometimes referred to as 360-degree understanding.

Digital Multichannel Customer Services

Customer service and contact center solutions have traditionally been focused on trying to meet the needs of the masses by adapting to the situation as it looks at the moment of contact. However, influences from the consumer market are causing fast changes in how end users prefer to interact and how they expect customer services to be provided. Furthermore, customers now expect consistent support and cross-channel knowledge of earlier interactions, irrespective of when they communicated, how they communicated, or even from where they chose to do so. This means that contact centers will have to be much more agile than ever before.

In Europe, for example, customer service organizations mainly choose their websites to convey messages, and then they offer email, social media, and phone as options to get services. IDC's research into customer experience indicates that in the near term the digital customer experience via the web/portals is still going to attract the highest attention.

Overall, organizations are prioritizing digital channels and mobile customer care especially in the Americas and EMEA.

Social Customer Service

EMEA organizations are less focused on social customer service than their North American counterparts. They focus instead on mobile solutions and other digital media such as email and chat. However, organizations that have set up social media as a channel have done it mostly using separate teams organized outside or at the periphery of the regular customer service organizations. More and more organizations are realizing the need to look at social contacts as part of a larger context and leverage social media services to be integrated into the main contact center routing features. This would allow for responses, escalations, and service levels to be tracked against all touch points.

No-Call Resolution and Private Social Networks and Forums

One-call resolution has been the guiding principle in the contact center arena, in which the goal and promise is that customers will have all the answers to their questions in that one call. To do this, the integration with the back-office staff in various ways has been critical, and solutions for employee networking have begun to get new energy.

Some companies have implemented what can be defined as private social network solutions, where customers can interact with other customers or potential customers to find out more about a product, a problem, or a user issue without contacting the company's customer care directly. The purpose of these social sites is to have a no-call resolution opportunity for their customers, where they find the help they need either by readying other solutions or networking and discussing their challenges with other users. It is important that these discussions are facilitated so they do not lose control of the content.

There is a definite risk of losing control of the social environment and thereby compromising the brand value. But organizations must understand these risks and opportunities and prepare their staff to handle these challenges. Some organizations allow only certain people with the right understanding of social networks and skills to engage to respond on social media. With the help of the new types of support tools, the possibility of sending out inappropriate messages can be minimized.

Employee Networking

Employee social networking and collaboration allow employees to interact internally. Most unified communications solutions are built around the concept of the address book, and that we all know who to contact because we know each other. Social collaboration takes into account the fact that we do not know everyone internally and especially not what they can help us with.

Organizations are leveraging social collaboration to provide better customer services by networking and connecting customer services representatives with subject matter experts. In this environment, they can collaborate, share information, screens, and applications, discuss queries, and allow for effective and one-call resolution calls.

Business Process Automation

Business process automation (BPA) provides a foundation for improving customer-facing processes, including back-office tasks which can be combined with the contact center agents' daily tasks through the same call blending management solution.

In the CCIS context, BPA solutions can be built using contact center functionality. CCIS-supported BPA enables companies to streamline enterprise business processes that are initiated by a voice call, email, and SMS to capture, prioritize, route, escalate, track, and manage processes through the process life cycle. These tasks can be completed by agents during off-peak hours or by staff in charge of the task being distributed.

LEARN MORE

Related Research

- *Worldwide Contact Center Infrastructure and Software Forecast 2014-2018 and 2013 Vendor Shares* (IDC #I03X, June 2015)
- *Making the Case for Customer Experience and the Internet of Things: Cisco Announces Context Service for Cisco Contact Center* (IDC #lcSE25498215, March 2015)
- *Worldwide Unified Communications and Collaboration 2015 Top 10 Predictions* (IDC #254486, February 2015)
- *AT&T Announces Commercial Support for WebRTC* (IDC #lcUS25404415, January 2015)
- *Interactive Intelligence Adds a New Product to Its PureCloud Portfolio* (IDC #lcCZ25375415, January 2015)
- *WebRTC Gets a New Application in the Contact Center for Agents — Avaya and Google Collaborate on Contact Center Solutions for Businesses* (IDC #lcSE25346714, December 2014)
- *Market Analysis Perspective: EMEA Unified Communications and Collaboration, 2014* (IDC #CEMA20981, May 2014)
- *IDC's Worldwide Unified Communications and Collaboration Ecosystem Taxonomy, 2014* (IDC #244036, October 2013)

- *EMEA Unified Communications and Collaboration Market 2012 and 2013-2017 Forecast* (IDC #CT03V, August 2013)

Synopsis

This IDC MarketScape study uses the IDC MarketScape model to assess a number of vendors in the worldwide contact center infrastructure and software (CCIS) market. The IDC MarketScape is an evaluation tool based on a comprehensive framework and a set of parameters that examine vendors relative to one another and to those factors expected to be most conducive to success in a given market in the short and long term.

"The CCIS market includes functionality that runs on standards-based equipment or purpose-built systems such as PBX. It has revived itself over the past three years with vendors active in several acquisitions, divestments, and partnerships," said Jason Andersson, program director, IDC Nordics. "The movement to cloud is clear as investments in both hosted solutions and cloud solutions are beginning to make global headway. IDC expects 9.4% revenue growth in worldwide CCIS in 2015. Although premises-based solutions have garnered high attention in recent years, enterprise evaluations, trials, and ultimately adoption of hosted solutions (single-tenant) and cloud (multitenant) CCIS solutions will contribute significant growth predicted for the global market this year. Revenue growth will be driven by enterprises looking to retain capital, reduce costs, and improve customer experience, as well as by service providers refining their contact center strategies and product portfolios."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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