



A Frost & Sullivan Buyers Guide Excerpt: Contact Center Buyers Guide, North America, 2020

Provided by



THE STUDY

This buyers guide examines the North American contact center market, and covers the contact center on-premise systems and hosted/cloud markets. This study is based on extensive primary and secondary research and is divided into 2 sections.

Section 1 provides analyst commentary on the most important forces affecting the North American hosted/cloud contact center market. A number of trends, including movement to the cloud, have been gaining steam for a decade. Others, such as creative pricing strategies or the creation of app stores for customers to more easily add new capabilities from third-party suppliers, are growing in strength. Frost & Sullivan expects that these trends will extend well beyond 2023.

Section 2 highlights and assesses the capabilities of the top-performing North American cloud contact center providers. The list is not exhaustive: Frost & Sullivan chose vendors based on the strength of vision and ability to execute; some offer complete contact center solutions while others offer compelling suites focused on areas such as agent performance optimization. Solution providers are listed in alphabetical order.



EXECUTIVE SUMMARY: THE COMPETITIVE LANDSCAPE AT A GLANCE

This buyers guide examines the North American contact center market for both premise- and cloud-based solutions. It considers full-suite, pure-play, cloud-based providers and those that provide premise, cloud-based, and hybrid solutions. It also includes a handful of telco-based providers that offer business process outsourcing (BPO) and hosting, as well as premise and cloud-based solutions directly to enterprise customers.

Key Trends

In the 2018 Cloud Contact Center Buyers Guide, Frost & Sullivan noted 3 primary trends driving the customer care industry: the adoption of cloud as standard; the continuing move toward omnichannel delivery in the context of digital transformation; and a focus by providers on developing solutions that address the needs of a changing workforce. These trends continued unabated in 2019, with further refinement, as Frost & Sullivan discussed in the 2019 combined premise and cloud buyers guide.

Cloud is still a given, but **hybrid cloud** is a hot topic. Companies are using the cloud not just to host contact center services but also to get a head start on innovation when rip and elevate isn't yet an option. As such, providers have adapted by:

- Continuing to bolster on-premise offerings so customers can get additional value out of their existing operations.
- Creating and stocking app stores for third-party cloud applications to deliver innovation for cloud customers and to supplement on-premise systems.
- Ensuring tight integration between cloud and on-premise applications.

Workforce engagement management (WEM) made its debut as one of the trends driving the industry in 2018 and 2019. Listen, Free, Motivate, Empower, Protect, and Enable are all descriptors of design considerations for workforce engagement.

The industry has finally reached the edge of the hype cycle for the umbrella term **artificial intelligence** (AI) and is actively harnessing a set of AI technologies to infuse intelligence across the customer contact landscape. Just as important, providers in this guide are learning how to properly market and position their AI wares in addition to building professional services and consulting resources to assist customers with strategic AI plans.

Frost & Sullivan has found that these trends are still driving the industry. For buyers, the good news is that the industry is in a stage of refinement and innovation related to the trends rather than introduction of new segments that result in diverse and confusing marketing messages. For instance, rather than gamification being an oft-dismissed request for proposal (RFP) check-off item, customers generally understand what it is, and providers need to discuss whether they have full gamification suites or are just using game mechanics to enhance WEM solutions. Or, rather than a supplier saying it has an AI chatbot or speech-enabled interactive voice response (IVR) solution, it can now talk about how its solutions provide process automation across all segments in its portfolio.

INTRODUCTION

Revenue for the North America hosted and cloud contact center market grew 12.5% in 2018 and is forecast to increase at a compound annual growth rate (CAGR) of 12% through 2023. While swiftly losing ground to the cloud, during 2018 systems revenue grew 3.8% year-over-year and is forecast to increase at a CAGR of 2.9% over that same forecast period. One caveat, however, is that as of publication of this guide the 2019 market share and forecast are still being determined; Frost & Sullivan expects the forecast for different application segments for both cloud and premise will shift due to the effects of the rapid shift to a work-at-home model because of COVID-19.



SECTION 1: MARKET TRENDS

The key trends that were discussed in the Executive Summary have matured over the past two to seven years and have remained remarkably solid in the last three. As noted in last year's guide, "After decades of focusing on cost-cutting and isolating performance issues in the contact center, the industry turned its attention toward improving the experience of customers, and then to the workforce that serves them. In this decade, the key trends have revolved around the concept of people being facilitated by technology. Omnichannel customer care addresses the functional silos and breakpoints in context continuity of the customer journey. Digital transformation (the process of using digital technologies, including advanced communications, to remove cumbersome obstacles to growth that have built up in an organization over time) is now at the core of strategic planning. Intriguingly, the use of AI in the contact center has moved front and center as the industry has matured past using AI as point solutions, such as virtual assistants and bots, to infusing AI across the customer contact landscape in a variety of ways and methods. Finally, WEM has emerged as a familiar term and essential concept, and is at the heart of the development and application of solutions geared toward improving EX in the same way as improving the CX."

The industry has not been without other changes taking place, however, as detailed below.

COVID-19 Ready

Impossible to predict or ignore is the impact that the COVID-19 epidemic has had on customer contact. 2020 added pandemic to the list of events in the phrase "unforeseen events" that is often tagged onto discussions about BCDR initiatives. Alongside fires, floods,

hurricanes, and other natural disasters, COVID-19 brought to the forefront the need for the contact center backup plans the industry has long pushed for. Almost overnight, millions of people including contact center employees were conscripted candidates for working remotely. The industry quickly responded in kind with WAH models, free or trial offers for remote agents, and generous pricing models, even as they dealt with their own shift to WAH.

Many vendors were prepared for the move. For example, CoreDial's CoreNexa Contact Center was designed using WebRTC with teleworkers in mind, so from a technology (not management) perspective, agents merely had to go home and log in through a Chrome browser and everything was the same. Edify, with its next-gen cloud contact center platform, as well as Thrio, were designed with a work-from-anywhere model in mind.

Overall, solution providers did a spectacular job in moving masses of workers home. On the UCC front, companies such as RingCentral, 8x8, Cisco, Mitel, Enghouse, OnviSource, and Avaya provided communication and collaboration software for free for months. Cisco threw in free security services as well.

On the contact center side, providers quickly put together packages with temporary complementary remote agent solutions. Along with this appeared dozens of websites with information on WAH including best practices and use cases to act as guides for companies struggling with the sudden change.

In some cases, such as with Avaya, providers set up their own technical support contact centers to assist customers in making the change. Talkdesk announced a solution aimed at connecting skilled WAHA talent with companies seeking to hire agents. Talkdesk CXTalent is a talent job matching service for agents, supervisors, and system administrators that connects skilled individuals seeking WAH jobs with companies hiring a contact center workforce. It comes with free training available through Talkdesk Academy for job seekers to develop essential skills through four progressive levels of coursework and Talkdesk certification. Within 10 days of launch, the CXTalent platform was supporting 9,000 Talkdesk certified agents and 1,000 professionals with supervisor experience.

We will always have events that trigger a rapid response and the need to put a Plan B in place. If it's not COVID-19 it will be COVID-20 or something else. However, this particular event just added fuel to trends we were already seeing in customer contact. Better work/life balance, the need to increase employee engagement, and the desire to be empowered and more mobile had been growing in importance for years, and the WAHA model that has been used as a perk for employees is a core component of these and other trends. And the "no choice if you want to stay in business" aspect of the pandemic simply forced many businesses to put aside their reluctance and dive right in.

Some vendors tweaked solutions to more fully assist with BCDR. For instance, Verint's WAH support program included pre-built COVID-19 categories for Verint Speech Analytics to help identify customer and employee business challenges and aid compliance, as well as a

KM starter package and WAH intelligent assistant. NICE, in addition to its CXone@Home program, also introduced one for its NICE Employee Virtual Attendant (NEVA) solution in a NEVA@Home package. Aspect was on the verge of introducing the latest version of its WFO suite when the pandemic hit, and introduced several upgrades to the suite including an improved mobile UI with the look and feel of the agent desktop, expanded cloud options, improved quality management, intra-day scheduling, and improved performance tools.

What Frost & Sullivan expects to see is a continuation and broadening of WAHA adoption, not just because companies had to do it, or as a perk, but because of other benefits as well. Many will see it as a way to cut down on the cost of physically running brick-and-mortar contact centers, and might continue with some form of WAH to scale back. But something even bigger might push the model to continue as the world has now witnessed something almost no one expected to see: the clearing of air pollution, reductions in traffic accidents and fuel consumption, and other factors that are hard to ignore. As we come out of this crisis, many companies will take social consciousness into account, and try to do their part in creating a better global sociological and environmental situation. From interviews with the suppliers in this guide, on average we expect anywhere from 45% to 65% of agents to remain in a WAH situation.

Cloud: Ready or Not

All of this just accelerated the move to the cloud for millions of agents across all suppliers. This also somewhat pushed another trend we are seeing in cloud, but in one particular segment: telco providers. When Frost & Sullivan published its first Cloud Contact Center Buyers Guide in 2018, the majority of telco suppliers were offering enterprise customers premise-based systems from the same vendors that they themselves use for BPO and managed services offerings, primarily Cisco and Avaya. A few also had offered customers the ability to license cloud seats as well. Now these providers have all forged deep relationships with other cloud platform providers.

For instance, early on Bell Canada partnered with 8x8 for its on-demand cloud platform. CenturyLink's cloud platform was based on Genesys for interaction routing and IVR, but was expanded in 2020 to include Genesys Cloud, giving CenturyLink a global, unified cloud service for network services and applications and contact center. Similarly, AT&T started off with a broad array of platforms, including those from Cisco, Avaya, Genesys, NICE inContact, TTEC, and CSG International (CSGi). In 2020, however, AT&T shifted its approach with the launch of AT&T Cloud Contact Center platform, which is based on the Five9 service. TTEC, which is the largest Cisco reselling partner in the United States, has solidly maintained the relationship that has spanned 16 years.

The end result is that the majority of telco providers have rethought their portfolios, and customers will have to evaluate not just the core contact center components but the value-added services these suppliers provide, whether it's the use of the company's network

or additional services, such as CenturyLink's Voice Clarity Measurement and Enhancement service. Certainly, these providers' ability to partner and help lead a company through digital transformation are key criteria in accessing further engagement.

Acceleration of Process Automation

The infusion of AI across the entire contact center landscape continues apace. AI, as it applies to the contact center, is an umbrella term that encompasses AI, ML, NLU, DL, and other related technologies to improve the CX. Since 2019, companies moved from talking about AI in a narrow way (focused on point solutions such as speech-enabled IVR or virtual assistants) to the matter of how to effectively plan for and deploy AI-enriched solutions across the customer contact landscape in a way that improves both the CX and the EX.

Now the number of companies doing so has mushroomed. Many have business units that focus solely on AI, and some have developed a CoE with a focus on integrating AI-infused solutions into customer environments. Now we have a vast array of applications including virtual assistants, predictive routing, process automation, voice biometrics, assisted and unassisted RPA, and automated forecasting and QA.

Frost & Sullivan further sees a shift with companies pushing the adoption of process automation as an integral part of business optimization strategies. Marketing of the benefits of process automation has ramped up, particularly as it applies to offloading agents of tedious, error-prone work but also in the broader goal of improving EX. Then suddenly when COVID-19 hit, process automation got a further boost as a tool to assist agents in times of change. NICE's Neva@Home again provides an example of blending a virtual and live workforce to reduce costs and improve CX and EX.

Conclusion

The contact center industry was already experiencing a time of great innovation when unforeseen events both tested and accelerated change. In 2020 and in the next year or two, Frost & Sullivan expects to see some fallout of smaller, start-up companies that didn't have the financial resources to make the necessary course corrections. Some will cease to exist and others will get acquired for their talent and intellectual property. Acquisitions will allow more established companies to continue on the path of innovation and bolster their ability to help end-user customers innovate and change as well. The ability to help customers transform their customer contact organizations may well end up being one of the top differentiators in the coming years.

Choosing a contact center provider is an important decision that must be based on a robust evaluation methodology that includes a thorough check of customer references. The following provider profiles offer detailed company and solution portfolio information as a way to start this process.



SECTION 2: COMPANY PROFILE

CallMiner

COMPANY BACKGROUND AND CURRENT PERFORMANCE

CallMiner is one of the original (and last remaining) pure-play providers of contact center and enterprise analytics. It's important to note, despite the "call" in its name, in its 17 years in the industry, CallMiner has blossomed from providing speech analytics to encompassing interaction analytics across all customer interaction channels, not just voice. The company mission statement, "We unite with our customers and partners to provide trusted intelligence through our best-in-class platform. This multichannel cross-journey intelligence helps our customers improve business performance in the areas of customer experience, employee performance, compliance, security, fraud and interaction automation," and the tagline of "Intelligence from customer interactions" reflect all channels of communications. CallMiner Eureka provides the full breadth of agent performance optimization and customer and employee engagement analytics. CallMiner is a privately held company headquartered in Waltham, MA, with offices in Fort Myers, FL; the United Kingdom; and Australia. The company supports customers in the Americas, EMEA, and APAC.

CallMiner has domain expertise in the outsourcing and financial services market, particularly in ARM. It also has significant traction in media and entertainment, retail consumer goods and services, healthcare, utilities and energy, manufacturing, government, communications, insurance, performance marketing, BPO, and travel and hospitality.

CallMiner has nurtured a customer-centric culture with a focus on customer collaboration that helps feed product development. It has a vibrant user community of more than 2,000 members where customers and non-customers collaborate on shared business problems, exchange ideas, and share best practices. In addition, in late 2019, CallMiner conducted its annual NPS survey and scored a 64, marking

the fourth consecutive year of score improvement. This score is far higher than the industry average (21.2) for enterprise-level B2B technology vendors.

CallMiner operates on an annual subscription model and has developed a comprehensive customer success program to support recurring revenue, including a designated customer success director for each account, ROI playbooks for business objectives, and ongoing customer education and peer connections. Rather than do the work for clients through managed services, CallMiner works alongside the customer to outline corporate goals and how the CallMiner program can achieve targeted results to support those goals. This focus on customer success is demonstrated by the company's strong renewal rates and net dollar retention of 107% in 2019, evidence that customers are renewing and expanding their usage of the Eureka platform. CallMiner is analyzing 1.4 trillion words per year in the Eureka platform for more than 400 organizations served directly and through partners.

The company size has grown as well to support customer growth, with employee count up 40% in 2019.

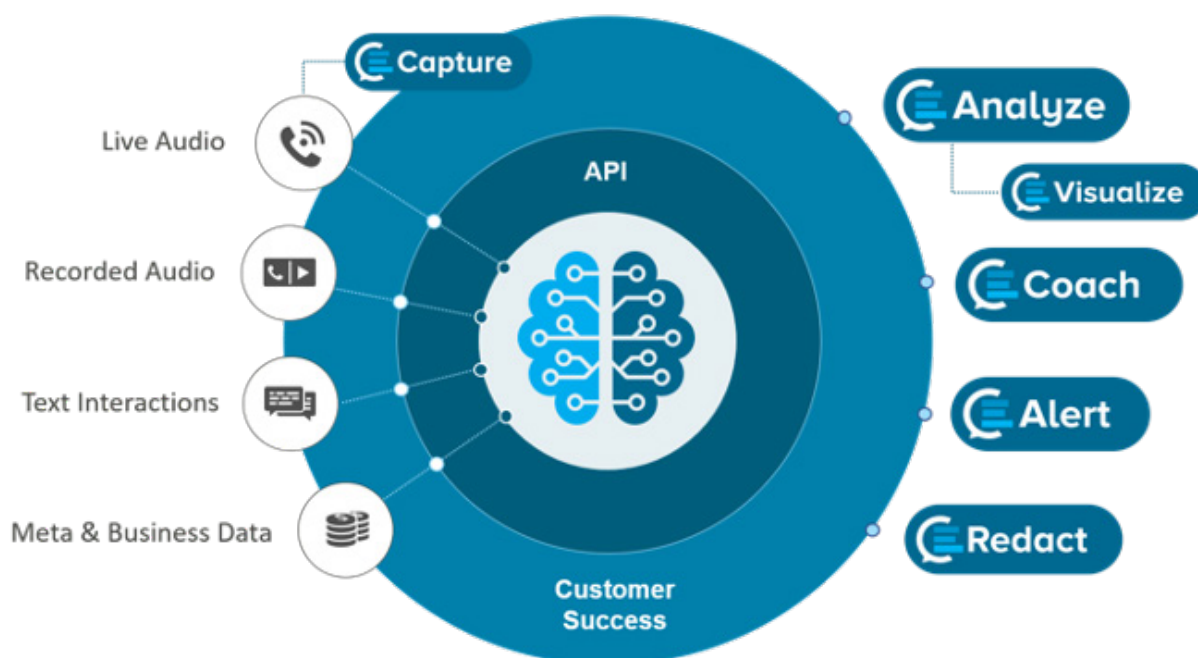
PORTFOLIO DESCRIPTION AND ANALYSIS

CallMiner's Eureka product portfolio spans end-to-end customer engagement analysis from real-time to post-contact analytics across all channels of customer conversations including calls, chat, email, and social media. The SaaS-based CallMiner Eureka platform consists of AI-enhanced engagement analytics modules that capture, transcribe, analyze, and produce insight from 100% of customer interactions. Exhibit 10 illustrates this.

CallMiner is a cloud solution with the ability to be deployed on-premise. It can be used as a complete analytics solution or as a data source to feed other systems through its API. The Eureka platform is agnostic to the source system that captures data, supporting integration with all market-leading call recorder, chat, and email systems and popular social networking sites. Eureka also supports

30 languages and dialects, with multiple languages certified with full PCI-compliant redaction. Across multiple industries, it meets or exceeds standards, including SOC2, ISO, and PCI, and it is in the process of becoming HITRUST certified.

EXHIBIT 10: CallMiner Eureka



Source: CallMiner

CallMiner has historically focused on contact center use cases and buyers with responsibility for agents, but over the past two years the company has expanded its portfolio to address a full ecosystem of customer insight areas through new products and strategic partnerships. CallMiner continues to support contact center needs by offering workforce automation tools that improve agent quality management, sales/collections optimization, CX, and compliance. However, it has started to focus more on bridging the customer insights gap that has existed between the contact center and other areas of business operations. CallMiner has made significant investments in CX solutions and partnerships to connect CX professionals with the interaction analytics insights from CallMiner products, including introducing new out-of-the-box content packs such as the [CX Solution Pack](#) and the [Emotion Solution Suite](#).

CallMiner has also announced strategic partnerships with leading CX platform vendors such as Qualtrics (SAP) and integrations with other top vendors such as Medallia. As an example, CX visibility from contact center conversation is presented within the Qualtrics user interface. Qualtrics users can measure unsolicited feedback from every contact center interaction as well as compare the remembered with the actual by comparing survey response with audio and transcription evidence for how an interaction occurred.

CallMiner solutions of note:

Eureka Analyze is CallMiner's core application for enterprise customer engagement analytics. Analyze captures the entire contact interaction, along with CRM and other data. CallMiner leverages AI and ML to analyze natural language patterns and then automatically categorizes and scores each interaction. For example, it can reveal what a call is about; whether the agent was in compliance, used proper language, or talked over the customer; or whether the customer was agitated or wanted to escalate. The interactions are scored across a number of customer-configurable criteria, including compliance, CSAT, and agent effectiveness.

Query creation is made simple using CallMiner's Semantic Building Blocks, auto-complete, and search suggestions. Fine-tuning and accuracy are achieved through category development tools and testing views. Rich insights about interactions are provided through an intuitive UI in a variety of formats including hierarchical tree views, tag clouds, or A/B speaker comparisons.

A particular CallMiner strength is its multichannel support that consolidates scoring for text-based interactions in addition to audio via telephony. Chat, email, SMS, social media, and survey response is available with consistent scoring metrics across all channels. In 2019, CallMiner enhanced its text analytics resources with additional UI features including a new emoji picker that works in conjunction with auto-suggest. For example, this makes it easy to identify all interactions where a caller may have expressed dissatisfaction and all text interactions with a "sad face" emoji.

Multichannel support extends to automated customer journey mapping. Analyze, generates "multi hop" maps that can track, for example, a customer who started with an email, engaged with chat, and followed up with 3 calls. The vertical axis of the map is self-configurable with attributes such as auto-scored CSAT for unique CX insight.

Solution Packs provide users with a jump start for their speech analytics program with out-of-the-box content packs designed to provide faster speed to intelligence. The packs include phrases, acoustic measures, and scoring metrics built by CallMiner BI analysts to support instant insight for specific use cases; users can fine-tune them for specific company needs. Solution Packs are available for customer service, sales, collections, chat, CX, and emotion use cases. The CX Solution Pack was introduced in early 2019 to address growing interest in interaction analytics insight outside of the contact center by CX professionals and marketing organizations. The CX Solution Pack includes the CmX Quality score (measuring effectiveness, ease, and emotion) and CmX Loyalty score (measuring retention, enrichment, and advocacy), which provide unsolicited feedback that complements other solicited CX efforts for better VoC and VoE insight. In late 2019, CallMiner announced the beta release of the Emotion Solution Suite, which provides out-of-the-box emotion categorization based on ML clusters, as well as pre-built visual dashboards to use in Eureka Visualize. The Emotion

Solution Suite helps users monitor emotion trends over time for all channels, including emoji support; it was released to full production in May 2020.

Eureka Coach is a cloud-based performance management portal that automates feedback to agents, supervisors, and managers. The solution features role-based graphical dashboards with agent and supervisor views of scoring by individual, team, and contact center-wide performance, as well as directed actions from supervisors to agents, and bidirectional feedback between agents and supervisors. It can provide personalized evidence for coaching with PCI-redacted call playback and the ability to tag specific sections with coaching notes. Eureka Coach utilizes the AI-driven, automated call categorization and predictive call scoring configured in Eureka Analyze.

Eureka Alert is a platform that combines AI-driven automated transcription, alerting, and redaction. This allows supervisors to monitor and manage agent behaviors by combining real-time speech recognition with automated language and acoustic scanning to provide notifications for the presence or absence of specific language or acoustic events. It also provides automated removal of

PCI-sensitive authentication and cardholder data from incoming call recordings or call recording archives. Alerts are delivered through an API for integration into agent or supervisor desktops, dashboards, or messaging systems for real-time monitoring or next-best-action guidance while calls are in progress.

Eureka Alert leverages the core Eureka data processing engine that was enhanced in early 2018 to support 10 times the capacity of the previous platform, significantly improving the scale of real-time capabilities by allowing users to monitor hundreds of thousands of agents concurrently. Alert uses high-quality, speaker-separated audio captured at the source to produce real-time streaming transcriptions that substantially increase alerting speed. Alert is also fully integrated into the Eureka Analyze platform to provide faster post-contact analysis with AI-fueled categorization and scoring of transcribed audio.

As an API-based module, data and notifications from Alert can be integrated not only into agent and supervisor tools, but also into tools across the wider business such as BI and CRM systems. Access to these customer insights can inform a range of business programs such as sales, marketing, compliance, and CX with real-time understanding of the VoC. This allows businesses to pivot or amplify strategies based on quicker access to customer intelligence.

Eureka API is a programmatic interface for accessing and sharing analytics and transcription from the Eureka platform. Geared for developers, data scientists, and partners, it provides a comprehensive set of APIs for contact/data ingestion, and data extraction for app creation and development.

Eureka Redact removes PCI and sensitive data from call audio and transcripts to maintain compliance both for ongoing calls and historical data sets.

Eureka Xchange is an app exchange for Eureka 10 speech analytics users that complements CallMiner's existing libraries of solution packs. Xchange offers download of additional automated categories and tags, including categories such as call openings and website issues.

Eureka Capture was added in 2019 to capture contact center audio in real time with no impact to existing call recording. High-quality, speaker-separated audio is securely sent to the CallMiner Eureka platform for real-time and/or post-call analytics.

Eureka Visualize, also introduced in 2019, adds graphical data exploration, discovery, and presentation as an upgrade component for Eureka Analyze users. Visualize, powered by Tableau, allows users to select any data point from Analyze and drag and drop to create visuals to present their engagement analytics story. It also allows for graphical display of before-and-after assessments to help drive WFM adjustments.

INFUSING AI ACROSS THE CALLMINER PORTFOLIO

CallMiner has been diligently working on infusing technologies under the umbrella of AI for years: early on with products such as speech analytics but increasingly in all areas, including coaching and automation. The foundation of the Eureka product suite is AI-driven category mining and omnichannel analysis of the words, acoustics, and sentiments from interactions.

CallMiner maintains a permissioned repository of federated contact center data contributed by a significant portion of customers spanning years of service. This anonymized body of conversational intelligence from multiple industry segments fuels CallMiner training for ML and research efforts.

The platform uses semi-supervised and unsupervised ML to reveal patterns and concepts based on contextual categories. CallMiner alone (with more developed by customers) has developed more than 12,000 categories related to customer interactions and contact center operations, from mining millions of voice calls and online chats across industries.

Eureka Analyze provides AI-driven automatic categorization that presents context and insight into CX, and aspects of agent performance. For example, the Emotion Solution Suite applies unsupervised ML to reveal the emotional state of customers and contact center agents based using CallMiner's federated training data. It also includes customizable automated scoring of agents to provide agents and supervisors with objective performance data in context with other team members, QM, and back-office operations. This includes more granular performance metrics that include aspects such as empathy, ownership, politeness, and understandability during interactions that can be used to enhance coaching and training opportunities.

SALES AND SERVICES MODEL

While CallMiner has several customers with well over 10,000 agents and is seeing increased adoption within the enterprise space, its highest concentration of customers is in the mid-market (between 100 and 2,000 agents). However, CallMiner has partners with customers that have as few as 10 agents as well. Approximately 90% of its customers are now in the cloud.

CallMiner sells directly and through channel partners (both traditional resellers and as an embedded offering). Resellers include Sitel, Praxidia (a Teleperformance company), Nuance, Aspect, and Five9.

CallMiner also has partnerships to enhance its product capabilities. It recently formed a partnership with Qualtrics, a leader in CX management cloud technology, to pair CallMiner's contact center engagement analytics with enterprise feedback solutions to provide comprehensive VoC insights within a cloud-based integrated offering. CallMiner has also partnered with Morae Global to deliver a regulatory risk mitigation and compliance solution that enhances traditional compliance approaches by utilizing sophisticated speech analytics technology to analyze audio interactions and uncover potential noncompliant behavior.

CallMiner offers an interesting business model for partners, selling inventory of data mining hours rather than selling on a per-agent basis.

STRENGTHS	CONCERNS
<p>Strong CSAT reputation is backed by a supporting business model. The company also enjoys a net dollar retention rate of over 100%.</p>	<p>As a best-of-breed, pure-play vendor, CallMiner faces competition from entrenched contact center solutions and WFO suite providers, as well as an emerging set of contact center providers integrating AI and maturing technologies into their solution sets.</p>
<p>Open and flexible applications provide users independence to configure the system for their needs without reliance on costly service engagements. The majority of CallMiner's customers require very little professional services engagement.</p>	<p>While CallMiner doesn't provide fully featured gamification capabilities on its own, data from the Eureka product suite can be pulled into third-party gamification tools.</p>

STRENGTHS	CONCERNS
<p>As a pure-play vendor, CallMiner has extensive expertise in gaining insight through customer engagement analytics and is 100% focused on customer engagement analytics for its revenue stream.</p>	
<p>Multichannel support consolidates scoring for speech and text, enabling one-click comparison between survey responses and conversational analytics. It also provides multichannel customer journey mapping.</p>	
<p>CallMiner Eureka is optimized for hosted delivery, with implementation times in 10 to 20 days.</p>	
<p>CallMiner provides easy-to-use, flexible, and customizable scorecards that enable any number of scorecards for agents, groups, or KPIs. Scorecards allow users to quickly see results, yet deep dive into any level of detail. Scorecards also can be embedded into areas such as training.</p>	
<p>CallMiner Eureka enables organizations to improve performance and extract customer insights by automatically transcribing 100% of customer conversations into structured data and intelligence. This capability reduces the time and effort required by business analysts to extract actionable and meaningful intelligence.</p>	

CUSTOMER RECOMMENDATIONS

Best Fit

Significant Deployments. CallMiner has some of the largest customer engagement analytics deployments in the industry, including two of the largest BPOs in the world, leading global banks, some of the largest telecommunications companies, and a media and entertainment giant. The system uses transcription technology to convert speech to text. This enables smaller data footprints, faster search response times with greater precision, true discovery of unknown trends, and seamless integration of text-based communications in the same interface. Full transcript approximation also allows users to preview every conversation without having to listen to the full audio recording.

User Control. CallMiner products are designed to keep control in the hands of the user without requiring a lot of professional services. CallMiner calls this “velocity to vision,” which means providing customers with tools to be able to self-manage, along with out-of-the-box functionality. CallMiner works to educate analysts and program managers to set up their Eureka program to support corporate goals and continually evaluate and adjust as the program matures.

Omnichannel Support. CallMiner’s ability to not only integrate with a range of text-based communication channels but also consolidate scoring and analytics without channel boundaries makes it a good choice for organizations challenged with channel integration. Multichannel customer journey mapping that’s auto-generated for customers with appropriate detail to confirm an “issue journey” is an outstanding resource for effective root cause analysis as well as for customer experience professionals.

User Community. CallMiner fosters a community of users as additional support. Its user community, **Engagement Optimization**, boasts more than 2,000 members, with content and information for customers and non-customers. Best practices, new ways of using the products, and other information are shared within the community, lessening the need for professional services consulting work. The CallMiner LISTEN conference is an annual event at which customers share their success stories and the company offers best practice sessions and workshops focused on getting the most out of customer engagement analytics. This event is also open to non-customers and analytics professional worldwide. CallMiner’s client success directors facilitate strategy sessions, help drive ROI, and steer targeted analysis to help create successful customers.

Out-of-the-Box Content. CallMiner's out-of-the-box Solution Packs provide users with tested content to get their speech analytics programs started without having to build from scratch or rely on managed services. CallMiner introduced new Solution Packs in 2019 for CX and emotion to complement the existing Solution Packs for sales, customer service, and collections. The packs include a set of categories and scorecards that have been tested over the years by both the CallMiner team and customers. Users can tune as much as needed to tailor to their business.

Caution

Product Suites. The trend in the industry is for adoption of suites of products. Some customers may prefer working with a single-vendor solution. In addition, over the past several years, significant advancements in analytics have been made by competitors, closing the gap on functionality and ease of use. However, CallMiner's API provides interoperability with major tech platform vendors and other solution providers.

Industry Consolidation. The impact of industry consolidation by partners can impact growth opportunities for CallMiner.

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THE FROST & SULLIVAN STORY

Frost & Sullivan, the Growth Partnership Company, helps clients accelerate growth and achieve best-in-class positions in growth, innovation, and leadership. The company's Growth Partnership Service provides the CEO and the CEO's growth team with disciplined research and best practices models to drive the implementation of powerful growth strategies.

Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from more than 40 offices on 6 continents to clients accelerate growth by:

- Delivering the broadest industry and market coverage of any research and consulting firm worldwide—10 industries, 35 sectors, and 300 markets—ensuring that clients understand their industry challenges and opportunities, growth opportunities in aligned industries and competitive pressures from previously unknown sources;
- Providing a 360-degree perspective, integrating 7 critical research perspectives to significantly enhance decision-making accuracy and lower the risk of implementing growth strategies with poor return;
- Leveraging extensive contacts in the value chain, including manufacturers, distributors, end users, and other industry experts;
- Offering a global perspective of opportunities and threats built on regional expertise;
- Documenting best practices worldwide that overcome tough business challenges; and
- Partnering with the client's team to ensure success.

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