



Omdia Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2020–21

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Summary

Catalyst

The penetration of cloud-based contact center solutions into the contact center market has been growing dramatically as enterprises continue to acquire new customer engagement solutions or replace their existing premises-based contact centers. Cloud solutions are growing in popularity and gaining an increasingly significant share of the market as their feature sets and flexibility begin to match or surpass those of legacy premises-based systems. Cloud contact center vendors are spending R&D dollars to further develop their solution capabilities internally while also making strategic acquisitions in the customer engagement market space to enhance and broaden their offerings. It can be difficult for enterprises to effectively navigate the broad array of available cloud contact center offerings in this rapidly evolving marketplace. The choices are plentiful, and cloud contact center solutions and vendors are diverse. They include offerings from legacy contact center vendors, cloud-only multitenant players, emerging niche solution vendors, and large telecoms and outsourcing providers.

This report reviews nine of the leading cloud contact center solutions, with emphasis on the ability of providers to handle multichannel customer interactions and connect with customer and company data through analytics. This report compares solutions based on the strength of their technology platforms, the views of their customers, and the market impact that each company currently has in today's very competitive environment. Omdia has compiled a select group of vendors for comparison based on their ability to offer full voice-call routing in the cloud and to route at least one additional interaction channel.

Omdia view

In today's competitive marketplace, it is crucial that contact centers regularly add new and advanced services to ensure agents can respond to customer inquiries from across multiple channels including voice, chat, SMS, social media, web, and mobile platforms to make interactions smoother and improve first-contact resolution (FCR) rates. Recently, cloud technology has gained a major traction boost in the contact center marketplace because businesses have been required to move workers home because of the "shelter-in-place" government edicts driven by the COVID-19 pandemic. Companies sought a solution that would ensure business continuity through these very uncertain times. As many employees became home workers, cloud-based contact center services enabled the required business continuity and gave access to the latest customer engagement software functionality and feature updates in a way that premises-based contact center solutions could not. Omdia assumes that a significant portion of the remote operations forced into action by the pandemic will not be returning to a premises-based solution; this will provide a permanent uptick in the cloud contact center growth rate as many agents continue working in the cloud to do their jobs.

Enterprise management now realizes that cloud solutions can have multiple advantages that were previously not fully realized. These include the transformation of the traditional contact center payment model from a large capital expenditure (capex) to an operational expense (opex) and the fact that cloud contact centers can be deployed much more rapidly than those implemented on the customer's premises. Cloud solutions give organizations more flexibility to expand or contract the

number of agents based on the fluctuating requirements of the company or to switch customer interaction management across a multitude of channels. These advantages, plus the now proven improvements in the security, scalability, and reliability of cloud solutions, mean that cloud contact centers are now an option for all sizes of contact centers, as indicated by their rapid growth across the globe and in a variety of vertical markets. Initially based on single-tenant platforms, today's multitenant solutions have become the standard, and contact center managers are rapidly adopting the advanced and robust capabilities as well as the economic advantages of these platforms.

To date, many enterprises have faced challenges in switching to the cloud from their legacy premises-based solutions. Some were restricted by the familiarity of their existing solutions, a desire to fully depreciate existing on-premises systems, or a basic hesitation to switch to an entirely new multitenant offering. As a result, there will continue to be an opportunity for vendors to sell hybrid solutions to larger organizations that want the advantages of someone else managing their platform while they retain some control and knowledge of the location and security of their customer data. Professional services around migration and ensuring the change-out occurs with minimal downtime will be essential for these contact centers in their transitions to the cloud environment.

The increased acceptance of cloud offerings among enterprises and the entry of new vendors to the market annually means that the competitive landscape for cloud contact center solutions has become very complex. Enterprises often require assistance in finding and selecting the appropriate platform to meet their needs while considering the size of the contact center required, the optimum speed of deployment, channel requirements, and depth of capabilities that will impact their decision. This Omdia Decision Matrix is intended to provide an in-depth view of several of the leading cloud contact center vendors to assist enterprises in finding the most suitable platform(s) for their needs.

Key findings

- The move to contact center cloud technology is becoming increasingly common across all vertical markets and contact center sizes, and even in the outsourcer market segment of users.
- Multitenant cloud solutions are more mature, secure, and fully featured than ever before, making them viable for even large contact centers with thousands of seats.
- The current challenge for many cloud contact center providers will be global expansion for the dual purpose of serving multilocation global clients and maintaining revenue growth.
- Legacy vendors offer a choice of deployment methods that will match the needs of those contact centers wanting to make a gradual switch from premises-based systems to a hybrid setting and eventually to the cloud, when required.
- The cloud contact center vendor landscape includes companies with varied backgrounds, including pure multitenant cloud providers, traditional premises vendors with hybrid and newer cloud offerings, telecoms carriers offering the products of partners, and outsourcers turned technology providers.
- Enterprises must decide whether they will choose a multitenant public cloud solution or host their solution in a private cloud depending on several factors, including data privacy, security, tolerance for risk, and often other vertical-market-specific requirements.

- Newer cloud vendors, which tend to be cloud-only providers, are ramping up the competition with advanced multichannel interaction capabilities and other attractive services and capabilities such as artificial intelligence (AI), conversational interactive voice response (IVR), big data, and Internet of Things (IoT) interoperability.
- Omdia has placed three vendors in the leader category: in alphabetical order they are Five9, Genesys, and NICE inContact. These vendors have a range of cloud approaches; all have a great deal of experience and proven reliability in delivering secure, advanced services. The leaders all have a good base of contact center customers as well as advanced multichannel offerings and strong corporate strategies.
- Bright Pattern, Cisco, Talkdesk, and Vonage are all worthy challengers with strong technological capabilities and offerings that may also meet the needs of contact centers requiring specific functionality and feature sets and with other business-specific needs.
- Worldline and 8x8 are rated as prospects that are also Tier 1 suppliers, typically aiming to meet the requirements of a particular type of customer in terms of size, vertical market, or special integrated unified communications / contact center (UC/CC) capabilities, and so on. As Tier 1 offerings these solutions should be explored as part of an overall technology selection.

A group of leading cloud contact center companies was selected to participate in this Omdia Decision Matrix study. Omdia recommends that buyers consider all nine vendors in this report, looking internally to determine the unique characteristics of their requirements and their strengths and weaknesses in order to best match their needs to a potential cloud contact center provider. Omdia recognizes that, increasingly, the differences in technology capabilities between vendors in the leader category and those in designated challengers and prospects categories are relatively slight. Variables including vertical market expertise, security, reliability, interoperability, and multichannel/omnichannel capabilities, as well as vendor product roadmaps and strategic plans, should weigh heavily in choosing the vendor that can best meet your company's specific criteria for a long-term customer engagement solution partner relationship.

Vendor solution selection

Inclusion criteria

Omdia selected vendors for comparison based on their ability to offer full voice-call routing in the cloud. All the selected vendors provide multichannel customer service, meaning they offer a full voice-call routing channel in the cloud with the capacity to route at least one interaction channel beyond voice. Selected vendors have a minimum of 20,000 cloud-based agent seats globally, and some also provide hybrid and single/multitenant cloud solutions alongside their existing premises-based contact center platform. The vendors in the Omdia Decision Matrix evaluation own their own technology, offer direct sales to end users, and host their services in their own data centers or in well-established, well-known data center provider facilities or in a combination of the two. They were evaluated not only on their technical strengths but also on their market impact and the opinions of their customers across a broad set of execution categories.

To better understand the competitive dynamics in the cloud contact center market, Omdia evaluated and profiled the following broad collection of cloud contact center providers:

- 8x8
- Bright Pattern
- Cisco
- Five9
- Genesys
- NICE inContact
- Talkdesk
- Vonage
- Worldline

Exclusion criteria

In addition to the nine vendors included in this study, Omdia also considered Avaya, Amazon, RingCentral, Twilio, and a few others, but they were not included in the detailed scoring because they do not currently meet all of the inclusion criteria for the Omdia Decision Matrix, had products that are in development stages and not yet generally available, have not been marketed/sold for a significant length of time, could not provide a fully completed application, or chose not to participate in the study for other reasons.

It should be noted that the list of cloud contact center vendors included in this report is far from exhaustive. Many new and emerging cloud players in the market offer competitive solutions. The report also excludes many of the outsourcers and telecoms organizations that play a prominent role in the contact center services market, leveraging many of the platforms from the above organizations and from others in order to provide contact center services. Leading service providers AT&T, BT, Telefónica, and Verizon all offer a range of contact center cloud services that meet the needs of many different types of enterprise. Some UC providers also offer integrated cloud contact center tools as well as contact center software to their UC customers but do not normally lead with their contact center offerings to their non-UC customers.

Contact centers seeking a cloud solution might also review some of the lesser known or relatively new cloud contact center players that have unique capabilities and market strengths that may also fit their needs: these include CenturyLink, Content Guru, Magnetic North, and Noble System.

Methodology

This report provides a summary of vendors' cloud contact center capabilities based on a quantitative assessment of their market impact and execution scores and the technology features that they support. Omdia selected vendors that can offer full voice-call routing (i.e., automatic call distribution [ACD]) in the cloud, that can route at least one interaction channel beyond voice, and that have at least 20,000 cloud-deployed agent positions worldwide. Although some additional vendors were able to meet these criteria, they were unable or unwilling to provide enough information for a full evaluation or chose not to participate in the study.

All included vendors were asked to complete an in-depth technical assessment checklist questionnaire and to provide market and revenue data and a list of 10–15 customers to be surveyed by Omdia about their vendor’s capabilities and effectiveness in serving its clients. Omdia used this data alongside in-house knowledge to determine the results of the Decision Matrix. The detailed scores underpinning the rating in the *technology*, *execution*, and *market impact* sections of the Decision Matrix can be found in the included individual vendor radar graphs and in the Appendix.

Technology/service assessment

In this assessment measurement, Omdia developed a series of features and functionality that would provide differentiation between the leading solutions in the marketplace. The criteria areas identified for multichannel cloud contact center are

- **Core capabilities:** the core requirements for call handling and interaction routing, including IVR and workforce optimization
- **Interoperability:** the ability of the platform to support time-division multiplexing (TDM) and IP switching, open standards, external IVR applications, and CRM connections
- **Reliability and scalability:** the degree to which the service provider offers outage abatement tools and assists clients with deployments of various sizes and the flexibility of different hosted configurations and deployment times
- **Administration and monitoring:** the vendor’s capabilities in system management, configuration, performance monitoring, and quality management
- **Platform:** the vendor’s capabilities in tenant separation, client upgrading, network connectivity, and telephony
- **Services:** the offering’s professional services components, customer support options, service level agreement (SLA) provisions, and pricing models
- **Solution maturity:** how long the company has been in the market with a cloud-based offering, how many customers the vendor has acquired, and how deeply the partnership ecosystem is built
- **Security:** the physical integrity of the platform, particularly with regard to data center and agent desktop security and compliance with regimes such as PCI
- **Multichannel:** the capabilities offered by the vendor in handling nonvoice interactions, particularly email, web chat, web collaboration, social media, mobile, and cross-channel communications from end-user customers
- **Solution breadth and depth:** how well each part of the vendor works together to deliver a fully functional cloud contact center platform; this takes into consideration integration with different partners and the availability of various deployment options
- **Vendor strategy:** each market participant’s global presence, product/technology roadmap, go-to-market plans, and brand equity in the cloud contact center space

Execution

The execution score of a vendor and its solution is determined by the responses of 7–10 of each vendor’s end users collected in a recent Omdia-managed email survey. The execution score is measured across the following 10 areas, each of which is scored between 1 and 10 in the survey:

- **Product quality:** an assessment of customers' views of the overall quality of the platform offerings and the services received
- **Hosting reliability:** an assessment of the vendor's ability to maintain effective service levels over time
- **Features and functionality:** the depth of features and capabilities within the products
- **Multichannel innovation:** an assessment of customer perception of the adequacy of the vendor's nonvoice interaction capabilities and their ability to adapt quickly to new tools
- **Usability of products:** an assessment of whether the agent desktop and supervisor administration tools are user friendly
- **Ease of integration:** an assessment of whether the contact center platform is flexible and easy to integrate with additional systems such as CRM, IVR, and analytics applications
- **Pricing:** an assessment of whether the system provides value and is competitively priced
- **Customization:** an analysis of how readily the vendor works with clients to integrate and customize its offering to each unique deployment
- **Professional services:** an assessment of the ability of a vendor to provide services, for example, to help a customer migrate from a legacy platform or add new channels to its system
- **Deployment time:** an assessment of the speed and ease of installation

Market impact

The global market impact of a solution is assessed in this dimension. Market impact is measured across six areas, each of which has a maximum score of 10:

- **Revenue:** each vendor's last full year (fiscal 2019) cloud contact center product and service revenue was calculated as a percentage of that of the market leader(s).
- **Revenue growth:** each vendor's revenue percentage growth was estimated for the financial years 2018–19 relative to the growth rate of the fastest-growing solution(s) in the market.
- **Geographical penetration:** where possible, Omdia determined each vendor's revenue reach in three regions: the Americas; Europe, the Middle East, and Africa (EMEA); and Asia Pacific. This revenue was calculated as a percentage of the market-leading solution's revenue in each region. Substantial penetration of all three regions was given additional weighting. Therefore, companies with substantial penetration across several global regions scored highest.
- **Customer size:** Omdia determined the percentage of each vendor's revenue from contact center deployments across four size bands: fewer than 100 agents, 100–499 agents, 500–999 agents, and 1,000 agents and above. This revenue is calculated as a percentage of the revenue of the market leader in each region. The vendor's overall customer size-band score is the average of these three values with additional credit for reach into multiple segments.
- **Vertical penetration:** Omdia determined each solution's revenue from the energy and utilities; financial services; healthcare and life sciences; manufacturing; media and entertainment; public sector; retail, wholesale, and distribution; telecoms; and travel and transportation verticals along with "other" (primarily business process operations [BPO]) businesses. This revenue is calculated as a percentage of the market leader's revenue in each

vertical. The solution's overall vertical penetration score is the average of these values with an emphasis on vendors penetrating the largest numbers of verticals.

- **Recognition:** this is a measure of the portion of the surveyed customers that reported familiarity with the vendor's offerings as a cloud contact center provider.

Omdia ratings

Omdia also provides guidance for enterprises looking to deploy cloud contact center solutions and places vendors into three categories— *leader*, *challenger*, and *prospect* —using the aggregated results of the Decision Matrix. To be clear, the solutions compared in this report are top offerings in the cloud contact center marketplace, and all are competitive offerings worthy of consideration. Because Omdia realizes the value from a hosted contact center deployment is critically dependent upon the solution's fit with the enterprise's overall customer interaction strategy, we recommend that a decision to purchase one solution rather than another should be based on a broad array of factors. These include (but are not limited to) the degree of alignment between the solution's features and functionality and the specific objectives of the enterprise's customer interaction and contact center strategy. As a result, Omdia's recommendations of short-list, consider, and explore should be considered only within the context of an enterprise's specific solution requirements:

- **Market leader.** This category represents the leading solutions that Omdia believes are worthy of a place on most cloud contact center technology selection short lists. The vendor has established a commanding market position with a product that is widely accepted as best of breed.
- **Market challenger.** The solutions in this category have a good market positioning and are selling and marketing the product well. The products offer competitive functionality and good price-performance proposition and should be considered as part of the technology selection.
- **Market prospect.** Solutions in this category are typically aimed at meeting the requirements of a specific type of customer. As a Tier 1 offering, the solution should be explored as part of the overall technology selection process.

Market and solution analysis

Omdia Decision Matrix: Cloud contact centers, 2020–21

Although cost may be the initial starting point for an enterprise to consider when deploying a cloud contact center, it should also consider using technology to differentiate the competitors. A cloud solution offers a way for an enterprise to gain access to the latest multichannel capabilities and tools without having to replace its systems. **Using a cloud solution, an enterprise can easily adapt to customer trends and behaviors as customers switch to digital web and mobile channels to find resolutions to their issues. Instead of having to deploy a new tool from scratch, the enterprise can regularly add new channel modules without needing to overhaul its contact center solution.** Several cloud contact center providers are now implementing a microservices approach to their product

application enhancements, making the addition of leading-edge features and functionality much faster than in the past and an ongoing process rather than having scheduled release dates.

In a cloud environment, if customers are using additional channels such as web chat to communicate, the enterprise will need to reassess those channel capabilities and ensure that customer data can be linked with traditional voice records. Agents need to be prepared to handle queries in those other channels and tailor their responses accordingly. An enterprise might decide to migrate a small number of agents at first to handle new channels and then gradually broaden the number of agents with that channel's capabilities. A cloud-based customer service infrastructure provides more flexibility in adding new channel features and functionality gradually as the customer requires them.

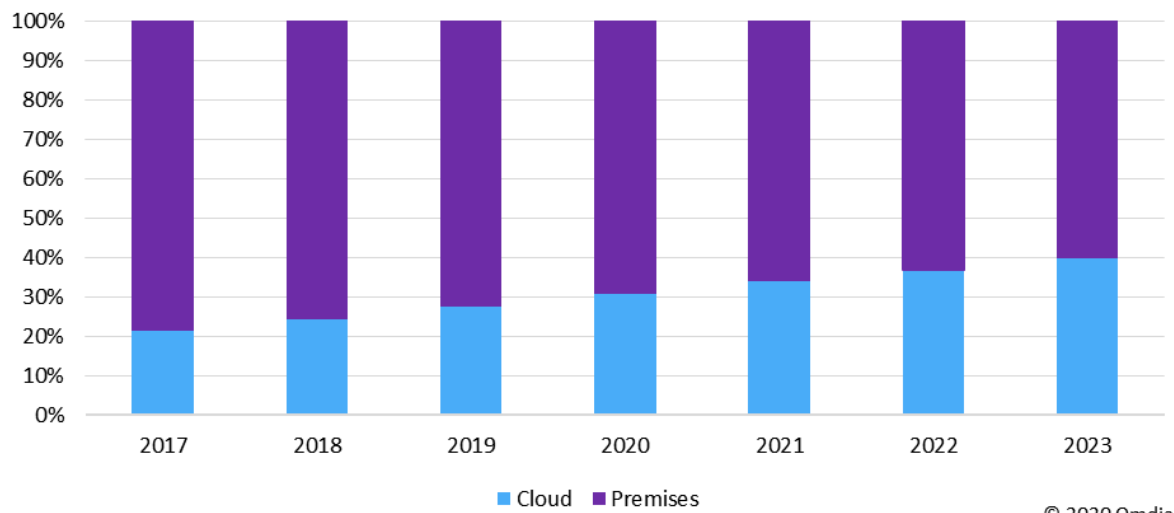
Cloud contact centers are typically faster to deploy and easier to scale than premises-based systems, both upward and downward, with reduced administration and complexity for adding or removing new agents, and scaling for changing seasonal demands. With cloud solutions, an enterprise can plan for a smaller initial outlay, counting on more flexibility to trial new channels and capabilities down the road. Migration can also be staged with less impact on existing tools and staff.

When selecting a cloud contact center vendor, an enterprise should consider how the potential solution can help it to add new functionality in stages as needed. Vendor roadmaps, technology partnerships, and investments in cloud infrastructure and security capabilities should all be reviewed as part of the selection process. This is especially true when considering offerings from legacy-premises-based solution vendors that have entered the cloud marketplace through internal development or acquisition. Technology providers offering both premises-based and cloud or hybrid offerings need to explain how their migration and R&D strategies will affect clients going forward.

As Figure 1 shows, a strong growth is forecast by Omdia in the penetration rate of cloud-based agent seats in the worldwide contact center marketplace through the year 2023. The forecast penetration of global cloud contact center seats almost doubles from 21.3% in base year 2017 to 39.7% in 2023. This forecast growth adds importance to the need for a method to distinguish between vendor solutions going forward.

Figure 1: Global cloud-based agents seat penetration, 2017–23

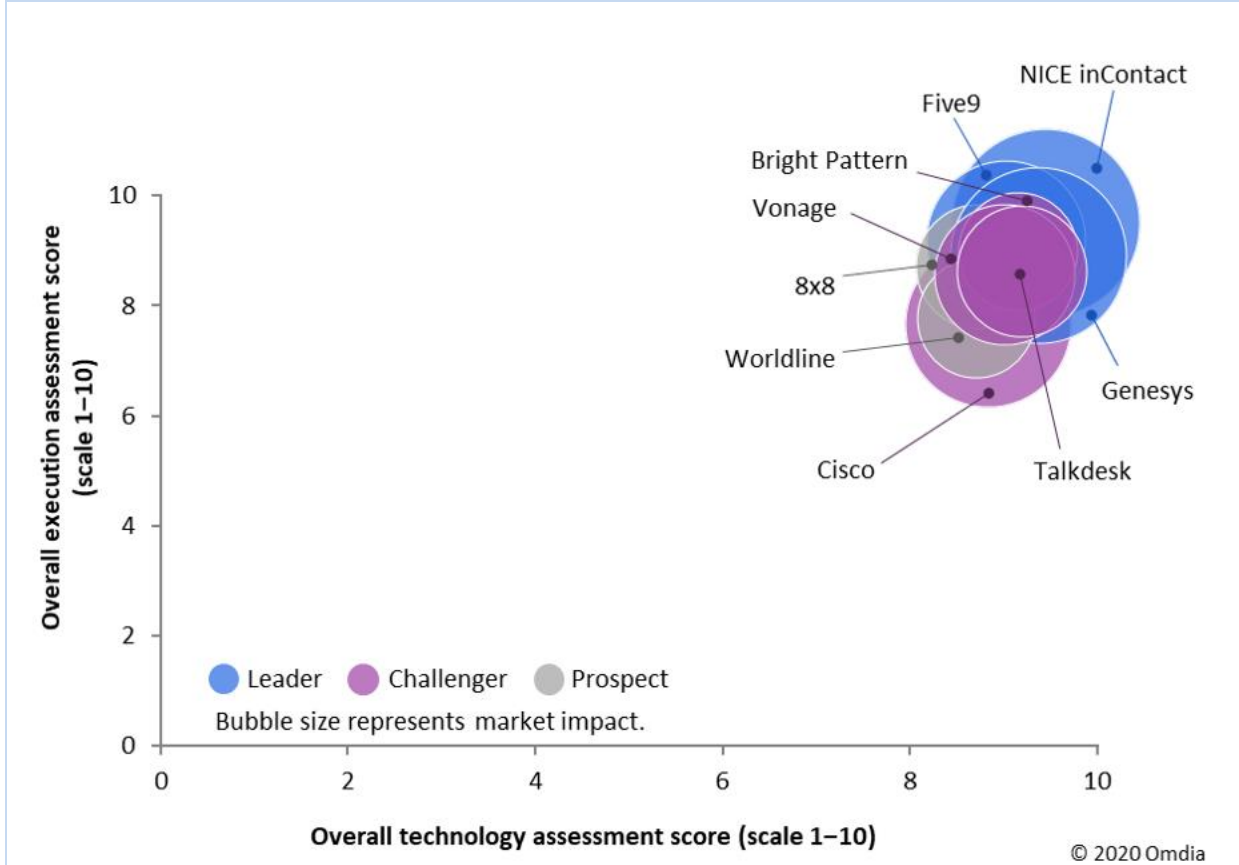
Percentage of global agent seats in the cloud



Source: Omdia

Figure 2 depicts the leading vendors in a bubble chart. The average scores from the technology assessment, execution, and market impact analysis were used to plot the vendor position and size on the graph.

Figure 2: Omdia Decision Matrix: Cloud contact centers, 2020–21



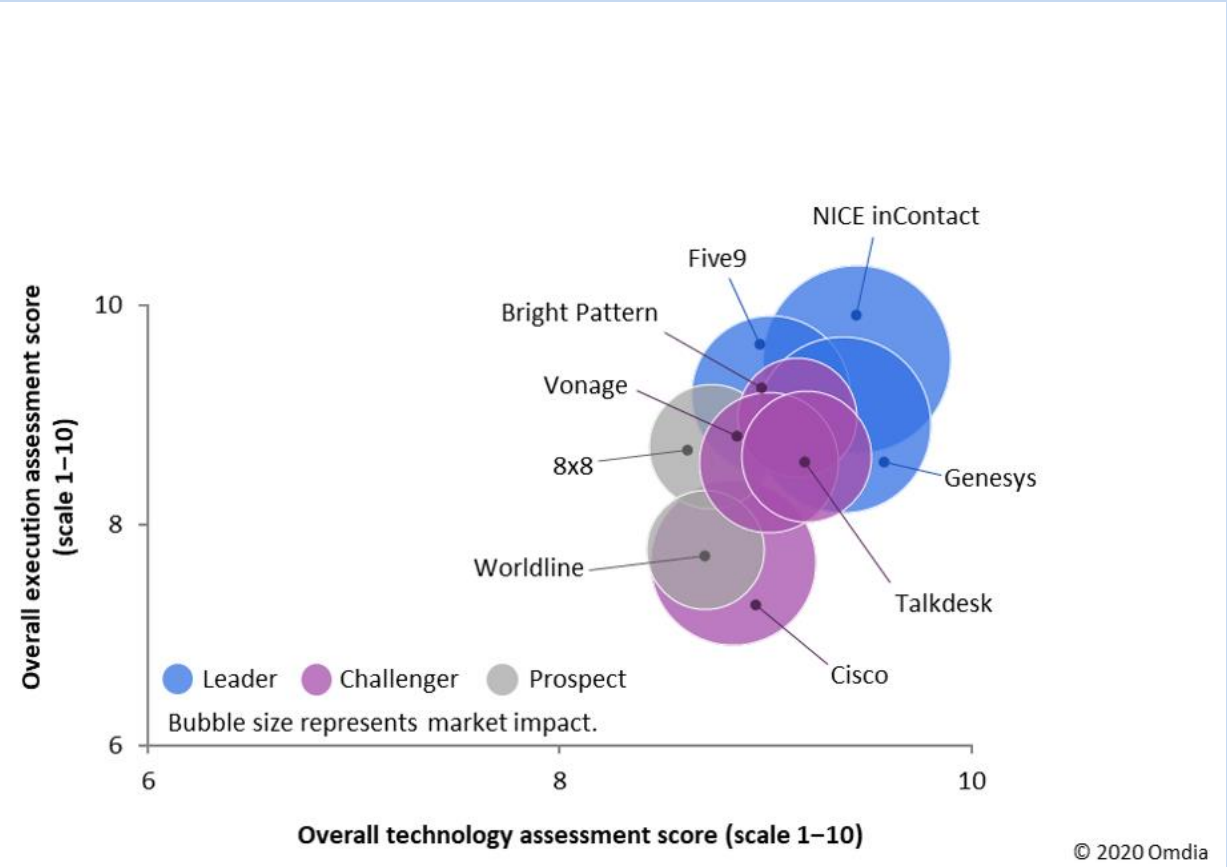
Source: Omdia

The closeness of the scores for all the rated vendors indicates an industry where fierce competition has resulted in a series of baseline technical capabilities being table stakes for market entry.

Differentiation is increasingly based on the market segment, the companies’ target customers, the quality of consultative professional services, the effectiveness of channels, and the degree of integration with other related applications and technologies. Most leading cloud contact center vendors are moving toward feature parity with each other and with their premises-based competitors, at least those that offer a cloud option. The size of the bubbles in this and the following chart indicate the relative market impact comparisons of the various companies, which consider total cloud revenue, annual revenue growth, customer recognition, vertical and geographic market reach, and average customer seat size.

As a result of the close scoring, the leaders were determined by the average score of their technical assessments, execution assessments, and market impact scores, which ranged from 8.4 to 9.0 out of a possible 10. Thus, Omdia rated NICE inContact (9.0), Genesys (8.7), and Five9 (8.4) as leaders; Cisco, Vonage, Talkdesk, and Bright Pattern, very close behind and tightly clustered with average scores between 7.8 and 7.9, as challengers; and 8x8 (7.6) and Worldline (7.2) as prospects based on their average scores. Figure 3 shows the scores in an expanded version of the Decision Matrix in which the market gradations are more apparent.

Figure 3: Expanded view of Omdia Decision Matrix: Cloud contact centers, 2020–21



Source: Omdia

Table 1: Omdia Decision Matrix: Cloud contact centers, 2020–21

| Market leaders | Market challengers | Market prospects |
|----------------|--------------------|------------------|
| Five9 | Bright Pattern | 8x8 |
| Genesys | Cisco | Worldline |
| NICE inContact | Talkdesk | |
| | Vonage | |

Source: Omdia

Worldline Profile

Worldline's entry into the contact center market and the development of the company's WL Contact solution began in the mid-1990s, when Worldline, capitalizing on its strong position in the financial services marketplace in Europe, saw an opportunity to add value to customer contact through the voice channel and other customer interaction technologies such as IVRs, voice biometrics, customer self-service, ACD on a virtual contact center, and outbound sales and service capabilities. This customer engagement technology development continued through 2014, when Worldline implemented a 2,000-seat multisite ACD and IVR solution handling more than 20 million calls per year, and then in 2016 with the international multichannel deployment of voice, email, and IVR for 1,000 agents across three continents. In 2017 Worldline got involved in omnichannel deployments, and in the past three years it spread deployments into the UK, the US, and Germany and rolled out omnichannel and AI deployments to 20,000 agents throughout France. Worldline has now developed into a world-class cloud contact center provider with a focus on the higher-agent-count marketplace.

Worldline has a major focus on the high end of the enterprise marketplace. Today Worldline boasts of supporting a major financial institution client that serves 32 million customers, via 52 million incoming calls and 18 million emails annually, enhanced by a dedicated Worldline team of 35 people. The Worldline WL offering stands up well to the other competitors compared in this analysis. Strengths are cited in the areas of administration and monitoring, overall platform, multichannel, solution depth and breadth, and overall vendor strategy. In the execution category, which is based on the customer survey conducted by Omdia as part of this analysis, Worldline WL rates around the average of all offerings in the areas of multichannel integration, ease of integration, and customization capabilities. Areas scored by customers as slightly under average were deployment time, product quality, usability of product, and hosting reliability. In the category of market impact, the Worldline WL cloud contact center product scored at the maximum score for the group of competitors in customer size based on the average number of agents per installation, confirming the company's high level of penetration at the higher end of the market. In the areas of geographical and vertical market reach, Worldline was scored below average, primarily because of the company's strong focuses on the EMEA region and finance industry as market targets. Company recognition also earned a relatively low score in our customer survey, most likely because of Worldline's limited exposure, to date, in the North American marketplace and other areas outside Europe.

Worldline WL Contact (Omdia recommendation: Prospect)

The parent Worldline company, based in France, is the European leader in the payment and transactional services industry. Worldline core offerings include pan-European and domestic commercial acquiring for physical or online businesses, secured payment transaction processing for banks and financial institutions, and transactional services in e-ticketing and for local and central public agencies. Thanks to a presence in 30+ countries, Worldline is the payment partner of choice for merchants, banks, public transport operators, government agencies, and industrial companies delivering digital services. Worldline activities are organized around three pillars: merchant services, financial services, and mobility and e-transactional services. Worldline employs approximately 12,000 people worldwide, with 2019 revenue of €2.4 billion (\$2.8 billion)

Worldline's entry into the contact center market and the development of the company's WL Contact solution began in the mid-1990s when Worldline, capitalizing on its strong position in the financial services marketplace, saw an opportunity to add value to customer contact through the voice channel and other customer interaction technologies such as IVRs, voice biometrics, customer self-service, call distribution on a virtual contact center (ACD), and outbound sales and service capabilities. This customer engagement technology development continued through 2014, when Worldline implemented a 2,000 seat multisite ACD and IVR solution handling more than 20 million calls per year, and 2016 with the international multichannel deployment, of voice, email, and IVR for 1,000 agents across three continents.

In 2017 Worldline got into omnichannel deployments and in the past three years spread deployments into the UK, the US, and Germany and rolled out omnichannel and AI deployments to 20,000 agents throughout France. In 2020 the company implemented full omnichannel, multilingual deployment of 9,000 agents in Belgium. Worldline has certainly developed into a world-class cloud contact center provider with a focus on the higher agent count marketplace. Today Worldline has a major financial institution that serves 32 million customers via 52 million incoming calls and 18 million emails annually, enhanced by a dedicated Worldline team of 35 people.

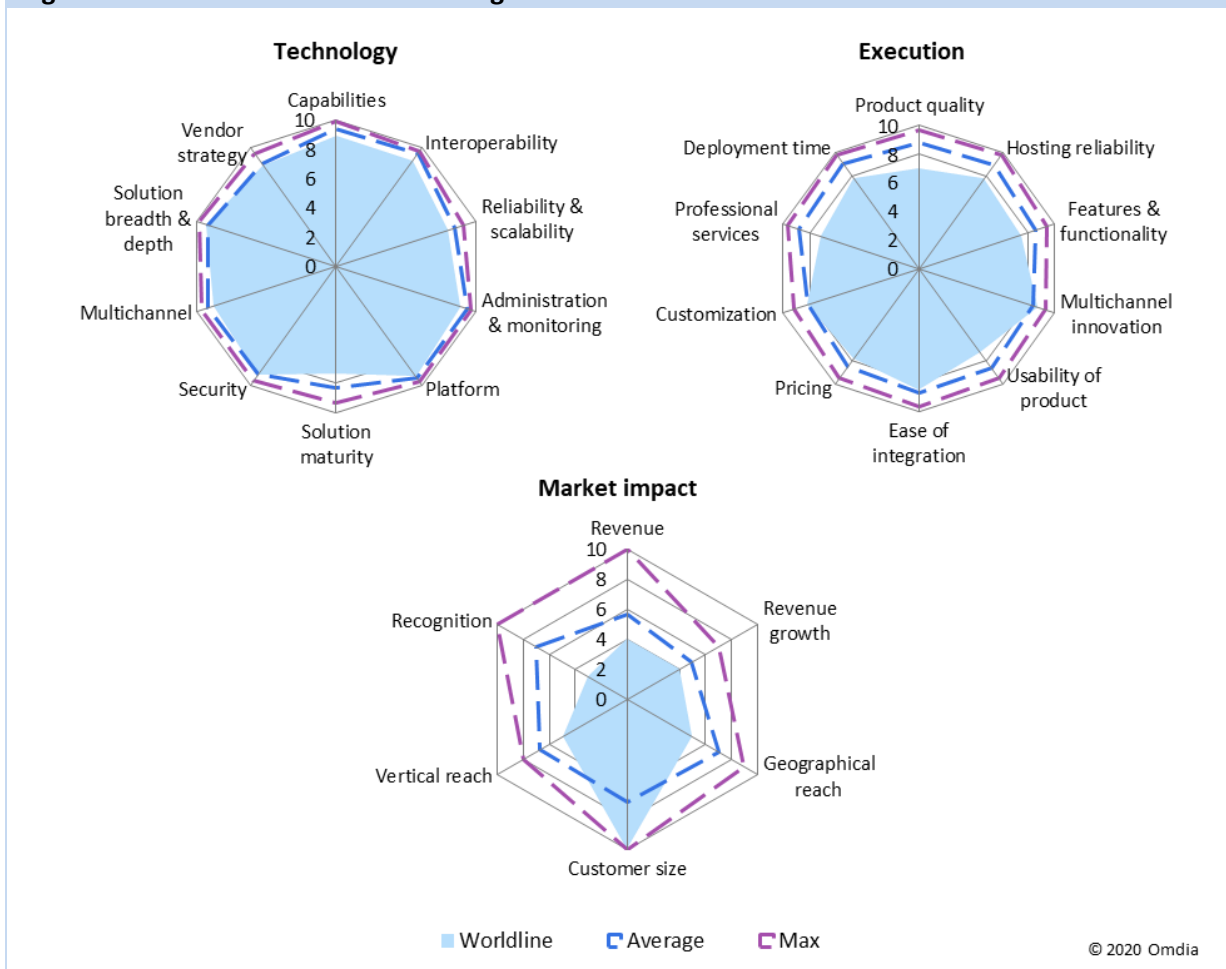
The Worldline WL cloud contact center is positioned as an omnichannel (voice, email, chat, social media, and video) customer engagement offering, aiming to serve very large enterprises including several beyond the original financial vertical market, and well suited for organizations with multiple sites and remote agents. Worldline offers a pay-per-use business model and is fully scalable from hundreds to tens of thousands of agent seats. The system features real-time and asynchronous reporting, strong customization capabilities, and guaranteed high availability with redundant architecture in Worldline's own data centers. Worldline WL offers true pay-as-you-use pricing based on per minute on call when connected to an agent, per chat conversation, per email, per minute on video calls, and per interaction on social media.

The WL omnichannel cloud solution is positioned to enterprise clients as a tool that allows their customers to contact customer care via any channel (voice, email, messaging, video, mobile, website) while allowing customer service agents to serve customers simply using an internet connection and a browser. The company boasts specific strengths across several toolsets including strong authentication, smart qualification, intelligent routing, contact processing, and contact follow-up, all tightly integrated with the enterprise's telephony, CRM, and customer database systems. Beginning in the fall of 2018 and continuing through the fall of 2019, Worldline has added a significant number of roadmap additions to the WL Contact solution in the areas of quality monitoring, compliance, bots, AI, automation, and performance. More specifically, these included customer satisfaction surveys (in SMS/web/voice); GDPR compliance; a webchat engagement and social network functionality; video call center manageability; bots available on Messenger, Chat, Google Home, and Amazon Alexa; and an AI-driven knowledge base capability. Most recently, application additions have been made in the areas of dynamic personalized routing using interaction context, automated alerting and alternative routing strategies to deal with unexpected staff shortages, and data reporting improvements. The extension of mobile-first strategies and enhancement of AI capabilities are on the current roadmap.

As can be seen in Figure 15, the Worldline WL offering stands up well to the other competitors in this analysis. Strengths are cited in the areas of administration and monitoring, overall platform,

multichannel, solution depth and breadth, and overall vendor strategy. In the execution category, which is based on the customer end-user survey conducted by Omdia as part of this analysis, Worldline WL rates around the average of all offerings in the areas of multichannel integration, ease of integration, and customization. Areas scored by customers as slightly under average were deployment time, product quality, usability of product, and hosting reliability. Finally, in the category of market impact, the Worldline WL cloud contact center product scored at the maximum score for the group of competitors level in customer size based on the average number of agents per installation, confirming the company’s high level of penetration at the high end of the market. In the areas of geographical and vertical market reach, Worldline was scored below average primarily because of the company’s strong focuses on the EMEA region and finance industry as market targets. Company recognition also earned a low score in our customer survey, most likely because of Worldline’s low level of exposure, to date, in the NA marketplace.

Figure 15: Worldline solution radar diagrams



Source: Omdia

Omdia SWOT assessment

Strengths

- High overall technology ratings in administration, platform, multichannel, strategy, and solution breadth and depth

- Customers' recognition of strength in integration, customization, multichannel capabilities
- Dominance in financial service industry marketplace
- Flexible pay-per-use pricing scheme

Weaknesses

- Low global recognition as a cloud contact center provider
- Narrow focus on financial industry and high end of the market
- Relatively low revenue market share of cloud contact center marketplace

Opportunities

- Ability to advance recognition and business in the Americas marketplace
- Potential to penetrate lower agent size centers that require more sophisticated technology

Threats

- The ongoing expansion plans of NA cloud contact center vendors into EMEA
- The potential convergence of UC/CC cloud buying practices of enterprises
- Difficulty of breaking into the NA contact center marketplace

Appendix

Methodology

Omdia selected vendors that can offer full voice call routing (i.e., ACD) in the cloud, can route at least one interaction channel beyond voice, and have at least 20,000 deployed agent positions worldwide. Although some additional vendors might have been able to meet these criteria, they were unable to provide enough information for a full evaluation, did not have sufficient market impact, did not sell to end users, or were unwilling to participate. All included vendors were asked to complete a full technical assessment checklist and to provide market revenue data and a list of 10 or more customers to be surveyed. Omdia used this data alongside in-house industry knowledge to determine the results of the Decision Matrix. Table 2 summarizes the final scoring for each vendor in each of the three areas of evaluation.

Table 2: The multichannel cloud contact center score overview

| Company | Technology | Execution | Market impact |
|----------------|------------|-----------|---------------|
| 8x8 | 8.74 | 8.71 | 5.42 |
| Bright Pattern | 9.15 | 8.98 | 5.17 |
| Cisco | 8.84 | 7.66 | 7.17 |
| Five9 | 9.03 | 9.18 | 6.92 |
| Genesys | 9.38 | 8.91 | 7.67 |
| NICE inContact | 9.45 | 9.50 | 8.17 |
| Talkdesk | 9.20 | 8.62 | 5.67 |
| Vonage | 9.02 | 8.57 | 6.08 |
| Worldline | 8.71 | 7.77 | 5.17 |

Source: Omdia

Further reading

Global Contact Center Market Forecast: 2017–23, INT001-000175 (January 2020)

Workforce Optimization Technologies Forecast: 2018–23, INT001-000150 (June 2019)

Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2017–18, INT001-000005 (November 2017)

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