

Decision Matrix: Selecting a Multichannel Cloud Contact Center Vendor

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SUMMARY

In a nutshell

This report explores the marketplace for hosted contact centers services in the US, with particular emphasis on the ability of service providers to handle multichannel customer interactions. It compares vendors based on the strength and currency of their technology platform, the views of their customers, and the impact that each company has in the marketplace. Ovum has selected vendors for comparison based on their ability to offer full voice call routing in the cloud. All the selected vendors have the capacity to route at least one interaction channel beyond voice and have at least 10,000 deployed agent positions in the US. Ovum advises on which vendors businesses should explore, consider, and – most importantly – shortlist.

Ovum view

Ovum believes that the market for cloud-based contact center infrastructure is changing from a cost-driven market to one that embraces a more nuanced view of the benefits of the cloud. Some companies have been participating in this market segment for nearly a decade; those firms with longevity tend to have the highest brand recognition and the most experience of delivering reliable, scalable platforms.

As contact centers in North America come to need more advanced services that go beyond the core (ACD routing for voice calls and IVR), new market entrants are providing more competition and forcing all participants to differentiate based on features, price, expertise, and services. Provision of core services is becoming commoditized, with little difference in the offerings of the leading vendors. But when it comes to multichannel interaction routing, competition is just starting to drive innovation.

Ovum forecasts that the proportion of agent positions in North America using hosted contact center technology will grow from less than 10% today to more than 20% in 2018. The pace of development in cloud platforms is rapidly bringing feature parity with premise-based infrastructure as well as increased confidence in system reliability. As more enterprises consider moving some of their interaction handling to the cloud, traditional vendors will have to adapt their development processes, speeding up their delivery of advanced services to keep pace with faster cloud-based update cycles. Some premises vendors are already moving in this direction, notably Cisco, Interactive Intelligence, Genesys, and Aspect.

As the core hosted voice offerings mature and become commodity services, existing cloud-based vendors such as LiveOps, Echopass, inContact, and Five9 are moving up the value chain, offering greater reliability and customized services, and appealing to larger enterprise customers. Those larger customers are more demanding and less price-sensitive than customers at the lower end of the market.

Ovum believes that the enterprise market is already demanding a more robust feature set and greater integrations with enterprise applications (such as CRM, workforce optimization, and analytics). Fortunately, enterprise buyers have a wide range of options, and can choose from a number of well-structured and full-featured platforms. The four shortlisted companies in this study represent a diversity of approaches in technology and service delivery. The capabilities of all the firms evaluated here are sufficient to provide most enterprises with leading-edge, future-proofed technology.

Key messages

- The current vendor landscape includes companies with four key backgrounds: pure cloud providers, traditional premise vendors, telecom carriers, and outsourcers-turned-technology-providers.
- Longevity in the cloud contact center market tends to correlate with brand recognition and revenue. However, newer vendors are ramping up the competition with advanced multichannel interaction capabilities and other attractive services offerings.
- Ovum has placed four vendors in the shortlist category. These vendors represent a range of cloud approaches; all have a great deal of experience and proven reliability in delivering secure, advanced services.
- Overall, the differences between vendors in the shortlist category and those designated "consider" and "explore" were relatively slight. From a platform point of view, there are more similarities between vendors than differences. Ovum therefore recommends that enterprise buyers look deeply at all nine vendors in the sample, having first looked internally to determine the unique characteristics of their requirements in order to best match to a potential service provider.

MARKET TRENDS

The cloud is growing faster than premise

The proportion of American agent positions that are fed their calls via cloud-based technology is increasing quickly. Ovum believes that 10% of the total seats in the US are now provisioned by hosted

service providers, and that this will more than double (to 23%) by 2018. The numbers may currently be small, but they have reached a critical threshold at which potential buyers are less likely to be put off by the exoticism of the deployment model. Instead, many contact centers at all size levels are now considering hosted options, and for much more advanced operations than were usual even two to three years ago.

Hosted contact center deployments are growing faster than premise-based deployments. This has encouraged more vendors to explore the space, which has the effect of further validating the deployment model, making it "safer" for businesses to explore moving some or all of their operations to the cloud. This is occurring outside the traditional low end of the market, as mid-sized and larger enterprises face replacement of premises-based switches.

As this growth fosters more competition among vendors, and therefore more choices for enterprises, businesses are exploring the use of the cloud to go beyond traditional call handling into areas that are still new for premise-based systems, in particular multichannel interactions. When there is no established infrastructure in place to handle new forms of customer contact, the traditional bias towards premise is weaker, and hosted service providers can compete based on integrations, partnership ecosystems, flexibility, and, of course, price.

Internal barriers to hosted deployment are falling

Service delivery is no longer driven solely by decisions made in the contact center. The isolation in which contact centers used to operate is giving way to a more collaborative planning, purchasing, and deployment environment. IT professionals generally remain committed to stability and consistency. They are highly sensitive to the cost of maintaining and administering new systems, and to the security risks of moving customer data and applications across networks.

Marketing professionals look at tools filtered through their ability to analyze customer behavior and protect the company's brand. They are increasingly likely to support business cases that emphasize the ability to collect information about customers, and to move a customer support platform into new, future-looking areas such as social media mining and analytics. These elements benefit contact centers, in that they tend to break down silos and allow departments to work together and be more flexible, and allow marketers to respond faster to changing business conditions.

These alternative buyers in marketing and IT are increasingly familiar (and comfortable) with cloud-based tools, which makes it easier for an organization to explore transitional options that include mixing some call handling via premise platforms with cloud-based options.

Multichannel options help differentiate the customer experience

While the migration to the cloud offers distinct budgeting advantages, enterprises are finding other significant strategic advantages, such as the fact that cloud-based systems are much quicker to deploy and easier to scale. Many users report that cloud platforms are easier to administer than premise-based systems due to interfaces that are unified across different product modules.

The cloud also offers enterprises a way to differentiate on customer service, by gaining access to the latest upgrades and technologies without having to replace their systems. Although cost may be the initial starting point for many organizations considering a cloud solution, enterprises are beginning to use their technology to differentiate themselves from their competitors.

By shifting the ownership of infrastructure and applications to a cloud provider, enterprises free up their internal IT resources; employees that would typically be responsible for deploying and managing data and infrastructure, maintaining servers and implementing upgrades can be reassigned to new projects. Once core technologies are taken care of and daily maintenance tasks are lessened, staff can focus on developing more relevant services for customers.

One of the most important advantages of having a cloud-based contact center suite is that enterprises can easily adapt to customer trends. Instead of having to deploy a new tool from scratch, enterprises can add on new channel modules as they become available in the cloud, without the need to overhaul their contact center solutions. Cloud technology permits fast upgrades, flexibility in adding new capabilities, and better scaling options to match customers' needs. Businesses are finding it easier to gradually add new channels according to customer needs. Using cloud solutions, enterprises have a smaller initial outlay and more flexibility to trial new channels with a set of agents. Migration can be staged with less impact on existing tools and staff.

Vendors come from different market segments with different strengths

The vendors offering services in this space come from several different starting points and converge on the cloud with different strengths and market opportunities.

Native cloud service providers

These are companies that offer only hosted services, with no premise equipment offerings in their portfolio. The larger firms in this category have been honing their expertise in the space for the better part of a decade. In this study, we consider LiveOps, Echopass, NewVoiceMedia, Transera, and Five9 to be cloud natives. While it is true that most these firms' clients are concentrated at the low, price-sensitive end of the market, suppliers emerging from this segment have been aggressively trying to target more high-end clients by offering more advanced (and profitable) value-added applications to their core call routing. These advanced options include multichannel call handling, support for mobility, customer and agent performance analytics, and workforce optimization tools.

Outsourcers turned technology service providers

These are companies that come from the business of agent provisioning, and that originally developed their cloud-based technologies as a way of reducing the costs (and increasing the flexibility) of their own call center operations. In many cases, the decision to productize these platforms makes a great deal of sense, because outsourcers have plenty of opportunity to test and improve the reliability and versatility of their technology. Other providers have knitted together a platform based on products from leading contact center infrastructures, tested the set-up with their own agents, and are now offering that

platform to enterprises. West Interactive is the sole representative of this category in this study; other providers with market presence include Convergys, Sitel, TeleTech, and Teleperformance.

Telecoms carriers leveraging their network capabilities

There have been attempts to replicate ACD functionality in the carrier network since the mid-1990s, when AT&T first offered network-based routing to contact center customers of its toll-free services. Today, having a carrier network at the heart of a hosted offering implies a high degree of security and reliability. The key vendors in the US that fit this profile are inContact (which was formerly known as the carrier UCN) and Verizon, which has a very large customer base in the hosted IVR market. Outside the US, carriers such as Telstra, BT, and Orange all offer hosted contact center services.

Premise vendors

An additional source of competition comes from premise vendors that are coping with (or hedging against) changing customer expectations by adding hosted options to their existing product portfolios. Some efforts in this area have been halting and less than enthusiastic, clouded by uncertainty about roadmaps and whether premise vendors can fully commit to migrating their customers away from their own hardware. Other vendors have entirely embraced the challenge and managed to create fully fledged offerings that are feature compatible with equivalent premises platforms, along with the infrastructure to sell and support customers on hosted platforms. Interactive Intelligence is the leading premise vendor to take this road to date. More recently, Genesys and Aspect have made decisive acquisitions and plans to diversify into the hosted space. Genesys purchased Angel and SoundBite, and Aspect bought Voxeo; both cases reflect the vendors' sense of urgency when it comes to bringing their hosted product families up to date and creating a more diverse offering for a wide spectrum of potential customers.

Pricing is squeezing downward

Ovum's analysis of pricing trends within the hosted marketplace indicates that there is downward pressure on the price of core cloud-based functionality, especially at the low end of the market. There also appears to be significant discounting among providers for very large clients.

Most of the firms studied in this report have several large deployments (close to or above 1,000 seats). Analysis of these deployments indicates that clients are asking for (and receiving) a greater degree of customization and integration services than we have seen in the past, especially compared to the SMB "low-cost" cloud options that were very popular in the marketplace in the early days of hosting. Cloud deployments are starting to look more like premise deployments in terms of the number of features and services that are bundled into offerings.

Hosted service providers are not competing with each other as much on cost as they are on factors that reflect the ease of administration, customization, and installation, and on access to state of the art services (such as analytics and reporting tools).

DECISION MATRIX

The multichannel cloud contact center Decision Matrix

In order to understand the competitive dynamics in the cloud contact center market, Ovum has profiled the following providers.

- Echopass
- Five9
- inContact
- Interactive Intelligence
- LiveOps
- NewVoiceMedia
- Transera
- Verizon
- West Interactive.

This list is not exhaustive, and does not include notable vendors such as AT&T, CenturyLink, CosmoCom, and Noble Systems. These vendors also play a prominent role in the cloud contact center market but were unable to provide sufficient information for a full evaluation. Premise-based contact center vendors Aspect, Avaya, Cisco, and Genesys are also key contenders as they further develop their cloud offerings. These vendors do not currently meet the requirement to have a minimum of 10,000 cloud contact center seats in order to be included in this report, but they are competing for market share and should not be overlooked.

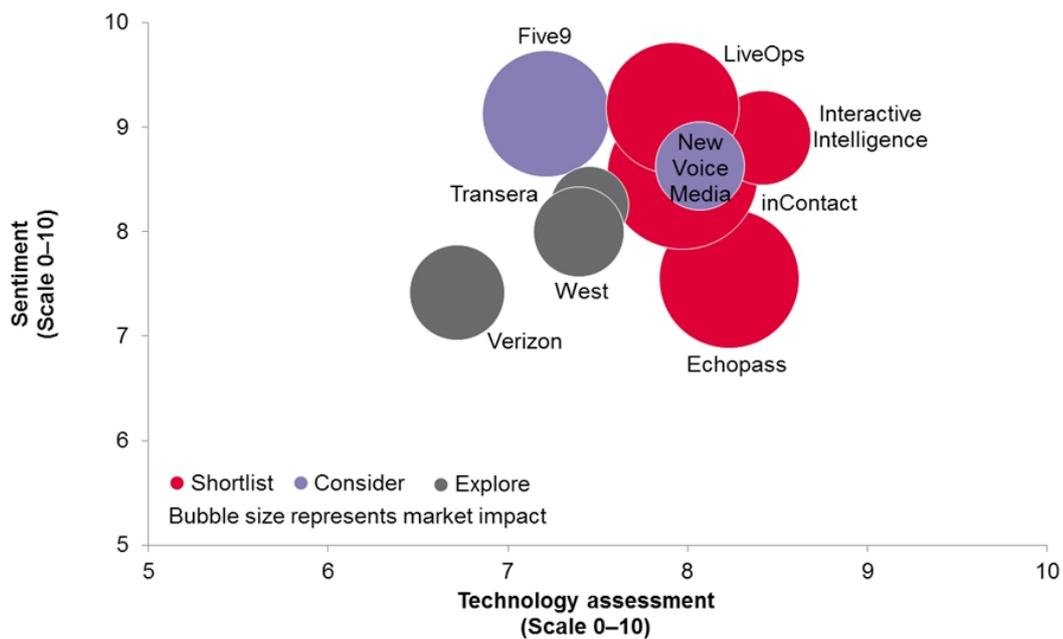
This report will provide a summary of vendors' capabilities based on a quantitative assessment of their market impact and end-user sentiment scores, as well as the technology features that they support. The detailed scores underpinning the Decision Matrix can be found on individual vendor radars and in Table 2 in the Appendix. Ovum also provides guidance for enterprises looking to deploy cloud contact center solutions, and places vendors in the "shortlist," "consider," and "explore" categories using the aggregated results of the Decision Matrix. The following definitions are used for each of these recommendations:

- **Shortlist.** This category represents the leading solutions that we believe are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best-of-breed.
- **Consider.** 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.
- **Explore.** Solutions in this category have less broad applicability, and are typically aimed at meeting the requirements of a particular kind of customer. They may be worth exploring as part of the technology selection.

Because realizing the value from a hosted contact center deployment is critically dependent upon the solution's fit with the enterprise's overall customer interaction strategy, a decision to purchase one

solution over 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, Ovum's recommendations of shortlist, consider, and explore should be taken only within the context of an enterprise's specific solution requirements.

Figure 1: The multichannel cloud contact center Decision Matrix



Source: Ovum

Figure 1 depicts the leading vendors in a bubble chart. The average scores from the technology assessment, end-user sentiment, and market impact analysis were used to plot the vendors. Echopass, inContact, Interactive Intelligence, and LiveOps were classified in the shortlist category, while Five9 and NewVoiceMedia have been placed in the consider group. Transera, Verizon, and West Interactive all received an explore rating in this space.

Ovum emphasizes that the vendors in both the explore and consider categories should be evaluated in the context of the given deployment scenario, because the respective strengths of each of the vendors may matter more than minuscule variations in the technology assessment score. It is also important to note that vendors in the consider and explore categories have proven, successful deployments, and have delivered measurable benefits to their customers.

Table 1: The multichannel cloud contact center Decision Matrix

Shortlist	Consider	Explore
Echopass	Five9	Transera
LiveOps	NewVoiceMedia	Verizon
Interactive Intelligence		West Interactive
inContact		

Source: Ovum

Shortlist: Echopass, inContact, Interactive Intelligence, and LiveOps

Echopass, inContact, Interactive Intelligence, and LiveOps are all identified as market leaders in this Ovum Decision Matrix. Echopass, InContact, and LiveOps are the most established vendors in the space, with the largest number of customers, and proven market share. All four vendors scored very highly in the technology assessment, with Interactive Intelligence leading the way despite its premise-based roots.

Among premise vendors, Interactive Intelligence was relatively early to market with its cloud platform, and, although it does not yet have as large market presence as the other cloud vendors in the shortlist category, it has focused on creating an easy-to-deploy stack of technologies with multichannel capabilities and workforce optimization. It has a clearly defined strategy in the market and is open to its customers selecting either of its deployment models.

Echopass's significant market share comes from the fact that it is well established and has some very large deployments. It is the only vendor to have gained a truly global offering, with customers in the Asia-Pacific region as well as in the US. LiveOps is distinguished by its high customer sentiment marks, strength in integrations, and highly rated multichannel capabilities. And inContact has an excellent reputation for reliability and scalability, due in part to its experience providing carrier services.

Consider: Five9 and NewVoiceMedia

NewVoiceMedia, while scoring highly in both the technology assessment and customer sentiment categories, has yet to make a significant impact in the market for its ContactWorld platform. Though small, the vendor has seen strong growth in the past year and is likely to be seen more in the US, following a closer relationship with Salesforce.

Five9 is a good overall provider of basic cloud contact center services, with strengths stemming from good customer relations and technology. It has a promising roadmap and ambitious plans to cross over into larger, multichannel deployments.

Explore: Transera, Verizon, and West Interactive

The scores and capabilities of all the vendors in this study are reasonably close; the challenge for buyers is to isolate the precise conditions that make a good match between service provider and client. For example, West scores highly on the quality of its services and expertise, and has worked hard to turn its experience operating high-volume contact centers into "trusted advisor" status for clients looking to migrate their technology to the cloud. Although renowned as an outsourcer, the vendor is focused on growing its cloud contact center business.

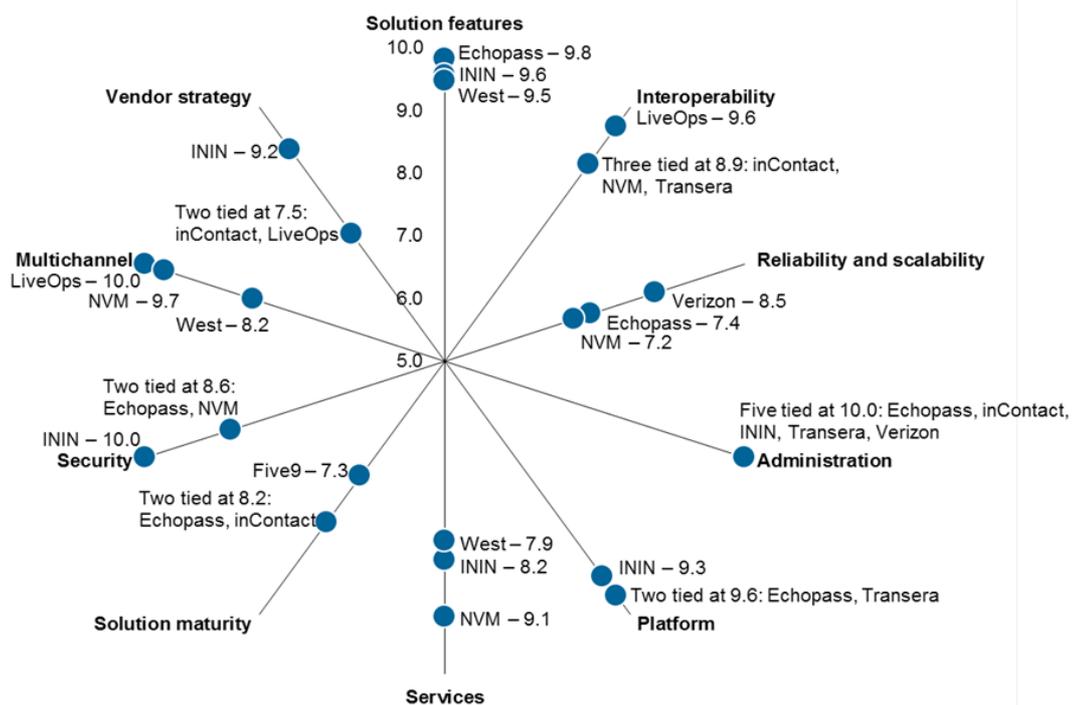
Transera has a great deal of experience in the retail sector, making it a good candidate for clients in that vertical (or related sectors), and for deployments of between 300 and 500 seats. Transera also provides a very robust cloud-based analytics application that is a more advanced platform than many small companies could afford if delivered as a premise-based application.

Verizon, with its enormous installed base of telecoms customers and decades of network engineering experience, is a safe choice for any enterprise that is looking to deploy cloud technologies. It is a strong bet for customers that have a mix of different applications to integrate.

MARKET LEADERS

Market leaders: technology

Figure 2: Market leaders: technology



Source: Ovum

The technology assessment scores for the nine vendors indicate that cloud-based contact center offerings are converging on some standardized approaches that we believe represent best practices. There is a high degree of similarity in the capabilities for system administration and control, for example. Interoperability is also critical for all vendors in the space, so it is not surprising that the scores in that area converge at a high level.

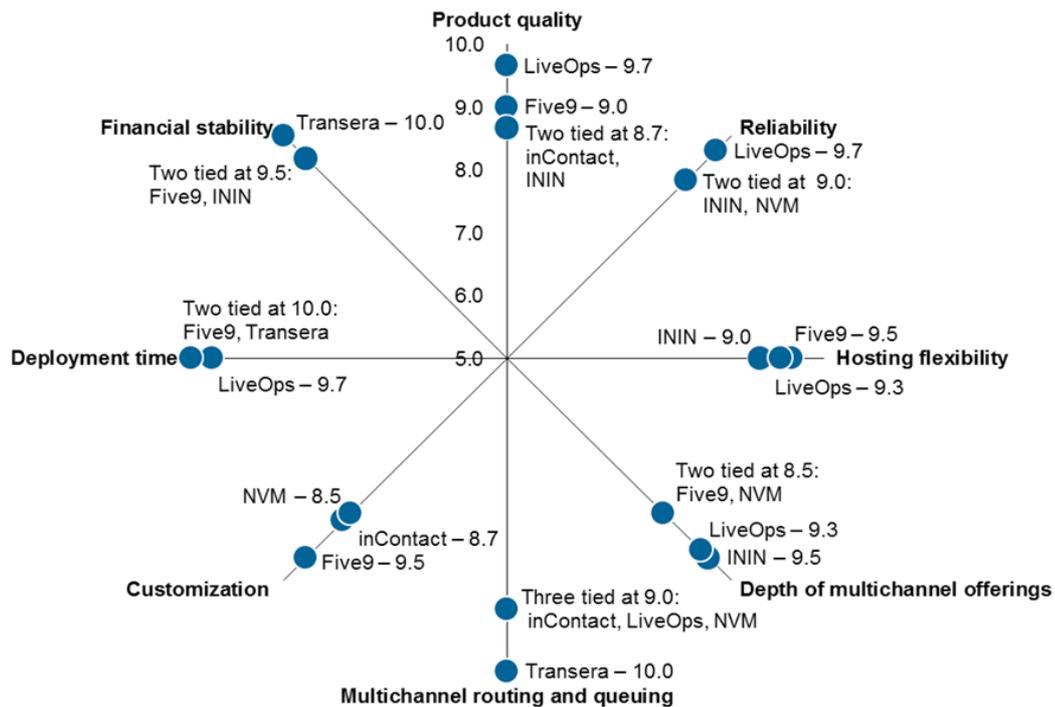
By contrast, the leadership positions in solution features represent companies coming at cloud services from three very different starting points. Echopass, the overall leader, has had a dozen years to hone its core offering; it sits at the top of the feature list largely because supplying cloud-based contact centers is its only role. Interactive Intelligence has been slowly building the infrastructure for its cloud offering based on the success of its premise platform, and has been careful to keep the two platforms in close parity. And West Interactive, historically an outsourcer (though rapidly becoming more of a technology supplier) has decades of experience in operations and management, which has given it an inside view on which features matter most in real deployments.

At the platform level, the leaders are joined by Transera, which has architected a unique solution that separates the application services stack from the voice network. Standard Internet protocols are used to manage the midpoint between the voice network layer and application stack.

Multichannel interaction features are highlighted by a different set of leaders – here LiveOps and NewVoiceMedia are distinguished by the breadth of their offerings across different contact channels.

Market leaders: customer sentiment

Figure 3: Market leaders: customer sentiment



Source: Ovum

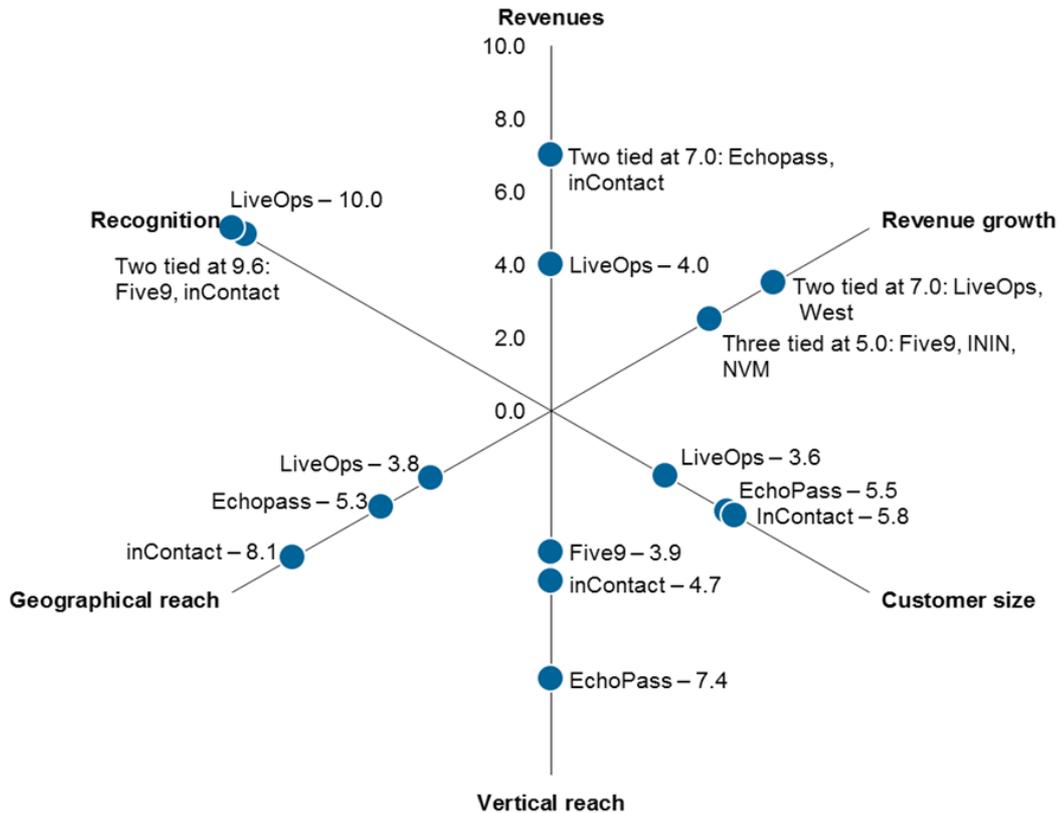
Customer sentiment is notoriously difficult to measure, but even a small sample provides a useful proxy for understanding the experiences that clients have with their service providers. Ovum research indicates that, as a group, customers of the nine profiled vendors have had positive experiences transitioning from premise to cloud-based infrastructure.

LiveOps customers rated it highly in six of eight categories, with near perfect scores in product quality and service reliability. Five9 also scored among the leaders in six categories, particularly hosting flexibility, customization, and deployment time. Transera had high scores in its customers' assessments of its multichannel routing and queuing, deployment time, and their perception of the company's financial stability.

In general, the differences between top and bottom performers in the customer ratings were slim, with all companies' ratings coming within a hairbreadth of both the average scores and the maximums.

Market leaders: market impact

Figure 4: Market leaders: market impact



Source: Ovum

The market for cloud-based contact center infrastructure is still in its formative stages. Even though some of the companies in our survey have been providing platforms for the better part of a decade, external circumstances have kept most contact centers tied to legacy ACDs. The primary driver toward the cloud for most of this century has been the lower short-term cost and better flexibility that comes from not purchasing technology outright. Because of their persistence in the market, those firms that have been around the longest have the highest recognition, which is one measure of market impact.

Other measures of market impact lean toward the companies that have the highest revenues in the sector, and the largest customer bases – notable here are Echopass and inContact. Revenue growth rates, though, indicate which companies are making headway in attracting new clients, whether through innovative technologies or by tackling segments of the market that have been underpenetrated. LiveOps and West Interactive lead here, followed closely by NewVoiceMedia, Interactive Intelligence, and Five9.

The market impact figures present a picture of an industry that is divided in two. On one side, long-established players garner most of the attention and the largest customer bases. On the other, an increasingly sophisticated and technologically advanced set of companies are differentiating based on

feature sets (including multichannel and multimedia capabilities), service reliability, or expertise serving particular vertical or geographical markets.

Given that Ovum expects the cloud-based infrastructure market to grow at a CAGR of 18% between 2012 and 2018, starting from a very small base (from 8% of North American seats in 2012 to 23% in 2018), there appears to be ample opportunity for any of the profiled companies to seize a significant portion of the market in the next few years.

VENDOR ANALYSIS

Echopass profile

Based in Pleasanton, California, Echopass has been providing cloud-based contact center services since 2000, making it one of the most experienced vendors in the marketplace. The firm's key offering is Echopass Cloud-based Contact Center, an integrated portfolio of contact center applications enhanced with Echopass software to provide a seamless all-in-one-suite solution.

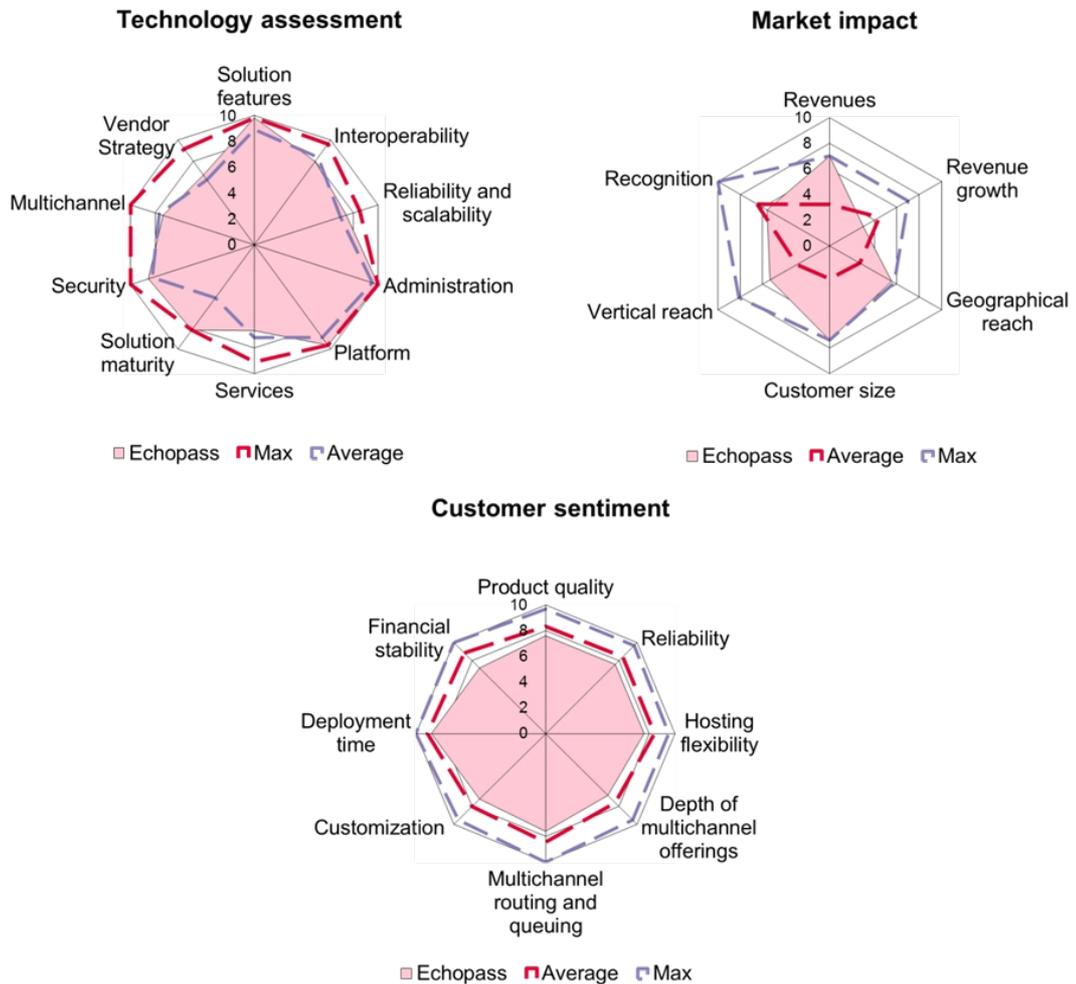
The company targets larger clients than the industry norm, focusing on the enterprise market. It also provides services to large-volume users such as telecoms carriers and systems integrators that require a high degree of reliability coupled with advanced features and functionality. More than 70% of Echopass's revenues come from large enterprise client deployments (typically larger than 500 agent positions).

Echopass relies on technology from Genesys for its underlying call routing and computer–telephony integration (CTI). Typical customer deployments can feature a full suite of contact center applications, including inbound call routing, IVR, outbound contact, multimedia interactions, workforce optimization, analytics, CRM integration, and other customer-specific integrations. The core functionality of the solution includes ACD, blended queuing, skill-based routing, speech and DTMF interactive voice response, web-based realtime and historical reporting, realtime dashboards, multimedia softphone/agent user interface, and self-administration tools for provisioning. Outbound capabilities include progressive, predictive, and preview dialing capabilities.

Echopass can handle multichannel interactions well. It has developed core alternatives to voice (email, web chat, and fax), and offers them as options rather than as part of the standard offering. Support for SMS, social media, and outbound notifications are also optional add-ons that the vendor provides through integrated offerings from its EchoPlace partners.

Although the company has a strong multichannel offering, executives point out that the majority of clients that are exploring multichannel interactions are doing so outside the context of the routing engine. They are using dedicated software applications to route and track non-voice interactions due to evolving internal processes, governance, and capability enhancement of the assigned agents rather than relying on the blended agent pool. This puts the cloud-based service provider in an interesting position: it succeeds in multichannel to the extent that it fosters a robust ecosystem for application developers and enables integrations with its core ACD platform. This shows the value of the EchoPlace partner network.

Figure 5: The Echopass multichannel cloud contact center radars



Source: Ovum

Recommendation: shortlist

Echopass is a good option for large enterprises with complex needs, but it has less appeal to SMEs with simpler configurations. It scored above the average in its technology assessment, especially with regard to the breadth of features available in its solution. Other measures were similarly impressive: administration, solution maturity and reliability/scalability were all comfortably above the average.

Echopass also scored highly in measures related to its market impact. Compared to its peers, the company has strong revenues and the largest customers. The one area in which it can improve further is customer sentiment. While customers appreciate Echopass's speed to market, its varied capabilities, and the quality of the Genesys platform, they are less convinced by its multichannel capabilities due to the slow market adoption of these capabilities. This is an area in which Echopass can expand its market outreach to educate customers on the range of its features.

Echopass says that what differentiates it from its competitors in this space is its ability to customize its product to fit the individual needs of the client, the depth of its complex integration experience, and its use of internal development to ease administration. This is especially important for larger enterprises, which are often trying to consolidate or virtualize call handling that spans multiple entry points (for example, companies that have multi-site or multi-vendor premise environments). These clients are looking for cloud solutions that solve operational problems and open up technology deployment possibilities, which is different from the traditional view of cloud services as a low-cost capacity upgrade. What Echopass offers its customers is a greater degree of fine-tuning, customization, and integration with other technology and services providers (including systems integrators such as IBM and Accenture). Echopass's key value proposition is its expertise in melding varied environments, in providing customization and integrations, and in staying on the cutting-edge of available interaction applications.

Five9 profile

California-based Five9 has been providing hosted contact center services since 2003. It currently serves 1,800 clients, with approximately 30,000 concurrent agent seats under license. The company began by offering primarily outbound services, but since 2006 has grown its inbound and blended business. Its primary customer base is the small to mid-sized enterprise, and its average deployment is approximately 100 seats. The company is expanding into larger deals.

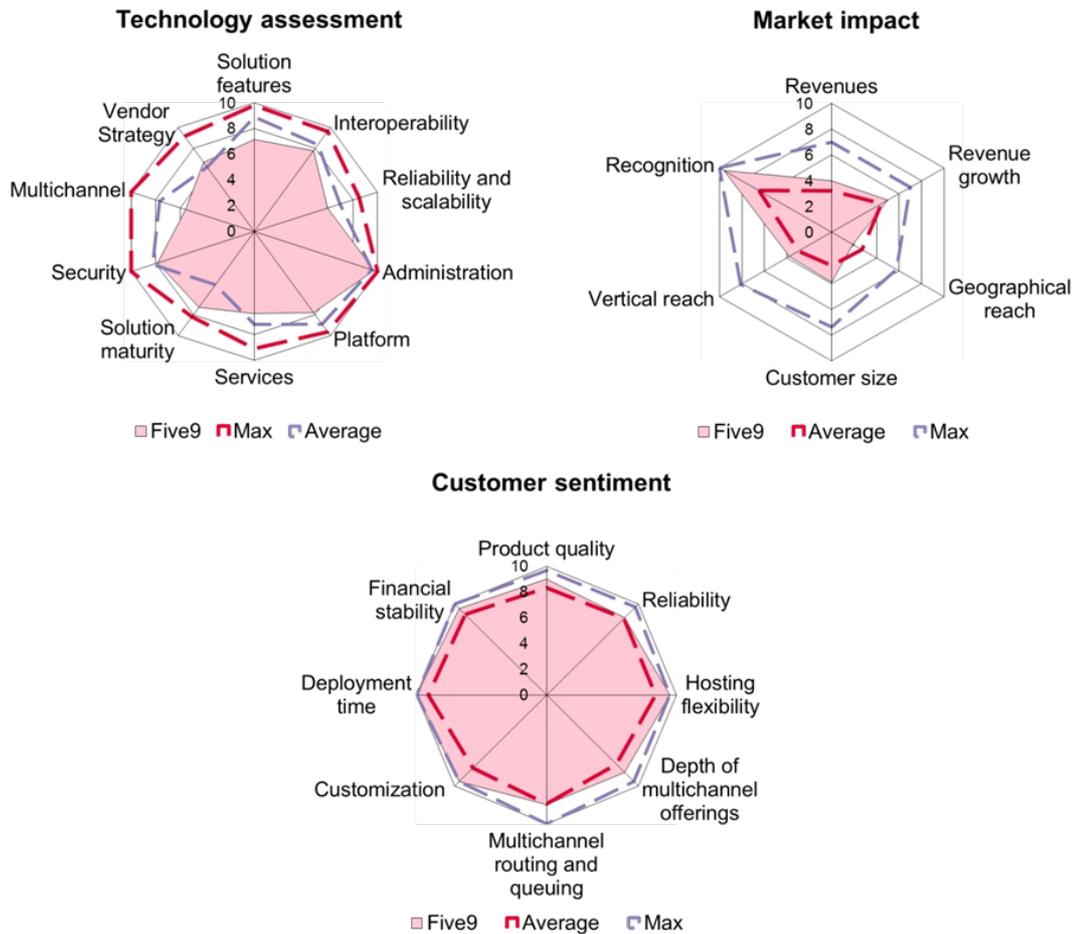
The vendor's key product is the Five9 Virtual Contact Center (VCC), a multi-tenant platform that can be configured depending on whether the client wants to incorporate inbound, outbound, or blended capabilities, and on whether CRM, workforce optimization, and multichannel features are needed.

Five9's latest version was released in June 2013, and incorporates features enabling supervisor mobility and integration with LiveHelpNow for the routing and handling of some multichannel interactions. The company invokes third-party integrations for nearly all of its multichannel capabilities (email, web chat, social media, and non-voice outbound). Five9's roadmap indicates a plan to have these handled natively within VCC in 2014, along with SMS interactions.

Five9's customer base skews toward smaller centers, and there has therefore been less pressure on the company to provide advanced, value-added features. That appears to be changing, however, as the company is rapidly acquiring larger accounts. Five9 is focused on speeding up the development of its technology roadmap and is devoting new sales resources to improve traction among larger contact centers.

At this end of the market the drivers have been cost (with a consistent pressure downward for the past several years) and rapid deployment. Five9 has one of the speedier deployment times in the industry. The company has also been rapidly building out its partner ecosystem to enable it to move towards larger enterprise clients with more varied needs. These include arrangements with Oracle RightNow, Salesforce.com, and KomBea (for PCI and security enhancements), and with traditional contact center applications vendors such as Nice.

Figure 6: The Five9 multichannel cloud contact center radars



Source: Ovum

Recommendation: consider

Five9 provides a good solution for SMEs and mid-sized enterprise accounts, and for firms looking at hosting primarily for capacity fluctuation issues. It is not the best provider of advanced technical solutions for large enterprises or complex deployments. In the technical assessment, Five9's scores come very close to the mean, with no areas of definitive superiority. Similarly, the firm's market impact scores are slightly above average overall, boosted in part by the fact that the company has high recognition as a hosted provider.

Five9 stands out for its customer sentiment scores. Its customers rate it very highly across the board, with excellent marks for product quality, hosting flexibility, and deployment time.

The supplier has no real offering for companies looking to integrate their customer care with mobile customer contact. The Five9 platform cannot preserve the context of an interaction as a customer crosses from one channel to another, and there are no dedicated applications for mobile self-service, chat, or co-browsing. It does enable click-to-call from within a mobile app, through an API. Ovum

recommends further enhancement of the platform's mobile capabilities as a way to differentiate its multichannel offering.

Five9 is a good overall provider of basic cloud contact center services, with strengths stemming from good customer relations and technology, and a promising roadmap for moving the company to larger, more multichannel deployments.

inContact profile

One of the longest-serving providers, inContact's origins are as a carrier network. This enables it to leverage its expertise in network reliability and scalability to appeal to high-volume clients, including BPOs and outsourcers. The vendor has been in business since 1997, and has offered cloud contact center services since 2003.

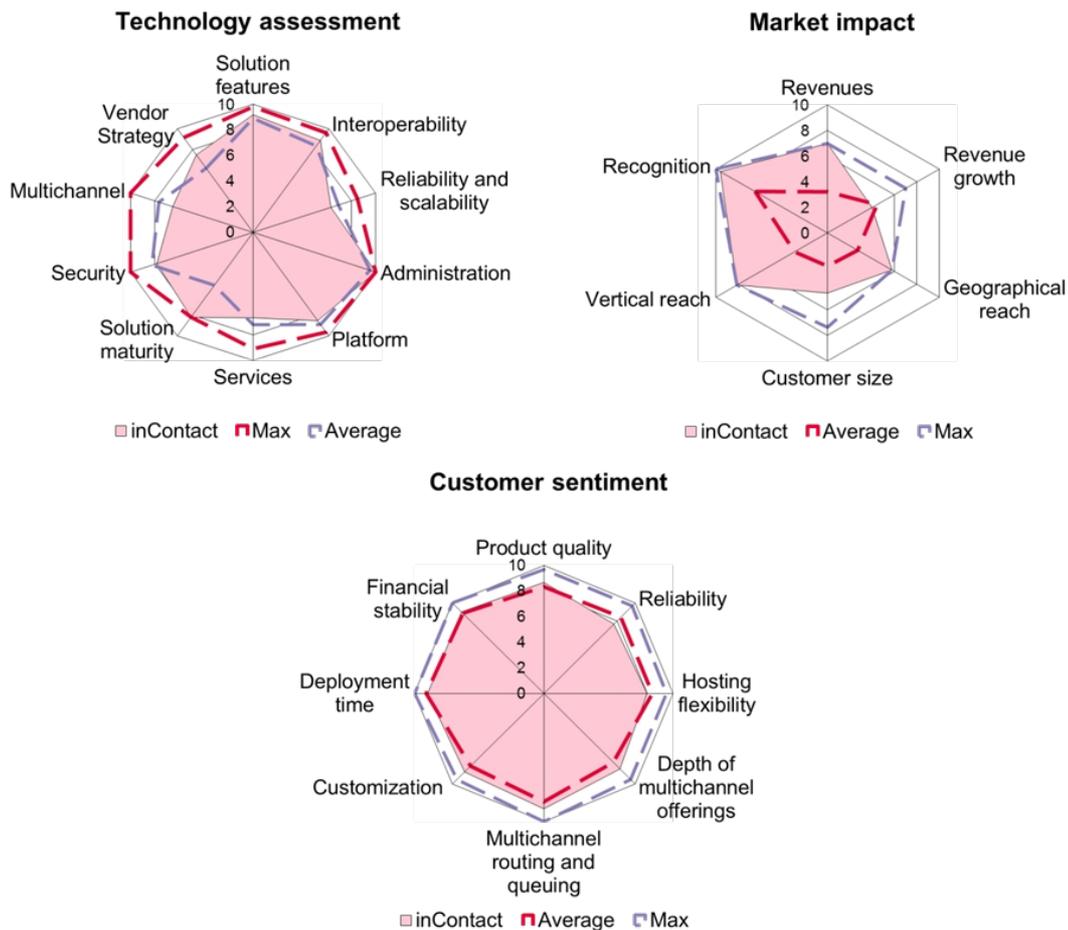
The Utah-based company delivers its internally developed platform in two offerings: Enterprise, which is aimed at larger customers, and FastTrack, for SMB users. The company currently has approximately 80,000 seats under license, with 80% of its deployments serving companies using 100 seats or fewer.

Traditionally, inContact has built its own technology platform elements, leveraging its networking capacity, and the result is a tightly integrated, highly secure, and scalable offering that has allowed the company to steadily grow and move up the value chain to larger and more diverse clients. The internally developed platform includes multi-tenancy, connectivity to all major TDM and IP client environments, integrated IVR, and out-of-the-box connections to major CRM systems. It also allows clients to move off premise equipment in a phased manner through tight integration with existing legacy switches.

In recent years, inContact has been working with partners to flesh out the advanced capabilities of its suite. It partners with Nuance, for example, for building speech self-service applications, and Verint for most of its workforce optimization tools. (Notably, inContact built its own survey/voice-of-the-customer tool years before that application segment became popular in contact centers.) The company currently provides out-of-the-box integrations with Salesforce.com, Microsoft Dynamics, and Oracle RightNow, and its CRM integration API also allows for customer integrations to other CRMs.

In the multichannel sphere, inContact provides support for email, web chat, social media, SMS, and proactive outbound. Social media interactions are integrated into the platform's universal queue through connections provided by partner SoCoCare. It has an internally developed mobile offering for contact center supervisors, available for the iPad.

Figure 7: The inContact multichannel cloud contact center radars



Source: Ovum

Recommendation: shortlist

In the market impact categories, inContact's scores were considerably above average, with the company leading all other vendors in four of six segments. It also did well in the technology assessment, receiving high marks for solution maturity, administration, and overall features. In the multichannel capabilities category, however, it came in behind some of its competitors. The vendor's customers pinpointed flexibility and price as key reasons for choosing inContact.

As inContact moves toward serving larger enterprises with more complex interaction needs, its executives report that the need to offer multichannel capabilities has become more acute. They note that most of the contact centers they serve are currently handling multichannel interactions, even if they do not route those interactions via the core inContact platform.

The vendor's differentiating factors include the reliability that comes from its carrier capacity, including its deep reservoir of redundancy through back-up data centers and network operating centers. It offers redundant connections into two different centers, and up to "four nines" (99.99%) reliability via SLAs.

Interactive Intelligence profile

Interactive Intelligence, headquartered in Indianapolis, is the most successful premise ACD vendor to transition into the hosted market so far. Founded in 1994, the company has been incrementally building out a cloud-based alternative to its signature premise system (known as the Customer Interaction Center, or CIC). The company currently offers a set of cloud-based contact center and unified communications tools collectively branded as communications-as-a-service (CaaS).

Although it has offered some cloud-based tools since 2001, the company revamped and rearchitected its platform in 2009. It now comes in four versions, a Small Center Edition (fewer than 50 seats), a Standard Edition (25–500 seats), a Preferred Edition (up to 5,000 seats, the vendor's most popular offering), and a Premium Edition (more than 5,000 seats). The latter adds very sophisticated options for natural language speech recognition, high-end customer support, and enhanced customization.

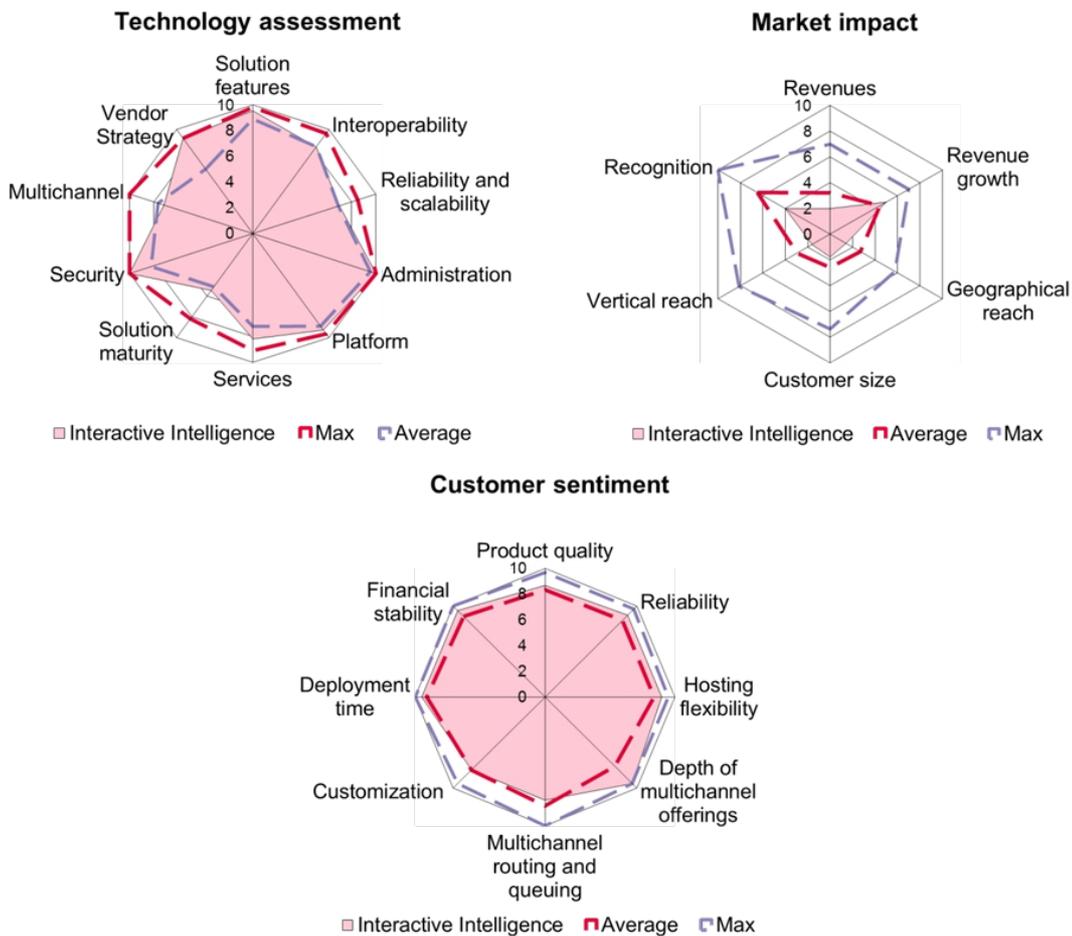
Interactive currently has approximately 12,000 seats under license across all of its platform versions, with 58% of its deployments coming in the 100–499 seat range. The company's experience as a premise vendor has allowed it to develop a market presence in the mid-range, in part by offering new customers the ability to retain their existing investment in premise equipment. Half of its cloud customers are deployed in a hybrid mode, primarily using premise equipment provided by Interactive Intelligence.

The company has historically had a cultural bias toward building its own applications and solutions rather than partnering for tools that it considers part of the "core." It created its own outbound dialer, for example, and an in-house workforce optimization tool. Today, however, the company is relaxing that approach somewhat, acknowledging that the environment for advanced applications and multichannel interaction processing is developing so quickly that it needs to be more open to external best-of-breed providers that can move more quickly to enhance its CaaS suite. While the company claims that this new openness is not a change in strategy, there are indications that it is more aware of the need to be more flexible and speedy in bringing new features to its customers, especially in areas such as social media processing.

Interactive's routing platform offers feature symmetry between the hosted and premise versions. The hosted edition is based on a "local control" model that allows customers to maintain ownership and control of sensitive data such as call recordings, perform their own administrative changes, and minimize bandwidth consumption by keeping voice traffic on the local network.

In keeping with the internal-development bias, Interactive's multichannel capabilities are primarily homegrown. Email, web chat, and SMS are all available. Social media routing is handled by the CaaS platform, with social media monitoring taken on by partners. Support for customer communities and outbound for channels other than voice are not available at this time.

Figure 8: The Interactive Intelligence multichannel cloud contact center radars



Source: Ovum

Recommendation: shortlist

In keeping with its long history as a premise vendor, Interactive scores higher than any other provider on the technology assessment measures. The company has invested a lot of resources in ensuring parity between its hosted and premise platforms. Its CaaS and CaaS Small Center solutions are feature-rich platforms, suitable for organizations of any size with fairly advanced needs.

The solution has a somewhat lower market impact profile. Today, the company does not garner nearly as much revenue (or attention) from its cloud platform as it does from its premise tools, although this is likely to evolve over the next few years, given that Interactive has made a big bet on the cloud in the most recent development planning cycle. Customer sentiment is also favorable: Interactive receives comfortably above average customer ratings for product quality, flexibility, and the depth of its multichannel offerings.

Interactive is a particularly good choice for enterprises in the middle of the market, especially those looking to transition from premise to cloud over a period of several years. The key areas for improvement for Interactive over the next two years will be managing its resources (including revenue

streams) as its customer base transitions from premises to cloud, and building up a broader reputation as a service provider that can provide reliable, scalable cloud platforms.

LiveOps profile

LiveOps has been offering cloud contact center services since 2006, when it shifted from its original role as an outsourcer of work-at-home agents to embrace the role of technology provider. At that time, it was able to use its own 20,000-person, independent contractor, agent base as a test bed to establish the viability of its cloud platform. The current version of its platform offering, available since 2011, is an internally developed multi-tenant routing engine that comes in three packages, based on the size of the client deployment.

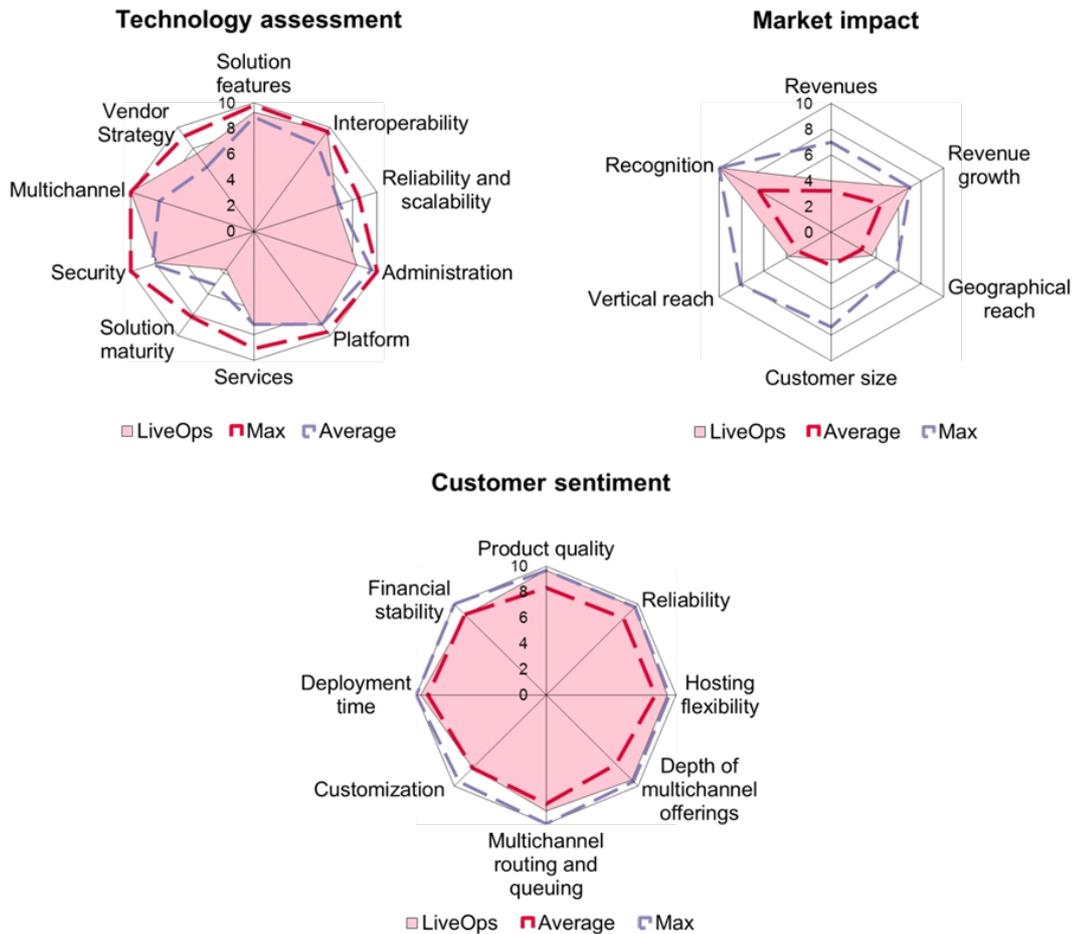
The California-based firm has approximately 38,000 client seats currently licensed, most of them in the sub-100 seat range. These seats are spread across different vertical markets, with the largest group (29%) in the retail/wholesale/distribution sector. It launched its current fully integrated, multichannel-plus-social-agent desktop, LiveOps Engage, in January 2013; it incorporates Salesforce.com and WebRTC integrations as key features.

Engage includes robust IVR capabilities, including the ability to tie custom applications into the system, with or without professional services. It integrates with partner-provided premise workforce optimization tools, and includes LiveOps' own call recording and quality monitoring.

Engage is switch agnostic, supporting major third-party TDM and IP equipment (the latter via SIP), and can support multi-vendor switch environments. It does not operate in a hybrid fashion, except that premise-based PBXs can redirect calls to the LiveOps cloud for overflow.

Unusually for a vendor that focuses on the SME market, LiveOps has robust multichannel capabilities. Engage supports email, web chat, SMS, and outbound interactions natively, and offers customer communities and IVVR through partners. It also offers mobile customer interaction support is also available, although this is rudimentary. The company indicates that its roadmap for 2014 will include features for mobile interactions, social media routing, and co-browsing (through partner integrations), as well as further CRM plug-ins.

Figure 9: The LiveOps multichannel cloud contact center radars



Source: Ovum

Recommendation: shortlist

LiveOps scored higher than any competitor on its customer sentiment metrics, with particularly good results for product quality, deployment time, multichannel routing, and the depth of its multichannel offerings. This across-the-board endorsement from customers indicates that the company has been smart in the way it has balanced sales growth with investment in features that appeal to its target market (SMEs).

Its technology assessment is comfortably near the average for the sample, which may provide some insight into the success LiveOps has had. It appears to have a strategy of incrementally improving on the technology available, but acts more in response to market demands than out of a desire to introduce challenging new technologies to a skeptical market.

LiveOps' strengths lie in its interoperability and integrations, and in its multichannel offerings (which are rated at the top of the group). The vendor has also seen strong revenue growth, and scored the highest for recognition, showing that its brand presence has a significant weighting. Ovum recommends that LiveOps put some of its muscle behind expanding its platform's reach into larger centers, new

geographies, and potentially into solutions targeting particular vertical markets. This will help the vendor to differentiate what is otherwise a well-rounded offering.

NewVoiceMedia profile

NewVoiceMedia was founded in 2000 and focuses on providing cloud-based voice and contact center solutions. It was launched in the UK and its data centers are held there, but it is rapidly expanding in the US; it is looking for additional sites, and has several global customers. The organization is strictly a multi-tenant provider that prides itself on building technology in-house in order to reduce deployment time and costs for its customers. It has developed its own workforce management solution and multichannel routing, and is able to quickly add new features based on customer requests.

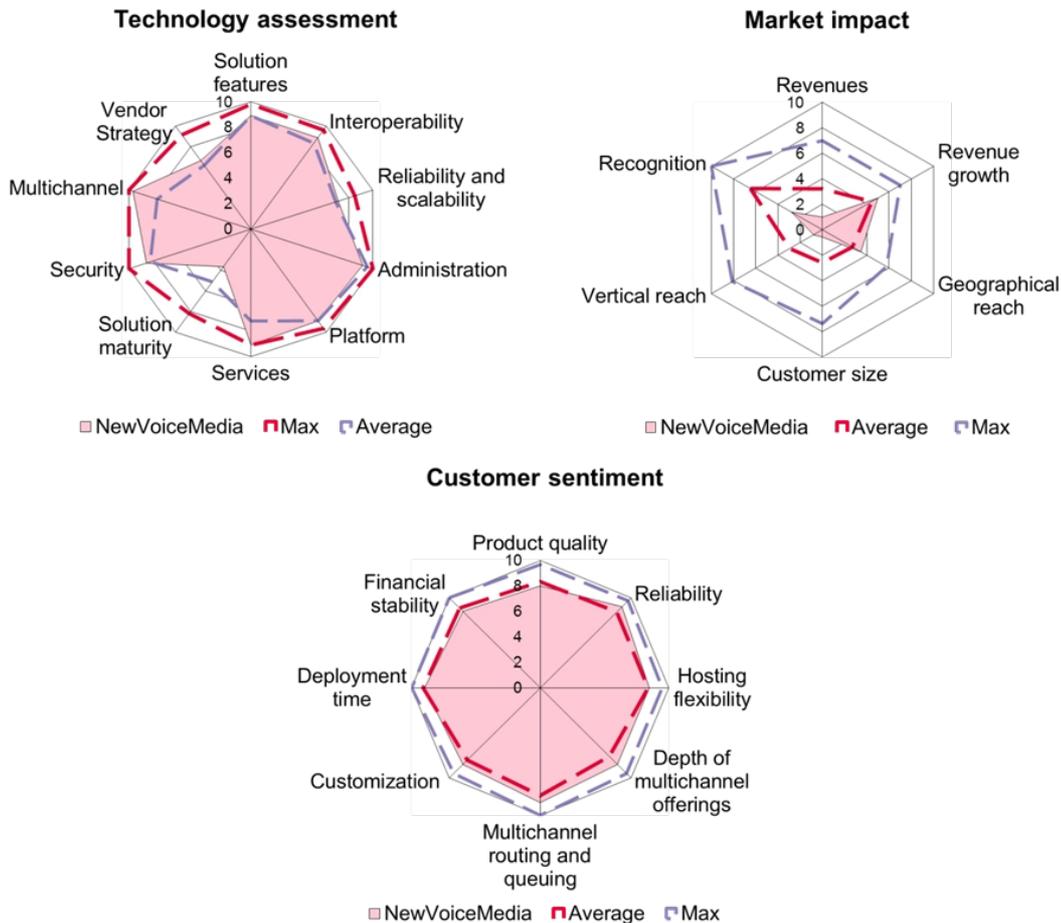
NewVoiceMedia offers its solution, ContactWorld, in several different packages according to its customers' needs. This includes standard and advanced versions of its service product, a sales and marketing platform, and an unlimited package that includes additional WFM, IVR, and compliance modules. Its standard features include call recording; routing based on criteria such as customer status, agent skills, or management levels; and click-to-call-back functionality. The sales and marketing offering was launched in May 2013 to meet demands from organizations requiring tailored outbound features.

One of the distinct benefits of the NewVoiceMedia solution is that it does not require the replacement of existing telephony in order to route and manage customer interactions. Contact centers can choose to keep their existing on-premise PBXs and telephones, or add a cloud-based VoIP PBX from NewVoiceMedia. The vendor is able to route and manage voice calls alongside new channel capabilities.

Salesforce.com is a key partner for NewVoiceMedia. The vendor offers full integration and routing based on Salesforce data, and is relying on the Salesforce eco-system to help it expand into the US market. Call recording and customer voice information is directly linked onto Salesforce case management records. Despite its heavy focus on Salesforce integration, NewVoiceMedia can integrate with other CRM solutions through standard web APIs.

NewVoiceMedia can route interactions from email or web chat using Salesforce's email and chat management tools. All channels can be integrated with its workforce management and routed based on agent skills and channel. The vendor offers tools to provide click to call from a website and chat, also allowing customers to build logic and processes using data feeds and tracking from a website. The vendor can also provide social media for its customers through the Salesforce interface.

Figure 10: The NewVoiceMedia multichannel cloud contact center radars



Source: Ovum

Recommendation: consider

NewVoiceMedia scored highly in the technical assessment and is well regarded by its customers. Its ContactWorld solution is well suited to existing Salesforce customers looking for tight integration with call routing, recording, and case management. Coupled with rapid deployment times and price competitiveness, NewVoiceMedia's solution makes most sense for organizations with fewer than 100 agents. However, the product is scalable and has some proven deployments in contact centers with over 1000 agents. The vendor's robust technical capabilities, high service levels, and PCI certification will help increase confidence in its ability to work with larger customers as it expands.

NewVoiceMedia's main weaknesses are its limited market share and lack of solution maturity. The ContactWorld product has only been available since 2006. It also rated lower across the market impact radar (with the exception of high revenue growth). Despite its rapid expansion in recent years, NewVoiceMedia still has a way to go before it is recognized as one of the leading cloud players. Its partnership with Salesforce has been productive to date and will certainly help the vendor to gain new customers. However, focusing on one partnership could be limiting if NewVoiceMedia wishes to expand

to some more complex, larger customer service deployments and compete against the more established cloud contact center providers.

Transera profile

Transera, based in Sunnyvale, California, was founded in 2004 and has been offering hosted contact center services since 2005. The venture-funded company has internally developed its own multi-tenant platform.

Transera differentiates its on-demand contact center solution by separating the application services stack from the voice network. It uses standard Internet protocols (SIP, for example) to manage the mid-point between the voice network layer and application stack. The interaction server is agnostic to the type of contact (call, chat, email) and can route any media type.

Transera's platform makes it possible to separate the call flow from the actual voice stream, which remains in the network. The rest of the on-demand contact center applications (such as the routing, IVR, quality monitoring, and reporting) are provisioned and delivered in a multi-tenant, software-as-a-service environment.

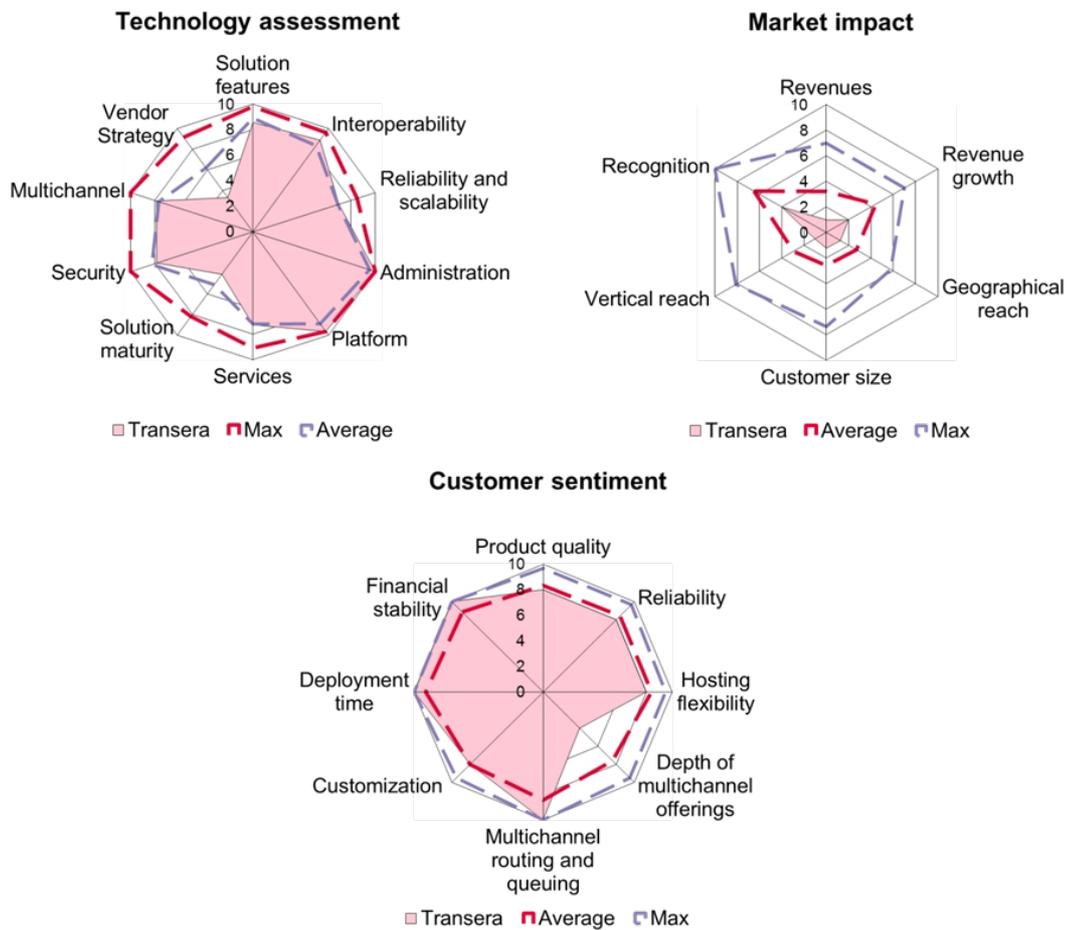
That positions Transera to provide very robust cloud-based analytics applications that the company has productized under the banner of the Transera Customer Engagement Analyzer. This tool brings together data from ACD applications, IVR systems, CRM applications, order entry applications, and other customer data sources. It is a much more advanced analytics platform than many small companies could afford if delivered as a premise-based application.

The company has a rich partnership ecosystem feeding it many of the applications needed for contact center operation, including workforce optimization tools, customer feedback/surveys, and IVR and speech self-service applications (though not the foundational IVR routing itself, which Transera handles). Some of the system administration functions are also handled through OEM partners.

Transera also relies heavily on partners for its multichannel capabilities. For email, web chat, social media, and SMS, Transera handles routing of the interaction natively, with agent desktop support provided by a third-party partner. Transera is developing a multimedia solution that will not require third-party partner integration; this is scheduled for release in late 2013. The company has not yet added support for customer mobility, with the exception of enabling click-to-call from within mobile applications.

Transera's core customer base consists of enterprises with 300–500 agents. The majority of its clients are in the retail sector, with most of the rest in financial services, manufacturing, and media.

Figure 11: The Transera multichannel cloud contact center radars



Source: Ovum

Recommendation: explore

Transera has spent almost a decade building a very sophisticated, highly feature-rich platform for cloud call routing. What it has yet to do is convince the market that it should be the provider of choice for complex deployments in multichannel environments. Its customers appear to have had good outcomes with Transera, but they acknowledge that the company's multichannel offerings are not as strong as those of its competitors.

Transera leans toward larger enterprise engagements, with an average of 300–500 seats per customer. The company's strength lies in managing complex routing, particularly in retail centers. However, it has fewer built-in CRM integrations than its competitors, and is weaker than the rest of the group when it comes to handling both web chat and customer mobility.

Ovum recommends that Transera build out its partnership network to make integrations with CRM more of a turnkey installation. There are also opportunities for the company to leverage its expertise in its key vertical (retail) into other areas such as telecoms and financial services.

Verizon profile

Verizon is one of the leading telecoms organizations in the US, delivering communications, IT, security, and network solutions to large global enterprise customers (as well as to consumers). Verizon is also a leader in contact center management, offering platforms that handle millions of calls per month while meeting stringent availability requirements. Its contact center solutions power nine of the top 10 banks. The company's extensive portfolio includes CPE, managed, and hosted contact center offerings.

As part of its wide range of products and services, the vendor also offers cloud contact center solutions. Verizon offers two options for cloud contact center customers:

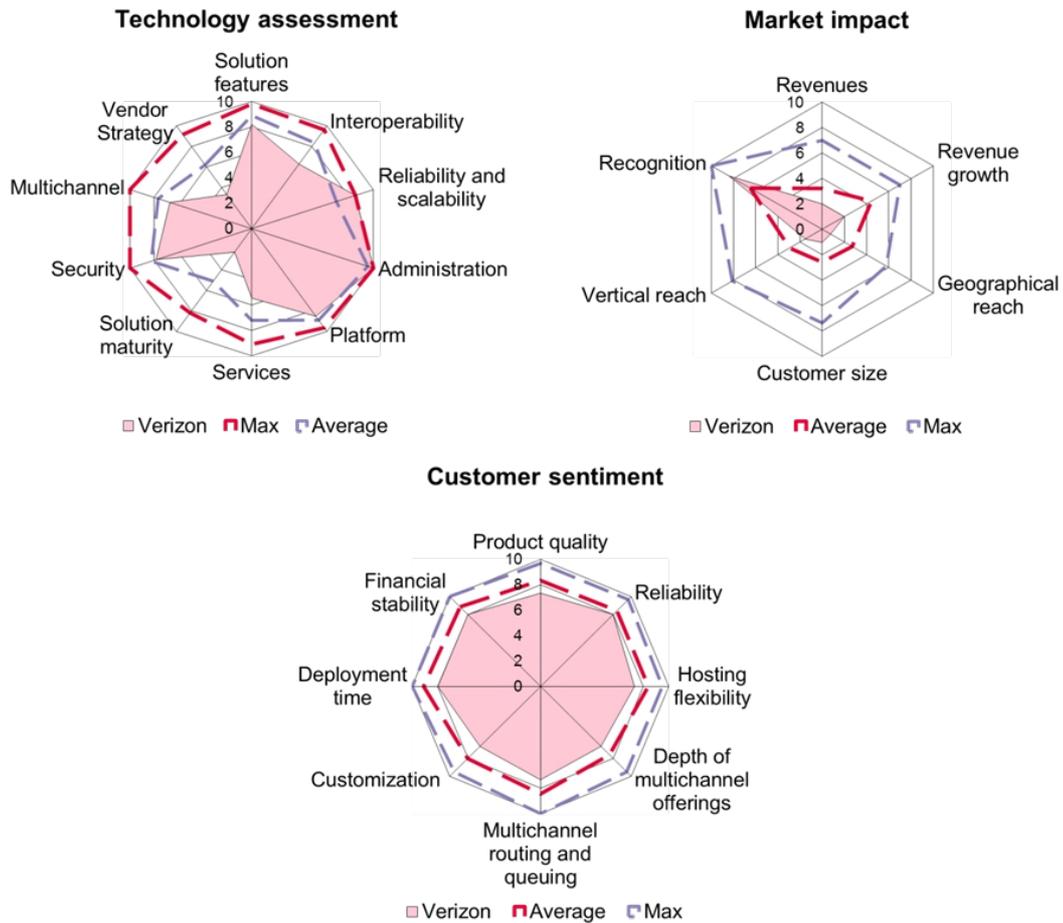
- Verizon Hosted Intelligent Contact Routing (ICR). This product is based on the Genesys platform and is aimed at contact centers with sophisticated requirements, typically above 500 agents. The product is intended for customers that require a significant amount of customization for their contact center solution and need to integrate with existing CRM, agent desktop, or workforce optimization applications. Most customers selecting this option will already have some contact center capabilities but will want to add additional services and access a broad selection of features and functionality.
- Verizon Virtual Contact Center. This solution is powered by inContact and is offered in a multi-tenant environment. It is aimed at customers looking for a packaged solution with minimal integration or complicated routing requirements. The majority of customers using this platform have fewer than 200 seats, although Verizon does have some very large customers using this platform that were looking to simplify their contact center.
- In addition to these two core platforms, Verizon offers its own IVR functionality and has the ability to build and design speech applications in-house. Verizon is one of the largest providers of hosted IVR services in the US. It has partnerships with Nice and Verint to provide call recording and workforce optimization capabilities, as well as with RightNow (now part of Oracle) for CRM.

Unlike the other vendors profiled in this Decision Matrix, Verizon does not offer contact center services as its core business, but rather as an additional service. This gives it an advantage in the cloud world, where its significant scalability and experience of providing services for different business requirements hold some weight. It has almost two decades of experience of providing hosted services, and its services and engineering teams are advanced in integrations and customization.

Verizon has done well at both the high end of the market (1,000+ seat deployments) and at the lower end (sub-1,000 seats). The company is now targeting the middle of the market more aggressively, thanks to the availability of the inContact platform aimed squarely at those customers. Despite the wide variation in the sizes of Verizon's clients, the company maintains a very respectable 30-day average deployment time.

Verizon supports a wide variety of multichannel interactions, some through third-party partnerships. The web chat features are particularly robust, including native queuing and routing, and (through partners) the ability to integrate proactive chat and co-browsing.

Figure 12: The Verizon multichannel cloud contact center radars



Source: Ovum

Recommendation: explore

Verizon's hosted portfolio is in transition. The company has a strong brand and robust solutions, and offers varied options to its small (albeit growing) base of customers.

Like all of its partners, Verizon may face challenges with Genesys now offering its own platform in the cloud, in addition to through partners. An advantage of Verizon is its ability to develop custom cloud solutions with a variety of partners; a disadvantage is its need to differentiate itself through services. Every couple of years, Verizon reassesses its technology partner platforms at both the higher and lower ends of the market. It is currently working with Genesys and inContact as leading cloud partners.

Even as Verizon decommissions its Web Center offering, which is 10 years old and more, it maintains a 90% customer retention rate. Ovum believes that Verizon should attempt to differentiate its offerings between the market segments, clearly explaining to its customers the wide array of tools available through its platform partners. The top and bottom of the market seek out hosted services for very different reasons; Verizon has the wherewithal to serve both, but needs to articulate separate value propositions for each segment.

Genesys has been aggressive in expanding its multichannel feature set and adding new capabilities such as speech recognition; Verizon should market these advanced features to its customer base. Verizon also relies on its own business network for new business. Although this network is vast, it may not necessarily be able to target the contact center managers that its solutions are aimed at without help from additional partners.

West Interactive profile

West Interactive is a subsidiary of the West Corporation, a leading provider of communications and network infrastructure solutions, and one of the largest contact center outsourcing firms in the US. Based in Omaha, Nebraska, the company offers the West Hosted Contact Center Platform (HCCP), a multi-tenant solution built on a combination of technologies developed in-house and by Genesys. It is available in six variant packages, and is deployed to approximately 12,000 agents, primarily in the Americas.

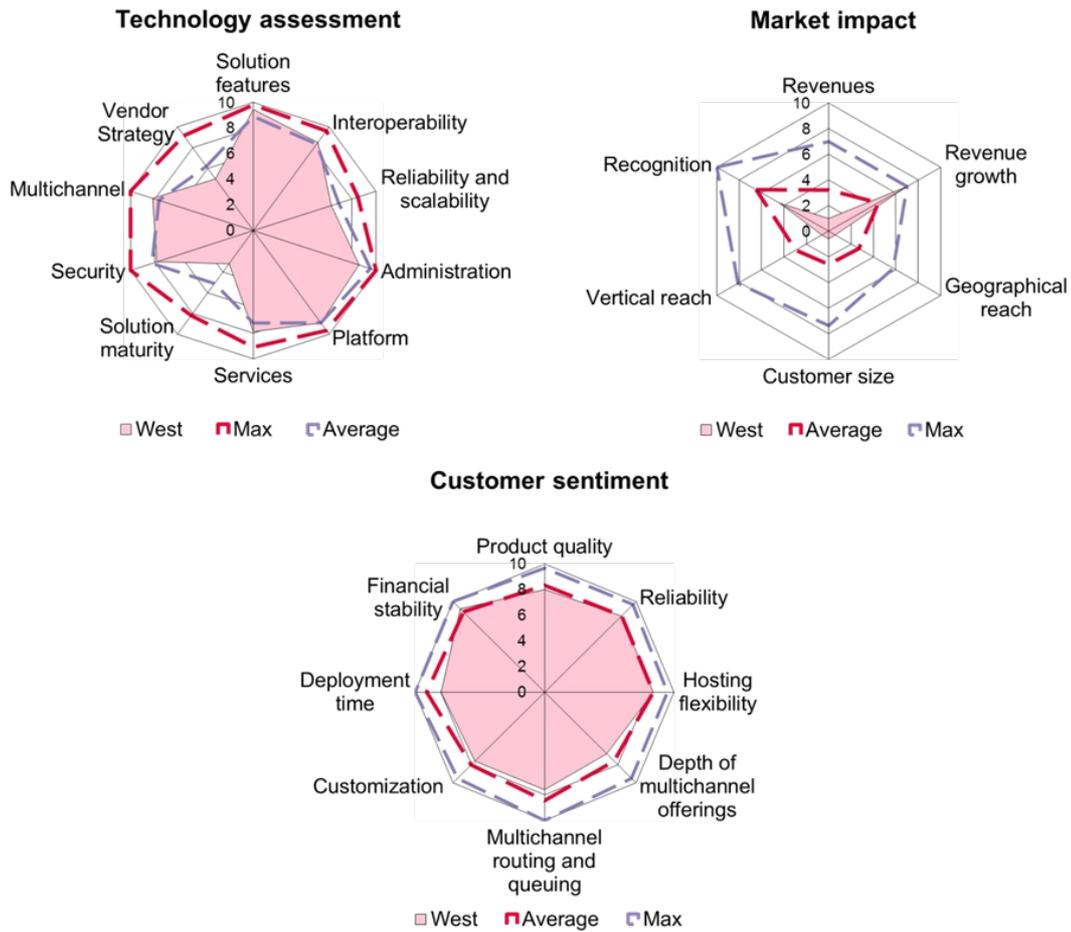
West's largest client pool consists of businesses using fewer than 500 seats, though the platform does scale up into the thousands of seats. The largest current customer is licensing between 1,000 and 2,000 seats.

The platform is composed of distinct solutions, aimed at different market segments. For the enterprise market, West uses technology from Genesys, including Genesys Voice Portal for IVR. For the small-to-mid-sized market, West uses its ControlMaxx solution, from its recently acquired Smoothstone subsidiary (now called West IPC) and its West-built system Virtual ACD (which stems from West's own home agent business, launched in 2003).

Unlike most of its competitors in the hosted space, West differentiates its offers based on the interaction channel components the client requires. Its offerings include inbound voice only, outbound (with inbound alongside), chat capability, email, and the chat/email combination. The most popular offering is for voice plus email, with the option to add web chat. The target clientele for that service are centers with 300–700 seats.

West's platform allows clients to treat all interaction types consistently. It supports voice (inbound and outbound), email, chat, SMS, and social media, and allows clients to blend media in routing, reporting, and desktop applications. West's chat capabilities are particularly noteworthy: it supports queuing and routing, as well as proactive chat, link to call-back, and co-browsing during chat.

Figure 13: The West Interactive multichannel cloud contact center radars



Source: Ovum

Recommendation: explore

Not surprisingly (for an outsourcer), West scores highly on the quality of its services and expertise. It has a smaller roster of high-volume clients who positively rate the company's reliability, flexibility, and financial stability. The core offering is comparable to its peers from the standpoint of its technological sophistication, multichannel capabilities, flexibility, and solution features.

West's weakness to date has been in its market impact. The firm's developing roadmap and offer set is less mature than those of some of its peers in the hosted contact center technology business, yet it continues to make progress. Parent company West's focus on platform-based businesses in the future likely means more focus on hosted contact center in coming years.

The company has excellent partner relationships with carriers, systems integrators and existing premise-based ACD vendors. The West HCCP integrates with premise switches including Cisco, Avaya (including Nortel), and Siemens.

The firm's expertise as an agent outsourcer provides it with an understanding of client business processes that can help enterprises transition from premise-based systems to the cloud over time, in complex configurations of technology.

APPENDIX

Methodology

Inclusion criteria

Ovum selected vendors that are able to offer full voice call routing (i.e. ACD) in the cloud, that can route at least one interaction channel beyond voice, and that have at least 10,000 deployed agent positions in the US. While some additional vendors were able to meet these criteria, notably AT&T, CenturyLink, CosmoCom, and Noble Systems, they were unable to provide sufficient information for a full evaluation. Premise-based contact center vendors such as Aspect, Avaya, Cisco, and Genesys Telecommunications also offer cloud contact center offerings, but these were not mature enough at the time of research to be included in this report. All included vendors were asked to complete a technical assessment checklist as well as provide a list of customers to be surveyed.

Technology/service assessment

In this assessment dimension Ovum analysts develop a series of features and functionality that would provide differentiation between the leading solutions in the market place. The criteria groups identified for multichannel cloud contact center are as follows:

- **Solution features:** The core requirements for call handling and interaction routing, including IVR and workforce optimization.
- **Interoperability:** The ability of the platform to support 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 clients with deployments of various sizes; it also measures the flexibility of different hosted configurations and deployment times.
- **Administration:** Measures the vendors' capabilities in system management, configuration, performance monitoring, and quality management.
- **Platform:** Identifies the vendors' capabilities in tenant separation, client upgrading, network connectivity, and telephony.
- **Services:** Measures the offerings' professional services components, customer support options, SLA provisions, and pricing models.
- **Solution maturity:** Assesses how long the company has been in the market with a cloud-based offering; how many customers the vendor has acquired, and how deep the partnership ecosystem is built.
- **Security:** Measures the physical integrity of the platform, particularly with regard to data center and agent desktop security and compliance with regimes like PCI.

- **Multichannel:** The capabilities offered by vendors in handling non-voice interactions, particularly email, web chat, web collaboration, social media, mobile, and cross-channel communications from end-user customers.
- **Vendor strategy:** Assesses each market participant's global presence, product/technology roadmap, go-to-market plans, and brand equity in the cloud contact center space.

Customer sentiment

In this dimension Ovum analysts reviewed the capability of the solution around the following key areas (based on a survey of vendor customers). At least six completed customer survey responses were required for each included vendor.

- **Product quality:** An assessment of customers' views of the overall capabilities of the platform offerings.
- **Hosting reliability:** An assessment of the vendors' ability to maintain effective service levels over time.
- **Hosting flexibility:** Whether the platform is available in multi-tenant, single tenant, or hybrid configurations.
- **Depth of multichannel offerings:** An assessment of customer perception of the adequacy of the vendors' non-voice interaction capabilities.
- **Customization options:** An analysis of how readily the vendors work with clients to integrate and customize the offering to each unique deployment.
- **Deployment time:** An assessment of the speed and ease of installation.
- **Financial stability:** Customer perception of the long-term prospects of the vendors.

Market impact

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

- **Revenues:** Each vendor's 2012 cloud contact center revenues were calculated as a percentage of those of the market leader. This percentage was then multiplied by a market maturity value.
- **Revenue growth:** Each vendor's revenue growth estimate for the financial year 2011–12 was calculated as a percentage of the growth rate of the fastest-growing solution in the market; the percentage was then multiplied by 10.
- **Geographical penetration:** Ovum determined each vendor's revenues in three regions – the Americas; Europe, the Middle East, and Africa (EMEA); and Asia-Pacific. These revenues were calculated as a percentage of the market leading solution's revenues in each region, and multiplied by 10. The solution's overall geographical reach score is the average of these three values.
- **Customer size:** Ovum determined the percentage of each vendor's revenues from contact center deployments across four size bands: fewer than 100 agents, 100–499 agents, 500–999 agents, and 1,000 agents and above.
- **Vertical penetration:** Ovum determined each solution's revenues 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 BPO) businesses. These revenues are calculated as a percentage of the market leader's revenues in each vertical, multiplied by 10. The solution's overall vertical penetration score is the average of these values.

- Recognition: A measure of the portion of the surveyed customers who reported familiarity with the vendors' offerings.

Summary scores

Table 2: The multichannel cloud contact center Decision Matrix

	Technology assessment	Customer sentiment	Market impact
Echopass	8.2	7.6	5.6
Five9	7.2	9.1	4.7
inContact	8.0	8.5	6.5
Interactive Intelligence	8.4	8.9	2.6
LiveOps	7.9	9.2	5.1
NewVoiceMedia	8.1	8.6	2.3
Transera	7.5	8.3	1.7
Verizon	6.7	7.4	2.6
West Interactive	7.4	8.0	2.4

Source: Ovum

Further reading

The Total Cost of Ownership of Cloud and Premise-Based Contact Center Systems, TE001-000551 (January 2013)

Hosted Contact Center: A Large Enterprise Pricing Framework, TE001-000399 (January 2012)

Hosted Contact Center: A Mid-Market Pricing Framework, TE001-000401 (January 2012)

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