

HFS Top 10: CX Services in the Pandemic Economy—The Best of the Best Service Providers

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The evolution of digital contact center market services has accelerated rapidly in the past year under pandemic-related pressures. Disruptions, including volume fluctuation, staffing pressures, and a newfound re-imagination of employee experience, thrust this industry into a revolution. Despite the increasing demand for digital solutions for certain interactions, people still fundamentally want to talk to other people in many circumstances. This industry has an increasingly difficult challenge of balancing the right blend of digital and human interactions in a volatile pandemic environment. Enterprises now rely on their service provider partners more than ever to help them find the right balance and differentiate through a dual focus on employee and customer experience.”

—Melissa O’Brien, Research Vice President



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Introduction and definitions

Introduction

The last 18 months created tremendous demand for contact center services and accelerated enterprises' reliance on providers to manage interaction volumes—both traditional (e.g., phone calls) and digital (e.g., chat, social media, self-service, and automated interactions). While on the one hand, digital is no longer optional, on the other is that the desire to hear another human's voice for reassurance was at an all time high during the pandemic. Providers in this market are increasingly blending these services and focusing on EX (employee experience) and CX (customer experience) in alignment with [HFS' OneOffice model](#) on page 7.

The 2021 *HFS Top 10: Digital Contact Center Services—The Best of the Best Service Providers* report examines the capabilities of the world's largest service providers. We assessed and rated the industry-specific service capabilities of the top 15 leading service providers across a defined series of execution, innovation, OneOffice alignment, and voice of the customer criteria. The report highlights the overall and sub-category ratings for these best of the best participants.

This report also includes detailed profiles of each service provider, outlining their rankings, provider facts, and detailed strengths and weaknesses.

This is a refresh of [HFS' 2019 front office customer engagement operations services report](#). Due to overwhelming demand for participation this year, we have only included the top 15 providers by headcount. We have also crafted a companion report, *HFS Market Analysis: Digital Contact Center Services Formidable Challengers*, featuring an additional 11 CX business process services specialists.

Happy reading!

— Melissa and Krupa

The digital front office—pillars of customer lifecycle management services

This Top 10 report focuses on customer service and contact center operations services

Marketing operations services	Sales operations services	Customer service and contact center operations services	
<ul style="list-style-type: none">• Content creation and development• Content classification• Ad moderation• Web development, e-commerce support• Campaign execution, loyalty program management, and coupon and gift card management• Search engine and social media marketing	<ul style="list-style-type: none">• Lead development and generation• Telesales and inside sales	<ul style="list-style-type: none">• Interaction focused, including• Technical support• Customer care• Loyalty and attrition campaigns• Collections	<ul style="list-style-type: none">Supporting business process, including• Fraud prevention• Case management and claims processing• Billing

Omnichannel CX

Voice | Chat | SMS | Email | Retail and face-to-face | Social media | Web and mobile app | Video kiosk

CX design and strategy

Customer experience design and consulting | Customer journey mapping | Design thinking | Brand strategy

Enabling technologies

Digitization and robotic automation | Analytics | Mobility | Social media | Cognitive computing | Artificial intelligence

Operating models, methodologies, and platforms

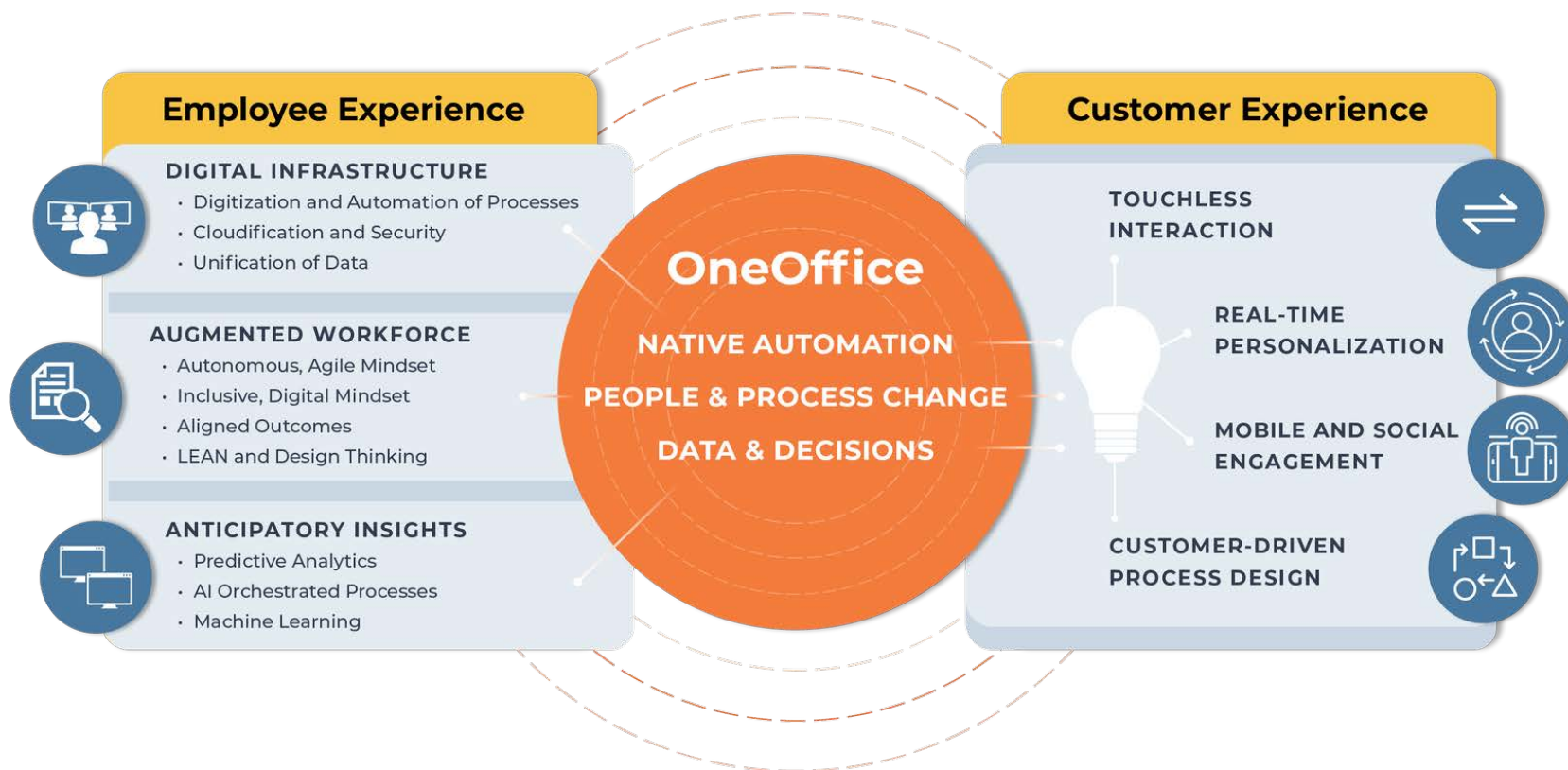
Outsourcing | Shared services | GBS | COEs | BPaaS, SaaS, and IaaS | Design thinking

Required
supporting
capabilities

HFS value chain definition: Value chain refers to the business units that carry out value-creating activities to design, produce, market, deliver, and support a company's product or service. In this usage, we refer to the range of primary processes and support services that providers offer to their clients.

The HFS OneOffice—digital transformation in action

The HFS OneOffice is our vision for actionable digital transformation. At its heart is the core concept that emerging technologies combined with people, process, and data innovation can break down the silos that limit our success and dissolve barriers between the front and back office to create the only office that matters—OneOffice. It represents a mindset shift to collaborative cross-functional enterprise operations powered by an integrated stack of emerging tech that complements your core, natively automates your processes, enables your employees and customers, and powers your decisions, breaking down your legacy silos in the process.





Research methodology

Digital contact services providers covered in this report

Top 15 study participants*

(Focus of this report)



Digital contact center formidable challengers*

(Please refer to the companion report *Market Analysis: Digital Contact Center Services Formidable Challengers*)



* Top 10 study participants have a digital contact center minimum headcount requirement of 25,000. Market analysis participants fall below this threshold but offer specialized value to enterprises.

Research methodology

The *HFS Top 10: CX Services in the Pandemic Economy—The Best of the Best Service Providers* report assessed and scored service provider participants' capabilities for execution, innovation, voice of the customer, and a new criteria for 2021, alignment with HFS OneOffice model. The details include characteristics in these four categories:

Ability to execute 25%	Innovation capability 25%	Voice of the customer (VOC) 25%	OneOffice alignment 25%
<ul style="list-style-type: none">• Depth and breadth of offerings and expertise: Includes capabilities across the HFS customer engagement services value chain.• Service delivery excellence: The ability to attract and retain qualified talent with relevant industry, process, and technical expertise; service delivery capabilities, including best practices, focus on continuous improvement, and delivery footprint.• Growth of digital contact center business: Year-on-year revenue growth, client growth (new logo and organic), resource growth, offering expansion.	<ul style="list-style-type: none">• Vision and refinement of go-to-market strategy: Includes vision and credibility of strategy, strong understanding of industry trends, and refinement of capabilities to address client challenges.• Technology innovation: Capabilities across traditional and digital channels, development of internal IP, and strong partnership ecosystem for innovation capabilities.• Co-innovation and collaboration: Co-development approaches with contact center clients, co-innovation centers, creative commercial models.	<ul style="list-style-type: none">• Direct feedback from service provider clients: Reference checks, surveys, and case studies critiquing provider performance and capabilities.• HFS voice of the customer vendor rating data: Ratings by active clients of in-scope service providers.• Referenceability: Provision of references and reference responsiveness.	<ul style="list-style-type: none">• Alignment with the HFS OneOffice model: Ability to help the clients connect the front, middle, and back offices and realize transformation potential.• Internal OneOffice alignment: A vendor's internal alignment with OneOffice.• One face to the customer: A vendor's ability to represent its full capabilities to its clients.• Change management and digital fluency: Formal approach to change management, ability to drive digital fluency internally and externally.

Sources of data

This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the Digital Contact Center service capabilities of the service providers covered in our study. Sources are as follows:



RFIs and briefings

- **RFIs**—Each participating vendor completed a detailed RFI.
- **Vendor briefings**—HFS conducted briefings with executives from each vendor.



Reference checks

We conducted reference checks with **50+ active clients** of the study participants via detailed surveys and phone-based interviews.



HFS vendor ratings

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh-from-the-field HFS Pulse data featuring **800+ vendor ratings from Global 2000 enterprises**.



Other data sources

- Public information such as press releases, websites, etc.
- Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.



Executive summary

Executive summary

The “digital” paradox

What is a “digital contact center,” anyway? After all, what *isn’t* digital in 2021? We changed this year’s report to highlight CX services market changes that take advantage of digitally enabled solutions and their ability to shift rapidly in crisis pandemic conditions. At the same time, the “legacy” labor-focused and voice-based services are alive and thriving and not going away. Providers’ pre-COVID-19 ubiquitous rebranding of their “digital services” has only accelerated. Most of the leading providers we’ve profiled have a well-thought-out and developed capability portfolio that includes customer experience design, analytics, and automation capabilities. While important as go-to-market messages and capabilities, these offerings are so prevalent that companies find it extremely difficult to differentiate. As the digital mix continues to shift (see page 19), these capabilities are more important than ever. What’s making leaders in tech innovation stand out is not their messaging; it’s their client stories and solution references in action—the proof is in the pudding.

Industry-leading growth

Contact center services providers were some of the real heroes and champions of the global pandemic. Every provider that almost seamlessly shifted services completely remote while putting employees’ safety and welfare first and not sacrificing business continuity and KPIs deserves enormous kudos. The contact center services providers that had previously invested in work from home (WFH), cloud, and automation had the most growth last year. In fact, we expect customer services to have the highest growth rate across IT and business services next year, as page 15 displays.

The OneOffice factor

The contact center plays an integral role in the OneOffice. Many don’t realize that contact center service providers have been some of the first and most innovative thought leaders for aligning EX and CX. They figured out a long time ago the inherent connection between the two, and the smart ones have invested heavily in their people through hiring and recruiting practices, ENPS initiatives, tools and technologies to enable solid EX, career-pathing, employee journey mapping, methodologies, and frameworks that enable execution on these concepts. These capabilities have become an even more critical element of operations since the widespread shift to remote in the wake of COVID-19.

The winners

We assessed 15 service providers across execution, innovation, OneOffice alignment, and voice of the customer (VOC) criteria. The top five leaders are 1. Teleperformance, 2. Concentrix, 3. Telus International, 4. SYKES, and 5. Tech Mahindra. These leaders’ shared characteristics that include include deep customer experience expertise across the value chain combined with strong consulting, design, and process expertise, continued identifiable investments and growth in their businesses, cultures of innovation, deep and ever-evolving third-party partnerships, internal OneOffice alignment enabling a comprehensive external approach with clients, the ability to deliver business outcomes, and exceptional employee and customer experience.

Voice of the customer

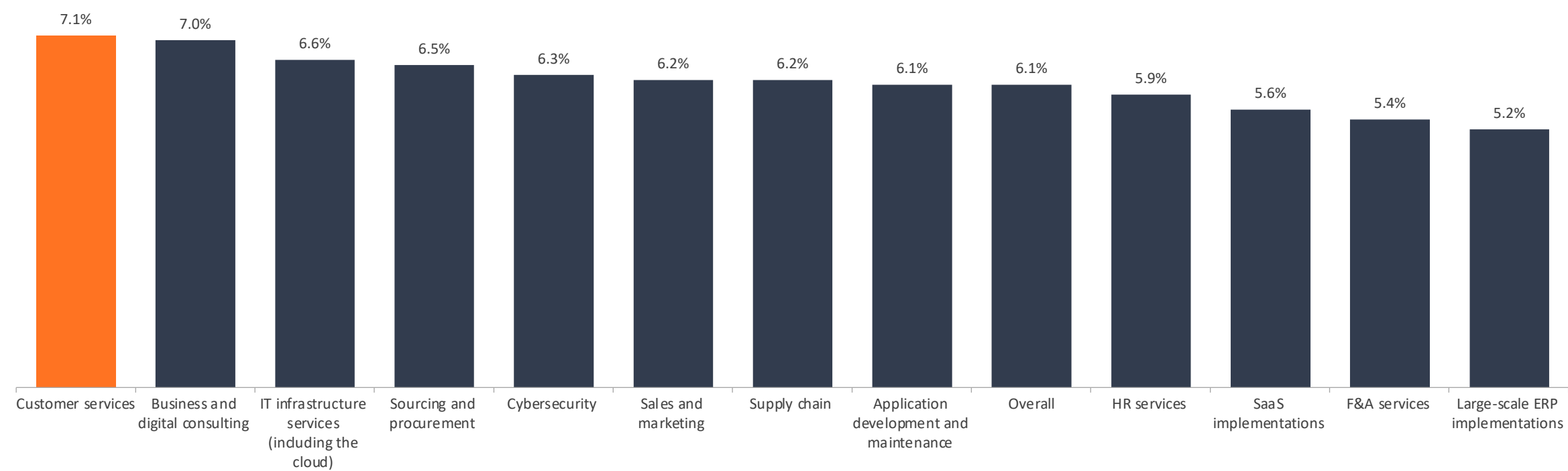
We did deep-dive interviews with over 50 enterprises as part of our voice of the customer research for this study. Enterprise clients of contact center services providers require the fundamentals of flexibility and scalability with a *trusted* partner first and foremost, and they yearn for greater process innovation, thought leadership, and ideas from their partners. The next slide highlights our observations of VOC trends.

VOC themes

- **Flexibility, scalability, and cultural alignment are core capabilities driving demand.** Geographic delivery diversity and work-from-home capabilities are more critical than ever. Fundamentally, enterprises need their partners to have core call center capabilities, the ability to attract and retain staff in multiple geographies, and the ability to help them analyze and innovate.
- **The table stakes continue to rise.** As with any commoditized market, cost savings and efficiency are table stakes, and clients are continuously looking for more ancillary services and process innovation.
- **Digital rebranding efforts are making it even harder for firms to differentiate.** With digital offerings in full swing, all providers are eager to show off their digital chops, and as the digital mix on page 19 continues to shift, these capabilities are essential. What's making leaders in tech innovation stand out is not their messaging; it's their client stories and solution references in action—the proof is in the pudding. Many references echoed the refrain that firms need to come to the table with tailored solutions rather than off-the-shelf slideware, and they need to lead with client stories to show they've done it before.
- **Enterprises remain hesitant about technology-focused solution adoption.** While digital channel adoption is on the rise, there is still a resounding hesitancy from enterprises about buying technology solutions from contact center services providers. The reasons for this are primarily twofold: First, many enterprise IT decision makers will not consider a CX-focused company for tech innovation, and, second, providers' solution descriptions can come across as too much like a sales pitch. CX leaders want solutions rather than “buy this” presentations.
- **Diversity programs and other CSR (corporate social responsibility) initiatives are serious topics of consideration during provider selection.** Diversity and inclusion are coming to the fore in evaluating providers. In such a labor and people-driven market, these programs are a necessity. Ninety percent (90%) of survey respondents said that a service provider's CSR initiatives are a significant consideration. Other Environmental, Social, and Governance (ESG) and CSR capabilities are gaining prominence, with enterprises selecting providers that can source from distressed communities. Impact sourcing is not limited to offshore communities; providers can find pockets of need in distressed communities in the US and other onshore delivery markets. Sustainability is a bit behind, but it is gaining traction; every reference cited it as important, but there were fewer formal policies in place to evaluate it than there were for diversity and inclusion (D&I).
- **Pandemic success stories.** Employee experience and work-from-home expertise created real stickiness with clients during the COVID-19 pandemic lockdowns. The high praise coming from client references indicated a high level of trust and reliance on their providers as true partners.

Customer service will see the highest growth rates across IT and business services next year

To what extent will you increase or decrease spending on external third-party services in the following areas in the next 12 months?
% expected growth (weighted average across respondents)



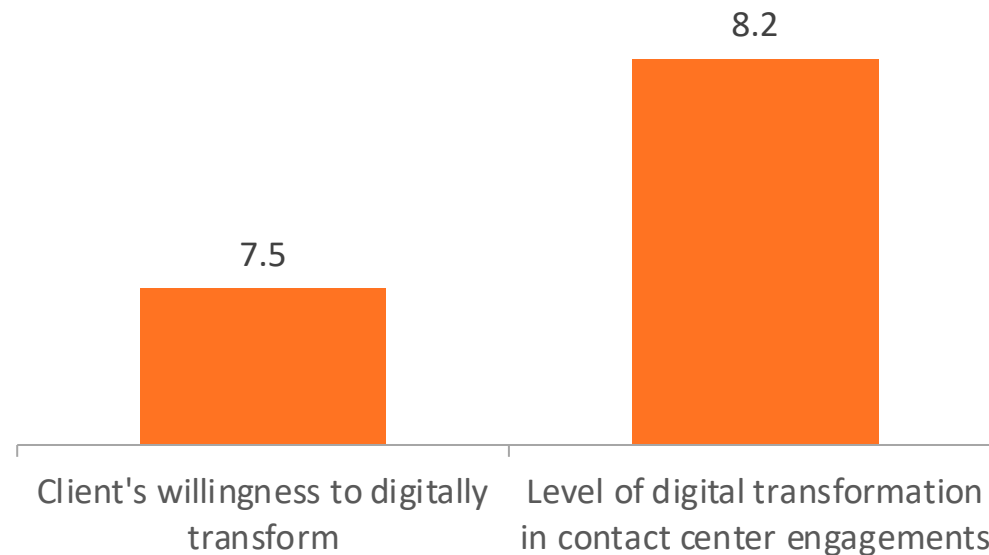
Sample: 800 respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

OneOffice is driving digital contact center engagements; enterprise mindsets are catching up!

Enterprises and service providers alike are displaying willingness to digitally transform, aligned with OneOffice.

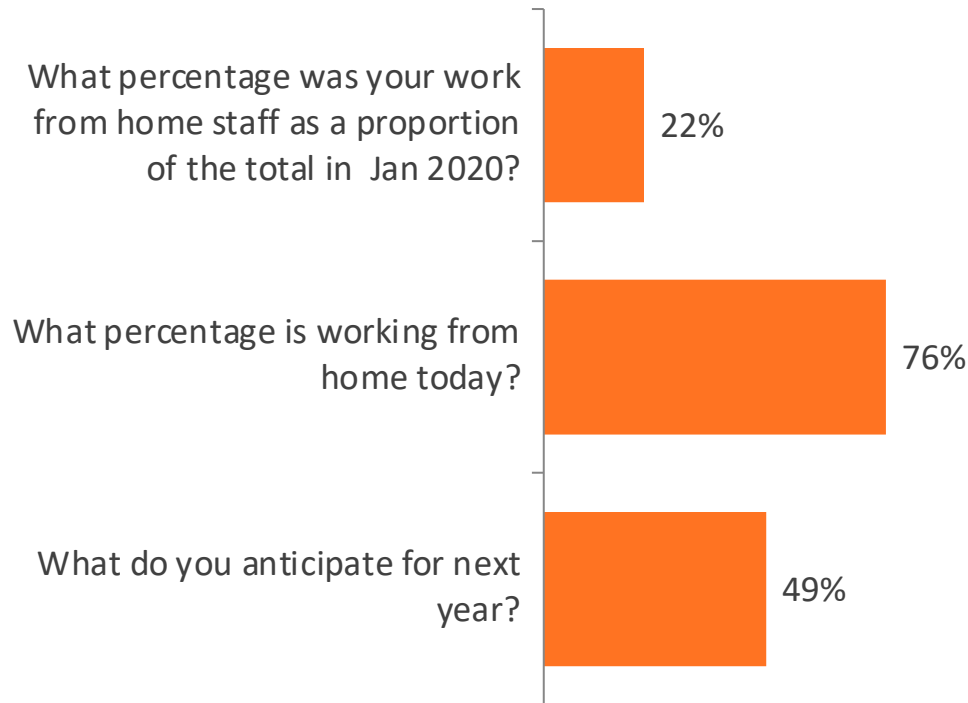
On a scale of 1 -10, where 1 is no transformation and 10 is full transformation, please rate the level of digital transformation achieved with each engagement, as described in HFS' OneOffice narrative

Average of responses from service providers



Sample: 26 global service providers participating in this study

The shift to work-from-home in the last 18 months has required a complete mindset and capability shift that will never return to in-office



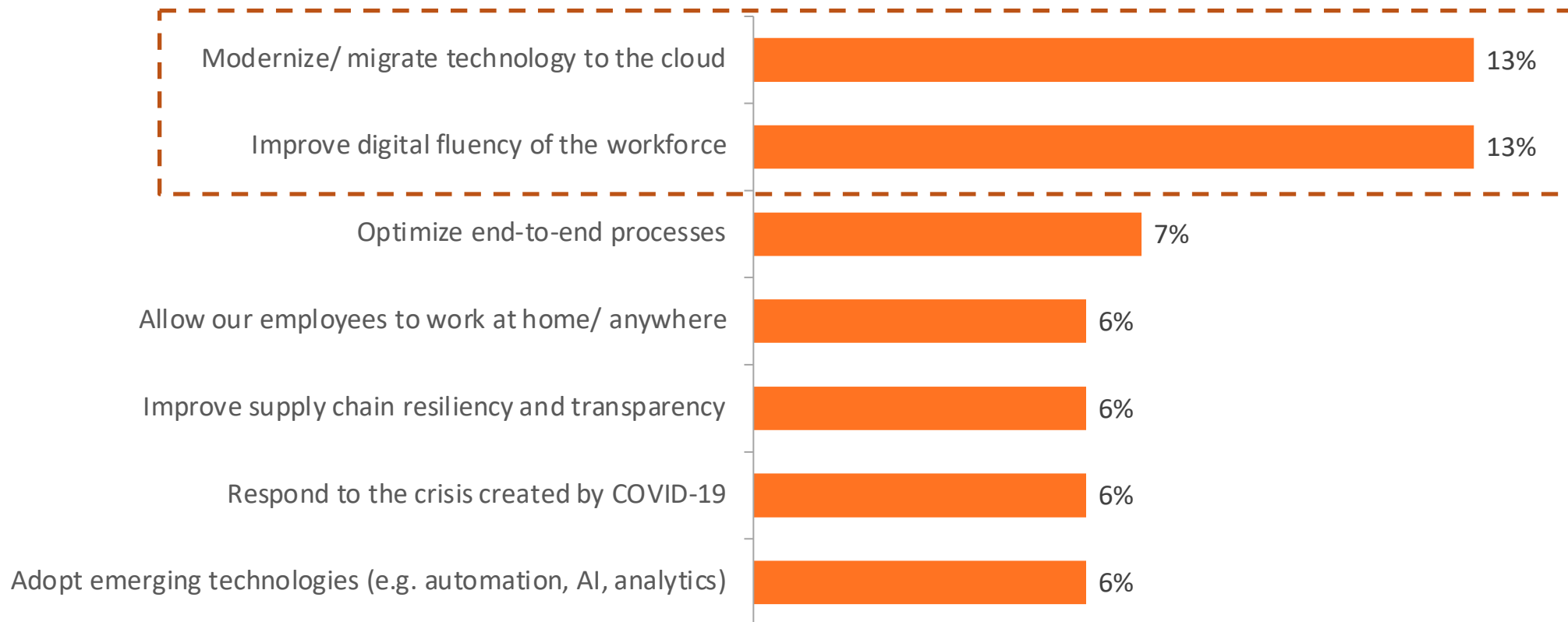
- In January 2020, work-from-home staffing accounted for only 22% of the contact center workforce. It was a growing delivery model, but enterprises used it only for specific use cases, demographics, and geographies. With pandemic lockdowns forcing a widespread shift to remote working, the cultural resistance to working from home dissipated, enabling enterprises to optimize the model.
- The pandemic taught service providers and clients that digitalization and the cloud play key roles in sustaining the industry, along with enabling digital fluency of the workforce.
- Amidst the challenges of security, compliance, human behavioral changes, and new expectations of clients, brick-and-mortar work environments will never return to pre-pandemic levels. Service providers are planning to continue a work from home model with nearly 49% of their total headcount in 2022.
- Service providers are building a resilient and agile hybrid WFH model to prepare for the next “new normal.”

Sample: 26 participating global service providers

Training staff to be digitally fluent as we head to the cloud dominates our immediate future

What are the major changes in your organization's ways of working for the next 12 to 18 months? (only rank #1 shown)

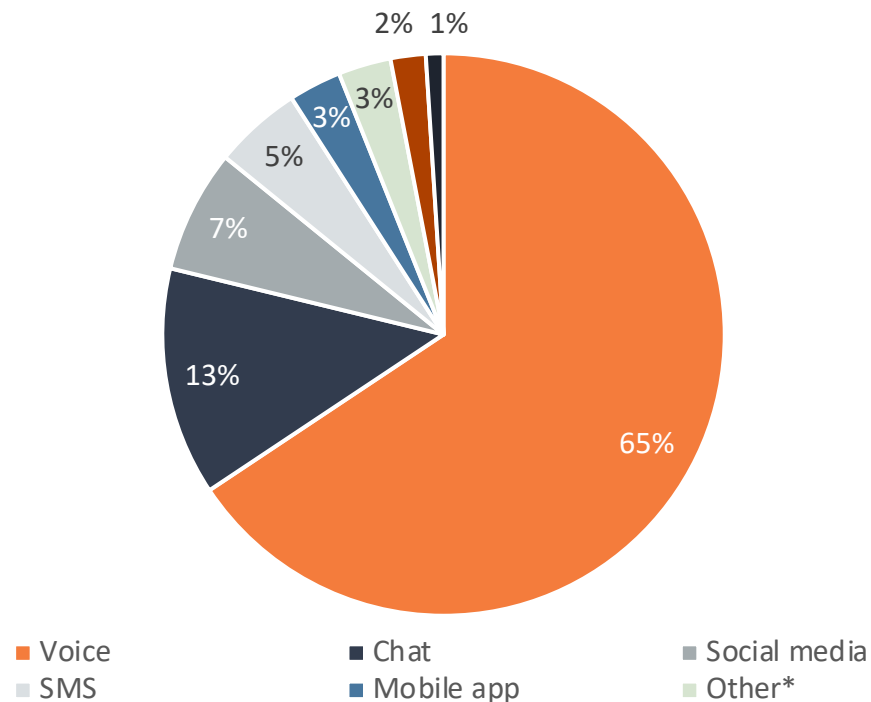
Percentage of respondents



Sample: 800 Global 2000 Enterprises
Source: HFS OneOffice Pulse Study, H1 2021

Voice is the prevalent delivery channel for CX services, but digital channels are on the rise

Q: Please provide a summary of your contact center interactions as a percentage of each as a portion of customer interactions overall.



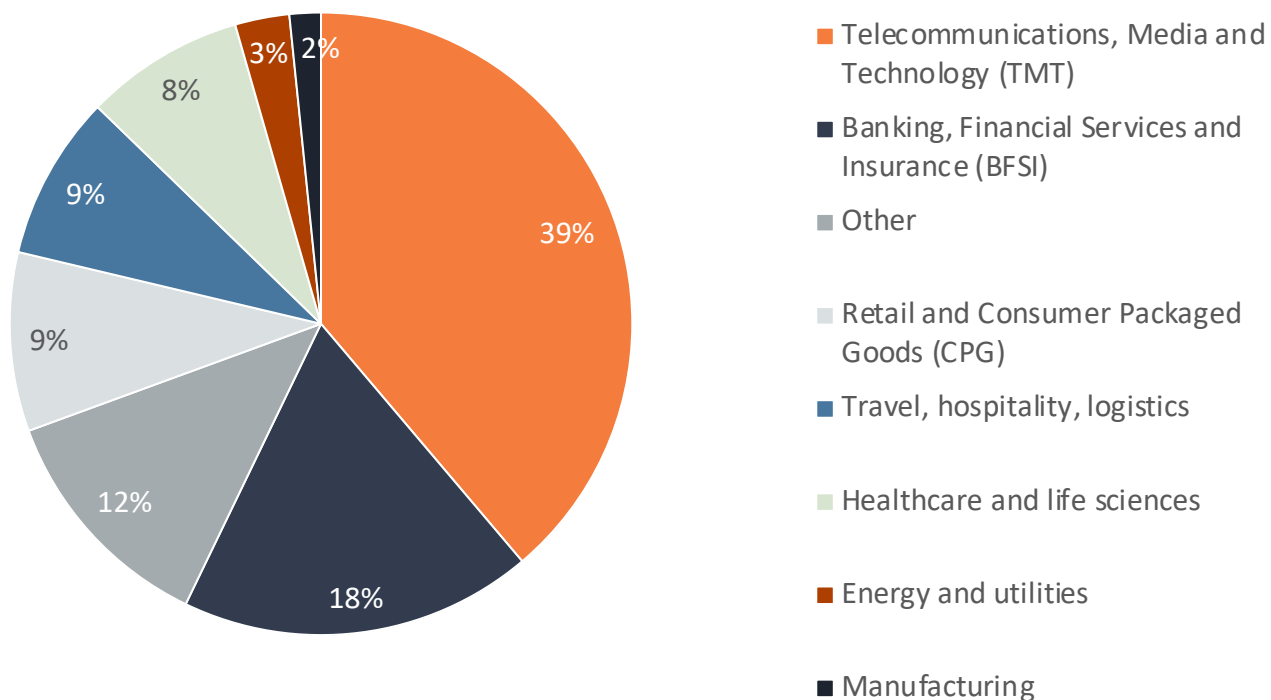
- Voice continues to be the prevalent delivery channel through which contact center service providers are providing services. Although voice is one of the longest-tenured traditional channels, you should not view it as lacking innovation. There have been significant advancements in the number of voice interactions augmented or automated by AI-powered tools like dynamic IVRs, dynamic personality-based call routing, and dynamic call flows.
- All participating service providers noted an increase in demand for digital channels, particularly for automated solutions to augment labor-based services during the past 18 months of pandemic-related disruptions, volume fluctuation, and staffing pressures. These issues are ongoing.

Sample: 26 participating global service providers

Other*: Email, other digital self-service, other non-voice services

TMT and BFSI continue to dominate contact center services revenues

Q: Estimate your revenue contribution as a percentage of contact center revenue across industries.



Sample: 26 participating global service providers















































































































Top 10 results: Digital
contact center services—best
of the best service providers

Digital contact center services—summary of providers assessed in this report

Service providers (alphabetical order)	HFS point of view
Alorica	Newly reimagined “cloud-native” provider focused squarely on employee experience
Atento	Large LATAM provider pivoting to innovation and continuing expansion
Concentrix	Comprehensive front-office portfolio driving experience service design
Conduent	Dependable provider with industry-focused solutions
HGS	Nimble, flexible partner with expertise poised to bridge gaps in the customer experience lifecycle
Majorel	A multilingual expert with a global footprint
Sitel Group	Industry-leading growth powered by design expertise
Startek	Expanding portfolio of traditional and digital omnichannel services
Sutherland	A design-focused provider with strong partnerships for innovation
Sykes	Reliable and innovative provider with serious digital services chops
Tech Mahindra	A digital-first provider with innovative capabilities
Teleperformance	Global leader by size, digital innovator and security expert
Telus International	A robust provider with an ever-expanding capability portfolio
Transcom	A trusted provider with breadth and depth of industry leadership expertise
TTEC	A global provider focused on partnering for tech innovation

HFS Top 10 rankings: digital contact center service providers, 2021

Rank	Overall HFS Top 10 position	Execution			Overall execution	Innovation			Overall innovation	OneOffice alignment	Voice of the customer
		Breadth and depth services	Scale and delivery	Growth		Strategy and vision	Technology enablement	Co-innovation and collaboration			
#1	 Teleperformance each interaction matters	 Teleperformance each interaction matters	 Teleperformance each interaction matters	 TELUS International™	 Teleperformance each interaction matters	 TELUS International™	 CONCENTRIX	 SUTHERLAND	 CONCENTRIX	 Tech Mahindra	 SYKES® Real People. Real Solutions.
#2	 CONCENTRIX	 Tech Mahindra	 CONCENTRIX	 SYKES® Real People. Real Solutions.	 TELUS International™	 Teleperformance each interaction matters	 CONDUENT	 CONCENTRIX	 SUTHERLAND	 sitel group	 CONCENTRIX
#3	 TELUS International™	 CONCENTRIX	 sitel group	 sitel group	 SYKES® Real People. Real Solutions.	 CONCENTRIX	 ttec™	 Teleperformance each interaction matters	 TELUS International™	 CONCENTRIX	 Teleperformance each interaction matters
#4	 SYKES® Real People. Real Solutions.	 sitel group	 ATENTO	 ttec™	 sitel group	 Tech Mahindra	 SUTHERLAND	 SYKES® Real People. Real Solutions.	 Teleperformance each interaction matters	 Teleperformance each interaction matters	 TELUS International™
#5	 Tech Mahindra	 majorel	 alorica	 SUTHERLAND	 CONCENTRIX	 sitel group	 TELUS International™	 sitel group	 Tech Mahindra	 TELUS International™	 alorica
#6	 sitel group	 SYKES® Real People. Real Solutions.	 SYKES® Real People. Real Solutions.	 Tech Mahindra	 Tech Mahindra	 HGS HINDUJA GLOBAL SOLUTIONS	 alorica	 Tech Mahindra	 SYKES® Real People. Real Solutions.	 SYKES® Real People. Real Solutions.	 ATENTO
#7	 SUTHERLAND	 TELUS International™	 majorel	 majorel	 majorel	 SYKES® Real People. Real Solutions.	 Tech Mahindra	 ATENTO	 sitel group	 Transcom	 HGS HINDUJA GLOBAL SOLUTIONS
#8	 Transcom	 SUTHERLAND	 SUTHERLAND	 Teleperformance each interaction matters	 SUTHERLAND	 SUTHERLAND	 Teleperformance each interaction matters	 TELUS International™	 ATENTO	 SUTHERLAND	 Tech Mahindra
#9	 HGS HINDUJA GLOBAL SOLUTIONS	 Transcom	 ttec™	 CONDUENT	 ttec™	 Transcom	 SYKES® Real People. Real Solutions.	 majorel	 Transcom	 HGS HINDUJA GLOBAL SOLUTIONS	 sitel group
#10	 ATENTO	 HGS HINDUJA GLOBAL SOLUTIONS	 TELUS International™	 CONCENTRIX	 alorica	 ATENTO	 HGS HINDUJA GLOBAL SOLUTIONS	 Transcom	 HGS HINDUJA GLOBAL SOLUTIONS	 ttec™	 CONDUENT

Notable performances in digital contact center services—the best of the best service providers, 2021

HFS Podium Winners

Top five providers overall across execution, innovation, OneOffice alignment and voice of the customer criteria

#1	#2	#3	#4	#5
				

Execution powerhouses Top 3 providers on execution criteria			Innovation champions Top 3 providers on innovation criteria			OneOffice alignment Top three providers on alignment with OneOffice			Outstanding voice of the customer Top three providers according to voice of the customer		
#1	#2	#3	#1	#2	#3	#1	#2	#3	#1	#2	#3
											

Other notable performances

- **Telus International** claimed the top spot in both growth and strategy and vision, largely driven by its investments in complementary services and developing a strong message.
- **Conduent** secured the second spot for technology enablement for its diversity of traditional and digital interactions as well as a focus on proprietary IP and patents.
- **Atento** and **Alorica** took the #4 and #5 spots respectively for scale and delivery, demonstrating a large footprint of services.
- **Sitel Group** fared well across the board, snagging the #3 spot in both scale and delivery and growth as well as the #2 spot in OneOffice alignment.
- **Sutherland** landed at #1 for co-innovation and collaboration.



Tech Mahindra profile

How to read the provider profiles

Summary statement about digital contact center services capabilities



Dimension	Rank	Strengths	Opportunities																							
HFS Top 10 position		<ul style="list-style-type: none">• Approach to digital contact center services: Description of capabilities in terms of background, leadership, organization, offerings, go-to-market approach, and identifiable investments in strategy.• Key differentiators• Technology innovation: Notable partnering approach, IP, R&D, etc.• Customer kudos: From references, HFS surveys, and enterprise interactions. <div>Sections and headings are standardized for all digital contact center services profiles</div>	<ul style="list-style-type: none">• What to continue• Other next steps for development• Customer critiques from references, HFS surveys, and enterprise interactions.																							
Ability to execute																										
Breadth and depth of services																										
Scale and delivery																										
Growth																										
Innovation capability		<table><tr><th>Relevant acquisitions and partnerships</th><th>Key clients</th><th>Operations</th><th>Top technology tools and platforms</th></tr><tr><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td></tr></table>	Relevant acquisitions and partnerships	Key clients	Operations	Top technology tools and platforms																				
Relevant acquisitions and partnerships	Key clients		Operations	Top technology tools and platforms																						
Strategy and vision																										
Technology enablement																										
Co-innovation and collaboration																										
Alignment to OneOffice																										
Voice of the customer																										

A digital-first provider with innovative capabilities

Dimension	Rank	Strengths		Opportunities	
HFS Top 10 position	5	<ul style="list-style-type: none">• Approach to digital contact center services: Tech Mahindra is using its CareXa and Stella frameworks for the future of CX services and has been one of the leaders in the focus to outcome focused services as well as a “digital first” approach.• Key differentiators: Tech Mahindra’s presence in the higher-scale tiers in this market is differentiated by its capability as an IT-services provider and an industry focused service provider. With the addition of Born to its portfolio, Tech Mahindra has added an integrated agency for strategy, creative, content, and commerce offerings with strong technology capabilities. This reinforces its focus on digital and enhances expertise in the creative, content and commerce space while establishing the firm as a player in the rapidly growing electronic and mobile space.• Technology innovation: Tech Mahindra’s SeeR analytics framework is one of the technology innovations the provider has brought to bear. Also, its omnichannel virtual assistant provides 24x7 self-service that both enhances CX and lowers cost to serve. Many of the proprietary tools Tech Mahindra has developed are focused on improving agent experience and performance, including a bot for training and role-playing for customer conversations.• Customer kudos: Buyers in this market suggested a higher level of confidence and using technology enabled solutions with Tech Mahindra as compared to its peers. Customers are excited to implement new tech innovations and ideas with Tech Mahindra. Customers are very impressed with business outcomes in areas such as NPS. Clients find Tech Mahindra to be strong collaborators.		<ul style="list-style-type: none">• What to continue: Tech Mahindra stands out with a digital-first, human-centric mindset and approach to its services, focused on outcomes. This will continue to help gain clients’ trust in its capabilities.• Other next steps for development: Despite some raving client fans and analyst accolades, Tech Mahindra doesn’t have a strong brand in this space to non-clients. It must develop a stronger roadmap and vision for contact center services that customers can understand and relate to their business. Investing in researching clients’ customers to help lead the industry will also help strengthen Tech Mahindra’s name in this market.• Customer critiques: Approach customers with a personalized solution rather than just selling off the shelf.	
Ability to execute	6				
Breadth and depth of services	2				
Scale and delivery	12				
Growth	6				
Innovation capability	5	Relevant acquisitions and partnerships	Key clients	Operations	Top technology tools and platforms
Strategy and vision	4	Key acquisitions (2017–2020) <ul style="list-style-type: none">• 2020: Zen3 Infosolutions, to bolster Tech Mahindra’s product engineering and AI/ML capabilities by offering expertise in technology and bringing in creativity to solve challenges• 2019 : Mad*Pow, to bolster Tech Mahindra’s capabilities in customer experience and digital transformations by leveraging strategic design and the psychology of motivation to create innovative experiences with compelling digital solutions that are good for business. The goal is to design for change by improving the experiences people have with technology, services, organizations and each other.• 2019: BORN Group	Total number of contract center clients: 158 Key clients <ul style="list-style-type: none">• Leading UK-based telecom provider• Large Indian e-commerce company• Leading telecom in the Philippines• APAC’s largest online marketplace and hospitality company• Tier 1 Australian telecom operator• Large US-based telecom provider• World’s largest ecommerce company• Leading telecom operator in New Zealand• Leading telecom operator in Australia• Leading US big box retail store	Delivery and innovation resources: 48,150 <ul style="list-style-type: none">• TechM BPS, a BPO arm of Tech Mahindra, has 25 delivery centers providing contact center support. COE, innovation centers, labs that support innovation: <ul style="list-style-type: none">• Makers Lab is Tech Mahindra’s R&D center focused on applied innovation, in collaboration with customers, partners, start-ups, academia, and associates. The mission of Makers Lab is to build smart machines of the future, including solving intelligence at its primal level and then applying that intelligence to products and IPs.• Global Presence of Makers Lab:<ul style="list-style-type: none">• Dallas (US): Focused on AI and AR/VRt5• Ipswich (UK): Focused on quantum computing and networks• Munich (Germany): Focused on AI, ML, and robotics• Innovation Hubs (India): Group of multiple labs at Pune, Bengaluru, Hyderabad, Delhi, and Chennai• Shanghai (China): Focused on ADAS, AI, ML• Tokyo (Japan): Focused on AI, ML, AR, and VR	<ul style="list-style-type: none">• SeeR: A self-service platform catering to bespoke Contact Center Analytics requirements.• Intelligent HUB: Part of BPS centric AI/ML capabilities through the latest acquisition of Eventus.• UNO Robotic Process Automation: Part of Tech Mahindra’s RPA framework• M.ai.a: Conversational AI and intelligent virtual assistant service built on industry leading platforms such as GCP and AWS with curated conversation design.• Entillio: A self-learning NLP, AI, and ML-based enterprise conversational platform designed to perform complex activities without the need for any human intervention.• Contact Center in a Box: A fully integrated cloud-based contact center platform that delivers omni-channel support across phone, chat, email, social messaging, and social media. The solution is built in partnership with NICE inContact and Genesys.• Desktop: A proprietary unified agent desktop solution that integrates multiple back-end systems to provide agents with a single framework encompassing enterprise single sign-on, end-to-end robotics automation to reduce AHT, eliminate human errors, and improve overall CX.• Genie: A real-world scenario-based learning solution to help agents quickly get familiar with different processes in a computer-based individual learning manner.• Frictionless Contact Center Solution: Provides a single platform to drive strategic initiatives in contact centers.
Technology enablement	7				
Co-innovation and collaboration	6				
Alignment to OneOffice	1	Key partnerships LivePerson, Celonis, Automation Anywhere, Amazon Lex, Genesys, NICE, Uniphore, Avaamo ThoughtSpot, Google Cloud, Blue Prism, UiPath			
Voice of the customer	8				



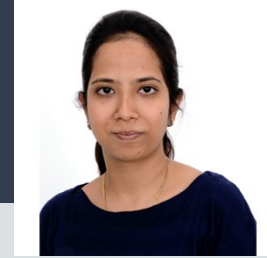
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Melissa O'Brien is Research Vice President, Customer Engagement, Retail and Travel Strategies at HFS Research. Melissa leads HFS' research initiatives for digital front office services, including customer engagement operations, digital marketing, digital associates, and CX design and consulting, digging into the trends and change agents driving customer experience across the enterprise.



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Krupa is a Knowledge Analyst at HFS Research, and she is part of data products. She is responsible for ITO-BPO outsourcing contract, merger and acquisition data collection, and analysis for different service lines.

About HFS Research

The HFS mission is to provide visionary insight into major innovations impacting business operations, including: automation, artificial intelligence, blockchain, Internet of things, digital business models, and smart analytics.

HFS defines and visualizes the future of business operations across key industries with our Digital OneOffice™ Framework.

HFS influences the strategies of enterprise customers to help them develop OneOffice backbones to be competitive and to partner with capable services providers, technology suppliers, and third-party advisors.

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