The Forrester Wave™: Contact-Center-As-A-Service (CCaaS) Providers, Q3 2020

The 10 Providers That Matter Most And How They Stack Up

by Art Schoeller
August 26, 2020

Why Read This Report

In our 33-criterion evaluation of CCaaS providers, we identified the 10 most significant ones — 8x8, Amazon Web Services (AWS), Aspect, Cisco, Five9, Genesys, Lifesize (formerly Serenova), NICE inContact, Talkdesk, and Vonage — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery professionals select the right one for their needs.

Key Takeaways

NICE inContact, Genesys, Talkdesk, And Five9 Lead The Pack

Forrester's research uncovered a market in which NICE inContact, Genesys, Talkdesk, and Five9 are Leaders; Aspect is a Strong Performer; and Cisco, 8x8, Amazon Web Services, Vonage, and Lifesize are Contenders.

Omnichannel, Native WFO, And AI Are Key Differentiators

As on-premises contact center (CC) software becomes outdated and less effective, integrated CCaaS suites improve omnichannel and workforce optimization (WFO) — as well as enable a broader range of AI applications. These capabilities dictate which providers lead the pack.

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by Art Schoeller
with Daniel Hong, Sara Sjoblom, and Peter Harrison
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The March Toward Integrated CCaaS Suites Continues

The historically slow-changing contact center industry has become dynamic thanks to new digital channels, remote agent work, and AI technology that pervade all aspects of customer service. Today's vibrant contact center market is defined by a shift to multitenancy, integrated suites that overlay customer interaction management, self-service, embedded AI, and enhanced workforce optimization. These elements have come together to lay the groundwork for change and differentiation in the CCaaS market.

Customer service leaders typically wait for compelling events before making major upgrades, as integration complexity, idle agent downtime, and reliable voice support pose serious concerns. CCaaS is the next evolution in contact centers due to customers' need for flexibility, agility, scale, and speed; however, some companies are exceptions that stick to on-premises software hosted by vendors like Avaya, Cisco, and Genesys. CCaaS is the sole focus of this evaluation, as CCaaS is now the dominant model for delivering contact center capabilities. Whereas in other enterprise markets the transition to software-as-a-service (SaaS) is largely complete, it's only at 33% of overall revenue in this market.[1] This slower conversion to SaaS creates openings for newer, disruptive vendors, such as Amazon Web Services.

As a result of these trends, CCaaS customers should look for providers that:

› **Provide a comprehensive approach to omnichannel.** Meeting customers on their channel of choice is the best practice, but it can present challenges as consumer behaviors change. While voice still accounts for most agent interactions, Forrester sees increased demand for asynchronous communication via WhatsApp, Apple Business Chat, and other apps.[2] This trend motivated NICE inContact, a Leader in this evaluation, to acquire and integrate Brand Embassy, which gave it both a wide range of digital channels and an architecture that facilitates rapid integration of new channels as consumer demands shift.

› **Include strong embedded workforce optimization capabilities.** It's common for CCaaS vendors to provide proprietary WFO solutions that integrate with their CCaaS stacks. Whether through acquisition or organic development, the market has seen a lot of activity in this space. Cisco, Five9, and Lifesize have all acquired WFO companies.[3] Aspect, Genesys, and NICE inContact continue to enhance their in-house-developed applications, and Talkdesk will be releasing its own. Native WFO improves the usability of CCaaS for a broader range of roles in the contact center, reduces the confusion inherent in multiple data sets, and lays the groundwork for additional AI apps that incorporate WFO data to autonomically and dynamically improve agent staffing or skills-based routing.

› **Have the foundation to build a cognitive contact center.** The chatbot market is active, providing clear ROI by automating customer contacts and offloading contact center agents. But embedding AI in other contact center functions is becoming more important.[4] AI mines voice and text interaction attributes in real time and feeds desktop agent virtual assistants that guide agents to relevant content and next best actions.[5] Connecting agents to customers using more sophisticated

AI-based attribute routing delivers both efficiency and revenue benefits. AI-based automated quality management (QM) analyzes and filters speech and text interactions for further inspection by QM teams. Solid CCaaS platform foundations enable these apps.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on CCaaS.[6]

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

FIGURE 1 Forrester Wave™: Contact-Center-As-A-Service (CCaaS) Providers, Q3 2020

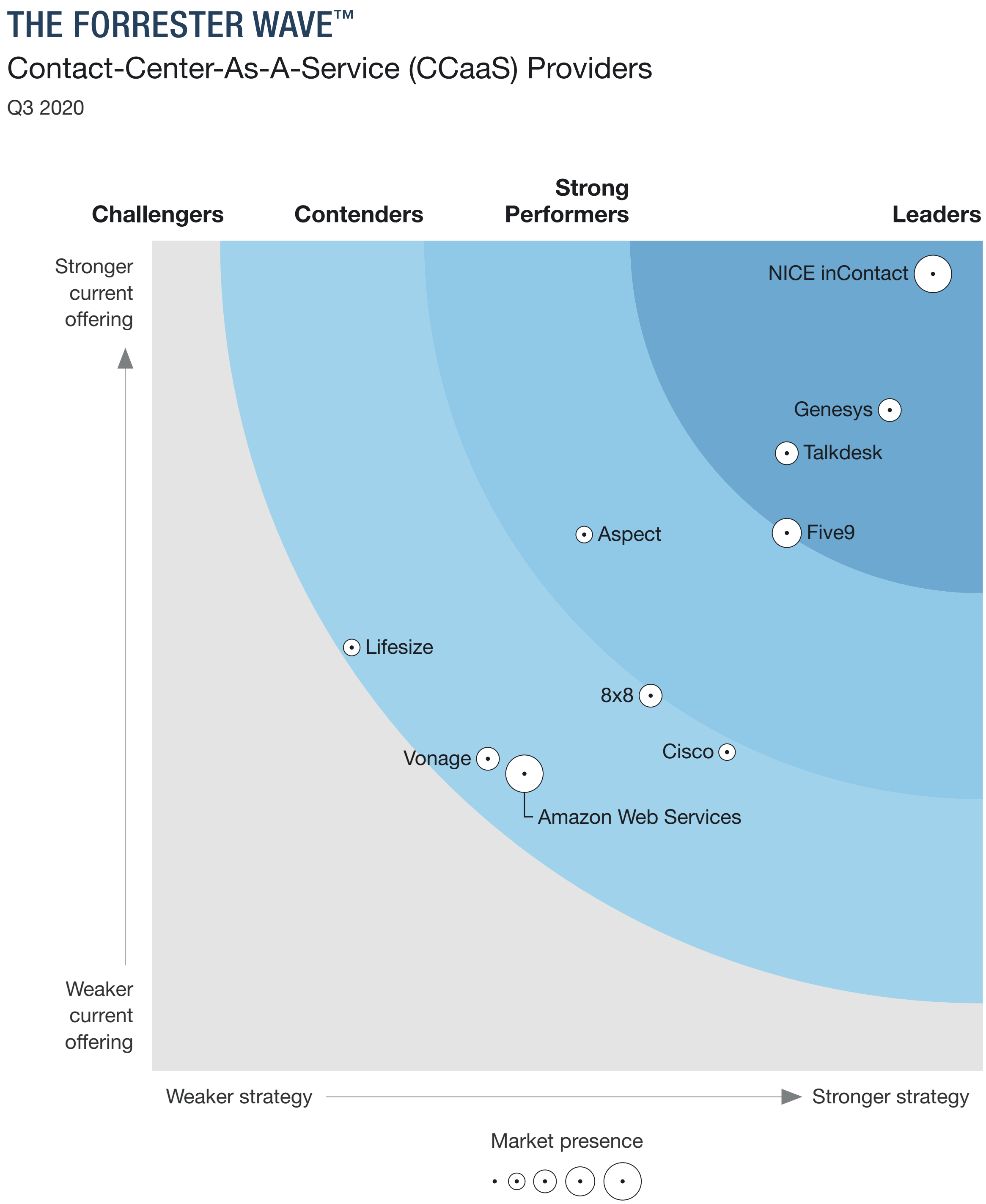

FIGURE 2 Forrester Wave™: Contact-Center-As-A-Service (CCaaS) Providers Scorecard, Q3 2020

	Forrester's weighting	8x8	Amazon Web Services	Aspect	Cisco	Five9	Genesys	Lifesize	NICE inContact	Talkdesk	Vonage
Current offering	50%	2.26	1.79	3.23	1.92	3.24	3.98	2.55	4.80	3.72	1.88
Contextual data management	3%	3.00	1.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	3.00
API breadth and depth	3%	3.00	1.00	3.00	1.00	5.00	5.00	3.00	5.00	3.00	3.00
SDKs and developer support	4%	3.00	3.00	3.00	1.00	3.00	5.00	3.00	5.00	5.00	3.00
Application store	3%	3.00	3.00	0.00	1.00	3.00	5.00	0.00	3.00	5.00	1.00
Support for agent-assisted touchpoints	5%	3.00	1.00	3.00	1.00	3.00	5.00	3.00	5.00	3.00	1.00
Routing algorithms	3%	1.00	1.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	1.00
Support for self-service capabilities	5%	1.00	3.00	3.00	3.00	3.00	5.00	3.00	5.00	5.00	3.00
Proactive notification	3%	3.00	1.00	5.00	1.00	3.00	3.00	0.00	5.00	5.00	3.00
Outbound	3%	1.00	0.00	5.00	1.00	5.00	5.00	0.00	5.00	3.00	3.00
Orchestration	6%	3.00	3.00	3.00	1.00	5.00	5.00	3.00	5.00	5.00	3.00
Analysis tools	3%	1.00	1.00	5.00	5.00	3.00	5.00	3.00	5.00	3.00	1.00
Text and speech analytics	6%	1.00	1.00	3.00	1.00	3.00	1.00	3.00	5.00	3.00	1.00
Journey analytics	3%	1.00	3.00	3.00	5.00	3.00	3.00	1.00	5.00	3.00	1.00
User experience strategy and design	6%	3.00	1.00	5.00	1.00	3.00	5.00	3.00	5.00	3.00	1.00
Omnichannel agent desktop	6%	3.00	0.00	3.00	1.00	3.00	5.00	5.00	5.00	5.00	1.00
Agent virtual assistant	4%	3.00	1.00	1.00	1.00	0.00	1.00	1.00	3.00	5.00	1.00
Agent desktop integration capabilities	3%	3.00	1.00	5.00	1.00	3.00	5.00	3.00	3.00	5.00	3.00
Quality monitoring	7%	1.00	1.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	1.00
Workforce management	7%	1.00	1.00	5.00	3.00	3.00	5.00	3.00	5.00	3.00	1.00
Coaching and performance	3%	3.00	1.00	5.00	3.00	3.00	3.00	3.00	5.00	1.00	1.00
High reliability	3%	3.00	5.00	3.00	3.00	5.00	3.00	3.00	5.00	3.00	3.00
Number of customer service agents (users)	3%	3.00	5.00	3.00	1.00	3.00	3.00	1.00	5.00	3.00	3.00
Number of live installations	3%	3.00	5.00	1.00	3.00	5.00	3.00	3.00	5.00	3.00	3.00
Breadth of CRM integration capabilities	5%	3.00	3.00	1.00	1.00	3.00	5.00	1.00	5.00	5.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

FIGURE 2 Forrester Wave™: Contact-Center-As-A-Service (CCaaS) Providers Scorecard, Q3 2020 (Cont.)

	Forrester's weighting	8x8	Amazon Web Services	Aspect	Cisco	Five9	Genesys	Lifesize	NICE inContact	Talkdesk	Vonage
Strategy	50%	3.00	2.24	2.60	3.46	3.82	4.44	1.20	4.70	3.82	2.02
Product vision	13%	3.00	1.00	3.00	1.00	5.00	5.00	1.00	5.00	5.00	3.00
Execution roadmap	13%	3.00	3.00	3.00	1.00	5.00	3.00	1.00	5.00	5.00	3.00
Market approach	14%	3.00	3.00	3.00	5.00	3.00	5.00	1.00	5.00	3.00	1.00
Geographic strategy and execution	15%	5.00	3.00	3.00	5.00	3.00	5.00	1.00	3.00	3.00	3.00
Customer success	15%	1.00	1.00	3.00	3.00	5.00	3.00	1.00	5.00	5.00	1.00
Partner ecosystem	20%	3.00	3.00	1.00	5.00	3.00	5.00	1.00	5.00	3.00	1.00
Commercial model	10%	3.00	1.00	3.00	3.00	3.00	5.00	3.00	5.00	3.00	3.00
Market presence	0%	3.00	5.00	2.00	2.00	4.00	3.00	2.00	5.00	3.00	3.00
Number of live installations	50%	3.00	5.00	1.00	3.00	5.00	3.00	3.00	5.00	3.00	3.00
Number of customer service agents (users)	50%	3.00	5.00	3.00	1.00	3.00	3.00	1.00	5.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Vendor Offerings

Forrester included 10 vendors in this assessment: 8x8, Amazon Web Services, Aspect, Cisco, Five9, Genesys, Lifesize, NICE inContact, Talkdesk, and Vonage (see Figure 3). We invited Enghouse Interactive to participate in this Forrester Wave, but it chose not to participate, and we could not make enough estimates about its capabilities to include it in the assessment as a nonparticipating vendor.

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
8x8	8x8 Contact Center	9.10 Winter 2020
Amazon Web Services	Amazon Connect	N/A
Aspect	Aspect Via Platform	19
Cisco	Cisco Webex Contact Center	N/A
Five9	Five9 Intelligent Cloud Contact Center	Summer release 2020
Genesys	Genesys Cloud	N/A
Lifesize	Lifesize CxEngage	N/A
NICE inContact	NICE inContact CXone	Spring 2020
Talkdesk	Talkdesk CX Cloud	Spring 2020
Vonage	Vonage Contact Center	Spring 2020 (20.5.180)

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **NICE inContact lights it up with best-in-class WFO, a broad channel mix, and scale.** NICE is top of mind for mid- to large-scale CCaaS deployments that require a full feature set. Its strong vision and roadmap enable numerous AI applications and partners in its CXone DEVone Ecosystem. The Brand Embassy acquisition outlined a solid strategy to shift away from a voice-centric architecture and a generalized approach to adding digital channels. Global presence is a weakness and a work in progress, as the vendor has historically been limited to just North America. On its roadmap, NICE looks to strengthen its virtual agent assistant with RPA capabilities, enable deeper speech and text analytics integration with its Nexidia assets, and add more AI capabilities that enhance routing and augment workforce management (WFM) and QM.

CXone has the broadest channel support — spanning voice and digital — and the strongest WFO offering in this evaluation. Integration of the Mattersight acquisition provides AI-enabled personal attribute routing. While the user experience spans all roles in the contact center with extensive capabilities, it presents more crowded screens that are difficult to navigate. Its agent virtual assistant is another area for improvement. Customer references want more frequent bug fixes and noted limitations of the WFO integrations with Salesforce — but praised the technical management support. Multiple customer references also lauded NICE's roadmap and vision. Shortlist NICE inContact when seeking innovative customer experiences across a wide set of channels with strong agent management capabilities.

› **Genesys has unmatched support for large-scale and global deployments.** Known for large-scale deployments and best-of-breed contact center technology, Genesys delivers via well-established global channels and partners — along with an extensive product portfolio spanning on-premises and cloud. While its WFO capabilities are improving, they have some gaps. Genesys has among the highest contact center revenues in the industry, but it also has a high debt load, which may limit investments in certain areas of the business, such as R&D or partner channel enablement, later on. Roadmap themes include support for new digital channels (e.g., Apple Business Chat), deeper WFO capabilities to compete with incumbent WFO vendors, and embedding AI into more applications.

  Genesys Cloud's strengths include its CRM integrations and an orchestration layer that integrates Amazon Lex, Google CCAI, and IBM Watson. The native WFO capabilities allow a seamless user experience for multiple roles and more consistent operational and WFO data. Product gaps include speech and text analytics and an agent virtual assistant, which it doesn't support, though they're on the roadmap, and its partners support them. Customer references indicated that there are limitations to the vendor's analytics, and despite the presence of an app store, they expressed that it has shortcomings. Customer references are also looking for WFM enhancements and broader support for bot integration but noted strength in the agent desktop, overall UX, orchestration, and the roadmap. Shortlist Genesys when looking for a full feature set including native WFO, CRM integrations, global reach, and an extensive partner ecosystem.

› **Talkdesk delivers newly developed, well-rounded capabilities and innovative support.** Talkdesk is rapidly expanding its CCaaS capabilities and support services, powered by multiple rounds of venture capital investments and offshore development. Its strong vision centers on a complete set of channel and WFO capabilities, along with AI applications for self-service, agent assistance, and WFO. Talkdesk CXTalent provides customers with a talent pool of "agents for hire" who are already trained on Talkdesk. Its professional services include benchmarking and assessment services. When it comes to weaknesses, it lacks brand recognition and an established global go-to-market strategy. Its roadmap includes adding voice-of-the-customer capabilities along with vertical applications, which is fairly unique in the CCaaS industry.

  Talkdesk's key strengths include a very streamlined UI for all roles in the contact center, proven scale based on recent wins, support for a wide range of cloud platforms (AWS, Google Cloud, and Microsoft Azure), and an impressive rapid addition of functions, including native WFO. Its app store is among the industry's best, and it has good chatbot integration capabilities. Guardian ensures agents' logins are validated and secure — a unique and well-timed capability for the COVID-19 pandemic. Its WFO applications are still new and need to improve, as coaching and performance management are weak. Customers gave strong marks for vision and roadmap but expressed concerns about reporting and billing. Shortlist Talkdesk for a navigable solution that scales with a broad range of capabilities and innovative support services. Companies should seek references for large deployments.

› **Five9 brings an innovative roadmap, solid growth, and robust outbound capabilities.** Five9 has a solid and well-balanced strategy that focuses on strong financials, global expansion, and product innovation. The vendor acquired Virtual Observer for WFO and Whendu for low-code integration, which provides an innovative approach to designing contact flows. However, its global coverage and average seat count (though both expanding) aren't on par with the Leaders in this evaluation. Five9's roadmap includes plans for Whendu to replace its existing orchestration environment and for deeper integration with Virtual Observer WFO, which will provide a common UI as well as operational data ingestion across the system.

  Five9 has among the industry's best outbound capabilities; a solid agent desktop; and out-of-the-box support for voice, voicemail, chat, email, and SMS. It supports packaged integrations with the most common CRM applications, and it's making progress on a deeper integration with Salesforce Service Cloud Voice. Five9 doesn't have an agent virtual assistant — a component Forrester sees as a key to improving agent performance — though it's on the vendor's near-term roadmap. A customer reference provided positive feedback on the agent desktop, Salesforce integration, channel support, and customer success management (CSM), but they noted limitations in Five9's app store and data access without going through reporting. Shortlist Five9 when looking for a solid contact center offering on an innovative trajectory with new levels of AI, workflow automation, and deep native WFO integration with its portfolio.

Strong Performers

› **Aspect has top-tier WFO and outbound but needs market presence and an app store.** Aspect, long known for its best-of-breed WFO and outbound technology heritage, boasts a sizable base of large on-premises contact centers. Its CCaaS offering, Via, has appeal, but uptake has been slow. Flexibility is at the heart of Aspect's strategy, and this is good. It offers multiple deployment models to support its existing customer base and can act as a path to migration to Via over time. Via can run on multiple types of platform-as-a-service (PaaS) (AWS, Microsoft Azure, etc.). The vendor's diminishing market presence is a weakness that's becoming problematic. At one point, Aspect was pushing its existing base too hard to migrate to Via when it lacked a full set of features compared with Unified IP. Its channels and geographic coverage are limited compared with others in this evaluation. Aspect plans to expand deployment options for Via across all types of PaaS (AWS, Google, Microsoft Azure) and add more channels and AI capabilities.

  Aspect couples a strong orchestration environment for designing contact flows with best-of-breed WFO and a very slick user interface for its applications. Outbound dialing continues to be a strength as well. Aspect can improve in some key areas: It doesn't support as many channels as others in this evaluation, it lacks an application store for customers, and it doesn't support agent virtual assistants. Outbound dialing and WFO received positive marks from customer references, but they raised concerns about the API/software development kit (SDK) support and overall roadmap. Companies looking for better feature utilization by all roles — and those that seek alternative PaaS (Google and Microsoft Azure) deployments versus AWS — should consider Aspect.

Contenders

- **Cisco offers broad partner support and UC but comes up short on channels and WFO.** Cisco's strengths are its brand, global partner network, and extensive installed base. Cisco Flex allows its large on-premises installed base to preserve its investment while migrating to Webex Contact Center or Webex Contact Center Enterprise. Its acquisition of CloudCherry (rebranded Webex Experience Management) added a fully featured voice-of-the-customer solution.[7] Cisco's weakness is its reliance on partners, such as Calabrio for WFO. Its roadmap includes deeper Control Hub integration, which will enhance customers' ability to easily manage unified communications (UC) and CC capabilities and support more messaging channels.

  Webex Contact Center has very strong analytics capabilities via its Analyzer journey analytics package combined with Webex Experience Management. These solutions are also flexible, which is a strength, as they can be deployed against Cisco's on-premises systems, which helps clients start their migrations to the cloud. Webex Contact Center can also integrate with Google CCAI for Dialogflow-based chatbots. Channel support, outbound, and speech and text analytics are product gaps fulfilled by partners. The breadth of APIs and SDK support are limited, and the lack of an app store limits access to Cisco's strong ISV partner ecosystem. Customer references validated the benefit of managing and using UC and CC from Cisco, but they raised concerns about broader channel support and roadmap clarity. Cisco is a solid fit for existing small to midsize Cisco customers seeking broad partner support and investment protection via Cisco Flex licensing.

- **8x8 combines UC and CC effectively over a global network but lacks large scale.** 8x8 is growing beyond its historic focus on a combined UC-plus-CC offering for the SMB market; it's going upmarket and expanding to new geographies. This is a good strategy, as it has extensive global coverage as a carrier and plans to grow its partner channel to target larger contact centers. However, name recognition will be a challenge for 8x8 in that new space. It will also require improvements to enable its channels to deliver CSM support. 8x8 acquired communications-platform-as-a-service (CPaaS) provider Wavecell for SMS and APIs for control of voice services. This enables a fuller set of communications APIs and channel support for developers. Its roadmap includes rapidly deployable virtual assistants and text analytics that works with its speech analytics.

  8x8 combines UC and CC very well, which is a core strength. This includes an integrated administration portal for both sets of capabilities as well as common capabilities such as messaging, voice, and video for agents and knowledge workers. The vendor's ability to link disparate messaging systems is unique. Agents on 8x8 messaging can communicate with tech support developers on Slack. 8x8 needs to update and improve its reporting and analytics.

Currently, it has a diverse set of APIs and SDKs for developer support that it needs to rationalize. Outbound dialing, reporting, interactive voice response, and roadmap all received high praise from customer references. They cited API and SDK limitations, clarity on license entitlements, and a lack of quarterly business reviews as areas that need improvement. 8x8 is a good fit for midsize companies that want to source their UC and CC from one firm and build on expanding the contact center to the broader enterprise.

› **AWS offers scale and modularity but requires extensive partner/developer support.** Amazon's strong enterprise mindshare can't be ignored; it often influences not only CIOs but also CEOs to consider Connect for midsize to very large CCaaS deployments. It makes great use of AWS Marketplace partners and in-house developers to fill product gaps. For example, it partners with Salesforce to integrate and resell its CCaaS solution, which shores up Amazon's lack of an agent desktop, digital channels, and some WFO capabilities. While there are solid Amazon apps for AI, analytics, and reporting, they all require integration within each implementation, which limits Amazon's strategy. The product roadmap is laid out well with clear time frames, but it's not very unique. In the near term, Contact Lens will provide speech and text analytics, and other enhancements will come later.

AWS's strength comes to life in its rapid deployment, which is facilitated by its extensive publicly available documentation, scale, and simple sourcing of carrier services. The orchestration environment includes the ability to easily integrate Amazon-Lex-based chatbots into a contact flow. Integration of a wide range of either AWS or partner applications adds channels and WFO. There's no agent desktop other than a simple call control app, which is a weakness. Customer references gave high scores for APIs, SDK, and developer support, but the lack of capabilities limits what services are exposed via APIs. Customer references rated the partner ecosystem for apps and professional services highly but said CSM is limited. Amazon is well suited to midsize to very large contact centers that already have developers experienced with AWS to build out more capabilities for a fuller contact center solution.

› **Vonage uses CPaaS to target verticals, but its focus is limited to serving SMBs.** Vonage's transformation from a carrier to a SaaS vendor has been facilitated through a number of well-managed acquisitions for UC, CC, and CPaaS. It's using its CPaaS to develop targeted, vertical customer service applications and custom applications or workflows. As a carrier, it can support agents across multiple locations very easily. Vonage's channel focus — which limits it to small and medium-size opportunities for CCaaS, despite a long-term marketing relationship with Salesforce — is a weakness. Its roadmap includes deeper integration with ServiceNow, rolling out its own agent virtual assistant, and deeper integration with Salesforce High Velocity Sales.

The acquisition of Over.ai provides Vonage with its own natural language processing and natural language understanding chatbot capabilities, so it doesn't rely on Google, Amazon, and others. This approach makes it simpler for Vonage customers to deploy a fully integrated conversational AI chatbot. Vonage's strengths include solid integration with the Salesforce desktop and reporting as well as the ability to enable more advanced customer interaction journeys with the added

CPaaS capabilities. Customer references validated the long history of integration and go-to-market strategy with Salesforce. Vonage lacks an agent virtual assistant, its channel support is limited, and it relies on partners to provide WFO. Customer references like working with Vonage because it's a carrier that can deploy agents across many global regions. Vonage is a great fit for small to midsize contact centers with up to 200 seats that are looking for a simpler approach to chatbots and custom applications enabled by its CPaaS.

› **Lifesize appeals to enterprises and BPOs but lacks certain bells and whistles.** Serenova's strength comes from its heritage of serving business process outsourcers (BPOs) and leveraging that experience to develop CxEngage. (Serenova has now merged with Lifesize.) Lifesize's vision is to serve the market need of clients who want to source UC and CC from the same provider. Ownership changes over the past decade have decelerated product momentum and focus and severely impaired performance and brand awareness. Lifesize's existing videoconferencing channel and customer base add more global reach, but it will take time for it to develop CCaaS skills. Lifesize will soon add video capabilities for markets such as telemedicine. Work is in progress for deeper integration of WFO acquisitions TelStrat QM and Loxysoft ProScheduler WFM. It has planned more integrations with ClearView for reporting and Omilia for chatbots.

CxEngage has strong capabilities for creating tenants and subtenants, which support the needs of BPOs and large enterprises with specific security requirements. The TelStrat QM and ProScheduler WFM acquisitions provide strong omnichannel WFO capabilities. However, the ProScheduler WFM UI needs more work to align it with the rest of CxEngage. Omilia is a strong choice for chatbot capabilities, but its partner Inference provides all other chatbot integrations. The provider doesn't support an app store or agent virtual assistants, and speech and text analytics are limited. Customers had positive feedback on CSM but felt that tech support could do better by identifying systemic problems instead of making individual bug fixes. Lifesize is well suited to mid- to large-size enterprises and BPOs looking for segmentation of individual lines of business or customers.

Evaluation Overview

We evaluated vendors against 33 criteria, which we grouped into three high-level categories:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include support for agent-assisted touchpoints (e.g., omnichannel), self-service across channels, native WFO (quality monitoring and workforce management), text and speech analytics, and user experience spanning all roles in the contact center.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product roadmap and execution, market approach, partner ecosystem, customer success management, and geographic strategy and execution.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's base of installed customers and agent positions.

Vendor Inclusion Criteria

Forrester included 10 vendors in the assessment: 8x8, Amazon Web Services, Aspect, Cisco, Five9, Genesys, Lifesize (formerly Serenova), NICE inContact, Talkdesk, and Vonage. Each of these vendors has:

› **Its own multitenant CCaaS solution.** Numerous models exist to host or operate contact center software and deliver it as a subscription service.[8] As the market evolves, the dominant model is for vendors to develop and operate the multitenant software themselves.

› **At least 70 live installations.** While this number may seem low, some participants in this evaluation have a select number of very large CCaaS implementations.

› **At least 25,000 agent positions deployed.** Less-mature vendors lack significant deployments and therefore installations and seat counts. As the market heats up, Forrester continues to see new and innovative entrants that have not gained sufficient traction to build up their installed bases.

› **Interest from Forrester end user clients in inquiries and consulting projects.** Unsolicited mentions in Forrester engagements are a sign of market presence and recognition. Forrester has conducted numerous consulting engagements involving vendor selection, ranging from 500 seats to more than 10,000 seats. There are many other CCaaS vendors in the market, some of which engage Forrester in proactive briefings. Lack of presence in Forrester end user engagements is an indication of more limited market penetration and awareness.

Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by June 2020 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

1 See the Forrester report "The Global SaaS Landscape, 2019 To 2022: Some Categories Grow, While Some Reach Saturation."

2 See the Forrester report "The Case For Asynchronous Messaging: Apple Business Chat, Messenger, WhatsApp."

3 See the Forrester report "Now Tech: Voice-Of-The-Customer (VoC) Vendors, Q1 2020."

4 See the Forrester report "Future-Proof Your Customer Service: Build An AI-Infused Cognitive Contact Center."

5 See the Forrester report "How To Build A Modern Agent Desktop And Transform Customer Service Experiences."

6 See the Forrester report "Now Tech: Cloud Contact Center Vendors, Q2 2020" and see the Forrester report "Vendors Battle For The Heart Of The Contact Center."

7 See the Forrester report "Now Tech: Voice-Of-The-Customer (VoC) Vendors, Q1 2020."

8 See the Forrester report "Now Tech: Cloud Contact Center Vendors, Q2 2020."

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