The Aragon Research Globe™ for the Intelligent Contact Center, 2024

Generative AI Will Power a Growing Number of ICC Virtual Agents

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Topic: Intelligent contact center

Issue: Who are the intelligent contact center providers and how will they evolve?

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SUMMARY

Aragon Research releases its fifth Aragon Research Globe™ for intelligent contact centers (ICCs). The ICC market has shifted, and with a focus on Generative AI to power virtual agents, the time is now to transform the contact center. As digital labor continues to grow, the 15 major vendors in this report are in the midst of some of the biggest changes since this market came to fruition 25 years ago.

Key Findings:

Prediction: By YE 2024, 70% of ICC providers will use third party LLMs that they train on their own product and service information (80% probability).

Prediction: By YE 2025, to keep up with the need for self-service support, 60% of enterprises will offer virtual agents that are trained to answer common questions (70% probability).

Prediction: By YE 2024, 55% of contact center providers will enable the development of an enhanced customer profile that will enable a more personalized customer experience (70% probability).

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Introduction

Aragon introduced the concept of the intelligent contact center in 2018. Many had skepticism about our position on this shift to AI. But over the last 11 months, with the advent of OpenAI ChatGPT and the shift to large language models, it is clear that AI is here to stay.

Contact centers are under severe pressure to modernize and transform not only for better omni-channel interactions but for quicker and more accurate answers. Going forward, virtual agents will be doing more work to answer foundational questions and answers, leaving the heavy lifting to humans.

So, as we head into 2024, the demand for the Modern Contact Center is here—but the race is for Intelligence is just getting started. Half of AI is about automation, and we will provide a detailed status of the direction that Human and Digital Labor will take as Generative AI becomes part of the ICC architecture. This Research Note evaluates the trends in the market and identifies 15 key providers that are making a difference in intelligent contact centers.

Transforming to Become an Intelligent Contact Center

With the need for better experiences, enterprises face the reality that Contact Centers are much more than a cost center. They are an experience center, and AI is quickly becoming one of the technologies to enable better experiences by enabling the automation of questions and answers via Generative AI.

With nearly every decision-maker believing that AI is here to stay, the pressure on Contact Center operators and the ICC Providers that support them to update the experiences they offer is high. It isn't just about calls handled, it is about faster time to resolution and overall satisfaction levels.

Digital Labor involves real virtual agents that can help solve the problems that customers have. The bigger challenge of customer experience gets at the crux of the intelligent contact center. Providers that are investing in automation and intelligence will need to be able to demonstrate to buyers that their product knows more and can react quicker to support a growing number of use cases.

Omnichannel Communications Is Foundational—Voice, Email, Chat, and Video

In 2024, it isn't a question of voice versus other channels. It goes without saying. The four areas of omnichannel include voice, email, video, and chat. As mentioned above, intelligent contact centers need to have basic capabilities that include traditional voice, email, and chat.

Enterprises should evaluate all of the communication modalities that an ICC Provider offers. Chat is growing in demand, and it isn't just web chat—it is the ability to connect to social media-based chat channels such as Apple Business Chat, WhatsApp, and Facebook Messenger.

Video communications represents a small but growing trend. Some providers are now offering video communications as a way to enhance the interaction with the customer. Just as with remote work and the shift from voice conferencing to video conferencing, there is an opportunity for some providers to differentiate themselves by offering video-based support. The key thing is to understand what the customer desires and be able to offer that interaction either on a regular basis or on-demand.

Intelligent Contact Centers with a UC&C Bundle

A Contact Center is in essence, an advanced communications platform. For a growing number of small and midsize enterprises, the idea of one communications stack that is integrated with the Intelligent Contact Center is gaining traction. We see more providers making a combined UCC and ICC bundle. In these enterprises, particularly in small businesses, it is often common to see either finance or business owners making decisions on their tech stack, which is one of the business drivers causing increased demand for the uber-suite. So, the demand for an integrated stack that combines UC&C and intelligent contact centers is growing.

The demand for ICC and UCC is also being seen in Sales, where advanced contact center-like capabilities are needed, but often, teams don't know what a contact center is. While there are many growing providers that only focus on the sales use cases, and are not included in this report, we also see many ICC vendors in this report realizing that sales organizations often need the strength and power of a contact center service.

A number of providers in this report offer a combined UC&C and contact center offering. This includes 8x8, Avaya, Cisco, Dialpad, Mitel, NEC, Unify, and Vonage. Note that it is the combination of an integrated client with growing capabilities in intelligence that will bring new levels of automation to a combined offering.
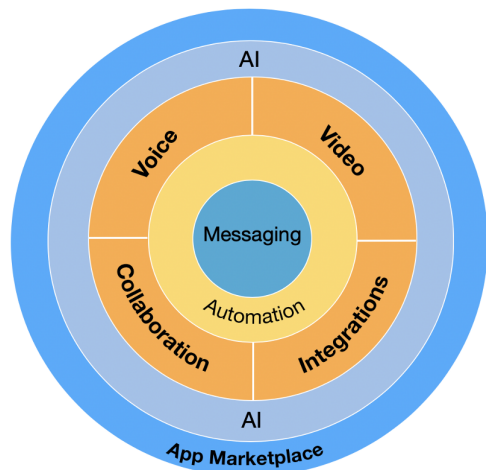
Unified Communications and Collaboration   Intelligent Contact Center
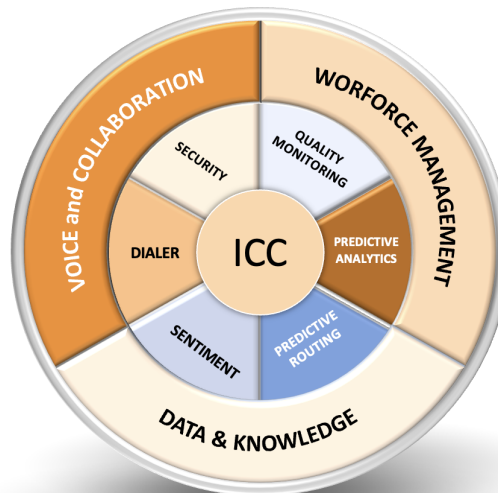
Figure 1: Enterprises are increasingly looking for an integrated communications stack that can blend UC&C with intelligent contact centers.

Telehealth Will Leverage ICC and UCC

Telehealth is one of the reasons that video-based ICCs will come online. In many cases, sophisticated routing will be needed in hospital and urgent care telehealth use cases. Today, many telehealth solutions do not offer that level of sophisticated routing with video capabilities.

Enterprises need to evaluate ICC providers for their omni-channel communications, including the ability to tailor those interactions based on customer preferences. As the Hospital Systems see growth, the first generation of API- based Telehealth providers will either evolve or give way to new providers that have an ICC as the engine for handling patient telehealth sessions.

Generative AI, LLMs, and Virtual Agents

Generative AI platforms, such as OpenAI's ChatGPT, are a general-purpose interface for the GPT family of large language model AI systems. Copilots are one specific use case where *existing* applications are enhanced through the use of an AI model (e.g., ChatGPT, PaLM2, or others) for a specific domain-driven large language model application. This year saw the launch of CoPilot offerings for both Microsoft Office 365 and Google Workspace Duet. These are focused on writing and summarizing information.

ChatGPT put generative AI on the map, demonstrating to business leaders that AI can support many of the business-critical tasks performed in the enterprise every day. It includes a pre-trained machine learning model, a neural network design running on cloud services, and development interfaces to utilize the model. ChatGPT is also available for

custom training for specific use cases. Use cases have exploded, and we expect many AI-enabled products built on this technology to arrive in the near future.

Large Language Models (LLMs) allow users to communicate with generative AI as if it were a virtual assistant. It is highly effective at a wide variety of business tasks. Whether it is generating copy for marketing or sales, producing boilerplate code or unit tests for a developer, filtering and interpreting data, summarizing documentation, or chatting directly with users for customer support, Generative AI is a highly competent general agent for the enterprise as a stand-alone product.

For Contact Centers, Virtual Agents need to be fine-tuned to address specific use cases and domains of application, such as product how-to questions or other things such as benefits questions.

In the race to LLMs that ICC providers will leverage, Microsoft continues to expand its partnership with its investment in OpenAI, Google has done significant work with PaLM 2 and Vertex AI offerings. Meta launched its Llama LLM, and startups such as Anthropic also have their own unique LLM.

Prediction: *By YE 2024, 70% of ICC providers will use third-party LLMs that they train on their own product and service information (80% probability).*

Virtual Agents—Increasing Complexity

The goal for Virtual Agents and Agent Assist offerings initially should be handling the repeatable inquiries such as Questions and Answers. Over time, they can be used for increasingly complex tasks over time. Digital labor today is being used for data entry, warehouse operations by a robot, or in call centers as chatbots to solve the problems that humans are having with a particular product or service.

What makes Intelligent Contact Center AI offerings so unique is that digital labor will learn how to deal with more complex interactions as it learns more about customer requests and solutions. As mentioned above, this means digital labor will need to be managed to ensure it is being used for the appropriate level and complexity of tasks it is able to be used for.

There are also increasing cases of AI-enabled agents assisting humans to complete highly complex activities such as surgeries, aviation activities, and processes in pharma/chemistry. As digital labor systems evolve and mature, we believe we will see an emergence of digital managers, digital executives, and digital developers.

Don't Get Caught Off-Guard; Digital Labor Is Here Now

As AI technologies improve, mature, and collect more information, digital labor will become only more capable of supporting and augmenting activities that today are primarily performed by humans. Digital labor entities are able to process information and make response decisions independently and much faster than their human counterparts.

Business and IT leaders must realize that the emergence of digital labor will slowly augment and grow within their workforce; it will not be a single or multiple pivotal or momentous event as theorized in "singularity." Singularity refers to a point in time in which technology becomes uncontrollable and irreversible, resulting in a significant impact on humans.

We can debate if this shift is a single point in time or a gradual evolution. However, your business, workforce, customers, and partners may become reliant on digital labor before you have even recognized its impact and the need to manage your hybrid workforce effectively.

While documents and conversations are primary information sources for today's virtual agents, over time, expect both images and videos to increasingly be used as knowledge sources (see Figure 2).
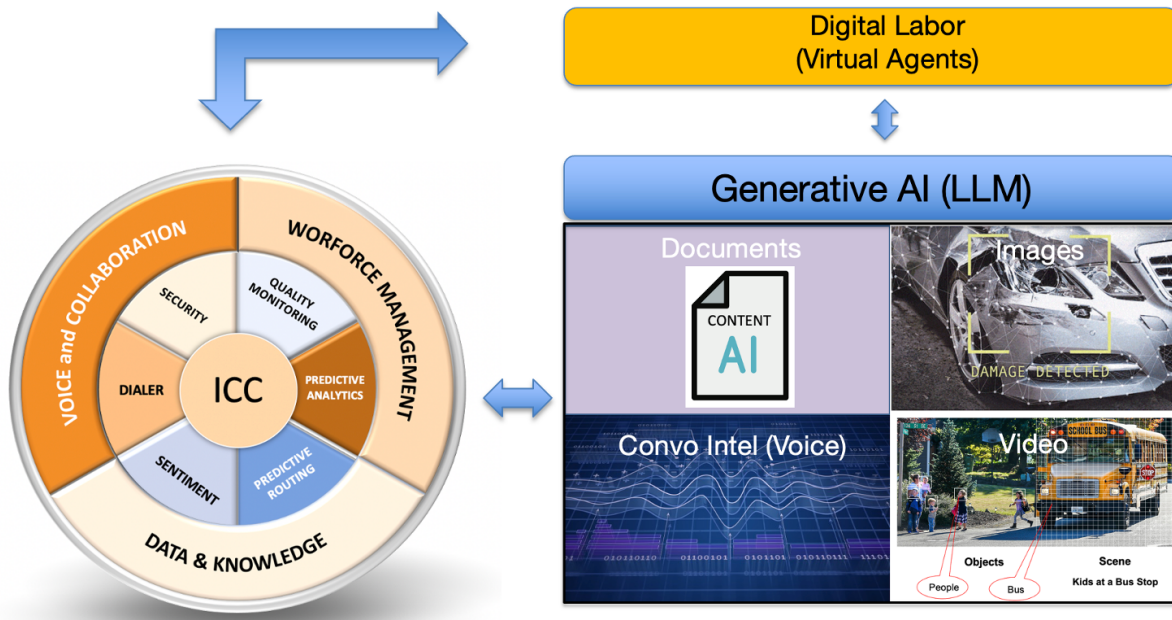

Figure 2: The intelligent contact center will have human agents as well as virtual agents powered by Generative AI.

Who Will Own the Customer Profile—CDP, ICC, or CRM

Data is the fuel for AI, and Customer Profiles are the secret sauce for better customer experiences. Intelligent Contact Centers can be the owner of customer profiles and customer data. There are many sources of information for customers, for products, and for answers to common questions.

Customer Data Platforms were the hot story in 2022. But for 2024, Aragon is seeing the rise of the Customer Profile and the ability of the ICC and its Generative AI front-end to leverage data from the CRM, the ICC, and other data sources, such as a trained Large Language model in an industry as ways to answer inquiries from customers and prospects.

CRM providers, such as Salesforce Service Cloud, have taken the lead in the area of customer profiles, as many ICC providers, they are still in the process of building out virtual agent and agent assist applications.

The Universal Customer Profile Is the Architectural Play

For many enterprises, the ICC may be the keeper of the customer profile. For others, they may want their CRM to be the primary record—and the ICC may take a feed from the CRM, such as a Sales or Service Cloud.

For small and midsize enterprises, it may or may not be feasible to have the CRM as the keeper of the customer profile. This is due to the fact that the CRM may be older and not upgraded to an Intelligent CRM where customer records are constantly updated.

For large enterprises with multiple contact center instances, it makes architectural sense to have the customer profile be maintained within the CRM, and the ICC takes the feed from the CRM. This is due to the dynamic nature of intelligent CRM platforms, where records are constantly being updated based on interactions with the actual customer.

Prediction: *By YE 2024, 55% of contact center providers will enable the development of an enhanced customer profile that will enable a more personalized customer experience (70% probability).*

Knowledge Lakes and the ICC

It is clear now that we have left the era of simple call routing. Increasingly, customers will be routed based on the rating of the question or inquiry.

An ICC will need to harness the Customer Profile and a body of knowledge about the types of calls and the types of answers that customers need. We refer to this information as the rise of Knowledge Lakes

A knowledge Lake is different than a Data Lake in that it is a collection of a series of knowledge objects that, when used by Generative AI—can formulate intelligent answers to both simple questions today—and increasingly complex questions over the next five years. Figure 3 shows how Generative AI knowledge levels for roles and industries will increase over time.
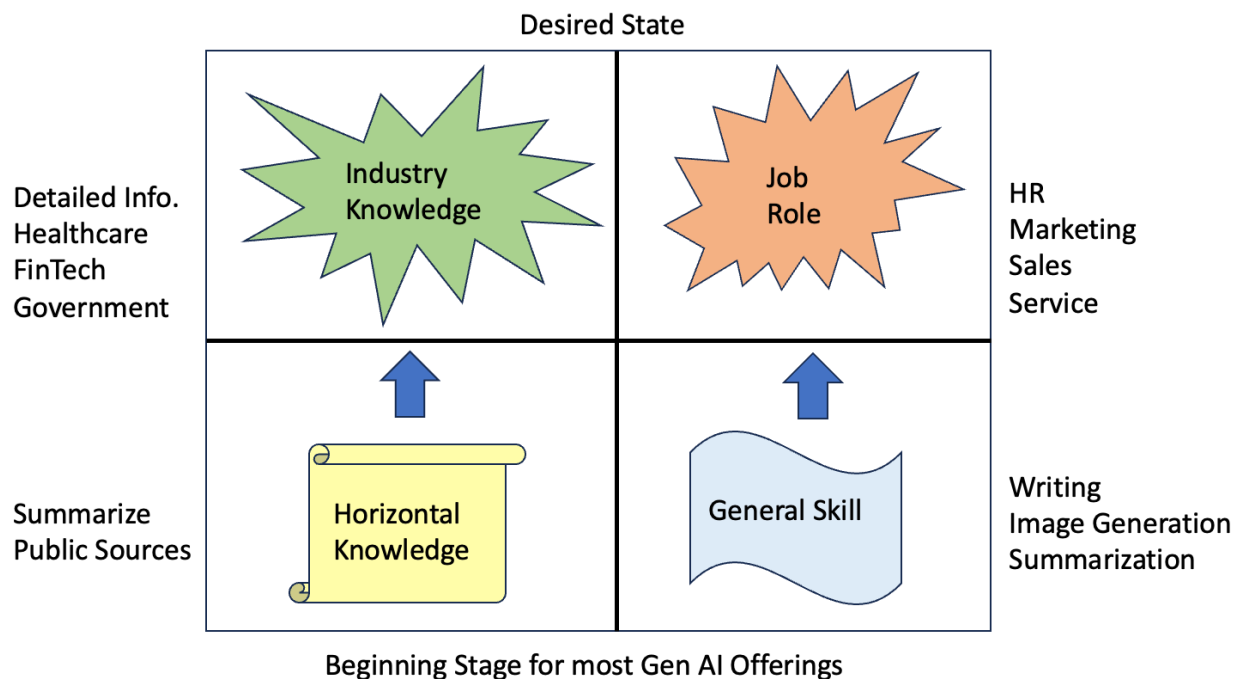

Figure 3: ICC providers and Enterprises will increasingly need to deal with skills and knowledge.

Focus Virtual Agents on Handling Basic Q&A

One of the biggest short-term opportunities for enterprises is to leverage Generative AI to build virtual agents that can answer questions. New Low Code tools from Google, Microsoft and many others are allowing Virtual Q&A Agents to be built in record time with the ability to point the virtual agent at knowledge sources and have them start answering questions right away.

IVAs are now working side-by-side with human agents in an agent-assist role to enable the human agents to resolve these issues easier. These IVAs for Agents, also called Agent Assist, can act as personal coaches and assistants to human agents. understanding the intent of the caller in real-time and providing the human agent with guidance on the next best action.

Real-time agent assistants are also incredibly valuable when onboarding or training new human agents, especially during the era of remote onboarding. With agent assist, new human agents can become proficient much faster and avoid rookie mistakes, thanks to having a real-time digital coach that can guide them in their interactions with users.

With Generative AI, transcription becomes a standard capability. This enables the complete documentation of the entire conversation, but, more importantly, it can leverage AI technologies to analyze the call and identify specific areas where the agent excelled or may be able to improve. This information can be provided to the agent as real-time or summary feedback and provides supervisors with information to accurately assess their agent's performance. There are many types of virtual agents that should be explored by the enterprise. See Note 1 for an overview.

Prediction: *By YE 2025, to keep up with the need for self-service support, 60% of enterprises will offer virtual agents that are trained to answer common questions (70% probability).*

Note 1: The different type of Virtual Agents

There are a number of different virtual agents that should be evaluated for development and deployment in an ICC.

Greeting Agents
Client greeting and issue identification.

Agent Assist
These agents guide the agent towards a successful outcome with suggestions on what the human agent should say in a given situation.

Questions and Answer Virtual Agents

Virtual agents are ideal at handling basic questions and answers, and they can do it very quickly.

Refund Agents

Refund agents are trained to be able to look up a customer account and determine if the customer is owed a refund or not. There are a growing number of examples of Refund Agents in production.

Enterprise Coaching: Why Demand Is Growing

The enterprise coaching market is starting to become more defined and more bifurcated. While there are two distinct use cases—Sales Reps and Contact Center Agents, there is also the need to guide managers on coaching that their teams need. This basically means that there is one set of needs that can be applied across multiple organizations in an enterprise.

Demand is growing because now the act of Coaching can be automated. Artificial Intelligence is one of the catalysts in this movement, and while it started and revolves around Conversational AI, Generative AI is also here and is going to help individuals to be able to get more detailed feedback about what they need to do. Today, more ICC providers partner with providers to offer newer Coaching capabilities that may exceed the older Quality management approaches of the past.

The ICC Maturity Model

Aragon introduced the ICC Maturity Model in 2022 and it still holds (see Figure 4 below). This model is one to use to start to evaluate ICC providers and the shift to Digital Labor and the Virtual Agent offerings coming from ICC providers and their partners.

While many Contact Centers can be modernized, the need for full omni-channel capabilities along with deployable virtual agents may mean looking at alternative providers.

With the complete shift to intelligent contact centers, providers will have to make significant investments to deliver the promise of understanding needs and behaviors and being able to react in real-time. Enterprises may find that in evaluating where they are in the ICC maturity model, that the conclusion may be to switch ICC providers.
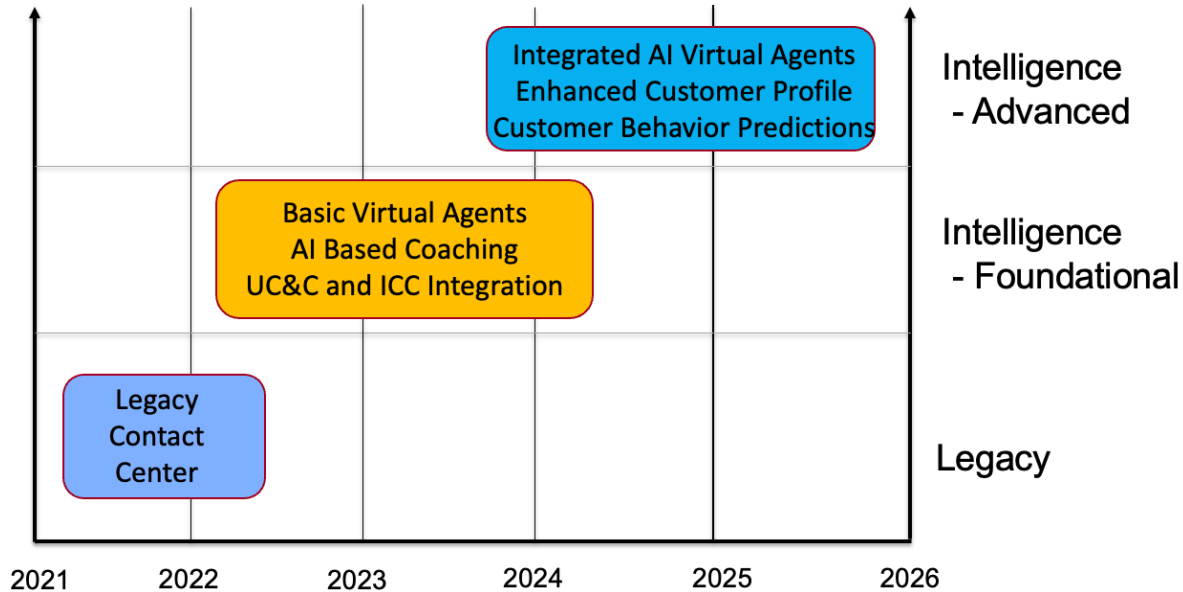
Figure 4: The ICC Maturity Model.

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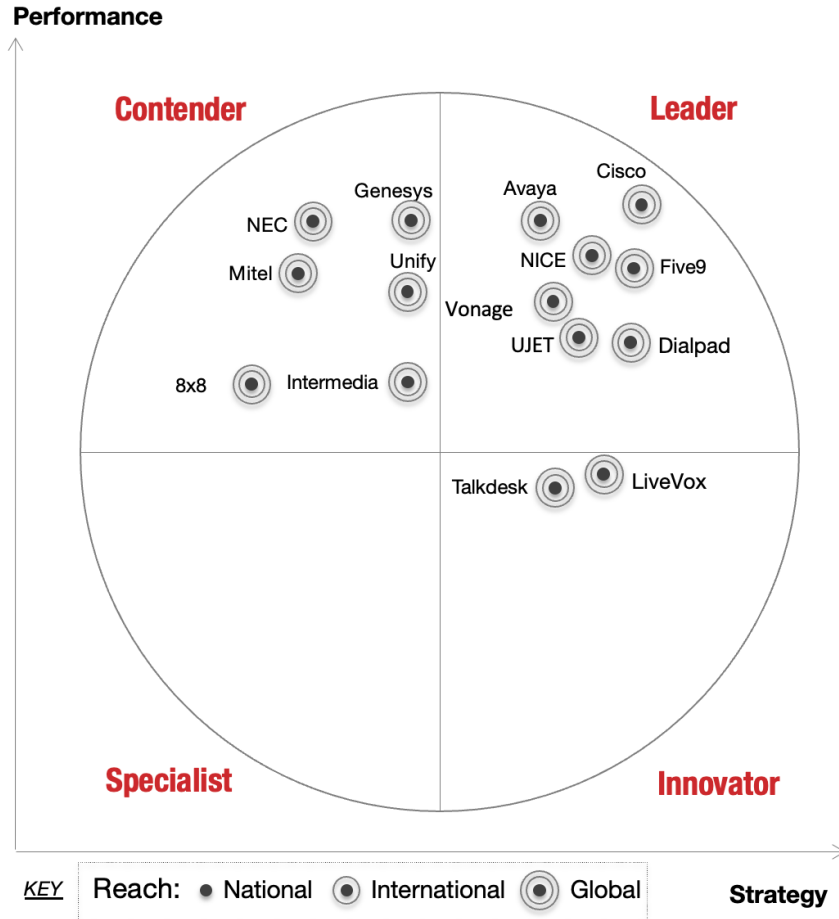(As of 11/07/2023)

Figure 5: The Aragon Research Globe for Intelligent Contact Centers, 2024.

Leaders

Avaya

Avaya, based in New Jersey and led by CEO Alan Masarek, has continued to expand its large customer base. Avaya added several seasoned C-Suite executives to the team including Amy O'Keefe as CFO, Omar Javaid as Chief Product Officer, Josh Mueller as CMO, and Jayesh Patel, as GVP, Product Management. Avaya has continued to focus on growing its large install base in Intelligent Contact Centers and Unified Communications and Collaboration. The Avaya portfolio now includes Avaya Experience Platform, Avaya Communication APIs, Avaya Cloud Office, Avaya Spaces, and Avaya Enterprise Cloud. Avaya also offers its on-premise offerings including Avaya Call Center Elite, Avaya Aura, and Avaya IP Office. Avaya continues to have one of the largest contact center install bases, partially due to its focus on large complex environments that require platform scalability.

Avaya Experience Platform is Avaya's AI-powered intelligent contact center platform that enables organizations to create and deliver in-the-moment experiences. The Avaya Experience Platform offers customers a series of deployment options and cloud-based services running on Microsoft Azure. Avaya is now leveraging Generative AI in the Avaya Experience Platform. The Avaya AI Workflow capability, combined with Generative AI, enables the building of new virtual agents that can integrate Google, IBM Watson, Nuance, and other conversational AI offerings into custom or pre-built solution virtual agents.

The Avaya Enterprise Cloud, its dedicated cloud UC&C and contact center service, is powered by Microsoft Azure. While it is clear that Avaya has focused on Microsoft Azure as its go-forward Cloud Partner, Avaya continues to support a multi-cloud application ecosystem, leveraging its product lines on a variety of cloud platforms including Amazon Web Services, Google Cloud, and IBM, along with market leaders such as Verint, Google, Afiniti, and Nuance.

Avaya is also well positioned to help customers leverage its communications and contact center needs – and due to its Multi-Cloud approach, enterprises can pick a deployment model that supports data sovereignty and data privacy. Avaya's reinvigorated leadership team and refreshed products and cloud flexibility, and overall scalability make them one to watch.

Strengths	Challenges
• Avaya portfolio that includes not just CCaaS but UCaaS and CPaaS capabilities	• Balancing its on-premise and cloud offerings
• Large deployment and cloud migration expertise install base	
• Native AI expertise and AI partner network	
• Extensive partner network and ecosystem	
• Path to cloud for every customer to minimize cost and risk	
• Composable communications platform architecture focused around CCaaS to provide agility, speed & value	

Webex by Cisco

The Cisco Webex Business Unit, led by GM Javed Khan, has continued to add innovation in both the Intelligent Contact Center and in its Communication and Collaboration product offerings. Cisco has seen significant growth of its Contact Center business. Part of this is due to a renewed focus by management, and part of it was that Cisco was offering its Webex Assistant several years before others. Cisco offers its Webex Intelligent Contact Center and its flagship Webex Meetings, Calls, and Messaging that are all offered as Webex One

The Webex Contact Center is a full cloud-based native intelligent contact center offering. New capabilities added in Mid-year 2023 include out-of-the-box Call Summaries, Agent Answers, and Topic Summaries, some of which are powered by Generative AI. In addition to new features launched this year, Cisco also has significant capabilities for conversational intelligence, including real-time transcription, wrap-up notes, and action items. Cisco continues to partner with Google for speech-based AI.

Cisco offers Cisco Webex Experience Management that includes advanced customer profiles, predictions on how customer experience will be impacted, and sentiment analysis. Cisco also offers Webex Workforce Optimization. Cisco Webex Experience Management offers a host of channels to engage with customers. Its flexibility and customer focus have also allowed it to win some large opportunities. Webex Contact Center also integrates with Salesforce Service Cloud, Microsoft Dynamics, and Zendesk.

The Webex Platform also focuses extensively on security, including support for privacy, encryption, data loss prevention, mobile security, and regulatory and legal compliance. In 2023, Cisco moved all of the Admin controls to the Webex Control Hub. With 47 data centers, it also supports data residency and sovereignty requirements globally. Given its focus on customer needs and its continued delivery of Intelligence in both ICC and UC&C, Cisco is seeing a significant increase in customer wins.

Strengths	Challenges
• Cisco brand	• Balancing multiple CC offerings
• Contact center install base	
• Focus on AI, including Generative AI	
• Flexible cloud, premises, and hybrid deployment options	
• End-to-end encryption	
• Overall UCC capabilities	

Dialpad

Dialpad, headquartered in San Ramon, California, and led by Founder and CEO Craig Walker, continues to focus on innovation in its growing product family, investment in AI and overall market execution. Dialpad's Ai-Powered Customer Intelligence Platform combines Ai Contact Center, Ai Sales Center, Ai Messaging, Ai Meetings, and Ai Voice. It has been providing these offerings to both sales and communications buyers for several years.

Dialpad Ai Contact Center offers a fully intelligent omni-channel platform, including voice, digital (12+ channels, including web messaging, social, & in-app messaging), and intelligent chatbots. Dialpad also offers Ai CSAT to help coaches better understand which agents need more support and attention by identifying calls and agents with negative customer sentiment scores across 100% of interactions.

Its launch of DialpadGPT in August 2023 is one of the first domain-based large language models (LLMs) tailored specifically to power enterprise communications features that automate tasks for businesses of all sizes, improving customer service, sales and recruiting experiences, and it can be customized for an enterprises' needs. Dialpad's new AI capabilities include:

- Ai Recap leverages the latest generative AI algorithms and Dialpad's proprietary natural language processing (NLP) models to generate short summaries that capture the main ideas and topics of a conversation.
- Ai Playbooks are a useful coaching and adherence tool for support teams, who can leverage generative AI, along with Dialpad's real-time transcription and speech recognition technology.
- Ai Scorecards suggests when an agent or sales rep's mandatory behavior or process is met during a call.

Dialpad continues to offer its API capabilities and is one of the leading ICC providers that partners with Google and leverages Google GCP data centers around the world to help companies easily scale. Dialpad also supports both Google Chrome and Google Workspace.

Dialpad focuses both on Contact Center, Sales and HR/Talent Acquisition use cases, making it somewhat unique in the ICC Market. Dialpad is seeing growth of its overall business and its long-term investment in AI is paying off. With its demonstrated growth upmarket into large Mid-market and Enterprises, coupled with continued focus on SMB and its Google partnership, Dialpad is one to watch.

Strengths	**Challenges**
● Natively integrated AI capabilities	● Focus on team collaboration
● Real-time analytics and transcription	
● Integrated Contact Center with Collaboration and Sales	
● Automated workflows	
● Visual bot builder	
● HD-Quality Voice and Video	
● Pre-built integrations, including CRM	
● Sales and Recruiting use case	

Five9

Five9, based in San Ramon and led by Chairman and CEO Mike Burkland has seen continued growth over the last 4 years. Five9 now offers a larger set of product services than ever before. This includes Integrated Virtual Agent, Agent Assist, Global Voice, Agent Desktop Plus and Supervisor Plus, Engagement Workflow, as well as integrations and APIs and SDKs.

Five9 was one of the pioneers in the shift to the Intelligent Contact Center and they have helped to educate the market. Five9 leads with its integrated Intelligent Virtual Agent (IVA) and in March 2023 they announced Agent Assist 2.0 with AI Summaries, powered by OpenAI.

In August 2023 Five9 announced that it was acquiring Aceyus to streamline the migration of enterprise customers from On-Premise Contact Centers to the Five9 Cloud based ICC platform. Aceyus has a number of pre-built integrations that can speed up the process of the overall migration, including contextual data.

Five9 supports both inbound and outbound use cases and has global call support and routing alongside omni-channel support. While it still partners with other WEM providers, enterprises can now get a complete ICC solution from Five9. Five9 also offers integrations, such as Microsoft, Oracle, Salesforce, Zendesk, and ServiceNow for CRM, UC, and workflow management.

Five9 continues to offer integrations into the Intelligent Cloud Contact Center platform, with over 300 APIs and SDKs, especially for the UC space with providers such as Zoom, Microsoft Teams, Mitel, and Nextiva. In 2023 they announced new partnerships with Invoca for product capabilities and with British Telecom (BT) to accelerate Cloud adoption. In March 2023, Five9 announced a new version of its Adapter for Microsoft Dynamics 365. Five9 also has continued its partnership with Salesforce including integration with Salesforce Service Cloud Voice for Partner Telephony.

Five9 offers its own white glove implementation service that continues to help it win new customers and retain existing ones. Five9 can offer conversational AI-based offerings to enterprises that have a separate contact center platform, whether that is on-premises or in the cloud. With its continued focus on Intelligence and its growing global presence, Five9 is well positioned for the future.

<u>Strengths</u>	<u>Challenges</u>
• Integrated Virtual Agent and Agent Assist	• Awareness outside of North America
• Cloud offering	
• Inbound and outbound focus	
• Omnichannel features	
• Salesforce integration	
• Customer support	

NICE CXone

NICE, based in Ra'anana Israel and led by CEO Barak Eilam, has doubled down on its investment in Contact Center and AI. In October 2023, Nice announced its plans to buy LiveVox. The deal will close in Q1 2024 and now gives Nice a larger install base and the ability to focus on the SMB market. NICE continues to offer its flagship CXone ICC offering. The additional NICE Product offerings include Enlighten AI, Digital and Self Service (Enlighten Autopilot Conversational AI and Chatbots), Journey Orchestration, CX Analytics, and Workforce Engagement. NICE CXone is offered both directly and via NICE's growing partner network, which includes UC&C providers such as Mitel and RingCentral.

NICE positions its Enlighten AI as its overall AI platform, which was enhanced in 2023 with Generative AI capabilities. Enlighten AI now features domain-trained models, Auto Summaries, and AI Based Routing. It also comes with strong levels of security. Enlighten AI offers sentiment analysis and agent behavioral scoring, real-time interaction guidance on next-best agent behavior, and automatic quality scoring that includes soft skills. CXOne Smart Assist offers the ability to train virtual agents quickly, leveraging its Enlighten AI customer data.

In September 2023, NICE announced its Integration Hub, its low-code interface that allows enterprises to integrate with other applications. CXone provides CRM integration with providers such as Salesforce and Microsoft. NICE brands its Cloud approach as the NICE Open Cloud Platform, which leverages different Cloud Providers.

In 2023, it announced that CXOne is now available in Microsoft Azure, giving it broader cloud options globally. NICE focuses on Healthcare, Financial Services, Government, Insurance Retail, Telecommunications and travel and Hospitality as well as Business Process Outsourcers. With the continued focus on AI and its acquisition of LiveVox in 2024, NICE is ready for the growing demand for Digital Labor.

Strengths	Challenges
• Cloud offering • Integrations • AI focus • Partner network • Growing Industry focus • Endpoints • Global partner ecosystem	• Balancing between direct and third-party partners for implementation

UJET

UJET, based in San Francisco and led by Founder and CEO Anand Janefalkar, offers its Contact Center AI platform that has seen strong growth due to its clean sheet design and the ability to integrate UJET into existing customer workflows, including Mobile Apps. UJET has an experienced management team including industry veteran and COO Vasili Triant. UJET Core capabilities includes Voice and Digital Channels, IVR, Virtual Agent, Agent Assist, Smart Actions (smart device capabilities), UJET WFM, and the UJET Agent Mobile app.

UJET WFM was introduced in March 2023, and it offers intelligent forecasting, multimodal support, adherence monitoring and rapid implementation. The UJET Mobile Agent App was introduced in June 2023 and that along with its iOS and Android SDKs allow for minimal footprint. UJET also allows Mobile devices to be used to verify a customer's identity via using fingerprints or Face ID, to blend channels like voice and SMS simultaneously, to share media from a consumer's mobile device, or collect metadata that can help to inform routing and resolution.

In 2022, UJET and Google announced that they were going to partner to deliver solutions to customers, which includes Google Cloud offering an expanded set of offerings to customers that includes Google's own first-party CCaaS solution, Contact Center AI Platform, leveraging UJET's technology. UJET also uses Google CCAI Insights to build and design its Virtual Agents. UJET uses topic modeling on call transcripts to then refine and complete the Virtual Agent. UJET runs in Google Cloud or AWS, and it can also run on ChromeOS powered devices.

In May 2023, UJET announced its integration with Microsoft Teams to enable first contact resolution. The integration enables Agents that use UJET to quickly connect with internal subject matter experts using Microsoft Teams. UJET serves the needs of small and large enterprises. It also has an edition for SMB that starts as low as $65 dollars per Agent per month.

UJET integrates natively with Freshdesk, Kustomer, Microsoft Dynamics 365, Oracle, Salesforce and Zendesk. One of the modern capabilities of UJET is that customer records are fully unified in the CRM, via its real-time data exchange, with no Personally Identifiable Information (PII) stored in the contact center. UJET focuses on Financial Services, Healthcare, Retail and Travel and Hospitality. With its Google Partnership, its native design and focus on AI, UJET is making an impact in the overall ICC market.

<u>Strengths</u>	<u>Challenges</u>
• AI Contact center offering	• Brand recognition outside of North America
• Virtual Agents and Agent Assist	
• Deep integration with CRM providers	
• Google partnership	
• SMB and Enterprise focus	
• Modern Architecture and Mobile Capabilities	

Vonage

Vonage, led by CEO Rory Read and based in Holmdel New Jersey, has been focused on growing its customer base by leveraging its growing Vonage Communications Platform (VCP). VCP now includes Vonage Contact Center (VCC), Vonage Business Communications (VBC), Vonage AI, Vonage Conversational Commerce, and Vonage CPaaS.

Vonage Contact Center (VCC) is a cloud-native, multitenant, global CCaaS solution that integrates natively with Vonage Business Communications, including voice, video and messaging, for omni-channel customer engagement. Due to its growing partnership with Salesforce, it offers broad and deep integration with Salesforce Sales and Service Clouds, and Service Cloud Voice.

Core contact center functionality such as omnichannel contact routing, self-service IVR, automated outbound dialing, screen pops, and associated real-time CRM updates are provided globally across clustered data centers in each region. In July 2023, Vonage announced its new Vonage Protection Suite, that offers both security and authentication to ensure that all communications are safe.

In AI, Vonage continues to offer Vonage AI Studio, its conversational AI platform that enables virtual agents and bots to be built that can leverage all channels for conversations including chat, voice and SMS applications including WhatsApp. Vonage also offers visual engagement features that work inside of Salesforce, Microsoft Dynamics, ServiceNow, Zendesk. Agents can escalate any call into a video session on the fly.

Due to Vonage's strong Communications Automation capabilities, powered by its APIs and configured in its low-code Studio automation suite, enterprises have the opportunity to integrate Vonage into critical business applications that may leverage either the Vonage Contact Center, Vonage Business Communications, its Unified Communications as a Service (UCaaS) solution, or both. In September 2023, Vonage announced Conversations for Salesforce, which leverages Vonage APIs to enable SMS, MMS and WhatsApp conversations all from within the Salesforce Platform.

While Vonage Contact Center has been one of the pioneers in its integration with Salesforce CRM, Vonage also has a growing set of integrations with ServiceNow, Microsoft Dynamics, Zendesk, and Microsoft Teams for improved collaboration between front office and back office. With its growing focus on Artificial Intelligence, Conversations and integrations, Vonage is positioned well to take advantage of the growing demand for intelligent contact centers.

Strengths	**Challenges**
• Contact center offering	• Balancing focus on UC&C and contact center
• Fully integrated UCaaS and CCaaS	
• Deep integration and focus on Salesforce	
• Vonage brand recognition	
• Integration extended to ServiceNow and Microsoft Dynamics, Microsoft Teams, and Zendesk	
• CPaaS API flexibility	

Contenders

8x8

8x8, which focuses on both UC&C and intelligent contact center is led by newly appointed CEO Samuel Wilson. 8x8 saw a number of executive appointments as a result of a management shuffle. In June 2023, Lisa Martin was selected as CRO, and Kevin Kraus was appointed as CFO. In September 2023, Bruno Bertini was announced as CMO. The 8x8 eXperience Communications (XCaaS) platform includes contact center, voice, video, chat, and API solutions.

8x8 Contact Center is a certified Microsoft Teams solution. The integration can be used in conjunction with 8x8 Voice for Microsoft Teams, a direct routing solution used to support high-quality voice calling to Teams users in 56 countries.

8x8 offers Conversation IQ, which makes native AI-infused quality management and speech analytics solutions available to smaller, informal contact center operations. In August 2023, 8x8 announced new Self-Service capabilities for the 8x8 Intelligent Customer Assistant. The new Intelligent Assistant features streamlined workflows, scripting tools for rapid deployment, and seamless transition to human agents.

The 8x8 XCaaS platform features a Dynamic Integration Framework, making it easy to add and deploy new channels, as well as offering out-of-the-box integrations with over 50 business and productivity apps, including Microsoft Dynamics 365, Salesforce, and Slack.

8x8 provides full cloud voice calling in over 50 countries and has an extensive global cloud footprint. A combination of public and private data centers, covering 35 geographic locations/regions, provide reliability, quality of service, and local data residency. 8x8 is also the only vendor in the industry to offer a platform-wide, financially-backed 99.999% uptime SLA across UC&C and contact center.

Strengths	Challenges
• 8x8 Voice for Microsoft Teams direct routing solution	• Slow to market with AI
• Agent Workspace	
• Single platform delivering cloud-native UCaaS, CCaaS and CPaaS	
• Remote/hybrid approach to QM/Coaching/Interaction Analytics	
• Customer support and satisfaction	
• Integration friendly, either through APIs, pre-built or partner network	
• Service Management options	
• Brand awareness	

Genesys

Genesys, led by CEO Tony Bates and headquartered in Menlo Park, California, announced that it achieved $2 billion in total revenue in fiscal year 2023 (February 1, 2022, to January 31, 2023). The product family now includes Genesys Cloud CX, Genesys' core offering, Pointillist and Exceed.ai, a marketing and sales-focused conversational AI platform. The shift to Genesys Cloud CX has served Genesys well and the addition of Pointillist end-to-end customer journey management software rounds out the portfolio.

For unified communications, Genesys has native capabilities as well as partnerships with Microsoft, 8x8 and Zoom to offer choice in the area of unified communications and collaboration. In September 2023, Genesys and Salesforce, which is a Genesys investor, announced an expanded partnership that includes a new solution called CX Cloud from Genesys and Salesforce. The new offering enables bi-directional data sharing that makes agent and supervisor roles more seamless.

The Genesys Cloud AI Experience, which was announced in September 2022, includes virtual agent capabilities (voicebots and chatbots) along with knowledge and predictive routing. In 2023, Genesys announced that it was adding Generative AI Capabilities that includes summarization and Agent Assist.

Genesys Cloud CX is available via 12 core AWS data center locations, and 4 AWS satellite regions. In July 2023, Genesys achieved FedRAMP authorization at the Moderate Impact level to better service government agencies and organizations working with those agencies. Genesys Cloud CX offers 5 consumption packages with the option for named, concurrent, or hourly pricing options.

Strengths	**Challenges**
● Broad ICC platform capabilities	● Maintaining and enhancing multiple product offerings
● Management team experience	
● Install base	
● Conversational AI	
● Large enterprise deployments	
● Strong partnerships	
● Usage-based pricing	
● FedRAMP Authorized	
● Integrated workforce optimization	

Intermedia

Intermedia, led by CEO Michael Gold and based in Sunnyvale, has continued to invest in innovation in its growing portfolio of products. Intermedia offers Intermedia Unite, its full UC&C Platform and its Intermedia Contact Center. It also offers Email, Content Management, and Archiving, that includes email archiving. One of the big moves for Intermedia in 2023 was a pivot to add AI to the Intermedia Platform.

In July 2023, Intermedia announced Spark AI that includes a number of features, including AI Meeting Notes & Action Items, AI Evaluator, AI Interaction Summary, AI Call Transcription, and AI Sentiment Analysis.

One new feature is AI Transaction Redaction, which is part of AI Interaction Summary. AI Transaction Redaction removes sensitive information from a call transcription. Sensitive data includes items like credit card numbers and personal health information.

Intermedia Unite offers cloud-based telephony, messaging, and meetings. It also offers AnyMeeting Video Conferencing and AnyMeeting Webinars. Intermedia AnyMeeting supports 720P resolution, meeting recordings, custom branding, and Notes. It also offers an optional Webinar option. One of the newer capabilities is the ability to provide end-to-end encryption.

Intermedia offers integrations for Google Workspace, Microsoft Teams, and Slack. Intermedia Unite with Microsoft Teams offers bundled telephony, powered by Intermedia. Intermedia sells Unite and AnyMeeting via resellers, some of whom white label the offering with their brand. With focus on collaboration and communications offerings, its NEC OEM relationship allowing Intermedia to expand its global footprint, and a growing partner base through its differentiated CORE reseller program, Intermedia is well-positioned for the SMB and mid-market.

With its UC&C, contact center, other collaboration offerings, and its NEC OEM relationship, Intermedia is well-positioned for the SMB market.

Strengths	**Challenges**
• Cloud PBX	• Market awareness
• Growing AI Capabilities	
• Call center	
• Mobile app	
• Native CRM integrations	
• Channel focus	

Mitel

Mitel, with a main US main office in Sunnyvale and led by President and CEO, Tarun Loomba, announced in October 2023 that it had completed the acquisition of Atos' Unify Communications Business Unit. This deal makes Mitel one of the largest providers of UC&C (Unified Communications and Collaboration) and Contact Center offerings. The new management team includes the additions of Marcus Hänsel as Chief Sales Officer, Sophie Ames as Executive Vice President and Chief People Officer, Luis Domingos as Chief Technology Officer and Head of Large Enterprise R&D and Charles-Henry Duroyon as Chief Operating Officer. While the deal is still fresh, the new combined Mitel and Unify can offer both Cloud and Hybrid Cloud solutions – including Cloud and On-Premise Contact Center.

The combined Mitel-Unify portfolio includes applications, collaboration, contact center, unified communications platforms and solutions, business phones as well as UCaaS via the RingCentral partnership. The RingCentral UCaaS partnership is available both in the US and in Europe where Mitel's Unify unit has a strong presence.

Mitel's flagship CX platform is MiContact Center Business which works on all Mitel communications platforms and supports omnichannel interaction management, historical and real-time reporting dashboards, self-service IVR (including AI-powered voice and chat virtual agents), fully featured web-based agent and supervisor desktop including AI-enabled agent assist. It supports integrations to 50+ Mitel Solutions Alliance applications and can be deployed on-premise, in a private cloud, or in the public cloud (dedicated instance) with both CapEx and OpEx purchasing models.

The addition of Unify also brings the strategic partnership NICE and offers the NICE CXone as its lead cloud contact center offering. For virtual agent requirements, Unify brings its experience with Google's contact center AI solution, as well as other 3rd-party AI providers.

While there is some overlap of products, the new Mitel can serve both the Mid-Market as well as large enterprises – due to the addition of Unify. Part of the reason for the success of Unify is its focus on Industries. Mitel now has expertise in industry verticals, including Financial Services and Insurance, Healthcare and Life Sciences, Public Sector and Defense, Telecom, Hospitality, Media and Entertainment, Manufacturing, Energy and Utilities, as well as Transport, Logistics and Retail.

Mitel's focus on industries will help them offer more tailored solutions to business buyers that are more focused on results versus just the technology. This trend towards Industry Clouds gives Mitel advantages over others and in particular, the historical Mitel/Unify strengths in Healthcare and Government bodes well for the other industry verticals. With a much larger global footprint the new Mitel is well positioned for the future.

Strengths	**Challenges**
• Private/Public Cloud (dedicated instance) and on-premise deployment options	• Balancing multiple distinct contact center offerings
• Hybrid cloud capabilities globally	
• End-to-end offerings	
• Large Enterprise and Mid-market expertise	
• Flexible CapEx and OpEx purchasing and deployment models	
• Global partner ecosystem	

NEC

NEC has been a long-time provider of Communications and Contact Center offerings for the SMB and Large Enterprise Segments. They are also one of the largest multi-national providers of IT infrastructure and communications Through their UNIVERGE communications portfolio, NEC offers its customers the power of choice—on-premises (UNIVERGE® SV9000 Series and UNIVERGE 3C®), cloud (UNIVERGE BLUE® CLOUD SERVICES) or hybrid (integration of SV9000 and UNIVERGE BLUE) solutions. UNIVERGE BLUE ENGAGE, powered by Intermedia, is a complete cloud-based contact center solution that can be fully integrated with UNIVERGE BLUE CONNECT (UCaaS) and accessed through a single pane of glass or can be used as a standalone solution.

Besides UNIVERGE BLUE ENGAGE its portfolio of contact center offerings includes UNIVERGE Business ConneCT and the UNIVERGE SV9100 Contact Center. NEC segments its offerings for small (five agents) and medium/large (up to 2,000 agents). NEC offers a full set of capabilities, including on-premises and cloud communications (UCaaS), messaging, meetings, and contact center. NEC partners with DVSAnalytics for workforce optimization (WFO). Its WFO includes forecasting, scheduling, recording, speech analytics, and live monitoring.

In November 2023, NEC announced UNIVERGE BLUE PULSE artificial intelligence, their cutting-edge AI technology engine thoughtfully and responsibly integrated into their UNIVERGE BLUE Intelligent Communications Platform. It plays a pivotal role in both UNIVERGE BLUE CONNECT and ENGAGE and helps to empower businesses by enhancing intelligence, productivity, efficiency, and customer care capabilities.

UNIVERGE BLUE PULSE features are designed to protect businesses and the customers they serve. For instance, no voice or meeting date is stored with third parties for transcription and analysis, and transcription redaction is on by default on voice queues with transcription enabled.

NEC focuses on a number of vertical industries, including education, government, healthcare, and retail. Besides its UC&C platforms, NEC continues to offer a full set of handsets for large and small enterprises. Additionally, NEC has been investing in computer vision and offers its Biometrics solutions (facial recognition, finger and palm print identification, intelligent perimeter intrusion detection system, digital ID, plus more. Reveal Combined with UNIVERGE BLUE CLOUD SERVICES, these offerings will help NEC expand its solution portfolio in its vertical markets, especially education, government, healthcare, and retail.

The demand for hybrid cloud-based UC&C offerings continues to grow. NEC, with its growing focus on AI, is well-positioned to continue to win in the SMB and large enterprise markets. Aragon expects to see many NEC on-premises customers opt in for the UNIVERGE BLUE CLOUD SERVICES offerings.

<u>Strengths</u>	<u>Challenges</u>
● Cloud and on-premise voice support	● Overall focus on video meetings
● Global cloud infrastructure	
● Industry solutions focus	
● Computer vision, including video analytics	
● Endpoints	

Unify

Unify, which is now wholly-owned by Mitel, and led by President and CEO, Tarun Loomba expanded its management team with the addition of Marcus Hänsel as Chief Sales Officer and Charles-Henry Duroyon as Chief Operating Officer. The deal was completed in October 2023, and it deal makes Mitel one of the largest providers of Communications and Collaboration offerings. While the deal is still fresh, the new combined Mitel and Unify can offer both Cloud and Hybrid Cloud solutions, including Cloud and On-Premise Contact Center.

Unify has a growing portfolio of products and services that are increasingly focused on Industries. Unify partners with NICE and offers the NICE CXone as its lead cloud contact center offering. Atos Unify offers two editions of the Atos Unify OpenScape Contact Center: Atos Unify OpenScape Contact Center Agile focused on agent populations of under 100 agents, and Atos Unify OpenScape Contact Center Enterprise for single or multiple sites with up to 1500 concurrent agents per system, 7500 agents per cluster. Atos Unify offers WFM via partners including Verint and ASC, as well as OpenScape Contact Center Analytics from Softcom.

In Conversational AI Unify leverages NICE's AI offerings and overall they also partner with Google and its Google contact center AI solution. Given its large enterprise focus, Unify also works with Third party providers based on the customer need.

Unify's industry-tailored portfolio offers solutions to attract business buyers that are more focused on results versus just the technology. Unify's early success in verticals was due to its specific focus on Healthcare and Government. The current industries that Unify serves include Financial Services and Insurance, Healthcare and Life Sciences, Public Sector and Defense, Telecom, Media and Entertainment, Manufacturing, Energy and Utilities, as well as Transport, Logistics and Retail.

Now that Unify is part of the Mitel, we expect that the combined company will have more focus on product innovation and on industry solutions for both SMB and large enterprise. The needs of large enterprises are complex and varied and Unify is well positioned to serve that customer segment.

Strengths	Challenges
• Contact center capabilities	• Focus on Virtual Agents and Conversational AI
• Large Enterprise expertise	
• On-premise and cloud support	
• Vertical industry solutions	
• CPaaS platform	
• Cloud deployment options	

Innovators

LiveVox

LiveVox, led by CEO John DiLullo, has continued to bolster its executive staff with two key hires in 2023: Bobby Hall as EVP of Channel Sales and Paula Morton as VP of Sales Engineering. LiveVox also announced that it was being acquired by NICE for approximately $350M. The deal closes in early 2024 and marks a further consolidation of the ICC Market. The LiveVox cloud-based intelligent contact center platform offers Inbound and Outbound Voice, Digital Messaging, a dynamic CRM, and Workforce Engagement built on a shared data model. The company's data framework is built such that other systems, data, and processes can be easily orchestrated to craft the desired customer and agent experience.

LiveVox offers AI virtual agents as well as its Agent Assist offering. In 2023, LiveVox added integrations with OpenAI to leverage its Generative AI capabilities. Personalization is enabled by its purpose-built Contact Center CRM, which also facilitates smooth escalations to agents who have all the previously entered information at their fingertips. LiveVox also offers SpeechIQ with Automated Quality Management, which provides unified insights about the customer experience by combining speech analytics with omnichannel intelligence and the ability to improve agent performance and customer experience.

The LiveVox platform is geared towards optimizing customer experience and engagement by providing a unified environment where voice, messaging, email, SMS, and virtual agent communication can be centralized and streamlined to drive self-service opportunities for customers and performance for contact center agents and deliver insights to leaders across the organization.

LiveVox focuses on Industries including Financial Services, Healthcare, Telecom, Teleservices, Retail, and Travel & Transportation. LiveVox's focus on its growing intelligence capabilities and ability to easily integrate other systems and data and its pending merger with NICE, it is one to watch in ICC.

Strengths	**Challenges**

- Cloud contact center focus and expertise
- Pre-integrated omnichannel and AI capabilities
- Easy orchestration of data, apps, and workflows
- Purpose-built CRM and unified data model
- Robust risk mitigation tools and controls
- Strong end-to-end SLA with high availability

- Market awareness outside of North America

Talkdesk

Talkdesk, led by CEO Tiago Paiva and based in San Francisco, continues to add executives to its leadership team. In August 2023, it announced that William Welch was joining as President and COO Neville Letzerich was joining Talkdesk as CMO. The Talkdesk offerings now include its ICC Platform, Talkdesk AI, Talkdesk Builder, Talkdesk Knowledge Management Talkdesk Workforce Management, and Talkdesk Workspace.

Talkdesk Workspace allows the Talkdesk user interface to be personalized and unifies all CX applications and data, leveraging Talkdesk Builder, its low-, no- and custom-code tools that allow the contact center to be customized across Workspaces, routing, reporting, automations, and integrations. In August 2023, Talkdesk CX Cloud received the US Government FedRAMP In-Process designation, which over time should give it access to the entire Federal government agencies.

In October 2023, Talkdesk announced that it was making Generative AI across its platform. The new features include automated summaries, automated topic discovery, and biases and inaccuracies. The Talkdesk AI platform continues to offer Talkdesk AI Trainer™, enabling agents with domain knowledge to improve AI models powering automations in the contact center, Talkdesk Agent Assist™ for next best actions during live interactions. The new Generative AI capabilities should enhance the transcription that was originally offered with Talkdesk QM Assist™.

Talkdesk continues to focus on industries including Talkdesk Financial Services Experience Cloud™ for Banking and Insurance, Talkdesk Healthcare Experience Cloud™, and Talkdesk Retail Experience Cloud™. Talkdesk continues to offer its app marketplace, AppConnect, that extends Talkdesk CX Cloud capabilities with 1-click access to over 80 contact center offerings. Talkdesk continues to push the envelope in the intelligent contact center.

Strengths	**Challenges**
● Cloud contact center	● Brand awareness outside of the U.S.
● APIs	
● Focus on AI	
● Industry products & solutions	
● Workforce management	
● Partner ecosystem	
● Analytics	

Aragon Advisory

- Enterprises should use the Aragon ICC Maturity model to evaluate where they are on the Intelligence Roadmap. This means evaluating current capabilities and looking at how to automate with virtual agents.

- Enterprises should evaluate both their ICC provider and third parties that can offer virtual agent for both agent and customer support.

- Enterprises need to ensure that managers and executives are trained on what AI is and the expectations they should have from providers.

Bottom Line

The race to deliver intelligent contact centers is on. Generative AI has become the battle cry and the low-code enabler to build virtual agent offerings faster than ever before. It is important to evaluate current and potential ICC providers both on core capabilities for omnichannel capabilities and also for their roadmap for both human and virtual agents. Additionally, as UC&C and contact center become more intertwined, look for more use cases that can support the growth of the business.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness**: Market awareness of the firm and its product.
- **Customer experience**: Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability**: Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging**: Is the offering priced and packaged competitively?

- **Product**: The mix of features tied to the frequency and quality of releases and updates.

- **R&D**: Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)

- **EMEA** (Europe, Middle East, and Africa)

- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide

- Time zone and location of support centers

- Support for languages

- References in respective hemispheres

- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators* or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.

- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.

- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.

- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

The inclusion criteria for this Aragon Research Globe is
- a minimum of $6 million in primary revenue for contact center or a minimum of $8 million in revenue in a related market (voice, video conferencing, collaboration, and team collaboration/messaging).
- **Shipping product**. Product must be announced and available.
- Customer References. **Vendor must produce customer references in each hemisphere that the vendor participates in.**

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process. This determination was not applied to this report as all vendors participated in the Globe process.

New vendors included in this report:

- *UJET*

Noteworthy vendors not included in this report:

The following vendors were not included in the report but are notable:
- *Altitude Software*

   o *Altitude is now part of Enghouse which also has its own Contact Center offering.*

- *Alvaria*

   o *Alvaria now focuses on Workforce Management (WFM) and Employee Experience (EX).*

- *Amazon*

   o Amazon offers its Amazon Connect Contact Center which focuses on enabling enterprises to build their own applications using Amazon AWS services.

- *Google*

   o Google announced it is offering its own Cloud Contact Center in March 2022. Google also offers Its contact center AI offering for virtual agents.

- ***Nextiva***

    o Nextiva is an innovator in unified communications and collaboration and resells Five9's contact center

- ***Twilio***

    o Twilio launched Twilio Flex Contact Center in October 2018. It is currently focused on acquiring customers.