



Everest Group Customer Experience Management (CXM) Services PEAK Matrix[®] Assessment 2023 – Americas

Focus on Alorica
September 2023



Background and scope of research

The Customer Experience Management (CXM) market in the Americas, APAC, and EMEA regions has shown resilience post the pandemic. In the Americas, enterprises invested in digital CX implementations to modernize contact centers. The APAC region saw increased digitization and emphasis on superior CX for customer acquisition. Transformation consulting services were in high demand in both regions. In EMEA, businesses focused on personalized CX through digital tools and transformation consulting. Generative AI has revolutionized the CXM market by enabling personalized customer experiences at scale, by leveraging its ability to create custom content and recommendations based on individual preferences. As businesses increasingly prioritize customer-centric strategies, generative AI's relevance will continue to grow, ushering in an era of hyper-personalization and enhanced customer engagement, ultimately shaping the future of CXM. Detailed assessments of CXM service providers both on a global as well as a regional level in the Americas, APAC, and EMEA regions are provided in this report, with an evaluation of their market success and vision and capabilities. Providers are adapting to meet the evolving customer requirements through technology investments and partnerships. Overall, businesses recognize the importance of CXM in retaining and attracting customers, driving market differentiation, and ensuring business continuity.

In this report, we present an assessment and detailed profiles of 54 CXM service providers globally featured on the [Customer Experience Management \(CXM\) Services PEAK Matrix® Assessment 2023](#). Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

The full report includes the profiles of the following 54 leading CXM providers featured on the CXM PEAK Matrix® :

[24]7.ai, Alorica, Altius Link, Arise, Ascensos, Atento, Bosch Service Solutions, BellSystems24, Capita, CCI, Centro, Cognizant, Concentrix, Conduent, Conectys, Datamatics, EXL, Firstsource, Genpact, GlowTouch, HCLTech, HGS, ibex, Ignition Group, IGT Solutions, Infosys, Intelcia, IntouchCX, iSON Xperiences, itel International, Konecna, Majorel, MerchantsCX, Probe CX, Qualfon, RayaCX, ResultsCX, Sigma Connected, Foundever, Startek®, Sutherland, TaskUs, TCS, TDCX, Tech Mahindra, Teleperformance, TELUS International, TMJ, Transcom, transcocosmos, TTEC, VXI, Webhelp, and Welsend

Scope of this report



Geography
Global, Americas,
EMEA and APAC



Providers
54



Services
Customer Experience
Management (CXM)

CXM Services – Americas PEAK Matrix® characteristics

Leaders

Alorica, Concentrix, Foundever, Teleperformance, TELUS International, and TTEC

- Leaders have been consistent in the delivery of CXM services, and they grew their client portfolio further in 2022 through expansion by organic or inorganic means; entering or strengthening presence in new geographies, languages, and verticals; and serving smaller buyer sizes and start-ups through specific SMB offerings. The Leaders possess strong language skills, including English, Spanish, Portuguese, and French Canadian. With their extensive network of delivery locations across the Americas, including the US, Canada, Mexico, Brazil, Colombia, and various Caribbean countries, they can effectively serve clients throughout the region and cater to diverse language requirements
- The Leaders offer targeted solutions and home-grown tools, such as analytics, automation, and digital experiences, to drive clients' business objectives. Additionally, they have established strong partnerships with renowned technology providers to augment their digital tool library and proprietary offerings. Their focus on innovation, talent management, and customer relationships contributes to their overall strength

Major Contenders

[24]7.ai, Arise, Atento, Cognizant, Conduent, EXL, Firstsource, Genpact, HCL Tech, HGS, ibex, IGT Solutions, Infosys, IntouchCX, Konecna, Majorel, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, VXI, and Webhelp

- Major Contenders possess language capabilities such as English, Spanish, Portuguese, and Canadian French, enabling them to effectively serve clients throughout the Americas region. They have established delivery locations across various countries, including the US, Canada, Honduras, Jamaica, Nicaragua, Pakistan, Senegal, Guatemala, and the Philippines, offering a diverse shoring mix to accommodate client needs
- Major Contenders have developed proprietary tools and platforms, such as analytics solutions, talent management frameworks, conversational AI platforms, and automation solutions, to enhance customer experience and operational efficiency. Additionally, they have established partnerships with leading technology providers to augment their digital capabilities and offer comprehensive omnichannel solutions. Buyers have acknowledged their strengths in areas such as talent management, pricing flexibility, performance management, and customer relationships

Aspirants

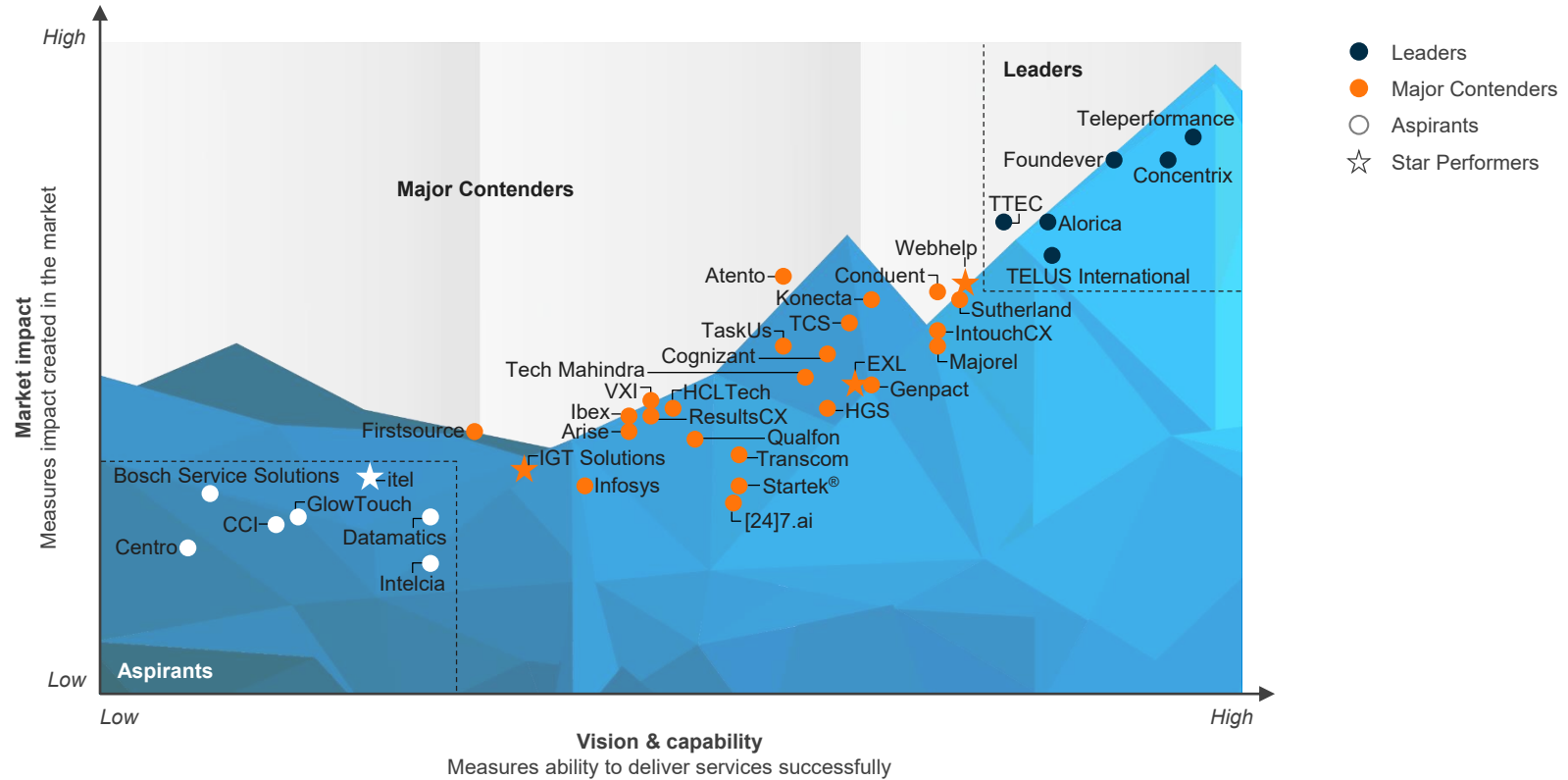
Bosch Service Solutions, CCI, Centro, Datamatics, GlowTouch, Intelcia, and itel

- Aspirants are focused on region(s), vertical(s), or buyers, and have a relatively smaller scale of CXM operations, a lower number of agents, and a skewed shoring mix
- They have developed proprietary tools and solutions such as chatbots, analytics platforms, automation solutions, and virtual assistance chatbots. These Aspirants also engage in partnerships with technology service providers to enhance their service offerings and provide value-added solutions. Buyers have acknowledged their strengths in areas such as scalability, domain expertise, responsiveness, and relationship management. They also have digital capabilities and offer innovative models of delivery; however, they currently have limited digital and traditional capabilities to cater to large buyers in this region with more complex requirements

Everest Group PEAK Matrix®

Customer Experience Management (CXM) PEAK Matrix® Assessment 2023 – Americas | Alorica is positioned as a Leader

Everest Group Customer Experience Management (CXM) PEAK Matrix® Assessment 2023 – Americas¹



¹ Analysis for Concentrix and Teleperformance is based on their capabilities before their mergers with Webhelp and Majorel respectively
Source: Everest Group (2023)

Alorica | Americas CXM profile (page 1 of 7)

Overview

Company overview

Alorica creates digital customer experiences at scale. It employs 115,000 solutionists, technologists, and operators that partner with global brands and disruptive innovators to deliver digitally charged, and tailored interactions that customers seek. It provides CX management services, including technical support, customer care, and financial solutions. It provides services to Fortune 1000 and new economy businesses in a variety of sectors, including media and entertainment, technology, financial services, healthcare, consumer goods and retail, travel and tourism, energy and utilities, telco, and public sector.

Headquarters: Irvine, California

Website: www.alorica.com

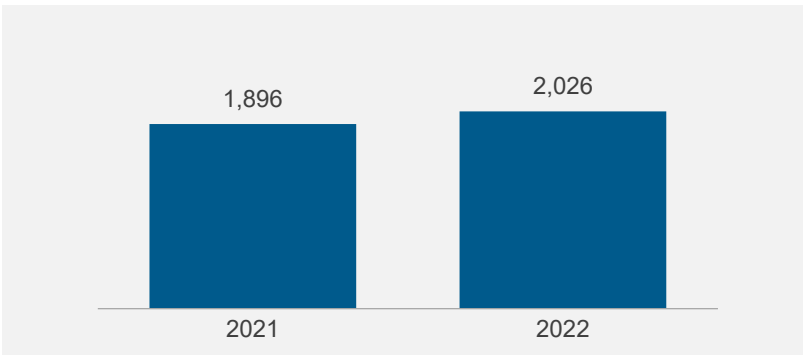
Key leaders

- **Andy Lee**, Executive Chairman
- **Greg Haller**, Chief Executive Officer
- **Bong Borja**, Chief Operating Officer
- **Mike Clifton**, Chief Growth and Transformation Officer
- **Shawn Stacy**, Chief Client Officer
- **Harry Folloder**, Chief Digital Officer
- **Colleen Beers**, Chief Administration Officer
- **Colson Hillier**, Chief Marketing Officer

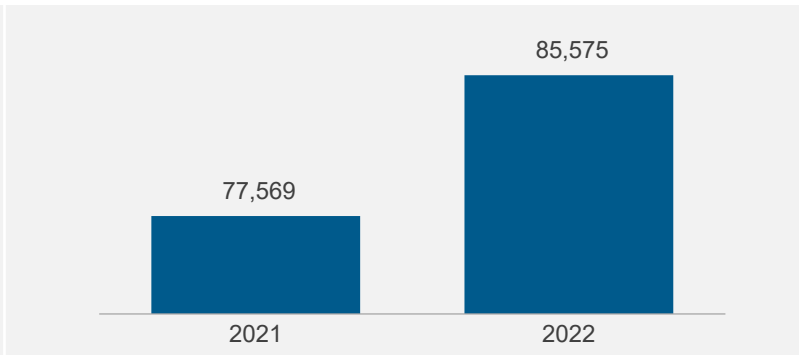
Recent deals and announcements (excluding ESG initiatives)

- **2023:** launched Alorica IQ, a digital foundry that integrates technology into all its services and customer interactions, unifying the company’s digital solutions, analytics, and consulting
- **2022:** partnered up with a cloud service provider for AI that is dedicated to improving interactions between businesses and its clients
- **2022:** Alorica Clear offers cutting-edge real-time AI technology in order to deliver customer experiences across its worldwide footprint. This solution blends machine translation with human post-editing to support multi-lingual digital interactions at scale from offshore digital centers of excellence
- **2022:** developed Alorica Life, a virtual innovation hub, and developed metaverse alliances to exhibit goods and virtual call centers, improve global digital hiring capabilities, increase immersive learning, training, and wellness settings, and engage in virtual collaborations, among other things
- **2022:** partnered with a journey orchestration provider to increase the range of CX consulting services offered by Alorica
- **2020:** launched Alorica Anywhere to meet the WAHA needs of customers. It implemented innovative WAH and in-center IT solutions while reducing redundant back-office costs

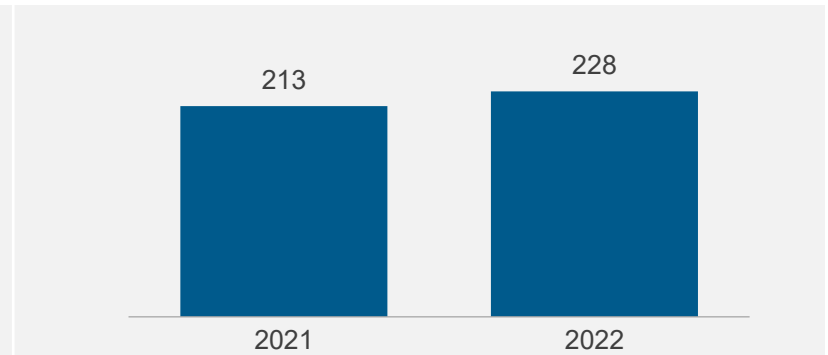
CXM revenue (In US\$ million)



Scale of CXM (number of agents)



CXM client base (number of clients)



Americas

Alorica | Americas CXM profile (page 2 of 7)

Capabilities

Americas CXM revenue mix

US\$ million

By geography

United States	93%
Canada	3%
Mexico	3%
Caribbean (Cuba, Dominican Republic, Puerto Rico, Jamaica, Trinidad & Tobago, and Bahamas)	1%

By buyer size

>US\$10 billion	76%
US\$1-10 billion	17%
<US\$250 million	4%
US\$500 million-US\$1 billion	2%
US\$250-500 million	1%

By industry

BFSI	23%
Telecom	21%
Healthcare	14%
Technology	13%
Retail	12%
Travel and hospitality	8%
Energy and utilities	4%
Media and entertainment	3%
CPG	1%
Government	1%

By process

Customer service	60%
Technical support	21%
Payment collection	10%
Order fulfillment and transaction processing	4%
Inbound sales	3%
Outbound sales	2%

Split of Americas CXM FTEs

Number of FTEs

By location¹

Low cost	61%
Medium cost	21%
High cost	19%

By language

English	89%
Spanish	10%
Others	1%
















































¹ High-cost regions include US and Canada; medium-cost regions are Latin America, Eastern Europe, and Middle East and Africa, and low-cost regions include India, the Philippines, and Rest of Asia

Alorica | Americas CXM profile (page 3 of 7)

Key CXM investments | proprietary solutions and partnerships

Key partnerships

Strategic CX investments

 Advanced analytics	     
 RPA/Automation	   
 Artificial Intelligence (AI) / Conversational AI	        
 Omni-channel / Agent Assist	       
 CCaaS/Cloud	      
 Others	      

Key proprietary solutions

Alorica connect	It is a gamified online and mobile tool to drive employee engagement, coaching, retention, and well-being including daily capture of employee confidence and sentiment.
Alorica contact	It is an omnichannel cloud contact center platform that integrates customer data and systems to anticipate questions before they are asked and uses dynamic contact flows to provide a personalized CX.
Predictive employee retention model	It is a proprietary Alorica machine learning tool that assists operations team in determining which agents are most at risk of attrition, so that they may act and retain them.
Systems integrator® (robotic desktop automation)	It is a proprietary assisted RPA tool that unifies various systems into a single user interface, creating intelligent workflow management processes and providing agents a unified information window to serve the customer.
Alorica's agent assist	It is a conversational real-time guide using AI to proactively recommend contextualized next-best actions to resolve complex customer issues.
Spectrum™ (workforce management)	It is Alorica's proprietary workforce management system that helps to address unforeseen personnel needs and offers employees a high degree of scheduling flexibility.
Electronic coaching for results (eCFR)	It facilitates ongoing, individualized training with a fully customized coaching portal based on learning preferences for agile coaching into operations.

Alorica | Americas CXM profile (page 4 of 7)

Client portfolio and Environmental, Social, and Governance (ESG) initiatives

Key CXM clients		
Client name	Region	Client since
A consumer goods and food delivery company	Philippines	2022
A fortune 500 energy provider	US	2022
The largest FinTech bank in Latin America	Mexico	2021
A multinational e-commerce company	Philippines and Colombia	2021
An online insurance company	US	2019
A leading online reputation management technology company	Bulgaria	2019
A Fortune 500 bank	US	2019
A multinational investment bank and FS company	US and India	2019

Environmental initiatives

Alorica Anywhere, the company's work-from-home option, is crucial to its attempts to lower carbon emissions in the areas where it conducts business. It has been able to decrease/consolidate its physical sites and lessen its carbon footprint as it continues to grow this product and provide remote employment for its employees across the globe

Social initiatives

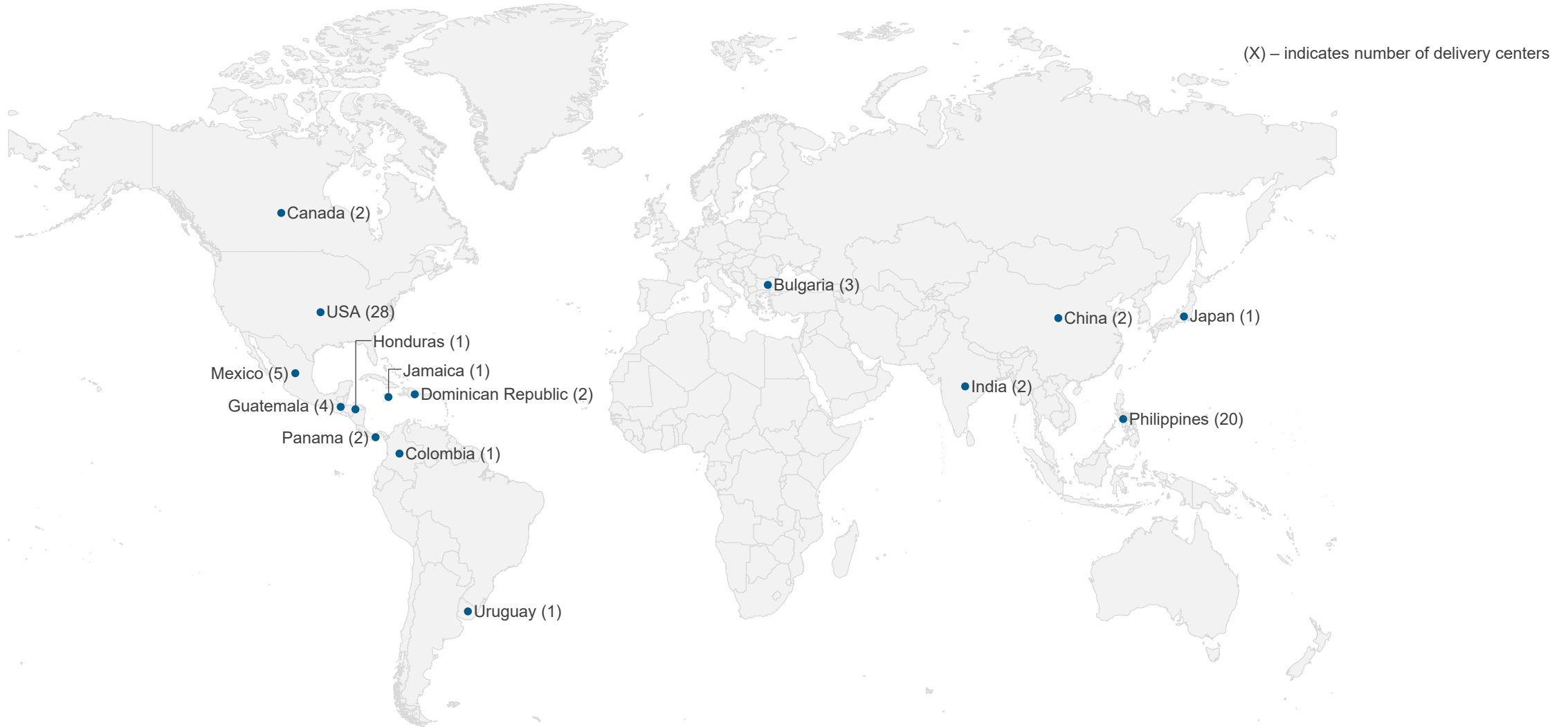
It has started initiatives to support its people (TIDE, Alorica Academy), give back to its communities (such as its cooperation with NGO Making Lives Better with Alorica (MLBA)), and hire people from underserved communities (impact sourcing)

Governance initiatives

- It seeks and promotes collaborations with providers that fit into various categories, and it keeps track of the money it spends with these diverse providers
- It also takes part in the yearly carbon disclosure project in order to disclose its efforts to combat climate change
- It has also formed an ESG/sustainability committee with senior personnel to monitor its ongoing ESG activities

Alorica | Americas CXM profile (page 5 of 7)










Location landscape



Alorica | Americas CXM profile (page 6 of 7)

Everest Group Americas assessment – Leader

Measure of capability:  Low  High

	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Americas									










Strengths

- Alorica is a leading CXM provider catering to clients across the globe with 85,000+ agents spread across various delivery locations. It has the expertise to cater to clients in telecom, media, technology, BFSI, retail, energy, travel and hospitality, healthcare, and public sector verticals
- It has an outcome-driven approach with targeted solutions to drive client’s business objectives including growth discovery, customer engagement, operational efficiency, business continuity, risk mitigation, and market intelligence through its home-grown solutions such as Alorica Experiences Practice, Alorica Analytics, Alorica Automation, and Alorica On-demand
- Through its dedicated Alorica IQ digital practice that employs over 100 engineers and technicians to innovate and enrich its digital CX tool pipeline, it caters to the evolving demand for AI analytics, contact optimization, intelligent automation, and emerging technologies such as generative AI, AR/VR, and metaverse
- Alorica has a robust talent management model enforced with proprietary platforms such as Spectrum, a workforce management system to ensure staffing availability and quality adherence. It has also invested in Alorica Clear, an AI-driven linguistic processing platform to enhance voice delivery; and Alorica Life, a metaverse innovation center, for expanding immersive learning and digital recruitment
- Alorica offers a comprehensive suite of financial solutions supported by the Alorica Pay platform, offering specialized services such as account resolution, fraud prevention, KYC, credit assessment, payment processing, and loan servicing
- Alorica has built a strong partner ecosystem with technology providers such as Google Looker studio, UiPath, Sanas, Five9, Cisco, Khoros, and Sprinklr to augment its digital tool library and proprietary offerings in automation, advanced analytics, speech analytics, and learning management solutions
- Buyers highlighted openness to feedback, customer relationships, flexible service delivery, and ease of doing business as Alorica’s key strengths

Alorica | Americas CXM profile (page 7 of 7)

Everest Group Americas assessment – Leader

Measure of capability:  Low  High

	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Americas									

Limitations

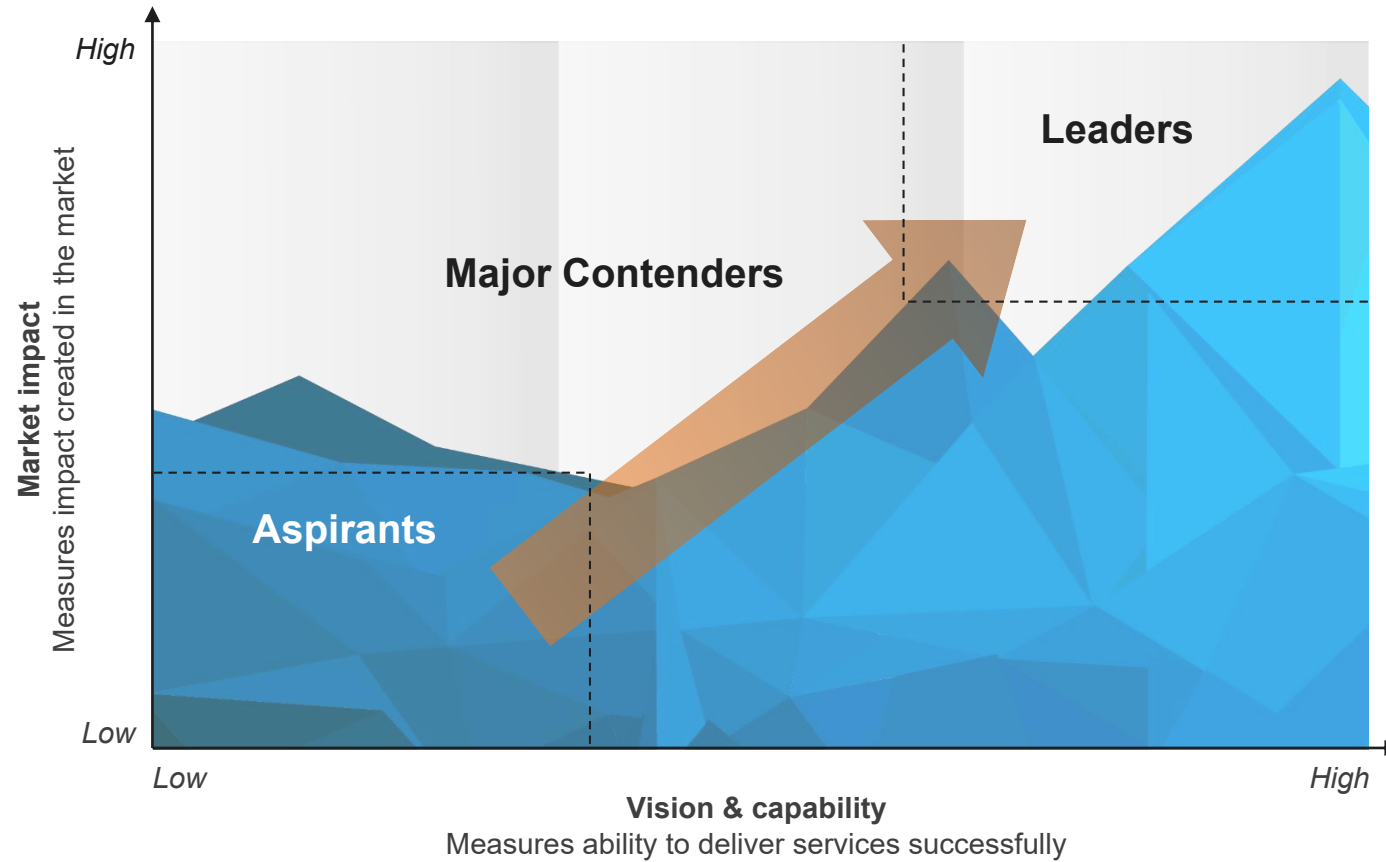
- While Alorica has a large customer base in North America, it has limited experience in catering to clients from Latin America. However, through its recent expansion in Mexico, Colombia, and Honduras, it aims to attract clients from these markets
- Although Alorica has a strong omnichannel offering, its channel mix is still skewed toward voice operations
- It has limited experience in catering to the unique CX outsourcing needs of small revenue businesses
- Buyers cited talent pool, proactive problem solving, domain expertise, and middle management retention as areas where Alorica can improve

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



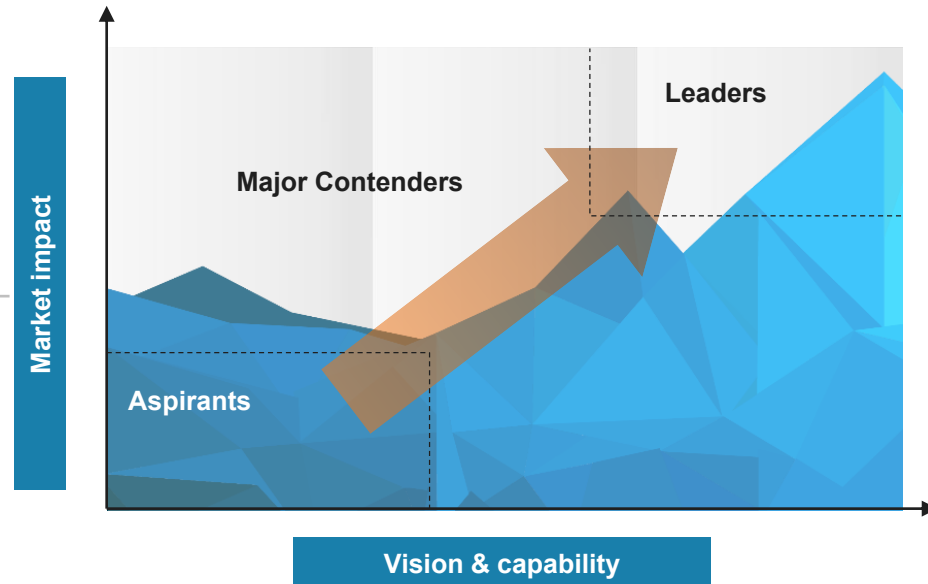
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



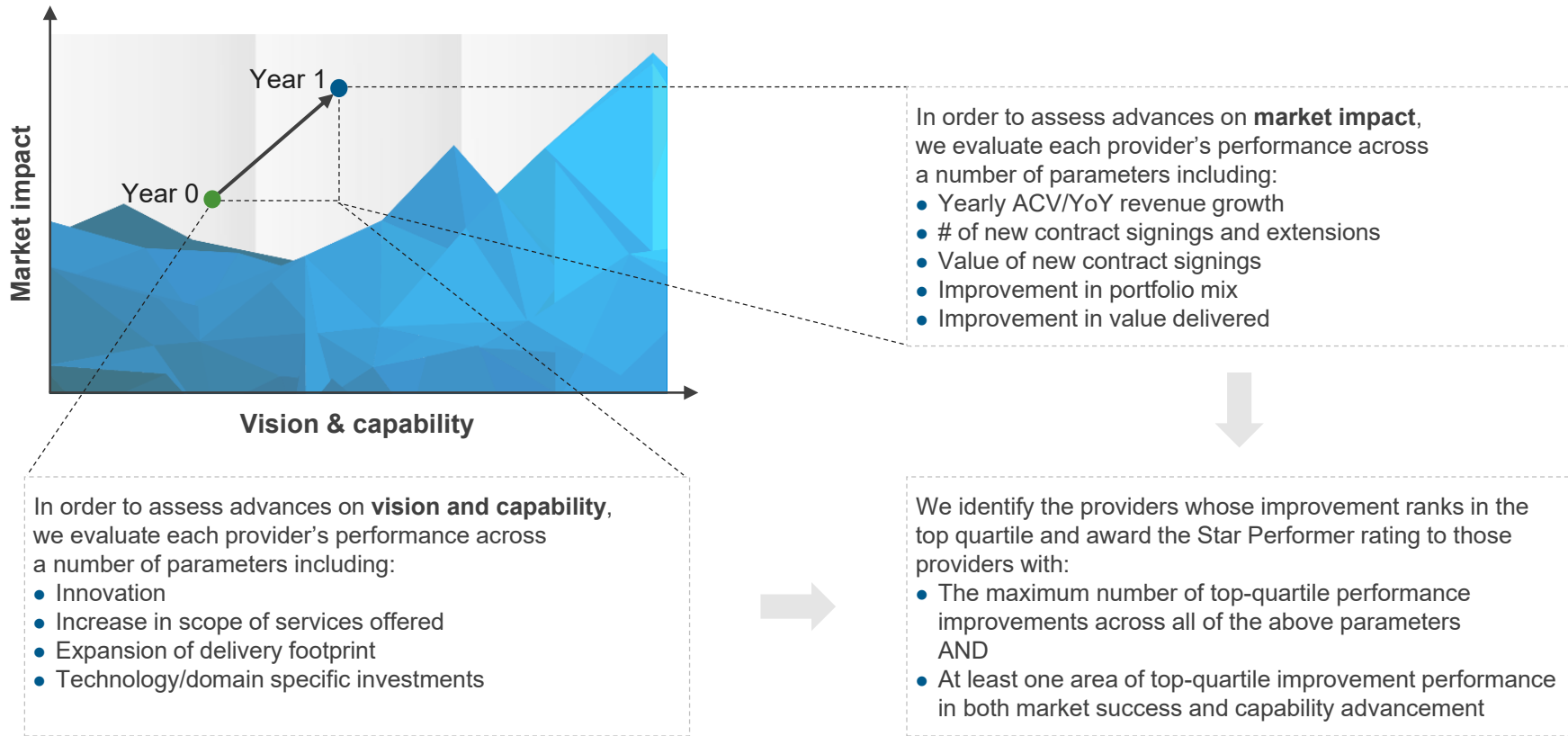
Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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