

# The Forrester Wave™: Cloud Contact Centers, Q3 2018

The 11 Providers That Matter Most And How They Stack Up

by Art Schoeller  
September 25, 2018

## Why Read This Report

In our 32-criterion evaluation of cloud contact center providers, we identified the 11 most significant ones — 8x8, Aspect, Avaya, Cisco, Enghouse Interactive, Five9, Genesys, NewVoiceMedia, NICE inContact, Serenova, and Talkdesk — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer service leaders select the right cloud contact center provider for their needs.

## Key Takeaways

### **NICE inContact, Genesys, And Five9 Lead The Pack**

Forrester's research uncovered a market in which NICE inContact, Genesys, and Five9 are Leaders; Aspect, Serenova, NewVoiceMedia, Enghouse Interactive, 8x8, and Talkdesk are Strong Performers; and Cisco and Avaya are Contenders.

### **AI, Native Workforce Optimization, And Omnichannel Support Are Key Differentiators**

As on-premises contact center technology becomes outdated and less effective, improved systems architected for cloud-based delivery that support artificial intelligence (AI), workforce optimization (WFO), and omnichannel will dictate which providers lead the pack. Vendors that can provide AI, native WFO, and omnichannel in the cloud position themselves to successfully deliver a cloud contact center service to their customers.

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## The 11 Providers That Matter Most And How They Stack Up



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September 25, 2018

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### Related Research Documents

- [The Forrester Wave™: Contact Center Interaction Management For Large Contact Centers, Q3 2016](#)
- [Future-Proof Your Customer Service: Build An AI-Infused Cognitive Contact Center](#)
- [Increase Customer Service Agility With Cloud Contact Centers](#)
- [Now Tech: Cloud Contact Center Providers, Q3 2018](#)



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## Cloud Is Old News — AI, Native WFO, And Full Omnichannel Matter

Acquisitions by the large contact center technology vendors — Avaya, Cisco, and Genesys — over the past several years should erase any remaining doubts that cloud is the future of the contact center software market.<sup>1</sup> Cisco acquired BroadSoft; Avaya bought Spoken Communications; and Genesys purchased Echopass and Interactive Intelligence. Market demand has also shifted. “Native” WFO for cloud contact center deployments is increasingly becoming a requirement, as evidenced by NICE inContact launching CXone and Aspect introducing Via.

An earlier start in cloud has afforded certain vendors first-mover advantage, as they’ve been able to flesh out their suites with differentiated features. Those late to the game are building out basic cloud delivery capabilities and go-to-market strategies. Customer service leaders should look for vendors that offer:

- › **Omnichannel support with the ability to add new channels easily.** Most cloud contact center vendors provide omnichannel capabilities that support assisted service and self-service across voice, email, chat, and social media. They’ve recently started supporting messaging platforms, SMS, and home devices. The timing and depth of support, including the ability to persist context across all channels, vary by vendor in this analysis, as does integration with CRM vendors’ digital channels that allows the cloud contact center solution to manage agent and customer state.
- › **Native WFO capabilities as the contact center enters the age of AI.** The consolidation of cloud-based WFO and contact centers is here. Most vendors in this evaluation offer call recording at commodity prices, making it simple to add quality monitoring and speech analytics capabilities from the same vendor. Native WFO allows a broader range of contact center managers, team leaders, and agents to navigate across the contact center system using a common user interface. A consolidated set of operational data, agent evaluations, and schedules provides a foundation for AI applications that will further boost contact center efficiency and effectiveness.
- › **Machine learning applications beyond just automation.** Automation gets the most attention around AI, but the subtler story is how vendors will embed machine learning inside contact center applications.<sup>2</sup> Machine-learning-enhanced routing is a key capability of Cisco’s Customer Journey Platform. It was also a determining factor for NICE’s acquisition of Mattersight and Avaya’s partnership with Afiniti. We evaluated vendors’ road maps for the potential of AI to utilize WFO and contact center data to augment quality assurance, forecasting, scheduling, and operational analysis.

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## Evaluation Summary

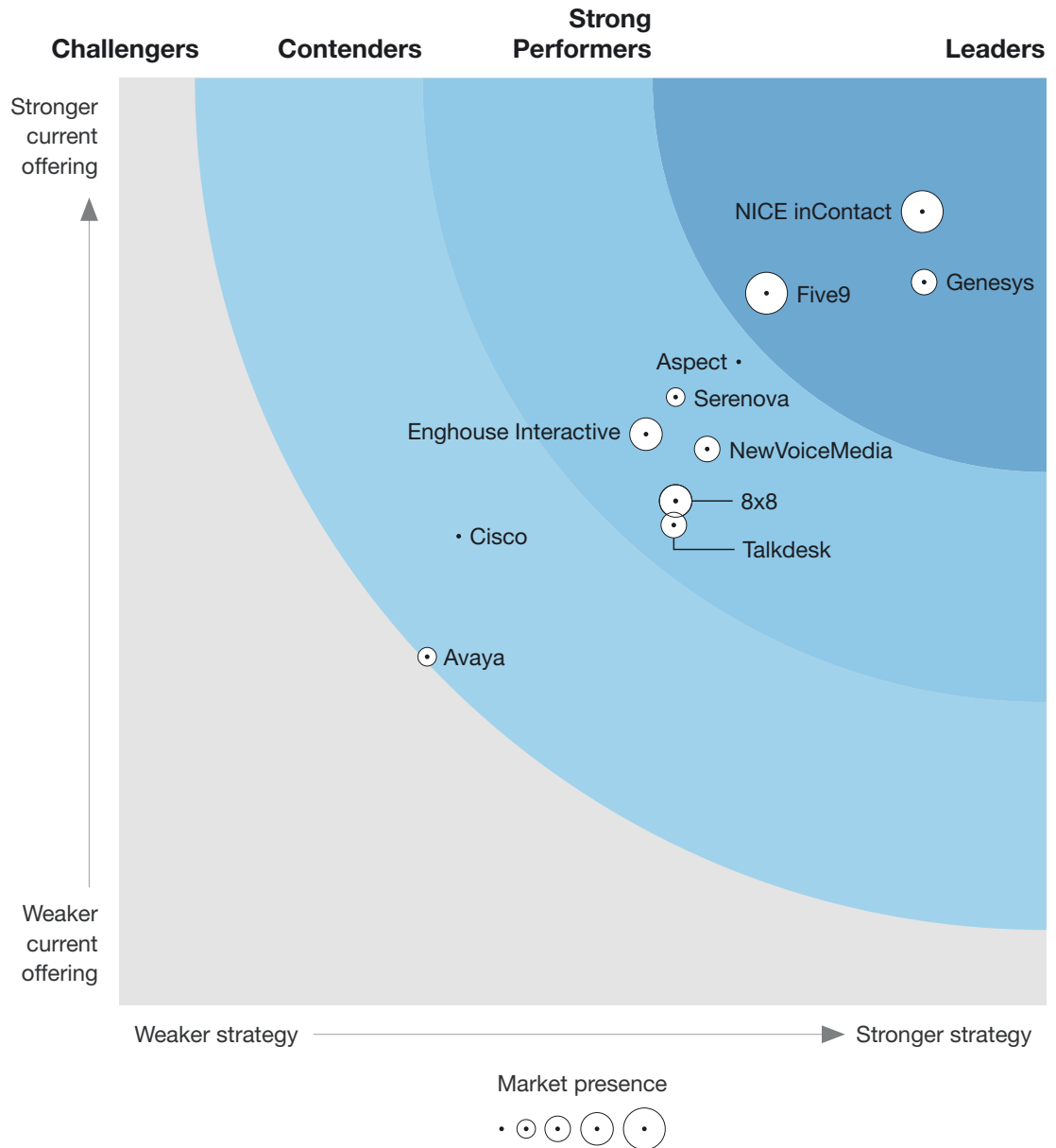
Our Forrester Wave™ evaluation highlights the difficulties that traditional on-premises-based vendors face in offering a cloud contact center service (often straddled on a public cloud) that requires new products, software architecture, ecosystems, and strategy. All three large vendors — Avaya, Cisco, and Genesys — acquired companies to achieve this transition, but they're late, and they'll need to move quickly to insert these solutions into their ecosystems. Aspect, which chose to build its own, is also late and has limited market penetration.

In the area of WFO, Forrester believes that natively integrated WFO technologies, such as workforce management (WFM), quality monitoring, call recording, performance management, and text and speech analytics, provide immediate benefits and lay the groundwork for contact centers to evolve strategically. Vendors like Five9 take a partnership approach to WFO. While this approach adequately serves the market today, it's not in line with the future cloud contact center market that Forrester envisions.

We intend this evaluation of the cloud contact center market to be a starting point only and encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through 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™: Cloud Contact Centers, Q3 2018

**THE FORRESTER WAVE™**  
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**FIGURE 2** Forrester Wave™: Cloud Contact Centers Scorecard, Q3 2018

	Forrester's weighting	8x8	Aspect	Avaya	Cisco	Enghouse Interactive	Five9	Genesys	NewVoiceMedia	NICE inContact	Serenova	Talkdesk
<b>Current offering</b>	50%	2.72	3.47	1.88	2.53	3.08	3.84	3.90	3.00	4.28	3.28	2.59
Product architecture	21%	3.00	5.00	1.00	2.00	2.00	3.00	5.00	3.00	4.00	4.00	4.00
Omnichannel capabilities	21%	1.64	4.04	1.32	2.36	3.64	4.04	4.04	3.00	4.28	2.68	2.04
Reporting and analytics	16%	2.50	3.00	3.00	3.50	3.00	4.00	2.50	3.00	4.00	2.50	1.50
User interface	16%	3.00	3.64	2.34	3.00	3.68	3.68	3.66	3.00	5.00	3.66	1.68
Infrastructure	16%	3.56	1.96	2.12	2.36	3.32	4.60	3.24	3.00	5.00	3.72	2.60
CRM integration	10%	3.00	2.00	2.00	2.00	3.00	4.00	5.00	3.00	3.00	3.00	4.00
<b>Strategy</b>	50%	3.00	3.34	1.66	1.83	2.84	3.49	4.34	3.17	4.33	3.00	2.99
Corporate strategy	34%	3.00	4.00	1.00	1.50	3.50	2.50	5.00	3.50	4.00	3.00	2.00
Customer success	33%	3.00	5.00	3.00	3.00	1.00	5.00	3.00	3.00	5.00	3.00	3.00
Third-party ecosystem	33%	3.00	1.00	1.00	1.00	4.00	3.00	5.00	3.00	4.00	3.00	4.00
<b>Market presence</b>	0%	4.00	1.00	2.00	1.00	4.00	5.00	3.00	3.00	5.00	2.00	3.00
Installed base	100%	4.00	1.00	2.00	1.00	4.00	5.00	3.00	3.00	5.00	2.00	3.00

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

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## Vendor Offerings

Forrester included 11 vendors in this assessment: 8x8, Aspect, Avaya, Cisco, Enghouse Interactive, Five9, Genesys, NewVoiceMedia, NICE inContact, Serenova, and Talkdesk (see Figure 3).

**FIGURE 3** Evaluated Vendors And Product Information

Vendor	Product evaluated	Version number
8x8	8x8 X Series	Virtual Contact Center 9.5 (now a component of X Series)
Aspect	Aspect Via	18.2
Avaya	Avaya Cloud Contact Center	N/A
Cisco	Cisco Customer Journey Platform	10
Enghouse Interactive	Enghouse Contact Center Service Provider (CCSP)	7.2.6
Five9	Five9 Virtual Contact Center (VCC)	N/A
Genesys	Genesys PureCloud	N/A
NewVoiceMedia	NVM Platform	Spring 2018
NICE inContact	NICE inContact CXone	Spring 2018
Serenova	Serenova CxEngage	N/A
Talkdesk	Talkdesk Enterprise Contact Center Platform	Spring 2018

## Vendor Profiles

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

### Leaders

- › **NICE inContact leads in scalability and native WFO but has limited reach.** The combination of NICE and inContact (acquired by NICE in 2016) has culminated with CXone — a full-featured, multitenant contact center offering with native WFO and analytics. NICE inContact hosts CXone through a combination of its own data centers and Amazon Web Services (AWS) for areas outside of North America. The vendor regularly wins 1,000-plus-seat deals and is continuing to expand its channel with partners like AT&T, Fuze, RingCentral, Verizon, and Vonage.

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NICE inContact is known for its ability to scale and support geographically dispersed implementations when clients need them. The caveat? There's limited in-country support outside of North America in areas where the vendor hasn't yet created a global services and account management model dedicated to CXone. NICE (and the brand inContact) has strong brand recognition in North America and a well-developed partner sales channel: It's the top-mentioned vendor on end user selection lists in Forrester inquiries. As part of the CXone initiative, NICE is revamping its WFO suite in parallel with enhancements to the inContact contact center capabilities, though there is still some divergence in developed products and road maps that will take longer to resolve. Client references said that reporting and user experience, while coming together, are still a work in progress.

CXone should be on client shortlists for North American deployments. Outside of North America, companies should delve deeper into the vendor's resources for account management and support.

› **Genesys offers an Amazon microservices stacked architecture but lacks proven scale.**

With revenues exceeding \$1 billion, Genesys is one of the largest contact center vendors. It has extensive global reach and a rich partner ecosystem to provide country-level and vertical-specific contact center solutions and services. PureCloud — Genesys' multitenant cloud contact center offering with native WFO — is designed to run on AWS, so it has a modern microservices architecture. PureCloud comes with prebuilt integrations with all major CRM providers, including Microsoft, Oracle, Salesforce, and SAP.

PureCloud has a common user interface across multiple roles — agents, supervisors, quality assurance, and workforce managers — simplifying training and optimizing many operational aspects of the contact center. Genesys' more advanced cloud contact center offerings, like PureEngage, support sophisticated capabilities such as AI-based predictive routing, so we expect the vendor to also roll these down to PureCloud. Customer references said the cloud offering needs to improve reporting, analysis tools, depth of CRM integrations, and self-service capabilities. While Genesys has extensive assets in each of these categories in its other platforms, it has yet to implement some of them in PureCloud.

Shortlist PureCloud for midsize contact center deployments within and outside of North America that need to tap Genesys' global resources and support.

- › **Five9 walks the walk by offering premium client support but lacks native WFO.** Five9 has crossed the \$200 million revenue mark, and it's increasingly winning larger-seat-count deals. Its multitenant, omnichannel cloud contact center solution has prebuilt CRM integrations with a slew of CRM players. The vendor provides WFO through partnerships with vendors such as Calabrio and Verint. In the past year, it's developed a more extensive sales channel, adding partners like Avant, Carousel, and Westcon.



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Five9 is known for its premium customer success management, with well-defined levels of support and staffing and strong positive feedback from customer references. Voice quality and reliability issues seem to be things of the past, and the vendor is currently rolling out an architectural approach (branded Genius) for incorporating machine learning capabilities across the platform. Five9 lacks full native WFO capability. The vendor has limited geographic coverage compared with others in this evaluation, and it's still primarily focused on midsize contact center rollouts where seat deployments are 50 or more.

Shortlist Five9 for North American midsize deployments where incorporation of a third-party WFO solution from Calabrio or Verint is preferred and where customer success management is front and center. Five9 is increasingly winning larger-seat-count opportunities, but we caution prospects to obtain references that align with their scale requirements.

**Strong Performers**

- › **Aspect combines leading WFO and self-service but lacks penetration.** Aspect Via is a multitenant, omnichannel cloud contact center solution running on AWS. The entire Aspect WFO suite is natively integrated with Aspect Via. Aspect uses its own natural language technology, which helps bolster conversational experiences in voice- and text-based interactions. Contact flows across channels that move from self-service to agent-assisted and are designed in one environment.

Aspect takes advantage of its strong position in outbound dialing, integrating its capabilities with Via for companies that require a best-of-breed outbound solution on the same system as their inbound operations. The vendor has one of the slickest UIs for its WFO tools, and it's invested heavily in design for its broader contact center suite in recent years. Despite these strengths, Aspect has had limited market adoption — reporting smaller agent seat counts and numbers of customers compared with other players in this evaluation. While it deploys Via in both North America and Europe, its deployment maturity lags other vendors, and it has preconfigured integrations with only Microsoft and Salesforce.

Aspect's cloud contact center offering should only be considered by companies with smaller seat counts (fewer than 100 seats) in North America and Europe at this stage of maturity.

- › **Serenova has global scale and operational excellence but lacks market presence.** CxEngage is Serenova's multitenant, omnichannel cloud contact center solution, developed and deployed on AWS. CxEngage provides full omnichannel routing and agent desktop support. The company has stated that it will continue to support its older LiveOps system while encouraging migration to CxEngage. Acquiring and integrating WFO provider TelStrat has given Serenova native WFO capabilities. Through partners, Serenova has preconfigured integrations with several CRM vendors, including Infor, Microsoft, Salesforce, SugarCRM, Zendesk, and Zoho.

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Serenova is known for scale. Having used its own cloud contact center solution to power its army of 30,000 work-at-home agents, the vendor has brought operational excellence and voice infrastructure support to CxEngage. Customer references indicate that Serenova is very responsive and clear when negotiating and supporting contract terms and conditions. Customers tout Serenova's ability to scale, support for voice services, strong set of APIs, and security. CxEngage doesn't support the entire stack of communications; it lacks support for outbound dialing and proactive notifications. While Serenova, as a smaller vendor, is responsive and supportive, the management team has had turnover issues over the past five years, which adversely impacts road map and vision. Serenova also needs to do more to boost name recognition in the market.

Companies in North America and Europe that require large scale and global voice support, with hundreds to thousands of seats, should consider Serenova CxEngage.

- › **NewVoiceMedia has strong Salesforce integrations but lacks proven scale.** NewVoiceMedia provides a multitenant contact center offering with strong inbound and outbound capabilities and a focus on supporting inside sales operations. Its integration with Salesforce leverages APIs that allow customers to route directly to digital channels on the Salesforce platform. This ensures one place for matching, managing, and reporting on agents and customer requests. While other vendors in this evaluation also have this capability, NewVoiceMedia sells to service organizations as well as CMO and sales teams. It has expanded its CRM integration focus beyond Salesforce to include SAP, ServiceNow, Zendesk, and Zoho.

NewVoiceMedia's customers tout the vendor's reliability, depth of Salesforce CRM integration, and voice infrastructure as being among the industry's best. As more organizations shift to inside sales, the deep Salesforce integration provides a differentiated go-to-market compared with most other vendors in this evaluation. NewVoiceMedia's focus on Salesforce has been a strength, and while it has added other CRM integrations, they're not as advanced, and the partnerships with these other vendors aren't as deep. Client references also indicate that NewVoiceMedia is on par with competitors, not leading with innovation.

Companies in North America, Europe, and Asia Pacific using Salesforce should consider NewVoiceMedia to exploit the strong integrations. Customers with CRM applications from other vendors should inspect the depth of both the integrations and support.

- › **Enghouse leads in the carrier channel but lacks native WFO and brand awareness.** Enghouse Interactive is unique in that it provides its multitenant, omnichannel cloud contact center offering to carriers, which then sell it as a cloud contact center service to enterprises. Carriers such as BT, PLDT, Telefónica, and Telenor, to name a few, privately brand the Enghouse offering as their own and have established their own sales and integration partner channels in their respective regions.

Enghouse's cloud contact center platform is known to be very scalable. Enghouse's indirect sales model and multitude of carrier partners (each with distinct requirements and configurations) hinder its ability to drive a consolidated software suite and microservices architecture. While the diversity

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of carrier partners provides global market coverage for Enghouse, the multitude of regional carriers limits prospects seeking a global implementation. Enghouse lacks a full native WFO suite, which impedes machine learning applications that incorporate WFM data. Carrier partners indicate strong satisfaction with Enghouse but mention that there are gaps in omnichannel support and native WFO.

Companies should consider Enghouse (via its carrier partners) for regional and pan-regional deployments (up to 500 seats), but they need to engage a smaller set of carriers, such as BT and Orange, for global deployments.

- › **8x8 bundles UC with contact center but is limited to smaller contact centers.** 8x8 continues to evolve its multitenant, omnichannel cloud contact center offering alongside its unified communications (UC) solution, jointly branded as X Series. Recent enhancements emphasize more cross-application integration, providing unified systems management of both UC and contact center with single sign-on. Its approach to voice infrastructure uses georouting to its nearest data center and dynamic mean opinion score measures to ensure global voice delivery and quality. Leveraging an extensive sales partner network, 8x8 has good global coverage along with established data centers and points of presence. It also has prebuilt integrations with major CRM vendors like Microsoft, Oracle, Salesforce, and Zendesk.

8x8 reports an extensive installed base across a wide range of geographies and focuses on customer experience improvement use cases that link knowledge workers to contact center agents. This is what sets 8x8 apart from competitors. To rapidly grow its base initially, the vendor sold to smaller, less sophisticated contact centers; it's now targeting opportunities in the midsize contact center market coupled with larger UC implementations. Customers are highly satisfied with 8x8's voice network coverage, support, and reliability. However, customers also feel that 8x8's road map, omnichannel support, and technology partner ecosystem could improve. 8x8 does not have full native WFO. It partners with Teleopti for WFM.

8x8 is a good fit for enterprises in North America and Europe that are looking to source both UC and a basic, midsize contact center solution from the same cloud contact center provider.

- › **Talkdesk has a broad array of integrations but is new to large implementations.** Designed as a multitenant cloud contact center solution on AWS, Talkdesk has followed the common path of cloud contact center market penetration by selling to small contact centers and growing over time to its focus on midsize deployments today. To appeal to that base, it supports a broad library of CRM integrations and has doubled down on its integration with Salesforce to provide single sign-on/user management, integrated reporting, and support for all Salesforce-supported digital channels.

Talkdesk's AppConnect is a unique and innovative capability that provides single-click access to and installation of partner applications, such as speech analytics. AppConnect not only rapidly installs the application but also provides free trials, billing, and contracting through Talkdesk. This is both a strength and a weakness. AppConnect, while innovative, limits Talkdesk's control over its road map and architecture. It allows customers to choose from a wide array of components, such

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as an omnichannel desktop, but limits them from applications that would span a more integrated suite. For example, if the output of machine-learning-based speech analytics is necessary to modify agent evaluations in quality monitoring, it would have to be done across multiple partner solutions. Also, with this model, Talkdesk lacks native WFO. Customer references state that Talkdesk could improve its lack of depth for omnichannel support.

Companies in North America should consider Talkdesk for quick-to-deploy midsize implementations and CRM integrations that larger vendors may not support.

## Contenders

- › **Cisco leverages a carrier-focused solution but is in the early stages of integration.** In purchasing BroadSoft, Cisco accelerated its plans for cloud and multitenant solutions, which allowed for a lower-cost alternative to its Hosted Collaboration Solution. With BroadSoft, Cisco inherited a unique cloud solution, Customer Journey Platform (CJP), that networks multiple contact centers on disparate systems, creating one pool of agents across locations. CJP has prebuilt integrations with Oracle, Salesforce, SugarCRM, and Zendesk. It's sold through carrier partners and select Cisco partners. In the future, Cisco will sell it as well.

CJP has evolved to become a fuller, multitenant, omnichannel cloud contact center solution with advanced routing capabilities that can utilize structured and unstructured data analysis in real time. It's known for its advanced real-time analytics capabilities that help drive routing decisions and improve customer journeys. Customer references say that CJP needs to flesh out its CRM integrations and omnichannel and self-service capabilities. In addition, the product architecture is not yet fully migrated to support microservices. Cisco needs to insert CJP into its sales, integration, and systems integrator ecosystem, which will take time, given that it acquired BroadSoft recently. While Cisco provides customer success management, it's only in the early stages of ramping up support for CJP.

Companies in North America that prefer to source their cloud contact center through a carrier should explore CJP. Existing Cisco customers on a Cisco on-premises-based platform can preserve their existing software investment when migrating to cloud through the Cisco Collaboration Flex Plan.

- › **Avaya offers a scalable solution for its installed base and BPOs but is late to cloud.** Avaya has world-class skills and leadership in the large contact center market. This year, it purchased Spoken Communications, a hosted contact center solution provider, which already had integrations with Avaya's numerous on-premises contact center software solutions. Avaya Cloud Contact Center preserves key components that are important to the Avaya base, such as the call management system reporting package. The solution includes an innovative real-time speech analytics solution, IntelligentWire. Large enterprises and business process outsourcing firms (BPOs) can self-provision individual instances to provide separate management, reporting, and system resources for

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individual customers and divisions. Avaya is in the early stages of introducing Avaya Cloud Contact Center to its partner channel, so sales today are largely direct. Avaya also offers private cloud and managed services options through Avaya Communications Cloud.

The approach for Avaya Cloud Contact Center is to host virtualized instances of the contact center software in “pods” that can scale up to 3,000 or 4,000 concurrent calls. The pods are linked with a multitenant layer that holds agent and customer state information, which allows for high scalability, reliability, and maintainability. As Avaya has only recently purchased Spoken, it will take time to introduce its channels, encourage DevConnect partners to port its solutions to the platform, and rationalize and optimize the offering for midsize contact centers. For example, in the future, Avaya will integrate Avaya Experience Platform, bringing the interactive voice response that supports its outbound notifications and dialing software Proactive Outreach Manager into the offering.

Large, existing, on-premises Avaya customers should consider Avaya Cloud Contact Center for their migration to the cloud.

## Evaluation Overview

The Forrester Wave follows a publicly available methodology that involves screening vendors, detailed questionnaires, and customer reference checks. Find more information about the methodology in the Supplemental Material section of this report.

We evaluated vendors against 32 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 omnichannel support, analytics, user experience strategy, CRM integrations, voice infrastructure, and a product architecture that is based on microservices. The incorporation of “native” WFO influenced a number of criteria in this list.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors’ strategies. We evaluated the overall business vision, product road map, geographic strategy, and partner ecosystem. Some vendors, such as Five9 and NICE inContact, were rated as Leaders but have more work to do to expand globally. Cisco and Avaya, due to their late entry to the cloud contact center market, received lower vision, road map, and geographic coverage scores. They’re investing in growing the market penetration of their recent acquisitions, so we anticipate that they’ll be stronger players in the cloud contact center market in the future.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor’s installed base of customers and agent positions.

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**Vendor Inclusion Criteria**

Forrester included 11 vendors in the assessment: 8x8, Aspect, Avaya, Cisco, Enghouse Interactive, Five9, Genesys, NewVoiceMedia, NICE inContact, Serenova, and Talkdesk. Each of these vendors has:

- › More than \$20 million in cloud contact center solution revenue in the most recent fiscal year.
- › An installed base of 20,000 agents or more for this solution.
- › Regular interest in Forrester client inquiries.

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## Supplemental Material

### Online Resource

We publish all of our scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; access 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 we 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 a small number of 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. In accordance with the [Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave document. We evaluated the vendors participating in this Forrester Wave using materials that they provided to us by May 2018 and did not allow additional information after that point. We encourage readers to consider how the market and vendor offerings change over time.

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 to the best of our ability according to our [Forrester Wave™ Incomplete Vendor Participation Policy](#) and publish their positioning along with participating vendors.

### Integrity Policy

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

## Endnotes

<sup>1</sup> In our 2016 Forrester Wave evaluation of contact center interaction management, the analysis indicated that Leaders provide a variety of deployment options: on-premises, hybrid, hosted dedicated instances, and full multitenant. As of 2018, the market trajectory has solidified toward multitenant cloud as the future of contact center software. See the Forrester report "[The Forrester Wave™: Contact Center Interaction Management For Midsize Contact Centers, Q3 2016.](#)"

<sup>2</sup> See the Forrester report "[Future-Proof Your Customer Service: Build An AI-Infused Cognitive Contact Center.](#)"

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