

Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16

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Summary

Catalyst

As businesses continue to replace their existing premise-based contact centers with cloud solutions, vendors are rapidly developing their capabilities and making acquisitions in the space. It can be difficult for enterprises to navigate the broad array of available cloud contact center offerings. The cloud contact center solutions and vendors are diverse; they include offerings from legacy contact center vendors, specialist multi-tenant players, emerging niche solutions, and large telecoms and outsourcing providers.

This report reviews many of the leading cloud contact center solutions, with particular emphasis on the ability of providers to handle multichannel customer interactions and connect data through analytics. It compares solutions based on the strength of their technology platforms, the views of their customers, and the impact that each company has in the marketplace. Ovum has selected vendors for comparison based on their ability to offer full voice call routing in the cloud. All the selected vendors have the capacity to route at least one interaction channel beyond voice.

Ovum view

It is vital that contact centers add new services to ensure that agents can respond to customer inquiries from across web and mobile platforms to make interactions smoother and improve resolution rates. Cloud technology is rapidly gaining traction in the contact center because it enables enterprises to gain access to the latest capabilities via fast upgrades rather than through entire platform overhauls.

Aside from transforming the payment model from capex to opex, cloud contact centers can typically be deployed faster than those on premise. They give organizations more flexibility to change the number of agents or to switch interaction management via different channels. These advantages, plus an improvement in the scalability and reliability of cloud solutions, means that cloud contact centers are now an option for all sizes of contact centers, as indicated by the rapid growth across the market. New multi-tenant solutions are emerging and contact centers are rapidly adopting these capabilities.

At the same time, many enterprises face challenges in switching to cloud from their legacy premise-based solutions. Many will be restricted by the familiarity of their old systems and a hesitation to switch to an entirely new multi-tenant offering. As a result there is an opportunity for vendors to sell hybrid solutions to larger organizations that want the advantages of someone else managing their platform while retaining some control or knowledge of the location of their customer data. Professional services around migration and ensuring the switch occurs with minimal downtime will be essential for these contact centers.

The increased acceptance of cloud among enterprises as well as the addition of many new vendors in the market means that the competitive landscape for cloud contact center solutions has become complex. Enterprises need assistance in finding the right platform to meet their needs; size of contact center, speed of deployment, channel requirements, and depth of capabilities will all impact their decision. This Ovum Decision Matrix provides an in-depth view of many of the leading cloud contact center vendors to help enterprises find the most suitable platform for their needs.

Key findings

- As larger contact centers make the switch to cloud they will need assistance to migrate customer data while ensuring minimal disruption to operations.
- Enterprises must decide whether they will choose a multi-tenant cloud solution or host their solution in a private cloud. Legacy vendors offer a choice of deployment methods that will match the needs of those contact centers that want to make a gradual switch.
- Multi-tenant solutions are now more mature and fully featured, making them viable for even large contact centers with thousands of seats.
- The current vendor landscape includes companies with four key backgrounds: pure multi-tenant cloud providers, traditional premise vendors with hybrid and newer cloud offerings, telecoms carriers, and outsourcers-turned-technology-providers.
- Newer vendors are ramping up the competition with advanced multichannel interaction capabilities and other attractive services offerings.
- Ovum has placed four vendors in the leader category: inContact, Genesys, LiveOps, and Interactive Intelligence. These vendors have a range of cloud approaches; all have a great deal of experience and proven reliability in delivering secure, advanced services. The leaders all have a good base of contact center customers, as well as advanced multichannel offerings.
- Five9, 8x8, and NewVoiceMedia are all worthy competitors with robust offerings that meet the needs of different contact centers.
- Overall, the differences in capabilities between vendors in the leaders' category and the designated challengers and followers were relatively slight. Ovum therefore recommends that enterprise buyers consider all seven vendors in the sample, having first looked internally to determine the unique characteristics of their requirements in order to best match to a potential service provider.

Vendor solution selection

Inclusion criteria

Ovum has selected vendors for comparison based on their ability to offer full voice call routing in the cloud. All the selected vendors also have the capacity to route at least one interaction channel beyond voice and a minimum of 10,000 agent seats globally. All vendors have a multi-tenant cloud offering and many also provide hybrid and single tenant solutions alongside their existing premise-based contact center platform. The vendors in the complete Decision Matrix evaluation also own their own technology and host their services in their own data centers. They were evaluated not only on their technical strengths but also their market impact and the opinions of their customers.

To understand the competitive dynamics in the cloud contact center market, Ovum evaluated and profiled the following providers:

- 8x8
- Five9

- Genesys
- inContact
- Interactive Intelligence
- LiveOps
- NewVoiceMedia.

In addition to these seven vendors, Ovum also examined Aspect, Cisco, and Vodafone, but we did not include them in the complete scoring because they do not meet all of the criteria for the Decision Matrix. For example, Cisco provides a contact center platform but customers can deploy it only through partners. Vodafone is one such partner; it hosts and resells Cisco's solution without having control over the development of the technology. Aspect does offer two different hosted options for its customers, but is relatively new as a cloud contact center provider and was unable to participate in the customer sentiment and market impact sections of the Decision Matrix.

This list of cloud contact center vendors is far from exhaustive; many emerging cloud players in the market offer competitive solutions. The report also excludes many of the outsourcers and telecoms organizations that play a prominent role in the contact center services market, leveraging many of the platforms from the above organizations in order to sell contact center services. Leading service providers AT&T, BT, Telefonica, and Verizon all offer a range of contact center cloud services that meet the needs of many different types of enterprise. Unified communications (UC) providers ShoreTel and Mitel offer integrated cloud contact center tools.

Contact centers should also review some of the less well-known cloud players that have unique capabilities and market strengths:

- CenturyLink
- Corvisa
- Content Guru
- Enghouse (CosmoCom)
- Magnetic North
- Noble Systems
- Transera
- Twilio.

Methodology

This report provides a summary of vendors' cloud contact center capabilities based on a quantitative assessment of their market impact and execution scores, as well as the technology features that they support. Ovum selected vendors that are able to offer full voice call routing (i.e., ACD) in the cloud, that can route at least one interaction channel beyond voice, and that have at least 10,000 deployed agent positions worldwide. Although some additional vendors were able to meet these criteria (notably AT&T, CenturyLink, Enghouse (CosmoCom), and Noble Systems), they were unable to provide sufficient information for a full evaluation.

All included vendors were asked to complete a full technical assessment checklist as well as provide market revenue data and a list of customers to be surveyed. Ovum used this data alongside in-house

knowledge to determine the results of the Decision Matrix. The detailed scores underpinning the Decision Matrix can be found on individual vendor radars and in Table 2 in the Appendix.

Technology assessment

In this assessment dimension Ovum analysts developed a series of features and functionality that would provide differentiation between the leading solutions in the market place. The criteria groups identified for multichannel cloud contact center are as follows:

- **Core capabilities:** The core requirements for call handling and interaction routing, including IVR and workforce optimization.
- **Interoperability:** The ability of the platform to support TDM and IP switching, open standards, external IVR applications, and CRM connections.
- **Reliability and scalability:** The degree to which the service providers offer outage-abatement tools and assists clients with deployments of various sizes and the flexibility of different hosted configurations and deployment times.
- **Administration and monitoring:** The vendors' capabilities in system management, configuration, performance monitoring, and quality management.
- **Platform:** The vendors' capabilities in tenant separation, client upgrading, network connectivity, and telephony.
- **Services:** The offerings' professional services components, customer support options, SLA provisions, and pricing models.
- **Solution maturity:** How long the company has been in the market with a cloud-based offering, how many customers the vendor has acquired, and how deep the partnership ecosystem is built.
- **Security:** The physical integrity of the platform, particularly with regard to data center and agent desktop security and compliance with regimes such as PCI.
- **Multichannel:** The capabilities offered by vendors in handling non-voice interactions, particularly email, web chat, web collaboration, social media, mobile, and cross-channel communications from end-user customers.
- **Solution breadth and depth:** How well each part of the vendor works together to deliver a fully functional cloud contact center platform; it takes into consideration integration with different partners and the availability of various deployment options.
- **Vendor strategy:** Each market participant's global presence, product/technology road map, go-to-market plans, and brand equity in the cloud contact center space.

Execution

In this dimension Ovum analysts reviewed the capability of the solutions in the following key areas (based on a survey of vendor customers). At least eight completed customer survey responses were required for each included vendor.

- **Product quality:** An assessment of customers' views of the overall quality of the platform offerings and the services received.
- **Hosting reliability:** An assessment of the vendors' ability to maintain effective service levels over time.

- **Features and functionality:** The depth of features and capabilities within the products.
- **Multichannel innovation:** An assessment of customer perception of the adequacy of the vendors' non-voice interaction capabilities and their ability to adapt quickly to new tools.
- **Usability of products:** An assessment of whether the agent desktop and supervisor administration tools are user friendly.
- **Ease of integration:** An assessment of whether the contact center platform is flexible and easy to integrate with additional systems such as CRM, IVR, and analytics applications.
- **Pricing:** An assessment of whether the system provides value and is competitively priced.
- **Customization:** An analysis of how readily the vendors work with clients to integrate and customize the offering to each unique deployment.
- **Professional services:** An assessment of the ability of a vendor to provide services, for example to help a customer migrate from a legacy platform or add new channels to their system.
- **Deployment time:** An assessment of the speed and ease of installation.

Market impact

The global market impact of a solution is assessed in this dimension. Market impact is measured across five categories, each of which has a maximum score of 10.

- **Revenues:** Each vendor's 2014 cloud contact center revenues were calculated as a percentage of those of the market leader. This percentage was then multiplied by a market maturity value.
- **Revenue growth:** Each vendor's revenue growth estimate for the financial year 2013–14 was calculated as a percentage of the growth rate of the fastest-growing solution in the market; the percentage was then multiplied by 10.
- **Geographical penetration:** Ovum determined each vendor's revenues in three regions – the Americas; Europe, the Middle East, and Africa (EMEA); and Asia-Pacific. These revenues were calculated as a percentage of the market-leading solution's revenues in each region and multiplied by 10. The solution's overall geographical reach score is the average of these three values.
- **Customer size:** Ovum determined the percentage of each vendor's revenues from contact center deployments across four size bands: fewer than 100 agents, 100–499 agents, 500–999 agents, and 1,000 agents and above. These revenues are calculated as a percentage of the revenues of the market leader in each region, multiplied by 10. The vendor's overall customer size-band score is the average of these three values.
- **Vertical penetration:** Ovum determined each solution's revenues from the energy and utilities, financial services, healthcare and life sciences, manufacturing, media and entertainment, public sector, retail wholesale and distribution, telecoms, and travel and transportation verticals, along with "other" (primarily BPO) businesses. These revenues are calculated as a percentage of the market leader's revenues in each vertical and multiplied by 10. The solution's overall vertical penetration score is the average of these values.
- **Recognition:** A measure of the portion of the surveyed customers who reported familiarity with the vendors' offerings.

Ovum ratings

Ovum also provides guidance for enterprises looking to deploy cloud contact center solutions and places vendors into three categories: “leader,” “challenger,” and “follower” categories using the aggregated results of the Decision Matrix. Because realizing the value from a hosted contact center deployment is critically dependent upon the solution’s fit with the enterprise’s overall customer interaction strategy, a decision to purchase one solution over another should be based on a broad array of factors. These include (but are not limited to) the degree of alignment between the solution’s features and functionality and the specific objectives of the enterprise’s customer interaction and contact center strategy. As a result, Ovum’s recommendations of shortlist, consider, and explore should be taken only within the context of an enterprise’s specific solution requirements.

- **Market leader:** This category represents the leading solutions that we believe are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best-of-breed.
- **Market challenger:** The solutions in this category have a good market positioning and are selling and marketing the product well. The products offer competitive functionality and a good price-performance proposition, and should be considered as part of the technology selection.
- **Market follower:** Solutions in this category are typically aimed at meeting the requirements of a particular kind of customer. As a tier-one offering, they should be explored as part of the technology selection.

Market and solution analysis

Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16

Although cost may be the initial starting point for enterprises to consider deploying a cloud contact center, they should also consider using technology to differentiate against their competitors. The cloud also offers a way for enterprises to gain access to the latest multichannel capabilities and tools without having to replace their systems. Enterprises can then easily adapt to customer trends and behaviors as customers switch to digital web and mobile channels to find resolutions to their issues. Instead of having to deploy a new tool from scratch, enterprises can add new channel modules without needing to overhaul their contact center solution.

For example, if customers are using web chat to communicate, the enterprise will need to reassess its chat capabilities and ensure that customer chat data can be linked with traditional voice records. Agents need to be prepared to handle queries in this channel and tailor their responses accordingly. Enterprises may decide to migrate a small number of agents at first to handle web chat and then gradually broaden the number of agents with this capability. Cloud-based customer service infrastructure provides more flexibility in adding new channel features gradually according to customer needs.

In addition, cloud contact centers are often faster to deploy and easier to scale, with reduced administration for adding new agents and scaling for seasonal demands. Enterprises can plan for a

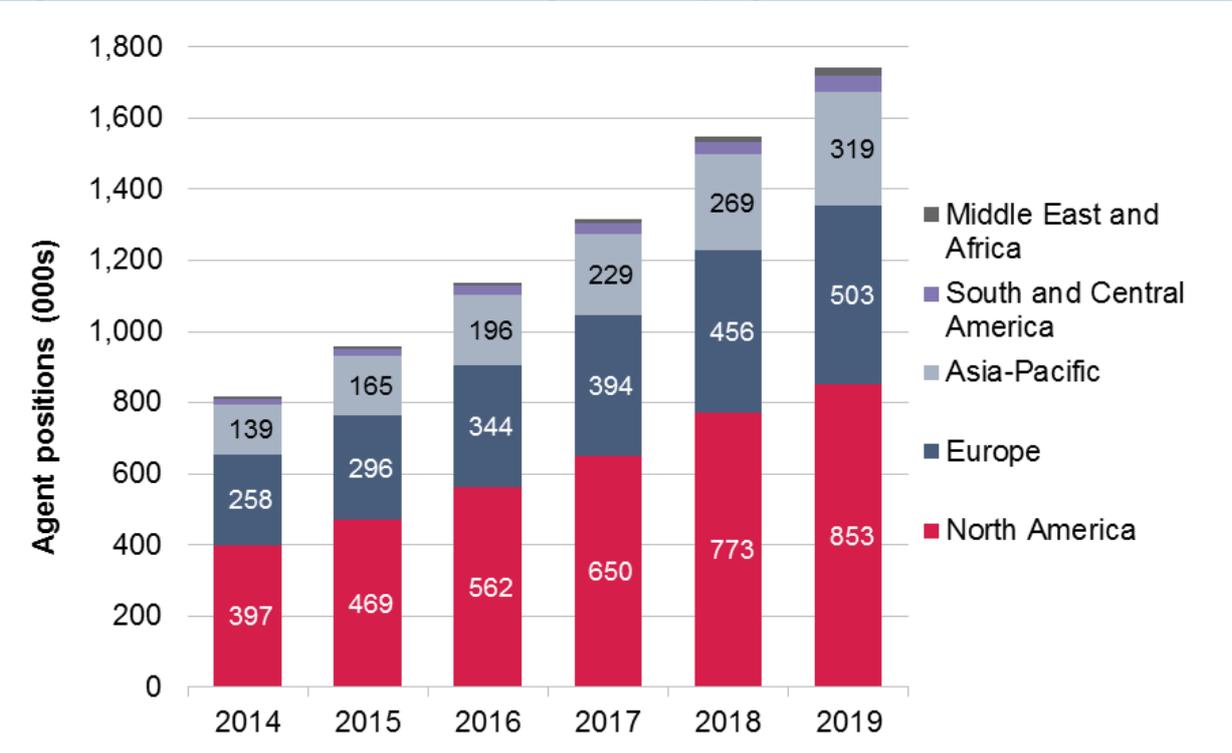
smaller initial outlay, counting on more flexibility to trial new channels and capabilities down the road. Migration can be staged with less impact on existing tools and staff.

Enterprises that are investing in cloud contact center tools should use new investments to evolve and become more customer-centric. Rather than focusing on cost savings and customer satisfaction, they can focus on customer advocacy through addition of digital services and careful monitoring of customer sentiment.

When selecting a cloud contact center vendor, enterprises should consider how the potential solution can help them to add new functionality in stages. Vendor road maps, technology partnerships, and investments in cloud infrastructure should all be reviewed as part of the selection process. This is especially true when considering offerings from legacy-premise vendors. Technology providers with a foot in both worlds need to explain how their migration and R&D strategies will affect clients.

As Figure 1 shows, high growth in the number of agent seats using cloud technology is predicted in all regions over the next five years.

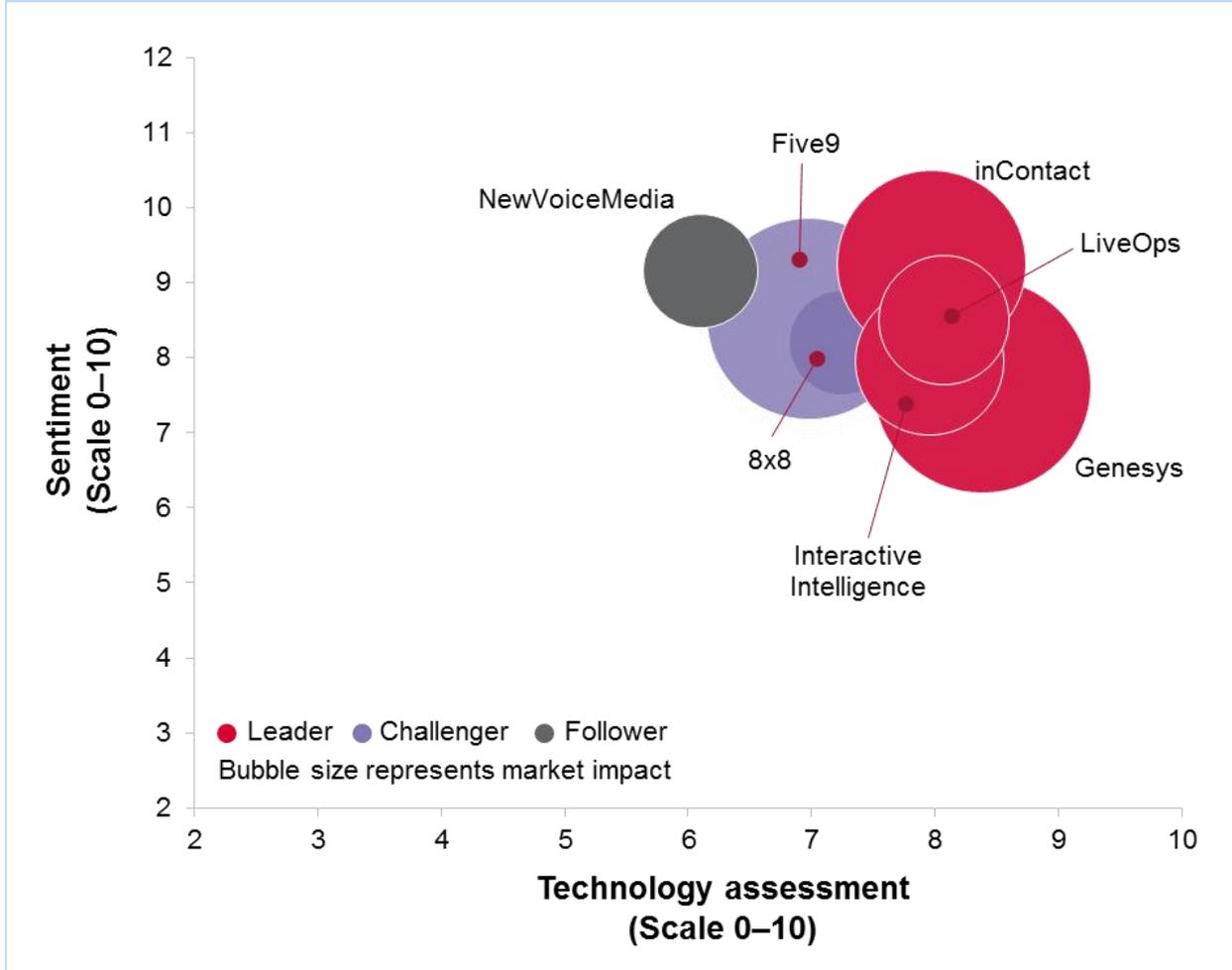
Figure 1: Growth in cloud contact center agent seats by region



Source: Ovum

Figure 2 depicts the leading vendors in a bubble chart. The average scores from the technology assessment, execution, and market impact analysis were used to plot the vendors.

Figure 2: Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16



Source: Ovum

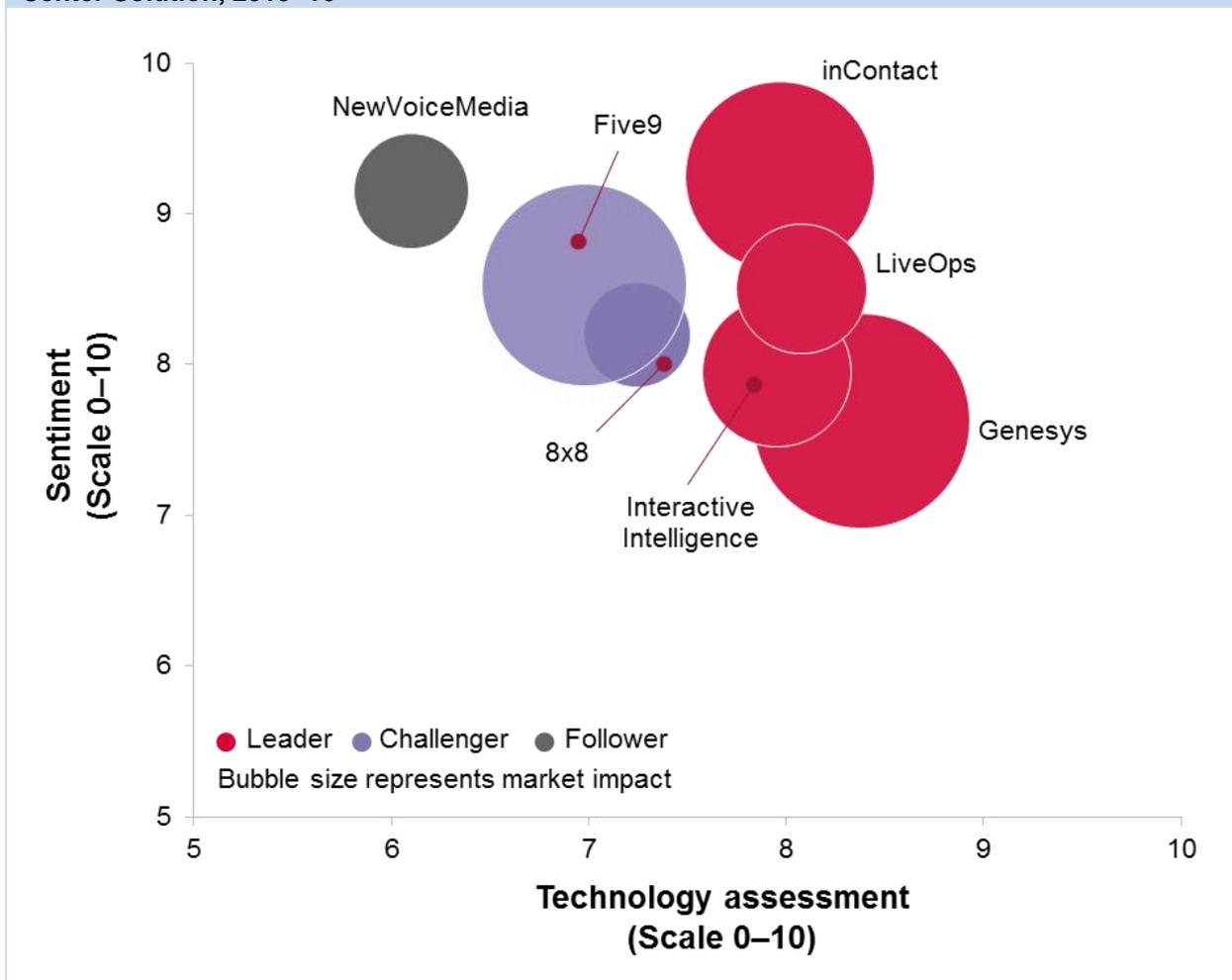
The closeness of the scores for all the rated vendors indicates an industry where fierce competition has enforced a series of baseline technical capabilities. Differentiation is increasingly based on either the market segment the companies target, the quality of consultative professional services, and the degree of integration with other related technology stacks. All the cloud vendors are moving toward feature parity with each other and with their premise-based competitors. In addition, all vendors were rated highly by their customers, with each vendor scoring an average of more than 7.5 for the execution portion of the Decision Matrix.

As a result of the close scoring the leaders were determined by their technical assessment, requiring a mark of more than 8.0 to classify in this category. Thus inContact, LiveOps, Genesys, and Interactive Intelligence are all rated leaders; 8x8 and Five9 are close behind, scoring more than 7.0 in the technical assessment. NewVoiceMedia is rated a follower because it scored slightly lower in the technical assessment and has a smaller market impact than many of the others.

Figure 3 shows the scores in an expanded version of the Decision Matrix in which the market nuances are more apparent. Interestingly, two of the players with the highest technical scores are those that also offer legacy premise-based solutions; Genesys and Interactive Intelligence have been offering communications and contact center tools for more than 20 years. Through acquisitions, notably those

of Utopy, Echopass, and SoundBite in 2013, Genesys has gained a large market share of cloud customers as well as a broad range of technical strengths. Interactive Intelligence introduced a new multi-tenant solution in 2Q15, in addition to its existing single-tenant cloud suite. The vendor now has a full range of internally developed cloud offerings to meet the needs of different-sized customers that are looking for different deployment types.

Figure 3: Expanded view of Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16



Source: Ovum

The rest of the vendors in the Decision Matrix offer cloud-only contact center platforms and are worthy of consideration by those looking for a multi-tenant solution. Among these players, inContact and Five9 have the largest market share, reflected by the size of the bubbles in the figures. Both these vendors were early to market with their multi-tenant offerings and have gained a large base of customers by continued expansion. LiveOps introduced its platform slightly later than these players but has the advantage of also offering agent services and has developed numerous unique technical capabilities. Finally, 8x8 and NewVoiceMedia have the smallest market presence to date. However, both vendors are seeing rapid growth in the number of customers deploying their platforms and should not be overlooked.

Table 1: Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16

Market leaders	Market challengers	Market followers
Genesys	8x8	NewVoiceMedia
inContact	Five9	
Interactive Intelligence		
LiveOps		

Source: Ovum

Market leaders: Genesys, inContact, Interactive Intelligence, and LiveOps

Genesys, inContact, Interactive Intelligence, and LiveOps are all identified as market leaders in this Ovum Decision Matrix. These vendors are all established contact center players with robust technology capabilities and proven market share. They are rated as leaders for their high technology scores: all four vendors gained over 8.0 in the assessment and also received high ratings from their customers.

Despite their roots in the on-premise world, Genesys and Interactive Intelligence have enhanced their cloud tools over the last few years, Genesys through acquisition and Interactive through continuous in-house technology development. Genesys is renowned for its broad technical capabilities and it continues to show that it is a leader for its technology, even though it has now made the transition to cloud services in addition to its on-premise offerings. It has gained a large customer base from its cloud acquisitions, has seen very high growth in uptake of its cloud products, and has a good geographical presence across Europe and Asia as well as in the US.

Interactive Intelligence has also successfully added cloud capabilities to its premise-based offerings. It has worked hard to prove itself a strong cloud contender and now has a significant percentage of its customers using its cloud solution. Although its multi-tenant offering was brand new when this Decision Matrix was written, the vendor’s ability to adapt and offer numerous different cloud deployment options for its customers is a strength that helped it to gain a place among the market leaders.

InContact has long-term presence in both the contact center market and as a regional telecoms carrier; it has benefitted from its strong reseller and partner base, including Verizon in the US, which is helping it reach larger clients. The vendor has gained a large installed base of contact center customers and continues to see high growth for its cloud solutions. Its technical capabilities are bolstered by its own workforce optimization solution as well as a partnership with Verint.

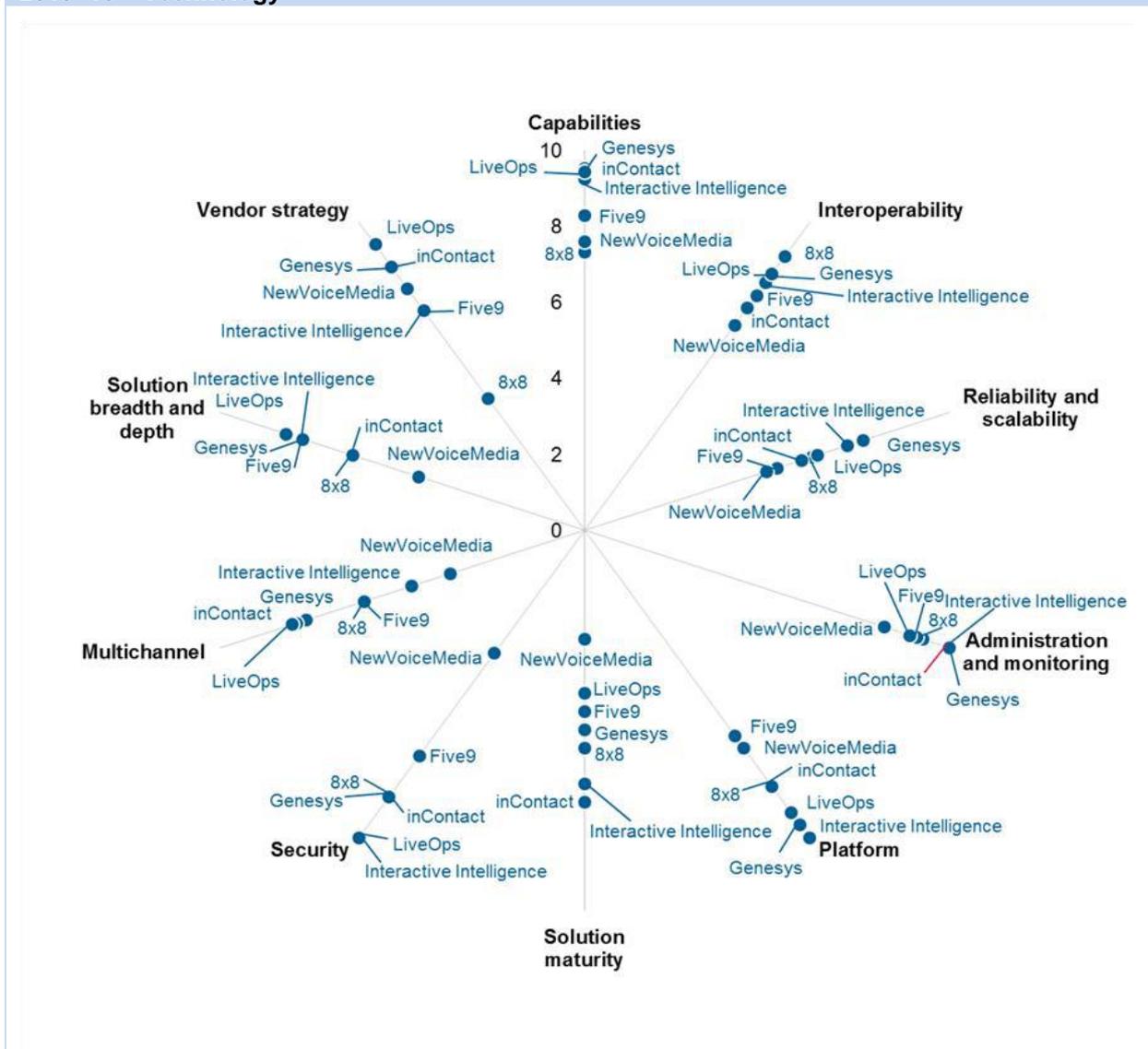
Much of LiveOps’ growth can also be attributed to relationships: its channel partner program was rolled out in 2013 and now accounts for about 50% of the company’s sales. LiveOps has introduced unique multichannel functionalities including context routing and supports WebRTC calling for contact centers looking for an alternative communications mechanism.

Market leaders

Market leaders: Technology

For the technology radar, Ovum has focused on 10 axes that represent the most important features relating to a cloud contact center as shown in Figure 3. The vendors scored well for this assessment across the board, but the results show the leaders with higher scores in many of the categories. LiveOps and Genesys in particular stand out for having broad capabilities, multichannel functionality, and clear-cut strategies.

Figure 4: Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16 – Technology



Source: Ovum

Despite some of the vendors having had cloud capabilities for more than 15 years, scores for solution maturity are notably lower than the other categories. In addition to the number of years providing cloud solutions, vendors were rated on their networks of resellers and partners as well as internal

professional services teams related to cloud contact center solutions. Having been in the market longer than any of the other vendors in the Decision Matrix, inContact is pinpointed as the leader for solution maturity. It has developed a large reseller network to grow its customer base.

Deploying a cloud contact center is an opportunity to differentiate, gain new multichannel capabilities, and optimize the contact center to meet customers' expectations. A vendor's ability to offer a range of new functionality as well as a differentiated product road map is a distinct leadership quality. Genesys, inContact, and LiveOps stood out in this category; all three vendors offer web collaboration and cobrowse features, and routing of email, web chat and social media. Genesys and LiveOps also offer customer journey solutions with the ability to retain context across channels.

Another important category in this technology assessment is interoperability. As contact centers add new routing platforms in the cloud, they will be most likely to add new modules and technologies in stages. They must ensure that all their solutions work well together, especially if they choose a best-of-breed option rather than pick a suite vendor. Contact center platforms must be integrated with CRM, automated self-service underlying telephony platforms and various agent desktop clients. Genesys, 8x8, and LiveOps showed the ability to work with a number of different third-party products.

Market leaders: Execution

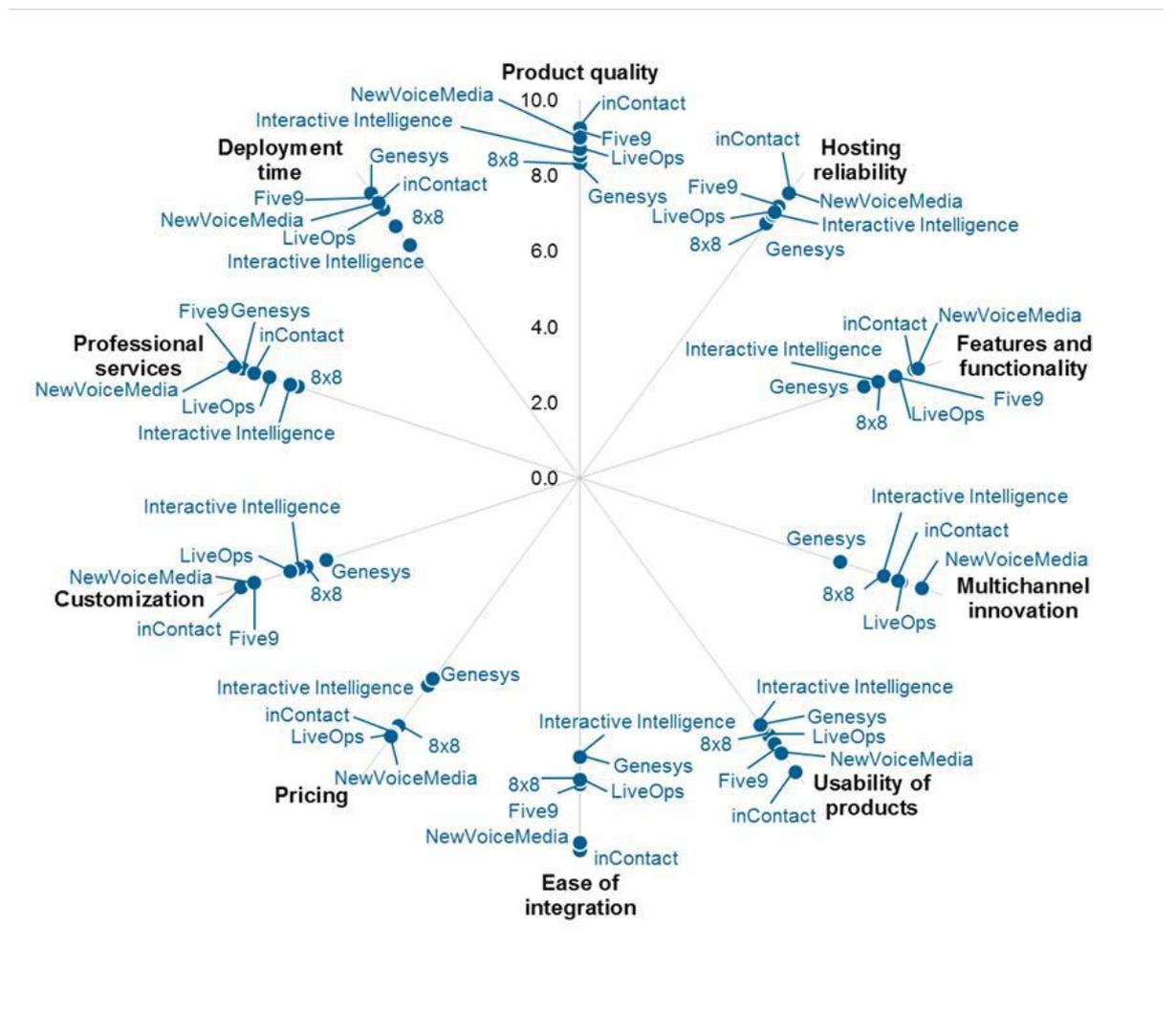
For the execution portion of the Decision Matrix, Ovum asked each vendor's customers to rate it against 10 different criteria. The results show whether a customer's perception of a vendor matches that vendor's own stated strengths. Each category is essential to a comprehensive cloud solution; in addition to product features, a vendor's reliability and ability to deploy a solution quickly must be taken into consideration.

All of the included vendors scored highly in this part of the Decision Matrix, with only small variations across the different categories. NewVoiceMedia, LiveOps, and inContact scored highest for pricing and the legacy premise-players Genesys and Interactive Intelligence scored weakest in this category. Multi-tenant solutions can often be more cost effective for customers and many Genesys and Interactive Intelligence customers have deployed more complex hosted services.

NewVoiceMedia stood out as having the overall highest scores in many of the categories in this area. Despite being one of the smaller players in the market, and having seen very rapid growth for its cloud contact center solutions, NewVoiceMedia has demonstrated that its customers value its services. They are particularly impressed with its pricing, integration with Salesforce, and customer service.

Another leader for execution is inContact, which gained top scores for a majority of the categories. In particular, inContact's customers gave it high scores for product quality, functionality, hosting reliability, ease of integration, and customization.

Figure 5: Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16 – Execution



Source: Ovum

Market leaders: Market impact

Figure 6 gives an indication of how many customers a contact center vendor has gained in the market. The revenues attributed to cloud contact center solutions show the weight that a vendor has in the market and its success to date. Five9 and inContact are the largest cloud vendors in this Decision Matrix, with Genesys following closely behind. Five9 and inContact gained this strong market position through longevity as cloud providers; Genesys attained the majority of its market share through its acquisition of Echopass in 2013.

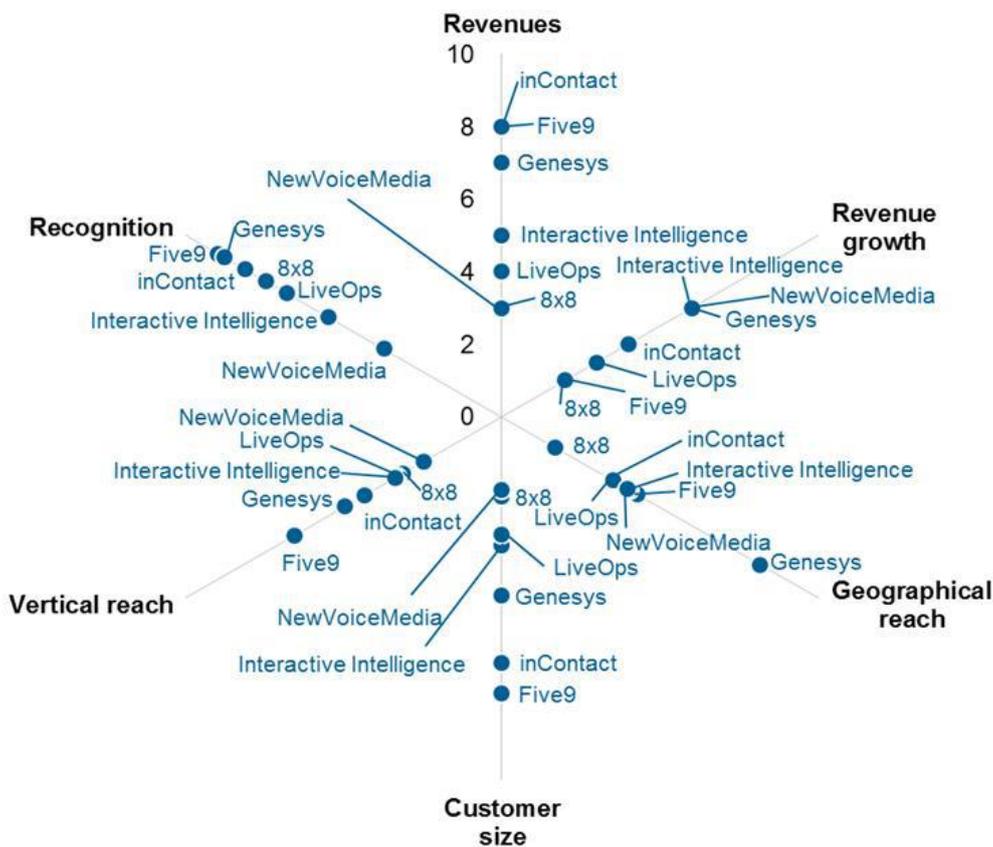
Revenue growth is another interesting category. Typically vendors with a smaller customer base have much higher revenue growth; that is true in the example of NewVoiceMedia. Interactive Intelligence and Genesys have also displayed high growth for their cloud services. Both vendors entered the market with well-respected contact center brands and experience in selling contact center tools and are rapidly gaining traction as cloud players as well as legacy vendors. The revenue growth category is also slightly misleading: despite the variation across the different vendors in this radar, all the

evaluated players have seen very high growth for their services of over 20%. The cloud contact center market represents a significant opportunity.

Geographically, most vendors evaluated here have seen a majority of their success in North America. However, many are adding new data centers and sales teams or acquiring organizations in Europe and Asia-Pacific to take advantage of the global market growth. Genesys has a stronger position in Europe, having previously been a part of French-headquartered Alcatel Lucent; joint deals helped it to grow in this region. NewVoiceMedia is the only vendor of the seven to have started in Europe and gained traction in North America. All of the multi-tenant vendors in the report are vying for market share among larger customers.

Although many have started to gain customers with more than 500 seats, this market is still relatively unsaturated by cloud contact center solutions – enterprises still have legacy installations that have not reached the end-of-life stage.

Figure 6: Ovum Decision Matrix: Selecting a Multichannel Cloud Contact Center Solution, 2015–16 – Market impact



Source: Ovum

Vendor analysis

LiveOps Cloud Contact Center (Ovum recommendation: Leader)

LiveOps has continued to invest in and strengthen its cloud contact center technology division, while maintaining its long-established reputation as a large contact center outsourcer. In 2006 it began to resell the technology that underpins its 20,000-person home-based agent outsourcing business. In 2013 it launched LiveOps Engage, a multichannel agent desktop that provides a single view and a single queue of all interactions. Today its cloud contact center solution is also sold as a multi-tenant service to customers outside of its existing base in three packages: Basic, Professional, and Enterprise. The vendor prioritizes flexible pricing, with customers having the choice of implementing concurrent pricing (where the center is billed for max concurrent usage in a month) or named pricing (where the center is billed for enabled system users, including admin and supervisors).

The vendor uses Tellme for its speech-based IVR solutions and offers a number of standard packages to its customers, including agent dial queuing and call forwarding. Customers can then configure their IVR on LiveOps' platform or work with a professional services team to build customized applications. LiveOps relies on partners for workforce optimization: it resells cloud-based Verint WFM via its channel partner Adtech Global and has out-of-the box integrations with Nice IEX TotalView, Aspect eWFM, and Monet Software. Workforce optimization could be viewed as one of the weaker areas for LiveOps given that many of its competitors have their own internally developed or acquired workforce optimization products. However, LiveOps has made easy integration a priority, with APIs for all of its applications and tight integrations with many CRM solutions.

The vendor has used its understanding of agents and contact centers to develop its tools and has continued to innovate, delivering a number of unique capabilities. One of the more recently developed offerings is contextual routing through its CxEngage tool. With CxEngage contact center managers can aggregate customer activity from any social, web, mobile, or voice channel to spot behavioral patterns. They can then proactively schedule a skilled agent to assist a customer if, for example, they abandon a shopping cart or have difficulty with online form completions.

In addition to offering standard connectivity options for agent communications (PSTN and MPLS), LiveOps also takes a leading position in utilizing WebRTC. It is one of the few vendors to support WebRTC calling for agents, working with both Twilio and Plivo. The vendor already has referenceable customers for WebRTC; its "contact center in a box" option meets the needs of centers that want to get distributed or at-home agents up and running quickly with minimal installations. The LiveOps platform is a good fit for organizations looking to add at-home agents because it is entirely software based.

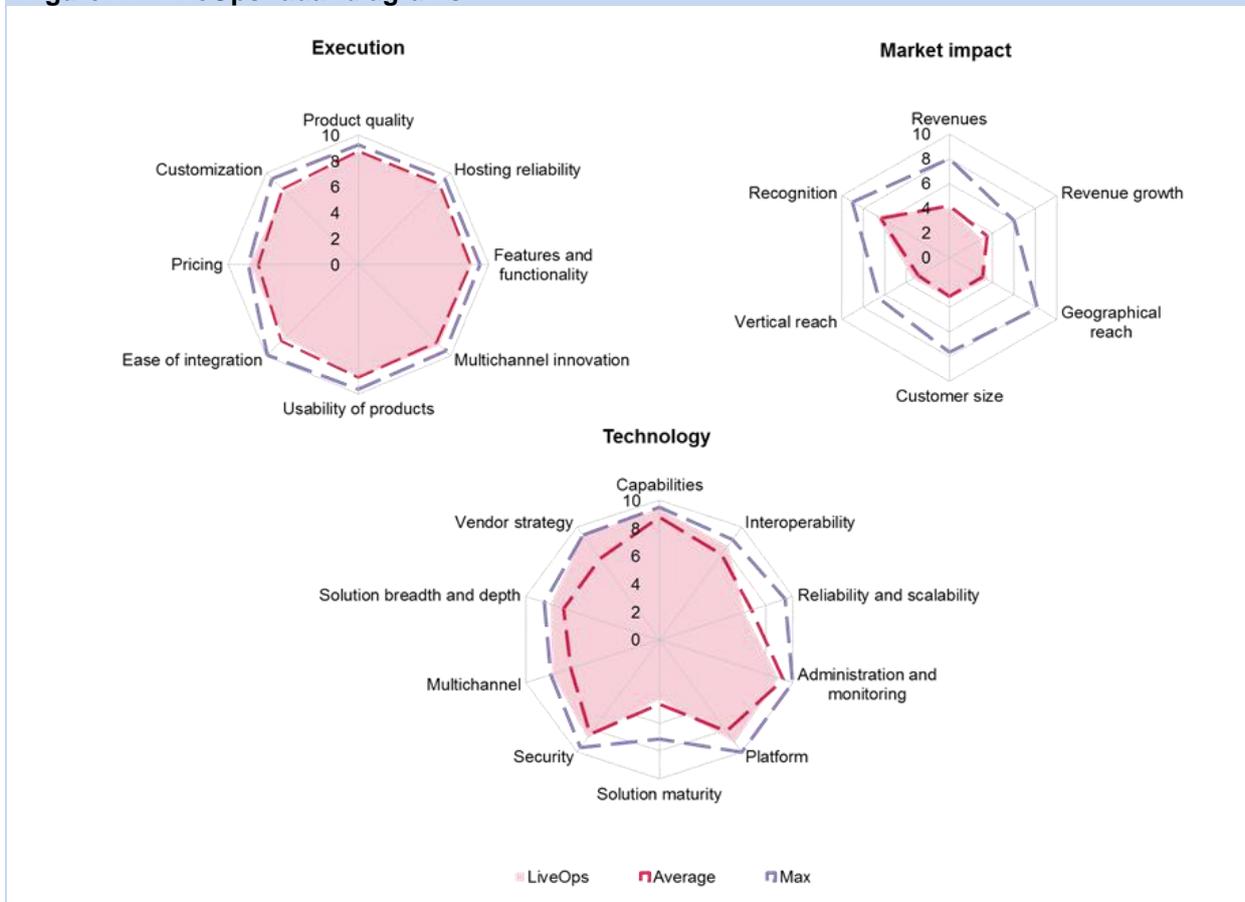
Despite its multi-tenant-only platform, LiveOps also targets larger enterprise customers, working with many that have more than 1,000 agent positions. It announced a new channel partner program in 2013 and is growing its reseller network. Today approximately 50% of its sales come from channel partners, of which Mitel, Salesforce, XO Communications, Gamma, and Adtech Global can be counted. LiveOps offers three variants of its solution: a stand-alone contact center for voice and/or multichannel, contact center voice embedded within CRMs such as Salesforce.com and Zendesk, and

a platform-as-a-service offering with a package of APIs for developers. All can be sold either direct or through channel partners.

The majority of LiveOps' customers are based in North America, but the vendor has also gained traction in Europe and Asia-Pacific. Its global customers are supported by data centers in the US, the UK, the Netherlands, Singapore, and Australia.

LiveOps has strong technical capabilities and is well regarded by its customers. It has seen ongoing revenue growth for its offerings. Its lower-than-average score in revenue growth is due to the fact that cloud contact center is a high-growth market, with many of its competitors seeing very high growth from a smaller base of customers. It is still relatively new to the cloud contact center market as a technology provider compared with competitors such as inContact and Five9, which explains its slightly lower score for solution maturity. However, it has a leading position, as recognized by its customers, which identified its advantages as product features (including multichannel and reporting), integration with Salesforce, and rapid deployment time. It did get a slightly lower score for scalability in the technical assessment because it only offers a multi-tenant option. This will not be suitable for all organizations because some contact centers still require hybrid or single-tenant options.

Figure 14: LiveOps radar diagrams



Source: Ovum

Appendix

Methodology

Ovum selected vendors that are able to offer full voice call routing (i.e., ACD) in the cloud, that can route at least one interaction channel beyond voice, and that have at least 10,000 deployed agent positions worldwide. Although some additional vendors were able to meet these criteria, notably AT&T, CenturyLink, Enghouse (CosmoCom), and Noble Systems, they were unable to provide sufficient information for a full evaluation. All included vendors were asked to complete a full technical assessment checklist as well as provide market revenue data and a list of customers to be surveyed. Ovum used this data alongside in-house knowledge to determine the results of the Decision Matrix.

Summary scores

Table 2: The multichannel cloud contact center score overview

	Technology assessment	Market impact	Execution
8x8	7.2	3.3	8.2
Five9	7.0	6.2	8.5
Genesys	8.4	6.6	7.6
inContact	8.0	5.8	9.3
Interactive Intelligence	8.0	4.6	7.9
LiveOps	8.1	4.0	8.5
NewVoiceMedia	6.1	3.5	9.2

Source: Ovum

Further reading

Fundamentals of Multichannel Cloud Contact Center Platforms, IT0020-000114 (May 2015)

Key Issues in Customer Engagement, IT0020-000110 (April 2015)

How to Develop an Omnichannel Customer Engagement Capability, IT0020-000108 (April 2015)

Global Contact Center Market Forecast: 2013–19, IT0020-000099 (March 2015)

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