

Critical Capabilities for Contact Center as a Service

Published 9 August 2021 - ID G00740374 - 37 min read

By Analyst(s): Steve Blood, Pri Rathnayake, Drew Kraus

Initiatives: [Customer Service and Support Technology](#)

CCaaS is dominating options for upgrading contact center infrastructure, with the opportunity to combine digital channels, workforce engagement and leverage flexible working at scale. This research will assist application leaders responsible for customer service in their CCaaS buying decisions.

This Critical Capabilities is related to other research:

[Magic Quadrant for Contact Center as a Service](#)

[View All Magic Quadrants and Critical Capabilities](#)

Overview

Key Findings

- Contact center as a service (CCaaS) providers are beginning to scale their infrastructure for multiregional deployments, adding new data centers, media gateways and language capabilities to support consolidated, multinational deployments.
- Service-level agreements (SLAs) and service penalties for nonperformance need to be more robust as clients scale their CCaaS environments into thousands of agents. Only a few CCaaS providers publish real-time and historic application availability on their websites.
- During 2020, as a result of the pandemic, organizations were compelled to build on employee experience, adding resource management capabilities, deepening workforce engagement management (WEM) functionality, and leveraging transcription for agent assist and speech analytics within CCaaS applications.
- The application marketplace is beginning to become a differentiator, as partners' software is readily integrated and available to trial and purchase via the CCaaS provider's marketplace.

Recommendations

For application leaders responsible for customer service and support who are planning, selecting and deploying contact center applications:

- Reduce the impacts of transitioning off legacy contact center platforms by focusing on providers with referenceable transition frameworks, methodologies and commercial options for migrating to their CCaaS offerings.
- Lower the cost of ownership for new CCaaS investments by prioritizing solutions that offer native functionality and complementary partner offerings accessible through application marketplaces.
- Plan for greater contact channel variability by placing increased evaluation weighting on flexible pricing models that can accommodate customer demands for shifting from telephone-based assistance toward digital assistance and self-service engagements.
- Reduce multiregional service compliance and quality challenges by assessing service providers' data center design and network architecture, and on standards compliance in relevant geographical regions.

What You Need to Know

Gartner has determined 11 critical capabilities that are weighted for each of the following five use cases:

- High-volume customer call center
- Customer engagement center
- Agile contact center
- North America
- Western Europe

These ratings have been applied to the 12 CCaaS providers' offerings that qualified for inclusion in this research.

Gartner's rating for each of the critical capabilities is a combination of research influences:

- **Client feedback on inquiry.** In 2020, Gartner analysts in the customer service and support technology practice conducted more than 3,000 inquiries with clients regarding technology decisions.
- **Peer Insight reviews.** There are over 1,400 CCaaS product reviews on Gartner Peer Insights, with more than 500 added in the last year. We also gathered data from Gartner Digital Markets (Capterra, Software Advice and GetApp) for further insight into customer feedback.
- **Vendor request for information (RFI).** Vendors were invited to complete an RFI, highlighting their product capabilities and developments since the last Critical Capabilities update. Gartner analysts then combined views of the CCaaS market and its direction.
- **Analyst experience.** Combined, the authors have more than 90 years of experience in customer service and contact centers.

In some cases, vendors' improvements in their offerings across various Critical Capabilities do not result in improved scores in those capabilities. This is because, in our opinion, the improvements were more in line with keeping up with broader industry practices.

In other cases, it can be seen that Gartner's view of a product/service is different to how some customer reviews rate the product/service. We can see this especially where providers have a specific target market or application. For this reason, we recommend that application leaders use the vendor scores given for each capability as part of an objective selection process.

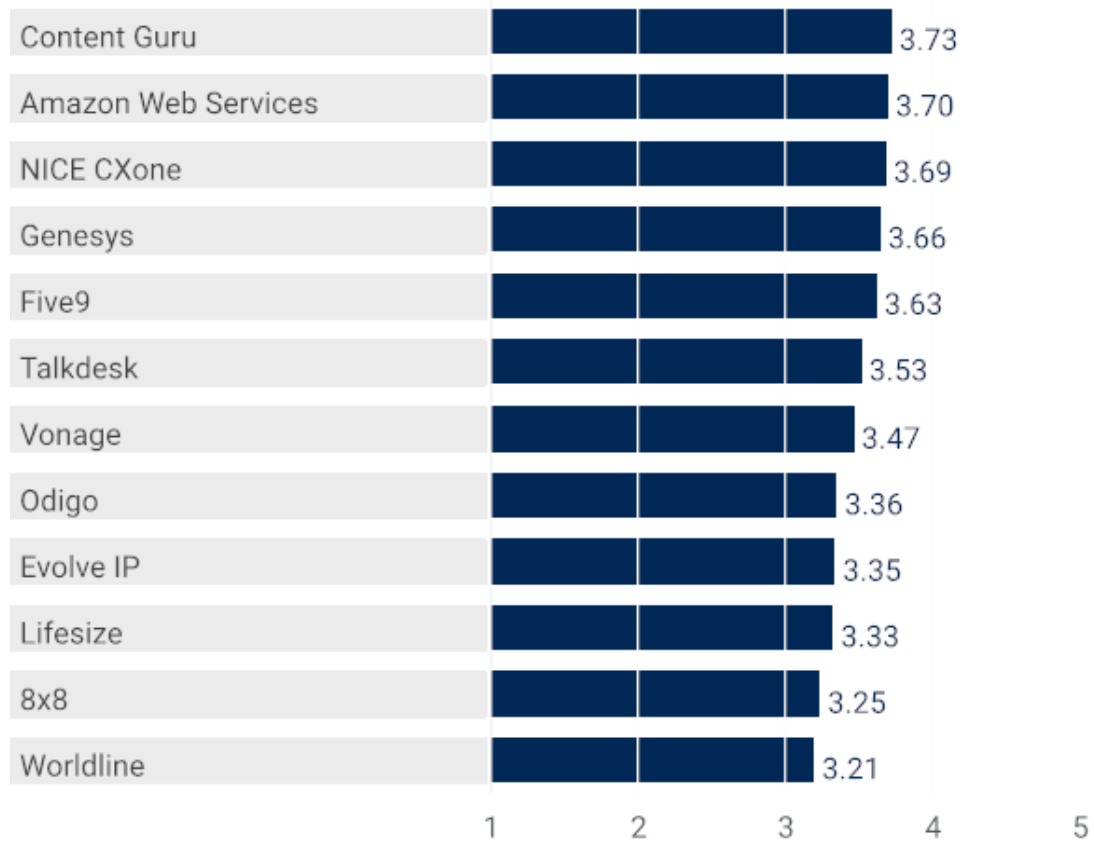
Evaluations should include adjusting the weightings given (using the online interactive version of this research) according to their own business mandates, performance requirements and future plans.

Analysis

Critical Capabilities Use-Case Graphics

Vendors' Product Scores for High-Volume Customer Call Center Use Case

Product or Service Scores for High-Volume Customer Call Center



As of 4 June 2021

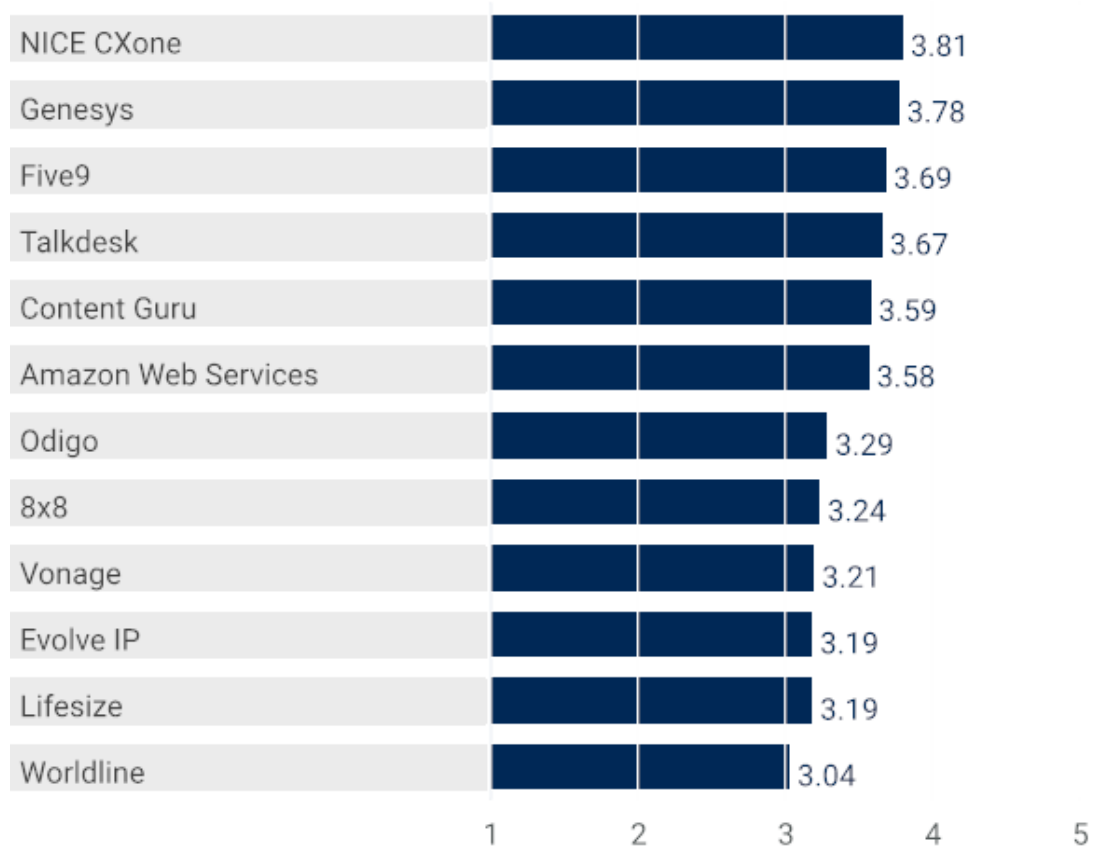
© Gartner, Inc



Source: Gartner (August 2021)

Vendors' Product Scores for Customer Engagement Center Use Case

Product or Service Scores for Customer Engagement Center



As of 4 June 2021

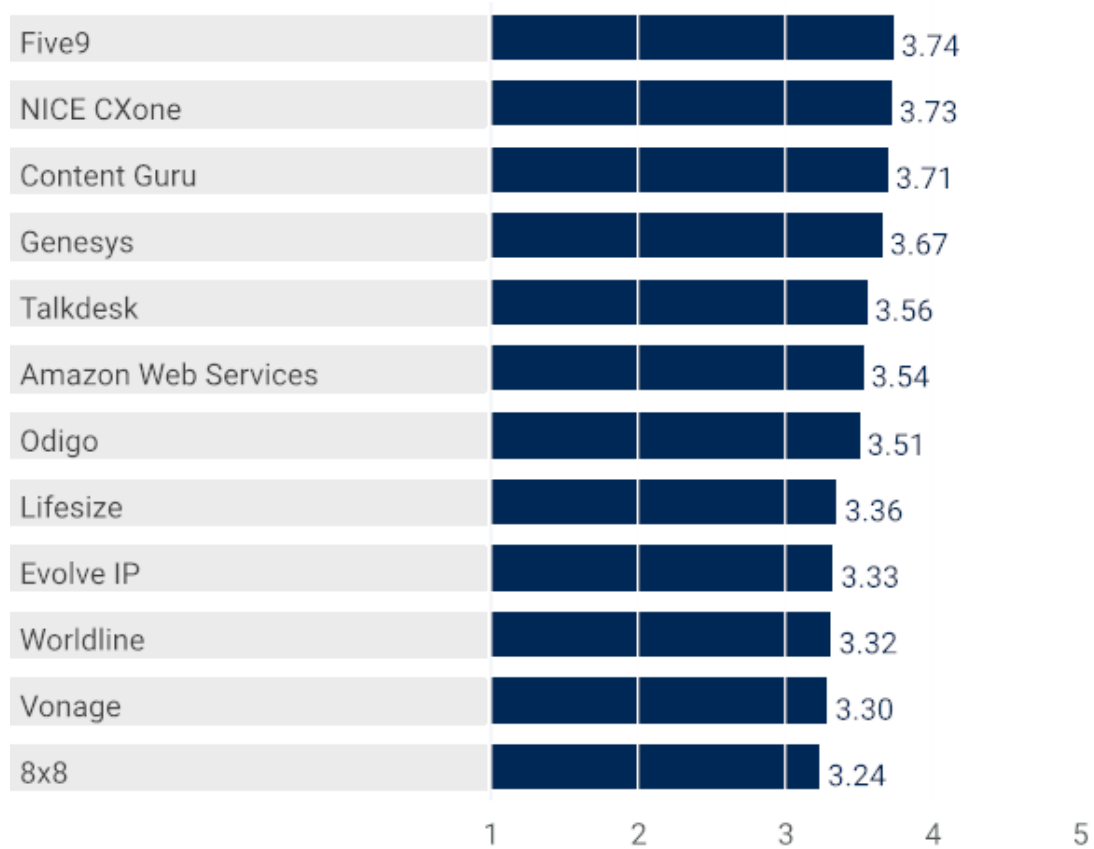
© Gartner, Inc



Source: Gartner (August 2021)

Vendors' Product Scores for Agile Contact Center Use Case

Product or Service Scores for Agile Contact Center



As of 4 June 2021

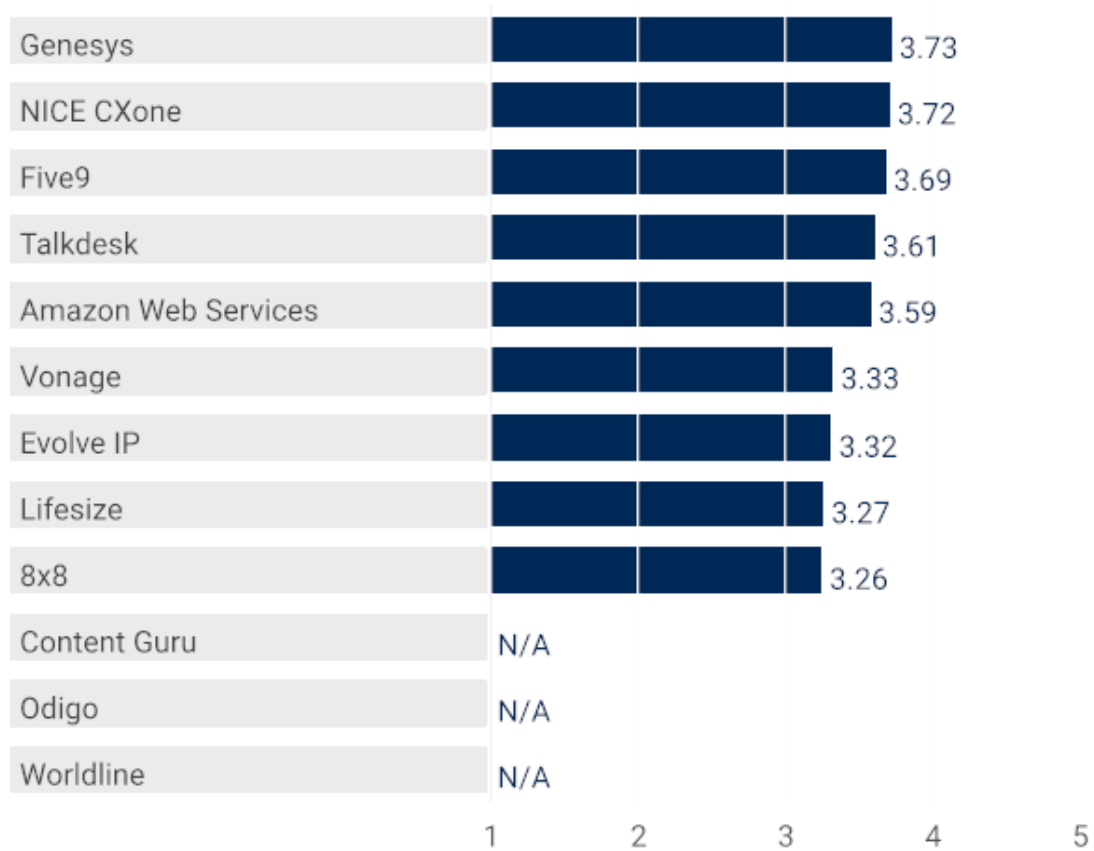
© Gartner, Inc



Source: Gartner (August 2021)

Vendors' Product Scores for North America Use Case

Product or Service Scores for North America



As of 4 June 2021

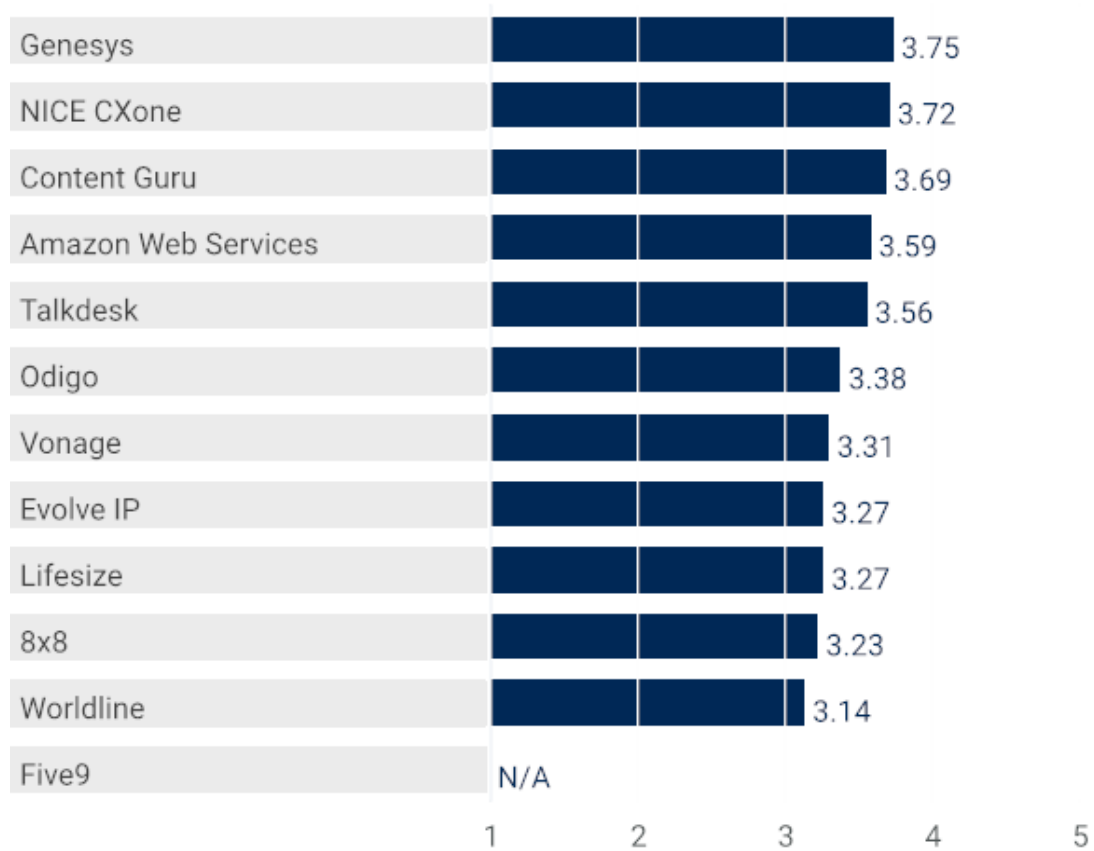
© Gartner, Inc



Source: Gartner (August 2021)

Vendors' Product Scores for Western Europe Use Case

Product or Service Scores for Western Europe



As of 4 June 2021

© Gartner, Inc



Source: Gartner (August 2021)

Vendors

8x8

8x8 primarily sells its 8x8 Contact Center offering as an extension of the X Series, a unified communications as a service (UCaaS)/CCaaS communications suite, which is a key reason why its use case scores are lower than those of providers that focus wholly on CCaaS. However, we have increasingly seen the 8x8 offering as a stand-alone CCaaS proposal in the last year.

8x8 has good brand recognition with Gartner clients in both North America and Europe, but more as a provider of a combined CCaaS and UCaaS offering. This is attractive to small and midsize organizations (specifically those with fewer than 300 contact center seats).

8x8 has made product improvements by expanding its data centers, carrier services and language capabilities to better support organizations with international requirements. Its certified integration of 8x8 Contact Center for Microsoft Teams is a key differentiator, along with an increased focus on analytics for workforce engagement.

While its SLAs and trust center are now public, 8x8 lacks historical detail to give customer and prospects service context. 8x8 needs to make partners' product capabilities more readily accessible through its marketplace, while the customer administration portal continues to be outdated. Customers indicate that service and support has been a bigger challenge in the last year for the vendor than previous years. More reviews in the customer community could help customers to collaborate with peers for some resolutions.

Amazon Web Services

Amazon Web Services (AWS) is a market leader in cloud computing and offers Amazon Connect as one of a large number of products that span technology and industry sectors. Its strengths in data center and carrier services mean it rates strongly in the high-volume call center use case. AWS relies on customer feedback to drive the continued development of Amazon Connect. The vendor has strong brand recognition with clients globally. Organizations with AWS master purchase agreements, and AWS DevOps practices, are very likely to include Amazon Connect in their service portfolio.

Amazon Connect has made important product improvements in multichannel with the launch of Tasks for managing all types of customer interactions, including work assignments and digital engagements. The launch of Contact Lens introduces real-time transcription and analytics to surface insights into customer conversations. Amazon Connect has strong approval ratings with customers on Gartner Peer Insights and has made further improvements in the last year. Peer Insights also indicates that the majority of customers were able to implement Amazon Connect within three months.

AWS continues to rely on partners for workforce optimization capabilities, a feature that many customers are looking to procure as a native capability in the CCaaS platform. The strap line for the AWS website – “Start Building on AWS Today” – extends to Amazon Connect and is consistent with organizations that have created AWS DevOps programs. However, in the broader market for CCaaS, we still see a preference for buying suites of capabilities versus build. Customer feedback indicates that training and support from AWS or its contact center partners is a key requirement for success.

Content Guru

Content Guru is sometimes better known by storm, the brand for its CCaaS platform. The company has strong experience supporting large contact centers, including those with more than 1,000 agents in Western Europe and Asia/Pacific regions. Its strengths in carrier and service-level capabilities meant it scored highest in the high-volume customer call center use case. Content Guru benefits from a well-developed channel program, especially with communications service providers in Western Europe. Its recent expansion into the U.S. market was augmented by the acquisition – by its parent company Redwood Technologies Group – of Potomac Integration and Consulting (PIC), a specialized integrator for the government sector.

Content Guru's storm CONTACT offering has made improvements in workforce engagement, adding native workforce management to its WEM portfolio. Enhancements to brain, Content Guru's artificial intelligence (AI) toolkit, extend the capabilities of machine agents to support automated tasks across multiple channels of engagements. Extension of languages and the introduction of storm Lite expand the addressable market for storm CONTACT.

The introduction of storm App Exchange offers greater flexibility in how customers consume storm, but this would benefit from further population with partner solutions and product ratings. Despite offering some strong SLAs, storm would benefit from greater visibility of service availability on its website. Storm CONTACT is not very visible in digital market ratings, which is important to clients looking for demonstrable, scalable references of CCaaS.

Evolve IP

Evolve IP sells its Evolve Contact Suite primarily as an extension of its Cisco-based UC offering, which is why its use case ratings are lower than those of providers that focus wholly on CCaaS. Evolve IP's market presence spans both North America and Europe, which are the focus for its business.

There are no changes to Evolve Contact Suite's critical capability scores this year, as outside of performance and reporting enhancements, most of its development has gone into integrating with Microsoft Teams. Evolve IP has a strong commitment to contractual service levels that provide tangible credits for nonperformance. Customers are positive about customer service but Evolve Contact Suite would benefit from greater visibility in digital markets for demonstrability.

Evolve IP lacks its own native workforce engagement solutions and needs expansion of its language capabilities to be more relevant to European customers. While Evolve IP is committed to service levels, customers and prospects would benefit from easier access to its status page from the website, and greater detail on monthly performance.

Five9

Five9's Intelligent Cloud Contact Center platform has been in the cloud contact center market for 20 years. It scored high in the agile contact center use case as a result of strong capability ratings for its customer administration portal, and customer service and support. Five9's execution favors North American and U.S.-based multinational organizations. Recent investments in the U.K. market as the focus point for European expansion are positively matched by signing local channel partners to support growth with U.K. business and U.K.-based multinationals. Effective marketing execution means the Five9 brand has good awareness with Gartner clients.

Five9's acquisition of Inference Solutions has driven improved scores this year, cementing its virtual customer assistant capability across both voice and digital channels. Language expansion will be important to support its European growth plans, as well as telecom relationships for interactive voice response (IVR) and the phone channel. Five9 has strong customer ratings and has made further improvements in Gartner Peer Insights categories in the last year.

Five9's customers would benefit from an interactive set of marketplace partner applications for download, trial and procurement. Real-time visibility of performance in its Trust Office would offer customers greater visibility of resilience as they scale their customer service operations. Five9 needs to improve on its SLA and penalties to demonstrate deeper commitment to scaling customers. Product review ratings are strong, but reporting is still highlighted as a challenge by customers.

Genesys

Genesys is a global contact center software technology provider with a strong brand recognition as a provider of both premises-based software and cloud-based contact center capabilities. Genesys Cloud CX scored high in the customer engagement center use case as a result of capability strengths in multichannel contact management, WEM and application marketplace integration. The vendor sells Genesys Cloud CX, hosted globally in AWS data centers, into multiple geographic markets, with notable strengths in North America and EMEA.

Genesys has strongly improved its pricing in the last year, creating more consistent pricing through the contract term and greater elasticity in software options. The Genesys Cloud CX trial strategy is a differentiating feature, which includes proof of concept and the ability to independently set up and trial digital capabilities. Genesys' ability to support proactive engagement is enhanced by working with digital experience platform provider Adobe. Its WEM capability has also improved this year, reflected in a stronger performance in Critical Capabilities for Workforce Engagement Management. Genesys Cloud Voice has become the primary option for telecom.

Genesys Cloud CX category ratings on Gartner Peer Insights made good improvements in the last year.

Pricing would be improved further with a greater focus on monthly as opposed to annual billing, and Genesys needs to resolve a channel conflict where pricing from a partner can appear higher than with direct sales. Customers also indicate that the Genesys CCaaS offering would benefit from more developed support for digital channels and better, robust reporting.

Lifesize

Lifesize brands itself as a provider of cloud contact center and video meetings solutions, following the merger of Lifesize and Serenova in 2020. As a result, it scores lower in use cases than providers that focus wholly on CCaaS. Lifesize operates mostly between North America and Europe and has applications hosted in AWS data centers in the U.S. and Ireland.

Lifesize CxEngage has made notable product improvements this year in WEM, with the integration of ProScheduler and analytics capabilities, warranting inclusion in the 2021 Magic Quadrant for Workforce Engagement Management. Agent experience enhancements with desktop and expansion of languages will make the offer more attractive to a bigger geographical audience.

To offer a more attractive CCaaS solution, CxEngage would benefit from a stronger virtual customer assistant capability functioning as an orchestrator of self-service, with customer-preferred natural language processing (NLP). AWS instances of CxEngage would need expanding to support more international, resilient needs of customers. The Lifesize App Store lacks accessibility of third-party capabilities. An interactive set of partner applications for download, trial and procurement would give customers greater flexibility.

NICE CXone

NICE CXone is a subsidiary brand of NICE, a provider of customer experience, public safety, financial compliance and robotic process automation. The CXone CCaaS platform is deployed in a mix of private data centers and multiple AWS data centers across the globe. NICE CXone scored high in the customer engagement center and agile contact center use cases because of its capability strengths in application marketplace integration, WEM and customer portal. NICE CXone retains its strength in the North America market, but also sells to multiple geographies with key channel partner relationships, especially in Europe and Asia.

NICE CXone has improved on its geographical diversity in the last year, adding new points of presence for quality and compliance. The introduction of Enlighten AI strengthens the vendor's AI proposition, especially for self-service, while CXone Virtual Agent Hub enables organizations to leverage third-party AI and "bring your own bot." Improvements have also been made to the solution's WEM capability, which were recognized with a stronger rating in this year's Critical Capabilities for Workforce Engagement Management. Gartner Peer Insight ratings for NICE CXone have improved across all customer experience categories over the last year, although customer feedback regarding product stability in some areas was noted.

The CXexchange marketplace would benefit from a greater population of partner applications for download, trial and procurement, offering more application flexibility for customers. The reviews tab is a differentiated capability but lacks a population of feedback. Real-time visibility of CXone platform performance on the vendor's trust site would offer customers and prospects greater visibility of resilience as they scale their customer service operations.

Odigo

Odigo is an independent CCaaS provider following its sale by Capgemini to private equity firm Apax Partners in September 2020. Odigo's best use case score was for the agile contact center because of strengths in the customer administration portal. However, it lags other CCaaS-centric providers, which have stronger ratings across most other capabilities. Odigo's market strength is with European-based multinational organizations, though Capgemini is still a key partner for global offers.

Odigo improved on its multichannel capabilities with the introduction of CX Studio to better manage customer interaction flows. The addition of an onboarding capability in WEM can help lower the cost of transitioning employees to Odigo's CCaaS platform. Customer feedback on Gartner Peer Insights indicates an improvement for Odigo across all customer experience categories over the past year, though some challenges with support are still evident.

Odigo's customers would benefit from an application marketplace where customers can more readily download, trial and procure partner applications. The vendor's approach is still very system-integrator-led. Real-time visibility of the Odigo platform performance on a trust page would offer customers and prospects greater visibility into resilience, as they look to partner with a CCaaS provider to scale their customer service operation. Odigo would benefit from more international visibility in digital markets.

Talkdesk

Talkdesk, founded in Portugal, built its business initially in the U.S. market. Talkdesk sells its CX Cloud CCaaS offering to mostly North America and European organizations, leveraging AWS for data center connectivity and multiple instances across North America, Europe and Asia/Pacific. Talkdesk's strongest use case score was for the customer engagement center, as a result of a strong marketplace capability. The vendor uses a mix of direct and channel sales to fulfill customer demand.

Talkdesk improved on the application marketplace integration capability this year, where it populates complementary partner applications, many available for trial before procurement. Its WEM capability also improved with Workspace, enabling employees to customize their desktop experience.

Further improvements in multilanguage support will benefit organizations looking for global standardization of contact center platforms. While Talkdesk's application availability is public and is segmented by capability, it lacks domain-specific reporting relevant to multinational organizations. Service and support has been more of a challenge in the last year, evidenced through customer feedback.

Vonage

Vonage is a cloud communications provider that offers communications APIs, unified communications and contact centers as cloud services built on the Vonage Communications Platform. As a result, its use case scores are lower than providers that focus wholly on CCaaS. It hosts Vonage Contact Center (VCC) in AWS data centers in the U.S., Europe and Asia/Pacific, and operates its own global telecom network for quality and cost benefit to its customers.

VCC has made good improvements this year in the multichannel capability, adding native chat and stronger management of multichannel, including APIs for initiating workflow steps (callback, surveys, requests to third-party applications). It has also added a visual builder to its virtual customer assistant capability to improve ease of self-service configuration.

To consider Vonage as a single CCaaS solution, organizations with multiregional requirements should verify that Vonage can support all required language sets for both agents and admins. The Vonage App Centre lacks third-party applications for VCC. A more accessible and interactive set of partner applications for download, trial and procurement would give customers greater flexibility. While Vonage (originally NewVoiceMedia) was one of the first providers to publish platform availability on its website, today this important feature for service demonstrability is now buried in multiple web clicks.

Worldline

Worldline Contact (WL Contact) is primarily sold directly by Worldline, a global digital payments company. Worldline's strength for WL Contact is with European-based multinational organizations. Its best use case score was for the agile contact center, for which its consumption pricing capability is rated highly. However, with a specialized focus historically in the payments sector, Worldline rated lower than most providers in each use case. It hosts WL Contact in its own data centers in Europe and in Atos data centers in the U.S.

WL Contact has improved this year in the multichannel capability, adding rules of engagement for website visitors based on the customer journey. It has also improved on bot management as part of virtual customer assistant capability, supporting external FAQs for optimizing customer response and bot identity to personalize answers based on history or time of day.

WL Contact would benefit from broader language support and more distributed data centers to support global customers. There is no Worldline marketplace for partner applications. Worldline's approach is system-integrator-centric, with developer-only visibility. WL Contact could benefit from significantly more customer references in digital markets to be more demonstrable to prospects across target vertical markets.

Context

2021 continued where 2020 left off, with continued high demand for replacing legacy, premises-based contact center infrastructure with CCaaS alternatives. Gartner is forecasting 38% growth for CCaaS in 2021 (see [Forecast Analysis: Contact Center, Worldwide](#)).

The agility demonstrated by CCaaS providers during the pandemic in 2020 has reset expectations for cloud services, resulting in CCaaS dominating customer buying decisions when upgrading contact center technology. The adjacent product areas of workforce engagement management (WEM) and multichannel contact management are increasingly being consolidated as part of a rationalization effort by contact center leaders. While CCaaS is not the only consideration for all of these requirements, providers of the service are in a much stronger position to offer consolidation than providers of the premises-based technology platforms that preceded them (see [Market Guide for Contact Center Infrastructure](#)).

The need for collaboration between customer service representatives and their colleagues across the organization has triggered CCaaS providers to seek certification with collaboration platform providers. The extent of integrations and certifications vary, but we expect customer demand will make this a mandatory requirement in the next 12 to 18 months.

CCaaS providers continue to make acquisitions of adjacent technology to offer a broader suite of capabilities. While the core capability of CCaaS is to support getting customers connected, vendors assessed in this Critical Capabilities and its companion Magic Quadrant scored better if they also had native capabilities in the other three pillars of great customer service – process orchestration, knowledge and insight, and resource management.

Product/Service Class Definition

This research evaluates CCaaS providers offering SaaS-based applications that enable customer service organizations to manage multichannel customer interactions holistically from both a customer experience and an employee experience perspective.

CCaaS solutions are largely systems of differentiation. They enable an adaptive, flexible delivery model with native capabilities across the four pillars of great customer service (see [Customer Service and Support Technology Primer for 2021](#)) and productized integrations with partner solutions through application marketplaces.

This Critical Capabilities report includes all of the vendors included in the 2021 companion Magic Quadrant.

CCaaS solutions are used by customer service and telemarketing centers, employee service and support centers, help desk service centers, and other types of structured communications operations. CCaaS solutions are typically deployed as an integral part of a broader customer service and support technology ecosystem addressing the four key pillars for customer service.

The core capability of a CCaaS solution is:

- **Getting connected** — Focusing on delivering a channel-agnostic, architected design to create customer service journeys, including intelligent self-service. Services are consumed on a per seat, per concurrent user or transaction basis.

The optional capabilities of a CCaaS solution are:

- **Process orchestration** — Supporting increasingly complex and personalized customer engagements (see [Magic Quadrant for the CRM Customer Engagement Center](#)).
- **Resource management** — Developing and maintaining engaged and empowered staff based on the understanding that engaged employees power a stronger customer experience (see [Magic Quadrant for Workforce Engagement Management](#)).
- **Knowledge and insight** — Delivering customer and operational insights and recommending next best actions across all functional groupings.

Critical Capabilities Definition

Data Center Design

The strength of the data center architecture utilized to provide resilient and scalable computing power to support on-demand customer service.

This is the ability to support high availability and/or disaster recovery configurations for scalable customer service environments. The overall architectural robustness includes elastic data center infrastructure or computing power and multinational presence by leveraging either traditional server infrastructure or infrastructure as a service (IaaS) partners. This capability enables organizations to scale infrastructure resources down, as well as up, to meet unpredictable service requirements. Providers that meet this requirement will utilize a distributed data center infrastructure across multiple geographies. There will be no single point of failure.

Multichannel Contact Management

The breadth of customer communications channels supported in terms of both assisted service and self-service, and manageable by advisors with workspace tools or deep integration to customer engagement center (CEC) platforms.

This is the ability to offer configurable agent workspaces with channel-context-related tools, intelligent routing and historical/live dashboard reporting for multiple, blended customer communication channels. This capability should at least include voice, email, web/SMS chat, social, mobile and video, and should be referenceable by customers. The ability to offer customer self-service or assisted service via voice- and text-based channels is also increasingly important. This capability enables organizations to consolidate the number of platforms used for managing customer service channels for more consistent management and measurement in support of improved customer experience. Providers that meet this requirement will be able to demonstrate multichannel capabilities, from flow design to advisor desktop, and present customer references with multichannel implementations.

Application Marketplace Integration

The availability, referenceability and rating of applications and integrations within marketplaces, both within the CCaaS provider's marketplace and in third-party marketplaces.

The application marketplace approach is designed to provide fast and easy integration to customer service applications, supporting the speed and agility of a system of differentiation. Leading CCaaS providers will maintain their own application marketplaces, supporting applications developed by communities, partners or the vendor itself. Equally, the CCaaS provider will be referenceable in third-party application marketplaces offering easy-to-access integrations to other leading providers of customer service software through extensible APIs. Providers with extensive marketplaces and strong referenceability and rating in third-party marketplaces will score highly in this category, whereas those that do not exhibit an application marketplace approach will score poorly for this capability.

Standards and Compliance

The extent to which the service platform supports multiple standards bodies focusing particularly on technology, security and regulation as they apply to customer service center environments.

There are multiple standards bodies that CCaaS platforms are required to conform to as part of service delivery. In the technology domain, it is important that platforms are supportive of APIs and connectors for integration to CEC applications in order to manage customer transactions and integration to WEM platforms for managing employees. As part of security, CCaaS platforms need to protect against distributed denial of service attacks, secure content with encryption, and maintain fraud detection and fraud prevention capability. Regulatory compliance is required for regional markets, such as GDPR in Europe, or vertical markets, such as HIPAA for American workers, FedRAMP for cloud service providers, and ISO 27001 as an overarching management certification framework. Providers that meet this requirement will be able to confirm ISO certification and list the compliance bodies in support.

Workforce Engagement Management

The depth of workforce engagement management (WEM) solutions offered either as an embedded capability or with a best-of-breed partner.

This is the ability to offer comprehensive WEM capabilities as part of the CCaaS suite, including workforce planning, compliance recording and performance monitoring. WEM can either be delivered through the product itself or via tight integration with partners, as well as open interfaces for integrating with existing best-of-breed platforms. It is more common to see CCaaS providers develop their own call recording and quality monitoring capabilities, and partner with best-of-breed providers of workforce planning software as an alternative to acquisition. Tight integration with best-of-breed WEM providers is increasingly important as CCaaS platforms scale to serve hundreds or even thousands of users. Here, organizations are more likely to rely on best-of-breed specialists for WEM. Providers that meet this requirement will not be exclusively reliant on partners for all of WEM. Services such as call recording and quality monitoring should be in-house options.

Virtual Customer Assistant

The presence of chatbots to support self-service and assisted-service interactions and transactions.

CCaaS providers that meet this requirement will be able to demonstrate a chatbot capability that should, ideally, take a configuration approach using their own application. This includes the ability to understand intent and business context, leveraging either their own artificial intelligence or a leading conversational AI platform provider (e.g., Amazon, Google, IBM, Microsoft).

Customer Administration Portal

The ability for customer service organizations to create, modify and manage core operational and reporting parameters of cloud-based contact center environments in real time.

Irrespective of the provisioning model (premises-based or cloud-based), customer service leaders must have the ability to manage the resources available to them to deal with unplanned communications. This must take place in real time and includes all facets of queuing, routing, reporting and administration. Providers that meet this requirement will have a portal that makes use of visual graphics and wizards to facilitate administration at multiple operational levels. Scores for this capability are influenced positively by design of user experience and positive independent reviews, in addition to feedback via Gartner inquiry.

Multilingual Support

The ability to provide customers with local language support consistent with target service markets.

Multilingual support covers a number of internal functional areas, including agent desktop, supervisor and administrator portals, along with associated help files. Externally, interactive voice response (IVR) portals must be capable of multilingual voice responses and have the ability to transcode conversations for analytics. Providers that meet this requirement will have local language support for target service markets, but especially English, French (including Canadian French), Spanish (including Latin American Spanish) and German as a minimum.

Pricing and Contract Elasticity

Overall competitiveness of market pricing and ability for customers to flexibly add and delete active agent license counts.

A key operational benefit of CCaaS is the elasticity of service provision. This enables organizations to scale up and down their customer service application resources in line with the advisors required to meet seasonal demand. While this is more relevant in concurrent seat licensing than named-user licensing, the overall contract flexibility is a key reason why organizations adopt CCaaS in place of premises-based platforms. There is also a range of service charges for concurrent and named-user licensing, where some providers offer premium prices to match a premium service. Providers that meet this requirement will offer monthly contract elasticity with no penalties for overconsumption, at market rates for the quality of service they offer. Scores for this capability are also influenced by Gartner Peer Insights.

Carrier Services

The vendor's ability to provide telecom connectivity as part of the contact center service, including competitive voice, messaging and data services.

The optimum business model for CCaaS is for the provider to include telecom connectivity as part of the overall service fee. An obvious benefit here can be seen when an administrator wants to increase the number of callers in queue. Without inclusion of telecom connectivity, the administrator will need to connect with the telecom provider as well to effect a desire to increase queue length. CCaaS providers with telecom licenses can buy minutes at wholesale rates, enabling them to be more competitive with customers' outbound calling requirements than CCaaS providers with just partnership arrangements. Interconnect agreements for carrier connections are key to providing higher service levels of overall availability. Providers that meet this requirement will have a telecom license for the markets they operate in. Enabling "bring your own telco" is commendable but does not replace a license with strong carrier interconnect agreements. Scores for this capability are also influenced by Gartner Peer Insights.

SLAs and Trust Center

The vendor's ability to support meaningful service-level agreements (SLAs) and provide open visibility into its performance.

Trust is one of the greatest hurdles for customer service organizations to overcome. “Can this provider manage my customer service platform better than I can?” is a question that needs to be answered effectively before the critical mass starts to adopt CCaaS. SLAs vary between 99.95% and 99.999%. The variation in service level is, in part, connected with data center architecture and carrier services employed. Organizations need to ensure that CCaaS providers are demonstrable with their service levels, not just of the platform but of connectivity to key business applications. Providers that meet this requirement will have a minimum of 99.99% availability as a standard and with it a clear set of compensation payments for nonperformance. Providers that exceed this requirement will also publish their SLAs publicly on their websites.

Customer Service and Support

The vendor’s ability to support its customers and partners effectively — directly, with partners and through communities.

CCaaS providers propose to take on much of the responsibility for managing the customer service platform, which in turn reflects the increase in costs over simply providing the software. In outsourcing support of the contact center platform, application leaders for customer service need clear demonstrability of the provider’s ability to deliver as good as, if not better, support than the organization can. CCaaS providers should also have established active communities where customers can collaborate with one another and with partners, as well as track service development requests with their CCaaS provider. Providers that meet or exceed this requirement will consistently have strong scores for customer service and support on Gartner Peer Insights, and a strong demonstrable community. Providers that are the subject of client dissatisfaction via Peer Insights, client inquiry or public sources will fall short in this capability.

Use Cases

High-Volume Customer Call Center

This use case addresses one of the primary goals clients strive to attain with CCaaS, which is to replace their legacy call center platform as a system of record.

While we expect that CCaaS platforms will have the ability to provide multichannel and WEM capabilities, the primary focus is on the scale and operational effectiveness of a call center platform. Where there are large volumes of calls to manage, organizations need platforms that can scale, support high resilience levels and deliver best-of-breed experiences. Automation plays a major role in initial customer response, to deflect simple responses and to classify and schedule responses that need advisor assistance. For this use case, there is a strong focus on carrier services and customer service levels.

Customer Engagement Center

This use case addresses the need for deeper integration with business application software platforms and support for digital channels to provide a strong customer experience.

A strong customer service experience is achieved with the tight integration of business application software for stronger customer engagement and workforce engagement management (WEM) for stronger employee experience. The goal of the customer engagement center (CEC) is to provide reactive service to customers as they move between communications channels (including social media) while retaining the customers' context. But the goal is also to apply the appropriate business rules to determine the next best action, information or process with which to engage the customers. In this use case, there is a strong focus on multichannel contact management and WEM.

Agile Contact Center

This use case focuses on the need for customer service managers to rapidly change the setup of the customer service environment in line with operational and budgetary needs.

Agile contact centers tend to be deployed for more specific customer service requirements – to rapidly introduce new communications channels, or to set up a support function for a new product or service. In most cases, organizations will already have other contact center technologies deployed. However, the agile suite offers greater flexibility in terms of speed of deployment, scalability and service elasticity. For this use case, there is a strong focus on customer portals and contract elasticity.

North America

This is a generic use case for North America with a strong focus on multichannel contact management.

To be visible in this use case, providers had to confirm that their revenue for this market was greater than 10% of overall revenue at the end of calendar year 2020. Evidence of sales, marketing and operational presence in the U.S. and Canada – as indicated by office addresses, website collateral and numbers of sales and operational support people – was also considered as part of this use case.

Western Europe

This is a generic use case for Western Europe with a strong focus on standards and compliance.

To be visible in this use case, providers had to confirm that their revenue for this market was greater than 10% of overall revenue at the end of 2020. Evidence of sales, marketing and operational presence in multiple European countries – as indicated by office addresses, website collateral, and numbers of sales and operational support people – was also considered as part of this use case.

Vendors Added and Dropped

Added

None were added

Dropped

Vocalcom

Inclusion Criteria

This Critical Capabilities research uses the same inclusion criteria as its companion Magic Quadrant. To qualify for inclusion, providers needed to fulfill all of the following requirements:

- A minimum of \$36 million in total revenue, as of 31 December 2020, must have been generated from concurrent licenses, named-user licenses and application consumption. This revenue had to come from enterprise customers and not include BPO or contact center outsourcing business. We required a letter of attestation from the business leader responsible for profit/loss of the provider's CCaaS offering certifying that the minimum revenue requirement was met.
- Sales, market and operational presence had to be demonstrated in North America and Europe and, optionally, any of the following regions:
 - South America (including Central America)
 - Asia/Pacific
 - Middle East and Africa

- Services must be offered primarily on multitenant platforms and on multiple instances of software, as required to meet the needs of customers across multiple geographies. (The term “multitenant software” relates to a service provider’s operation of a single software instance on which multiple customers can be supported.) To be included in this Magic Quadrant, vendors needed to show how their CCaaS platform is designed to support organizations with customer service teams serving anything from 25 users to many thousands of users. This must be evidenced by the vendor’s strategic intent for its CCaaS platform, contract reviews by Gartner analysts, and analysis of the company sizes associated with the vendor on Gartner’s Peer Insights and Digital Markets platforms. Providers also had to demonstrate how, irrespective of the architecture employed, their software inherently provides all customers with transparent access to the same set of services irrespective of location. Additionally, software updates must be simultaneously “pushed” to all customers, regardless of location, thus avoiding the “major upgrade” cycles typical of on-premises or single-tenant hosted/managed deployments.
- Contact center seat license ownership must be retained by the service provider. Customer contracts must allow for elasticity of usage (enabling customers to scale agent licenses or consumption up or down as usage demands change).
- At least 50% of CCaaS service revenue must be from inbound voice agent licenses (automatic call distribution [ACD]). Other licenses may include outbound voice (predictive, progressive or preview dialing) or routing of digital interactions (including email, web chat, SMS, social media, video or other channels). They may also include interactive voice response (IVR)/voice portal, WEM, call and/or desktop recording and analytics, knowledge management, workflow routing of noninteraction work items, integration with customer tracking (CRM) and other enterprise databases, and real-time and historical tracking and analytics. The service must provide prepackaged agent, supervisor and reporting applications, although their environments may be extended using a GUI-based interface or open APIs.

Gartner’s definition of CCaaS excludes:

- Hosted contact center services, in which system hardware and software are dedicated to individual customers.
- Managed services, in which hardware and software are dedicated to a particular customer and run on that customer’s premises or third-party data center, but are managed by a third-party service provider.
- Enterprise server software repurposed as CCaaS offerings.

Table 1: Weighting for Critical Capabilities in Use Cases

(Enlarged table in Appendix)

Critical Capabilities ↓	High-Volume Customer Call Center ↓	Customer Engagement Center ↓	Agile Contact Center ↓	North America ↓	Western Europe ↓
Data Center Design	10%	5%	5%	5%	5%
Multichannel Contact Management	0%	15%	10%	15%	10%
Application Marketplace Integration	0%	15%	5%	5%	5%
Standards and Compliance	10%	5%	5%	10%	10%
Workforce Engagement Management	10%	15%	10%	10%	10%
Virtual Customer Assistant	5%	10%	5%	5%	5%
Customer Administration Portal	10%	5%	20%	10%	10%
Multilingual Support	5%	5%	5%	5%	10%
Pricing and Contract Elasticity	10%	5%	15%	5%	5%
Carrier Services	15%	5%	5%	10%	10%
SLAs and Trust Center	15%	5%	5%	10%	10%
Customer Service and Support	10%	10%	10%	10%	10%
As of 4 June 2021					

Source: Gartner (August 2021)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighted in terms of its relative importance for specific product/service use cases.

Each of the products/services that meet our inclusion criteria has been evaluated on the critical capabilities on a scale from 1.0 to 5.0.

Critical Capabilities Rating

Table 2: Product/Service Rating on Critical Capabilities

(Enlarged table in Appendix)

Critical Capabilities	8x8	Amazon Web Services	Content Guru	Evolve IP	Five9	Genesys	Lifesize	Vonage	NICE CXone	Odigo	Talkdesk	Worldline
Data Center Design	3.1	3.9	3.5	3.0	3.5	3.8	3.0	3.5	3.5	3.2	3.5	2.8
Multichannel Contact Management	3.5	3.0	3.8	3.5	3.7	3.7	3.1	2.9	3.6	3.7	3.7	3.1
Application Marketplace Integration	3.0	4.2	3.0	2.5	3.5	4.3	2.3	2.8	3.8	2.5	4.0	2.3
Standards and Compliance	3.2	4.0	3.0	3.3	4.0	4.0	3.0	3.0	3.7	3.5	3.5	3.0
Workforce Engagement Management	3.3	3.0	3.4	3.3	3.8	3.9	3.7	3.0	4.7	3.2	3.7	3.0
Virtual Customer Assistant	3.0	3.8	3.6	3.0	3.6	3.4	2.8	3.1	3.7	3.3	3.5	3.1
Customer Administration Portal	2.8	3.5	4.1	3.5	4.0	3.8	3.5	3.5	3.7	4.0	3.5	4.0
Multilingual Support	3.0	3.0	3.7	2.5	3.2	4.0	3.1	2.5	3.5	3.5	2.7	2.7
Pricing and Contract Elasticity	3.7	3.5	3.5	3.5	3.5	3.0	3.5	3.0	3.5	3.8	3.1	3.7
Carrier Services	3.3	4.0	4.3	3.3	3.2	3.1	3.2	3.2	3.6	3.0	3.0	2.9
SLAs and Trust Center	3.3	4.0	3.8	3.8	3.2	4.0	3.0	4.5	3.3	3.0	4.0	3.2
Customer Service and Support	3.5	3.7	4.0	3.5	4.5	3.7	4.3	4.3	3.8	3.5	4.4	3.5
As of 4 June 2021												

Source: Gartner (August 2021)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3: Product Score in Use Cases

(Enlarged table in Appendix)

Use Cases	8x8	Amazon Web Services	Content Guru	Evolve IP	Five9	Genesys	Lifesize	Vonage	NICE CXone	Odigo	Talkdesk	Worldline
High-Volume Customer Call Center	3.25	3.70	3.73	3.35	3.63	3.66	3.33	3.47	3.69	3.36	3.53	3.21
Customer Engagement Center	3.24	3.58	3.59	3.19	3.69	3.78	3.19	3.21	3.81	3.29	3.67	3.04
Agile Contact Center	3.24	3.54	3.71	3.33	3.74	3.67	3.36	3.30	3.73	3.51	3.56	3.32
North America	3.26	3.59	-1.00	3.32	3.69	3.73	3.27	3.33	3.72	-1.00	3.61	-1.00
Western Europe	3.23	3.59	3.69	3.27	-1.00	3.75	3.27	3.31	3.72	3.38	3.56	3.14
As of 4 June 2021												

Source: Gartner (August 2021)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

Document Revision History

[Critical Capabilities for Contact Center as a Service - 10 November 2020](#)

[Critical Capabilities for Contact Center as a Service - 16 October 2019](#)

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[How Products and Services Are Evaluated in Gartner Critical Capabilities](#)

[Magic Quadrant for Contact Center as a Service](#)

[Forecast Analysis: Contact Center, Worldwide](#)

[Market Guide for Contact Center Infrastructure](#)

[Customer Service and Support Technology Primer for 2021](#)

[Quick Answer: Do I Need to Upgrade My Phone System to Upgrade to CCAas?](#)

[How to Negotiate a Favorable Contact Center as a Service Contract](#)

[Toolkit: RFP Template for Contact Center and Workforce Engagement Management Applications](#)

© 2021 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)."

Table 1: Weighting for Critical Capabilities in Use Cases

Critical Capabilities	High-Volume Customer Call Center	Customer Engagement Center	Agile Contact Center	North America	Western Europe
Data Center Design	10%	5%	5%	5%	5%
Multichannel Contact Management	0%	15%	10%	15%	10%
Application Marketplace Integration	0%	15%	5%	5%	5%
Standards and Compliance	10%	5%	5%	10%	10%
Workforce Engagement Management	10%	15%	10%	10%	10%
Virtual Customer Assistant	5%	10%	5%	5%	5%
Customer Administration Portal	10%	5%	20%	10%	10%
Multilingual Support	5%	5%	5%	5%	10%
Pricing and Contract Elasticity	10%	5%	15%	5%	5%

Critical Capabilities ↓	High-Volume Customer Call Center ↓	Customer Engagement Center ↓	Agile Contact Center ↓	North America ↓	Western Europe ↓
Carrier Services	15%	5%	5%	10%	10%
SLAs and Trust Center	15%	5%	5%	10%	10%
Customer Service and Support	10%	10%	10%	10%	10%
As of 4 June 2021					

Source: Gartner (August 2021)

Table 2: Product/Service Rating on Critical Capabilities

<i>Critical Capabilities</i>	<i>8x8</i>	<i>Amazon Web Services</i>	<i>Content Guru</i>	<i>Evolve IP</i>	<i>Five9</i>	<i>Genesys</i>	<i>Lifesize</i>	<i>Vonage</i>	<i>NICE CXone</i>	<i>Odigo</i>	<i>Talkdesk</i>	<i>Worldline</i>
Data Center Design	3.1	3.9	3.5	3.0	3.5	3.8	3.0	3.5	3.5	3.2	3.5	2.8
Multichannel Contact Management	3.5	3.0	3.8	3.5	3.7	3.7	3.1	2.9	3.6	3.7	3.7	3.1
Application Marketplace Integration	3.0	4.2	3.0	2.5	3.5	4.3	2.3	2.8	3.8	2.5	4.0	2.3
Standards and Compliance	3.2	4.0	3.0	3.3	4.0	4.0	3.0	3.0	3.7	3.5	3.5	3.0
Workforce Engagement Management	3.3	3.0	3.4	3.3	3.8	3.9	3.7	3.0	4.7	3.2	3.7	3.0

Virtual Customer Assistant	3.0	3.8	3.6	3.0	3.6	3.4	2.8	3.1	3.7	3.3	3.5	3.1
Customer Administration Portal	2.8	3.5	4.1	3.5	4.0	3.8	3.5	3.5	3.7	4.0	3.5	4.0
Multilingual Support	3.0	3.0	3.7	2.5	3.2	4.0	3.1	2.5	3.5	3.5	2.7	2.7
Pricing and Contract Elasticity	3.7	3.5	3.5	3.5	3.5	3.0	3.5	3.0	3.5	3.8	3.1	3.7
Carrier Services	3.3	4.0	4.3	3.3	3.2	3.1	3.2	3.2	3.6	3.0	3.0	2.9
SLAs and Trust Center	3.3	4.0	3.8	3.8	3.2	4.0	3.0	4.5	3.3	3.0	4.0	3.2
Customer Service and Support	3.5	3.7	4.0	3.5	4.5	3.7	4.3	4.3	3.8	3.5	4.4	3.5
As of 4 June 2021												

Source: Gartner (August 2021)

Table 3: Product Score in Use Cases

<i>Use Cases</i>	<i>8x8</i>	<i>Amazon Web Services</i>	<i>Content Guru</i>	<i>Evolve IP</i>	<i>Five9</i>	<i>Genesys</i>	<i>Lifesize</i>	<i>Vonage</i>	<i>NICE CXone</i>	<i>Odigo</i>	<i>Talkdesk</i>	<i>Worldline</i>
High-Volume Customer Call Center	3.25	3.70	3.73	3.35	3.63	3.66	3.33	3.47	3.69	3.36	3.53	3.21
Customer Engagement Center	3.24	3.58	3.59	3.19	3.69	3.78	3.19	3.21	3.81	3.29	3.67	3.04
Agile Contact Center	3.24	3.54	3.71	3.33	3.74	3.67	3.36	3.30	3.73	3.51	3.56	3.32
North America	3.26	3.59	-1.00	3.32	3.69	3.73	3.27	3.33	3.72	-1.00	3.61	-1.00
Western Europe	3.23	3.59	3.69	3.27	-1.00	3.75	3.27	3.31	3.72	3.38	3.56	3.14
As of 4 June 2021												

Source: Gartner (August 2021)