Agent Management Buyers Guide

Software Provider and Product Assessment

iSG Research™

Agent Management

While contact center operations require very specific technology for things like interaction routing and analysis, customer support is fundamentally a business about managing labor. For decades, contact centers have tolerated attrition rates of as much as 100%—even higher in some sectors. The fundamental tension in centers between maintaining high service levels and manageable costs is almost entirely due to the fact that the labor pool is always in flux. The costs to hire, train, motivate and retain qualified agents dwarf every other ongoing expense, including the cost of technology.

This is a key reason why artificial intelligence technology has become so exciting to software providers and buyers in this space. AI use cases for contact centers have promised to both dramatically increase agent productivity *and* reduce the number of interactions that need to reach agents. The result has been a shift in the focus of agent management technology away from long-term fundamentals like scheduling and monitoring and towards tools that use more automation to do things like evaluate interactions in bulk to look for performance anomalies. Today, agent management is more focused on analytics and automation than enabling shift trading or optimized scheduling. Ventana Research asserts that by 2026, agent training and skill development will primarily be self-directed, using automated scheduling and AI assessments.

Agent Management
Market Assertion

By 2026, agent training and skill development will be primarily self-directed, using automated scheduling and AI assessments.

Keith Dawson
Director of Research, Customer Experience

ISG Research™

ISG Research defines the Agent Management category to include traditional tools and their successors: systems used to schedule, evaluate, motivate and manage contact center agents, including workforce management, quality measurement, agent desktops, agent performance and agent experience. Many of those elements overlap, and all have a significant analytic component. They also bleed into automation, self-service, customer feedback and knowledge management.

Agents are still the foundation of contact center processes that impact every customer experience. These processes must be able to operate from any location at any time, and agents must be able to respond to customers via any communication channel for any request. Optimized contact center processes ensure agents are empowered to take action on behalf of the customer and are supported by technology that supplements, guides and extends the productive capacity of the workforce. During challenging periods, contact centers must be ready to operate in a scalable way to meet spikes of inbound demand.

Workforce flexibility requires a focus on digital readiness and tools that engage the agents and allow them to adapt and support customers as needed during disruptions to the standard working environment. Focusing on workforce agility enables enterprises to adapt, shift focus and continue to meet customer service expectations even during challenging periods.

The physical work environment impacts the agent experience, and enterprises must be prepared to support agents who work from home or other non-centralized locations. Perhaps even more important is the digital work environment—the agent desktop and other tools available to agents no matter where they are located. The quality of these tools helps determine the level of satisfaction an agent has while engaging with customers. The complexity of legacy systems can be a detriment to agent performance and, subsequently, their retention.

> **When the agent experience is hindered by available tools, customer service interactions suffer.**

When the agent experience is hindered by available tools, customer service interactions suffer. Optimizing the agent experience is a critical step in a superior customer experience. Several factors in the work environment are usually the issue, among them the tools agents use to work with customers and resolve issues. Key among those tools is the agent desktop, which is the digital center of customer interactions and the gateway that provides access to individual applications the agent needs to deliver service.

The desktop supports direct dialogue with customers and provides the agent visibility into—and information about—all the interactions that comprise the customer journey. It is essential for effective dialogue with the customer and allows agents to monitor and assist intelligent virtual agents. When properly utilized, the desktop acts as the hub that provides fast, easy access to all applications the agent needs to serve customers.

Enterprises have focused on optimizing the customer experience by using voice of the customer tools to understand customer sentiment. In the same way, enterprises are beginning to look at the value of listening to the voice of the agent, encouraging agents to identify gaps in tools, skills and the work environment instead of focusing on targeted efficiency coaching.

Elevating agent concerns to the level of importance of customer concerns accomplishes several important goals. It demonstrates to agents that the enterprise cares about their challenges and needs. It enables the organization to target specific issues impacting the comfort, satisfaction and efficiency of subsets of agents down to the individual. And when agent feedback relates to the tools they use, improving those tools can help improve agent recruiting, motivation, performance and retention, which in turn improves the customer experience.

An agent's ability to provide memorable, personalized customer experiences is often hampered by technological limitations. Many enterprises still use legacy agent desktops and customer relationship management systems, creating challenges for contact centers. Today's desktops should provide a single point of access to all applications used in customer interactions. Unfortunately, many agents need to work across multiple applications to resolve customer issues.

An agent desktop must unify disparate data sets to empower the agent to respond to customer needs. However, in many instances, agents are forced to navigate to multiple databases separately to resolve customer issues. There is ample evidence that limited agent visibility of the customer's history of interactions can result in frustration and dissatisfaction. This constraint reduces responsiveness and the ability to personalize agent-customer interactions.

When seeking to optimize the customer experience, enterprises have traditionally focused on metrics related to interaction durations or transaction outcomes rather than metrics related to the customer's experience. The historical focus on average handling time and first-call resolution has led to management efforts that push agents to operate quickly and handle more interactions and has encouraged coaching focused on improving agent operations within the parameters of inadequate desktop technology.

The adequacy of data available within the agent desktop has a direct impact on the agent's experience, as does the design and usability of the desktop. Clumsy and cluttered desktops can be improved by deploying current web- and cloud-based applications and adopting a unified desktop approach. Today's agent desktops can be configured to match the particular skills and experience of the agent using the system. For example, an inbound interaction can be routed to an agent with the appropriate skills to respond to the known issue, who is provided with relevant customer information. There is no need to search across systems while assisting the customer. In fact, "intelligent" agent desktops anticipate what the customer might need and prompt the agent using predictive intelligence and machine learning technology.

> **An optimally configured agent desktop with convenient access to all necessary information simplifies the agent's work, improving the experience for the agent and the customer.**

An optimally configured agent desktop with convenient access to all necessary information simplifies the agent's work, improving the experience for the agent and the customer. Today's agent desktops connect to information sources from across the enterprise and provide dynamically generated information and potential responses derived from the context of interaction. The desktops also automatically channel

the agent response to the customer's preferred mode of interaction and provide visibility into customer journey touchpoints across connection channels. When the agent desktop rests on a unified customer data platform, it quickly provides the contextual information an agent needs to personalize customer interactions.

Providing agents with the necessary tools to improve the customer experience can enhance the agent experience. Agents who feel empowered by their tools rather than at odds with the technology are more likely to deliver better customer experiences and will be less frustrated, fatigued and burned out. Furthermore, today's systems provide performance analytics to share up-to-date information with the agent on their performance and suggest areas for improvement.

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Agent management offerings have expanded, incorporating features that support agent guidance and assistance; gamification; collaboration; the use of AI for interviews, hiring and evaluations; workflows and automation; remote or hybrid workers; and analytics with more sophisticated key performance indicators. ISG Research believes that the necessity of agents, whether human or machine-based, requires a focus on agent management. Some software providers are moving faster than others to recognize and implement the shift to benefit customer engagement.

With the agent pool now often dispersed from the main location, centers need different collaboration and communication tools so agents can work in teams and be adequately coached by supervisors. They need things like video for internal meetings and training, and the enterprise needs process automation systems to ensure that out-of-sight agents follow set procedures and do not become disconnected from the overall strategy

This Buyers Guide research examined software providers that offer agent management systems independently and in packages that include contact center routing features. Most independent providers concentrate on the agent experience without offering interaction routing or any communications or telephony aspects for operations. In fact, many providers that offer complete platforms use specialists to deliver those capabilities via white label or original equipment manufacturer relationships to contact centers. It is more likely that a contact center software provider with a routing platform will use third-party agent management tools than a proprietary system. Buyers should investigate which agent management provider is aligned with or embedded within which contact center routing platform.

Enterprises should note that the term "agent management" as we define it is very closely related to common industry terms such as "workforce optimization," "workforce engagement

management" and "agent performance optimization." We believe that our definition presents the clearest guide to the specific capabilities required for effectively running the agent portion of a contact center and that other industry definitions, while useful in certain contexts, do not provide a complete picture of the full spectrum of needs for today's workforce.

The ISG Buyers Guide™ for Agent Management evaluates products such as workforce management (primarily scheduling agents and forecasting volume), quality measurement (interaction recording, agent evaluation, coaching and performance measurement), agent experience and feedback, agent performance management and agent desktop features. To be included in this Buyers Guide, products must include workforce management, quality management and performance measurement, at a minimum.

This research evaluates the following software providers that offer products that address key elements of agent management as we define it: 8x8, Alvaria, AWS, Calabrio, Content Guru, Five9, Genesys, Nextiva, NICE, Odigo, Playvox, Salesforce, Talkdesk, UJET and Verint.

Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

> " **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business requirements in any enterprise.**

The ISG Buyers Guide™ for Agent Management is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for agent management software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for agent management to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of agent management technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and deployment

time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of agent management software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating agent management systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. <u>Define the business case and goals.</u>

   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.

2. <u>Specify the business needs.</u>

   Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.

3. <u>Assess the required roles and responsibilities.</u>

   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.

4. <u>Outline the project's critical path.</u>

   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.

5. <u>Ascertain the technology approach.</u>

   Determine the business and technology approach that most closely aligns to your enterprise's requirements.

6. <u>Establish software provider evaluation criteria.</u>

   Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.

7. <u>Evaluate and select the technology properly.</u>

   Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.

8. <u>Establish the business initiative team to start the project.</u>

   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

## Overall Scoring of Software Providers Across Categories

The research finds NICE atop the list, followed by Verint and Genesys. Companies that place in the top three of a category earn the designation of Leader. NICE has done so in seven categories; Genesys in five; Verint in three; Calabrio and Talkdesk in two; and Content Guru and Playvox in one.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

Agent Management
Overall

Providers	Grade	Performance	
NICE	A-	*Leader*	83.8%
Verint	A-	*Leader*	82.3%
Genesys	B++	*Leader*	81.1%
Calabrio	B++		79.5%
Content Guru	B++		79.2%
Salesforce	B++		77.1%
Talkdesk	B++		75.5%
Five9	B+		72.9%
Playvox	B+		69.4%
8x8	B		65.0%
AWS	B		64.9%
Nextiva	B		63.2%
Odigo	B-		61.3%
UJET	B-		60.3%
Alvaria	C++		56.2%

Source: ISG Research
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The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

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ASSURANCE	EXEMPLARY

Customer Experience

Content Guru

Genesys

◆ NICE

Verint

◆ Salesforce

Calabrio

Playvox ◆

◆ Talkdesk

8x8 ◆

AWS ◆

◆ Five9

◆ Alvaria   Odigo ◆

UJET ◆   Nextiva ◆

MERIT	INNOVATIVE

Product Experience

Source: ISG Research
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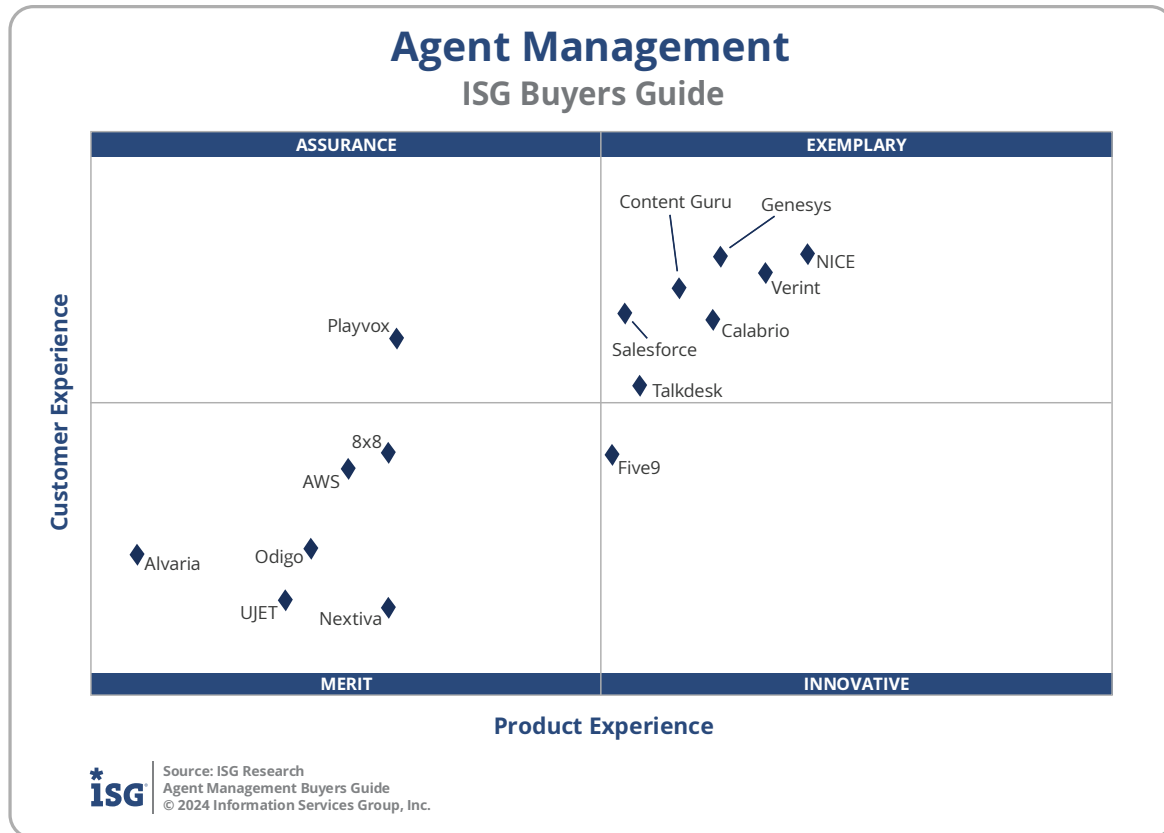
Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: Calabrio, Content Guru, Genesys, NICE, Salesforce, Talkdesk and Verint.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The provider rated Innovative is: Five9.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The provider rated Assurance is: Playvox.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: 8x8, Alvaria, AWS, Nextiva, Odigo and UJET.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise

or for a specific process. Although there is a high degree of commonality in how enterprises handle agent management, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (20%), Capability (25%), Reliability (15%), Adaptability (5%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. NICE, Verint and Genesys were designated Product Experience Leaders. While not a Leader, Calabrio was also found to meet a broad range of enterprise product experience requirements.

Agent Management
Product Experience

Providers	Grade	Performance
NICE	A-	*Leader* 66.8%
Verint	A-	*Leader* 65.5%
Genesys	B++	*Leader* 64.1%
Calabrio	B++	63.9%
Content Guru	B++	62.8%
Talkdesk	B++	61.6%
Salesforce	B++	61.2%
Five9	B++	60.7%
Playvox	B	53.0%
8x8	B	52.6%
Nextiva	B	52.3%
AWS	B	51.3%
Odigo	B-	49.5%
UJET	B-	48.7%
Alvaria	C++	44.0%

Source: ISG Research
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Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

Agent Management
Customer Experience

Providers	Grade	Performance
NICE	A-	*Leader* 17.0%
Genesys	A-	*Leader* 16.9%
Verint	A-	*Leader* 16.7%
Content Guru	A-	16.5%
Salesforce	B++	16.1%
Calabrio	B++	16.0%
Playvox	B++	15.7%
Talkdesk	B+	14.7%
Five9	B	13.7%
8x8	B	13.7%
AWS	B	13.4%
Odigo	B-	11.9%
Alvaria	B-	11.9%
UJET	C++	11.2%
Nextiva	C++	11.0%

Source: ISG Research
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The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are NICE, Genesys and Verint. These category leaders best communicate commitment and dedication to customer needs. While not Leaders, Content Guru and Calabrio were also found to meet a broad range of enterprise customer experience requirements.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for agent management in 2024, a software provider must be in good standing financially and ethically, have at least $25 million in annual or projected revenue (or at least $20 million for providers of exclusively agent management systems) verified using independent sources, sell products and provide support on at least two continents, and have at least 50 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 18 months.

Agent Management, evaluating the tools used to schedule, evaluate, motivate and manage contact center agents, including workforce management, quality measurement, agent desktops, agent performance, agent experience, automation and self-service and customer feedback.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant agent management products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
8x8	8x8 eXperience Communication Platform	n/a	August 2024
Alvaria	Alvaria	n/a	August 2024
AWS	Amazon Connect	n/a	September 2024
Calabrio	Calabrio One	n/a	September 2024
Content Guru	Content Guru Storm	n/a	September 2024
Five9	Five9 Intelligent CX Platform	n/a	September 2024
Genesys	Genesys Cloud CX, Pointillist	n/a	September 2024
Nextiva	Nextiva	n/a	August 2024
NICE	NICE CXone	24.3	July 2024
Odigo	Odigo	n/a	September 2024
Playvox	Playvox Workforce Engagement Management	n/a	September 2024
Salesforce	Salesforce Service	Summer '24	August 2024
Talkdesk	Talkdesk CX Cloud	n/a	September 2024
UJET	UJET	n/a	September 2024
Verint	Verint Open CCaaS Platform	n/a	September 2024

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	Agent Performance Management	Interaction Handling Analytics	Agent Feedback
ASC Technologies	Contact Center Analytics	Yes	Yes	No
Avoxi	Avoxi Platform	No	Yes	Yes
Callminer	Eureka Platform	Yes	Yes	Yes
Eleveo	Eleveo Platform	Yes	Yes	Yes
EvaluAgent	EvaluAgentCX	Yes	No	Yes
Intradiem	Intradiem Platform	Yes	No	No
Puzzel	Puzzel Contact Centre	Yes	Yes	No
Sharpen	Sharpen CCaaS	Yes	Yes	No
Vocalcom	Hermes360	Yes	Yes	No

About ISG Software Research

ISG Software Research provides authoritative market research and coverage on the business and IT aspects of the software industry. We distribute research and insights daily through our community, and we provide a portfolio of consulting, advisory, research and education services for enterprises, software and service providers, and investment firms. Our premier service, ISG Software Research On-Demand, provides structured education and advisory support with subject-matter expertise and experience in the software industry. ISG Research Buyers Guides support the RFI/RFP process and help enterprises assess, evaluate and select software providers through tailored Assessment Services and our Value Index methodology. Visit www.ventanaresearch.com to sign up for free community membership with access to our research and insights.

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