

Contact Centers for Retail Buyers Guide

Software Provider and Product Assessment

A photograph of three call center agents working at their desks. They are wearing headsets and looking at computer monitors. The agent in the foreground is a woman with long dark hair, wearing a brown blazer over a white top. The agent in the middle is a woman with short grey hair, wearing a yellow top. The agent on the left is a woman with dark skin, wearing a red top. They are all focused on their work.

EXECUTIVE
SUMMARY

***iSG** Research



Contact Centers for Retail

Contact centers have remained largely unchanged for decades, but are now undergoing a drastic overhaul in operations, interaction mechanics and underlying technology architectures. This is proving disruptive to both technology buyers and sellers. The most immediate cause is the explosion of new tools derived from artificial intelligence (AI) innovations. Contact centers have always operated as reactive, cost-sensitive entities purpose-built for a narrowly defined function. Now centers are being asked to expand core functions, re-task the human labor force, respond to customers and retailers in real time and

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Retailers have long used advanced analytics and personalization techniques derived from marketing technology, alongside traditional contact center tools, to maximize customer value at every stage of the consumer lifecycle.

use data for more sophisticated decision-making. In a short period, the foundational assumptions related to outfitting contact centers have been upended.

Retailers have been at the forefront of advanced service technology adoption even before the current AI development frenzy. Retailers have long used advanced analytics and personalization techniques derived from marketing technology, alongside traditional contact center tools, to maximize customer value at every stage of the consumer lifecycle. Today's advancements in data management, multichannel communications and analytics provide retailer contact centers with a deep toolkit for building customer value.

ISG Research defines Contact Center systems as the technologies responsible for routing customer interactions to an automated or live representative. The fundamental tool for routing voice interactions is the automated call distributor (ACD), software that connects to a telephony switching fabric and uses intelligence to ensure the call goes to the right

representative. The collection of essential contact center technology also includes an elaborate suite of applications used to manage the operations of the human workforce, including routine functions such as scheduling shifts, forecasting interaction volume and measuring the efficiency of people and teams. Both routing and agent management tools are generally found in unified software systems, and though it is rare, it is still possible to deploy many or all of the tools on-premises. Today's configurations are generally built for cloud deployment and fall under the industry rubric of CCaaS, or contact center as a service. Current tools have also expanded well beyond the core routing and agent productivity systems and now include very sophisticated analytics capabilities, workflow automations, advanced self-service systems and data integrations with adjacent tools, especially in the back office. AI innovations have also led to the creation of wholly new tools for managing quality, delivering knowledge and speeding interactions.



Contact centers were first developed as business entities almost 50 years ago, and for much of that time, core technology and operations remained fairly stable. Well into the digital era, the fundamentals of interaction routing and workforce optimization were standard practices, augmented but not displaced by incremental innovations in expanding the channel landscape, more powerful analysis and better ways to measure performance.

The past three years have seen more disruptive innovation than centers have experienced to date. Much is made of the importance of AI in creating entirely new tools, and indeed, we assert that by 2027, three-quarters of contact centers will have introduced multiple GenAI applications into their service processes for routing, chatbots and agent assistance. But less discussion surrounds the impact of outside providers entering the contact center software space from adjacent markets, especially the hyperscaler giants. When firms with R&D resources in the tens of billions of dollars enter a market, the incumbent players have little choice but to make peace with a changed environment and adapt. The result has been an expansion of choice. In the past, a buyer had to select the core call-routing engine and build a center's tech stack around that software provider's solution. In the new world, hyperscalers have commoditized the routing engine, allowing virtually anyone—buyer or another provider—to build a contact center infrastructure based on whichever software component is most important to them. So, a buyer committed to a particular CRM or case-tracking tool can start with those elements and build the center using the extensive integrations and partnership networks available. Or, they can work with software from the back office or marketing department and conform the center's systems to accommodate those applications.



This means that providers from many origin points can plausibly go to market with a software suite that serves the core needs of contact centers—routing and workforce management. Buyers then distinguish between options based on more broad-based needs, such as data management, back-office integration, conformity with existing legacy tools or something specific to the unique business or vertical market. In 2025, contact center buyers face more—and more complicated—choices than ever.

What retailers need is assurance of interoperability and clean, easy integrations. Most buyers appear to source technology from as few providers as possible, leaning toward suites for simplicity of administration. Most large and mid-sized platform providers encourage this by forging extensive partnership networks and app marketplaces that let buyers fill peripheral software needs with best-of-breed niche tools, with the assurance that the platform provider will coordinate the connections.



Retailers that have not purchased contact center systems since before the pandemic (which is most of them) are experiencing a different world: new providers, providers that have evolved focus and a set of functional capabilities that didn't exist five years ago. Business requirements have not advanced as quickly as technological innovation, so buyers are understandably reticent—even confused—about how to prioritize deployment of a new system. It doesn't help that many contact center buyers are now also sitting side-by-side with CX professionals who have different, parallel goals for software purchases, and are simultaneously under great pressure from executives to stay current on developing AI technologies (if that is even possible).

All of that said, what retailers really need to do is focus on two things: the foundational elements of yore, meaning routing and workforce tools, and the expanded universe of tools that support and extend its mission. Those would include advanced analytics, conversational AI for self-service, AI tools for automating quality and knowledge resources that feed the customer-facing AI.

Buyers also need assurance that when they take the leap into the realm of the new, they have concrete ROI metrics to back them up. Providers report a consistently high portion of AI-related sales riding atop detailed proof-of-concept trials. Some also indicate that the uptake for certain AI tools is correspondingly slow, as buyers wait for the proof points.

To meet these retailer's needs, today's contact center systems must incorporate key AI applications that make up the current "core" capabilities: information synthesis and delivery to customers and human agents, automating processes within the center and between departments and analyzing customer sentiment more deeply than just at the level of the interaction. Contemporary tools need to be strong in areas that were once peripheral, especially self-service and analytics.

The ISG Buyers Guide™ for Contact Center Retail evaluates software providers and products in key areas, including interaction routing (voice and digital), agent management, interaction handling analytics, automation and self-service, workflow automation and integration, AI/GenAI support and specific enterprise features related to the retail industry.

This research evaluates the following software providers offering products to address key elements of Contact Center Retail as we define it: 8x8, Aircall, Content Guru, Dialpad, Emplifi, Exotel, Five9, Genesys, Nextiva, NiCE, RingCentral, Salesforce, Sinch, Sprinklr, Talkdesk, Twilio, UJET, Verint, Vonage and Zendesk.



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



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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.

The ISG Buyers Guide™ for Contact Centers for Retail is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address retail enterprises' requirements for contact centers. 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 contact centers 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 contact center 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 contact center software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge retail enterprises to do a thorough job of evaluating contact center 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.



Key Takeaways

Retail contact centers are being reshaped by AI, cloud platforms and the demand for more personalized, real-time customer engagement. Core routing and workforce tools are now paired with analytics, automation and conversational AI to support multichannel service, optimize operations and maximize customer value across the consumer lifecycle. Retailers face an expanding set of choices and need interoperable platforms with clear ROI, making success dependent on solutions that balance foundational reliability with advanced AI-driven capabilities tailored to retail experiences.

Software Provider Summary

The research identifies NiCE, Verint and Genesys as the market leaders, with strengths across multiple categories, while providers such as Salesforce, Zendesk and Content Guru demonstrated targeted capabilities. Classification placed NiCE, Verint and Genesys in the Exemplary quadrant alongside providers including RingCentral, Talkdesk and Sprinklr. Providers such as Five9 were categorized as Innovative, 8x8, Twilio and UJET as Assurance, and providers such as Aircall, Nextiva and Vonage were rated as Merit. This segmentation highlights those that deliver the strongest balance of product and customer commitment.

Product Experience Insights

Product Experience accounted for 80% of the overall rating, with emphasis on capability, usability, reliability, adaptability and manageability. NiCE, Verint and Talkdesk emerged as Leaders, delivering strong retail-focused contact center capabilities, while Salesforce and RingCentral also demonstrated depth in specialized functions. Leaders distinguished themselves with breadth ensuring that their platforms can scale to complex retail requirements and support AI-driven personalization and advanced multichannel engagement.

Customer Experience Value

Customer Experience represented 20% of the evaluation, focused on validation and TCO/ROI. NiCE, Verint and Content Guru led in this category by demonstrating strong customer commitment, ROI frameworks and lifecycle support. Genesys and Salesforce also performed well, though just short of leadership. Providers that ranked lower often lacked depth in CX or transparent ROI support, making it harder to justify long-term investment.

Strategic Recommendations

Retailers should treat contact center selection as a strategic decision that balances core routing and workforce tools with advanced AI-driven capabilities for analytics, personalization and customer engagement. Retailers should prioritize platforms that ensure interoperability, simplify administration and deliver measurable ROI through proof-of-concept trials. Using the ISG Buyers Guide as a structured framework helps retailers evaluate providers consistently across product and customer experience, ensuring investments that improve efficiency, enhance loyalty and maximize customer lifetime value.



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. Define the business case and goals.
Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
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. Ascertain the technology approach.
Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
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. Establish the business initiative team to start the project.
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. Providers that place in the top three of a category earn the designation of Leader. NiCE has done so in seven categories, Verint in six, Genesys in three, Talkdesk, Content Guru in two and Dialpad in one category.

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.

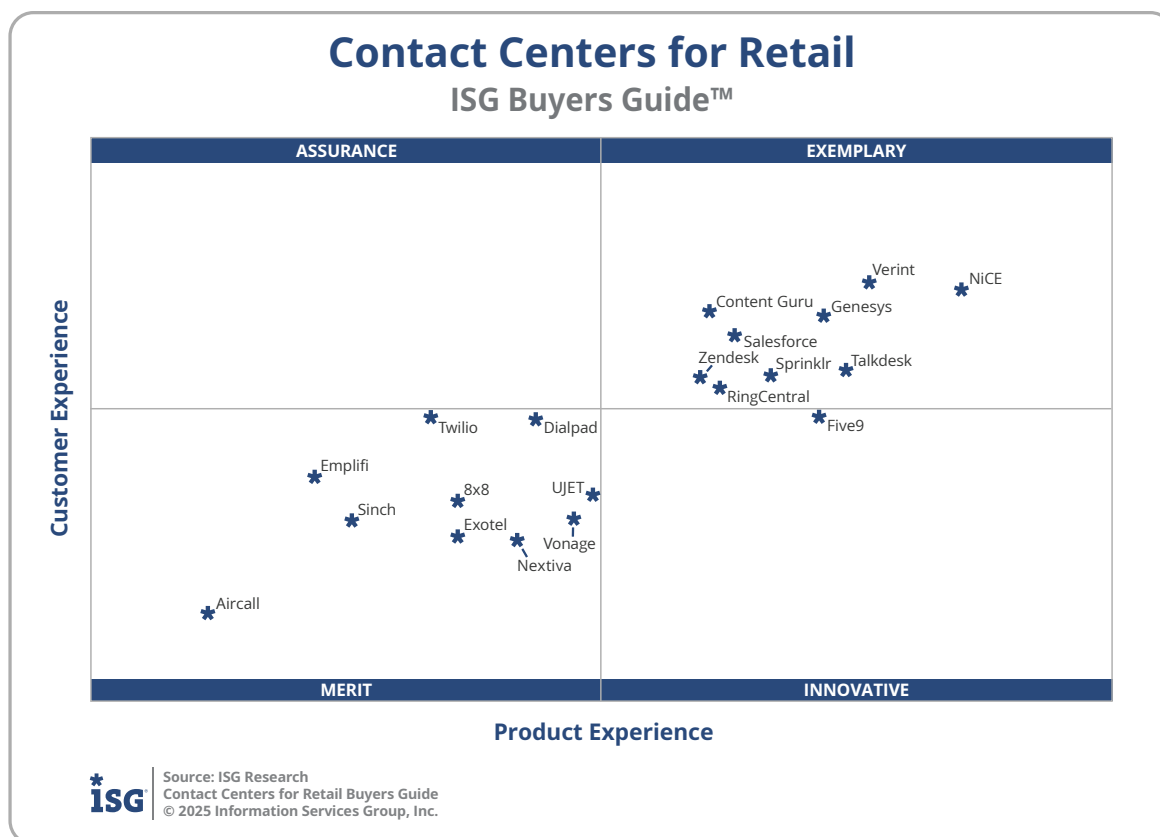
The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

Contact Centers for Retail Overall

Providers	Grade	Performance
NiCE	A-	Leader 81.4%
Verint	B++	Leader 79.0%
Genesys	B++	Leader 77.2%
Talkdesk	B++	77.0%
Five9	B++	75.6%
Sprinklr	B+	74.9%
Salesforce	B+	74.3%
Content Guru	B+	74.1%
RingCentral	B+	73.2%
Zendesk	B+	72.8%
UJET	B	68.3%
Dialpad	B	67.4%
Vonage	B	67.3%
Nextiva	B	65.4%
Twilio	B	64.9%
8x8	B	64.2%
Exotel	B	63.5%
Sinch	B-	61.0%
Emplifi	B-	60.6%
Aircall	C+	46.0%



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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: Content Guru, Genesys, NiCE, RingCentral, Salesforce, Sprinklr, Talkdesk, Verint and Zendesk.

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. No providers were rated in this category.

Merit: The categorization of software providers in Merit (lower left) represents those that did not surpass the thresholds for the Assurance, Exemplary or Innovative categories in Customer or Product Experience. The providers rated Merit are: 8x8, Aircall, Dialpad, Emplifi, Exotel, Nextiva, Sinch, Twilio, UJET and Vonage.

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 contact center, 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 retail 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 lifecycle 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 (12.5%), Capability (35%), Reliability (12.5%), Adaptability (10%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research. Nice, Verint and Talkdesk were designated Product Experience Leaders.

Contact Centers for Retail

Product Experience

Providers	Grade	Performance
NICE	B++	Leader 65.0%
Verint	B++	Leader 62.3%
Talkdesk	B++	Leader 61.6%
Genesys	B++	61.0%
Five9	B++	60.8%
Sprinklr	B+	59.4%
Salesforce	B+	58.3%
RingCentral	B+	57.9%
Content Guru	B+	57.6%
Zendesk	B+	57.4%
UJET	B	54.4%
Vonage	B	53.7%
Dialpad	B	52.6%
Nextiva	B	52.0%
8x8	B	50.3%
Exotel	B	50.3%
Twilio	B-	49.5%
Sinch	B-	47.2%
Emplifi	B-	46.1%
Aircall	C	33.2%



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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 lifecycle 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.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are Verint, NiCE and Content Guru. These category leaders best communicate commitment and dedication to customer needs. While not Leaders, Genesys and Salesforce 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.

Contact Centers for Retail

Customer Experience

Providers	Grade	Performance
Verint	A-	Leader 16.5%
NiCE	A-	Leader 16.4%
Content Guru	B++	Leader 16.1%
Genesys	B++	16.0%
Salesforce	B++	15.8%
Talkdesk	B++	15.4%
Sprinklr	B++	15.3%
Zendesk	B++	15.2%
RingCentral	B++	15.1%
Five9	B+	14.8%
Twilio	B+	14.8%
Dialpad	B+	14.7%
Emplifi	B+	14.0%
UJET	B+	13.8%
8x8	B	13.7%
Vonage	B	13.5%
Sinch	B	13.4%
Exotel	B	13.2%
Nextiva	B	13.2%
Aircall	B-	11.9%



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Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Contact Centers for Retail in 2025, a software provider must have a standalone software application (or suite of applications) that serves the operating needs of contact centers, including routing, workforce engagement, analysis and customer data management.

The enterprise must be in good standing financially and ethically, have at least \$50 million in annual or projected revenue, more than 50 employees, sell products and provide support on at least two continents and have at least 25 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 past 12 months. To qualify for evaluation in Contact Centers for Retail, the product should qualify through inclusion of the horizontal Buyers Guide and include capabilities that specifically support the vertical industry requirements as outlined in the capability model.

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 contact centers 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 Contact Center	9.16	April 2025
Aircall	Aircall Workspace Aircall Conversation Center	N/A	June 2025
Content Guru	storm CONTACT	N/A	June 2025
Dialpad	Dialpad Support	25.06.03	released June 2025
Emplifi	Emplifi Platform	N/A	June 2025
Exotel	Exotel Enterprise Contact Center	N/A	June 2025
Five9	Five9 Intelligent Cloud Contact Center Platform	N/A	June 2025
Genesys	Genesys Cloud CX Genesys Cloud EX	N/A	June 2025
Nextiva	Nextiva Unified Customer Experience Management Platform	N/A	April 2025
NiCE	NiCE CXone Mpower	N/A	June 2025
RingCentral	RingCX RingCentral Contact Center Enterprise	25.2	April 2025
Salesforce	Salesforce Service Cloud	Summer '25	June 2025
Sinch	Sinch Contact Pro	7.0 FP17 (7.0.17.0) Release	June 2025
Sprinklr	Sprinklr Service	20.4	June 2025
Talkdesk	Talkdesk CX Cloud	N/A	April 2025
Twilio	Twilio Customer Engagement Platform	Q1 2025	June 2025
UJET	UJET Platform	N/A	June 2025
Verint	Verint	2025R1	May 2025



Vonage	Vonage Fusion Vonage Contact Center	2025.1	February 2025
Zendesk	Zendesk Resolution Platform Zendesk for Contact Center	N/A	June 2025



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	Revenue	Customers	Geography	Capabilities
Gladly	Gladly Platform	No	Yes	Yes	No
Gorgias	Gorgias Helpdesk	Yes	Yes	Yes	No
Richpanel	Richpanel Help Desk Self Service	No	Yes	No	No
Dixa	Dixa Human + AI Platform	No	Yes	Yes	No
Zowie	Zowie AI Agent Zowie Inbox	No	Yes	No	No
Tidio	Lyro AI Agent	No	Yes	Yes	No
Quiq	AI Contact Center	No	Yes	Yes	No



About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

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About ISG

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