

## 2009 Quality Management/Liability Recording (WFO) Market Share Report

*DMG Consulting's annual **Quality Management/Liability Recording (WFO) Market Share Report** is widely recognized in the industry and financial community as the most comprehensive and accurate analysis of the contact center technology segment. The Report includes market share data for the industry's top vendors while providing end users and financial experts with the critical information they need to make the right investment decisions.*

The **2009 Quality Management/Liability Recording (WFO) Market Share Report** features a detailed revenue and market share analysis for the WFO market and its 45 vendors. The vendors profiled offer a suite of products for contact center quality assurance and recording, as well as supplementary modules for speech analytics, surveying, performance management, coaching, eLearning, and workforce management. The Report analyzes revenue and market share for total company performance, then breaks down the numbers by company, application area, technology sector (contact center and non-contact center), customer sector, revenue type and geography.

The recording and quality assurance market, including contact center and non-contact center uses of recording, has been an outstanding performer since 2001. In 2008, the WFO market grew by 14 percent while the contact center sector increased by only 4.3 percent. While this growth rate is more modest than in prior years, the contact center sector is outperforming many other IT software areas. Contact centers use recording to capture agent/customer call and screen activities for liability, verification, quality assurance and to feed into analytics applications. Enterprise use of recording is growing; the traditional uses are for contact centers, trading floors, first responders and air traffic control, but in recent years, recording has expanded to address video surveillance solutions (video-based recording and analytics) to protect buildings and infrastructure and branch/back-office communications and activities. Enterprise use of recording will continue to broaden as companies discover more ways that it can be used to reduce their exposure to risk.

This Report provides growth comparisons for 2008 and 2007 for the market, technology sectors, and contact center and non-contact center views. The Report includes five-year revenue trend analyses for total company GAAP revenue, contact center WFO segment, geographies and verticals. It also includes revenue and market share broken down by hardware/software/services and by geography for the market and individual vendors. This Report is essential for vendors and investors who want to thoroughly understand the current status and future performance of the 45-plus competitors in this dynamic growth market.

### Key Reasons to Buy This Report

- Obtain the most comprehensive, accurate and current market share analysis of the quality management/liability recording (WFO) market.
- Learn how the top 21 vendors in the market performed in all categories for 2008—total GAAP, contact center, non-contact center, security, applications and geography.
- See the trends and applications that fueled the growth in 2008 and how each vendor performed during the past five years.
- Understand the market trends affecting growth in the global market and the impact of the recession.
- Examine the financial performance of the industry's newest recording applications.
- Learn where contact center managers are really investing their money.

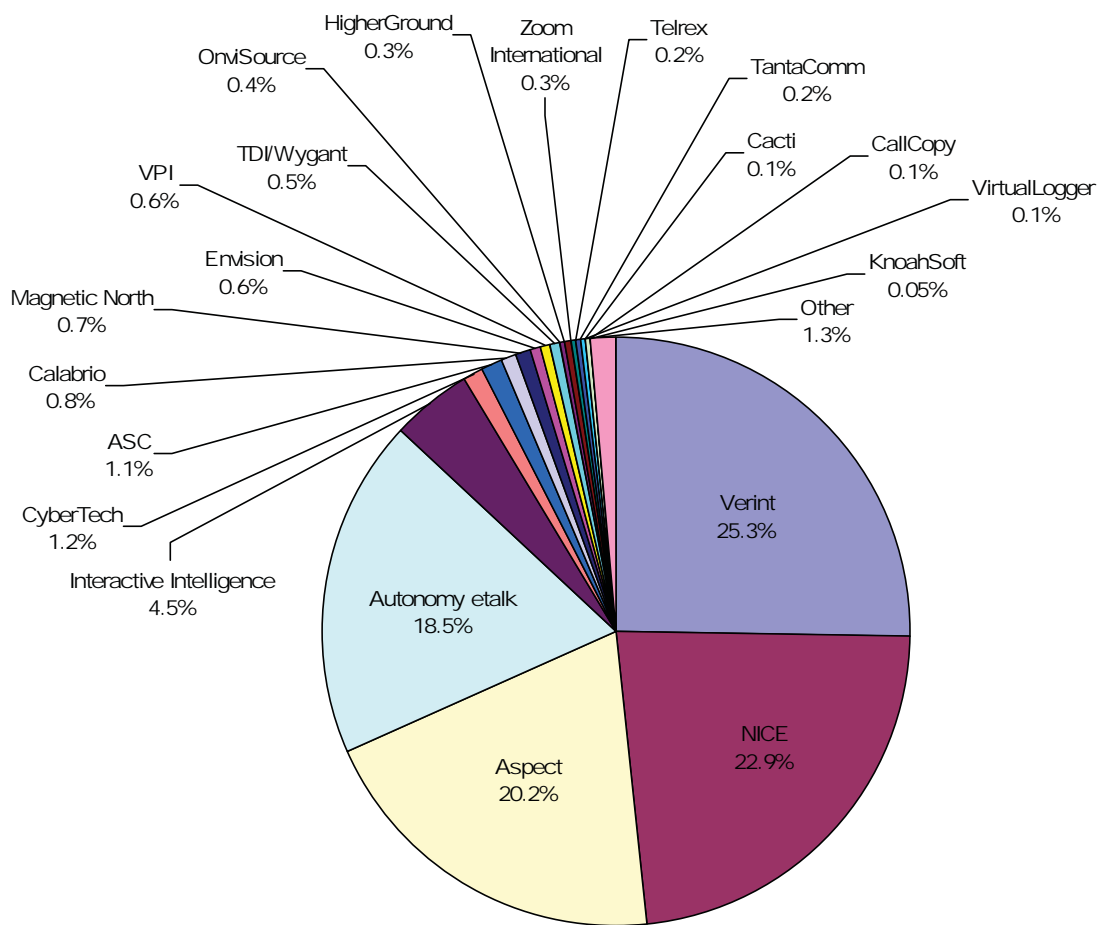
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To order a copy of the **2009 Quality Management/Liability Recording (WFO) Market Share Report**, contact Deborah Navarra at 516-628-1098 or [deborah.navarra@dmgconsult.com](mailto:deborah.navarra@dmgconsult.com). You may also purchase the Report online at [www.dmgconsult.com](http://www.dmgconsult.com).

## Report Highlights

- The quality management/liability recording market grew organically by 14 percent. Increased spending in the security sector contributed to this growth.
- The contact center segment increased by 4.3 percent, from \$1,019.3 million in 2007 to \$1,062.8 million in 2008.
- The contact center grew by a CAGR of 21% between 2004 and 2008.
- For 2008, back-office/branch WFO revenue hit \$54.8 million.
- Middle East and Africa had the largest CAGR, 55.1%, between 2004 and 2008; however, North America continued to dominate with \$881.9 million of the overall market.
- In 2008, the market saw increased activity in Asia, with efforts being made to open up the Chinese marketplace.
- Verint and NICE continue to dominate the market; however, almost all of the other 43 vendors are profitable and continue to grow.

Sample Figure: Total Company GAAP Revenue and Market Share for All QM Recording-Related Vendors Chart for 2008



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