

## Abstract: 2009 Quality Management/Liability Recording Mid-Year Market Share Report

DMG Consulting's **2009 Quality Management/Liability Recording Mid-Year Market Share Report** offers a detailed revenue and market share analysis of the Quality Management/Recording (also known as Workforce Optimization or WFO) technology segment for the first six months of 2009. This Report addresses revenue and market share for the 45-plus leading and contending vendors who offer a suite of products in this space, along with supplementary modules including Performance Management, Speech Analytics, Surveying, Coaching, eLearning and Workforce Management. This Report is vital for vendors and investors looking to understand the current and future performance of this highly competitive market and the position of each competitor.

After eight straight years of market growth, the first six months of 2009 saw a decrease in revenue for many segments of the WFO market, from contact center recording to quality assurance applications. While WFO performance was not stellar, it still outpaced the majority of other contact center and IT segments. Overall revenue for vendors fell by 1.6%, from \$1,336.2 million in the first half of 2008 to \$1,315.5 million in the first half of 2009. DMG expects that full-year 2009 revenue will be flat or will shrink 1% to 2% as compared to 2008. Growth in 2010 is expected to be 2% to 4%, mostly due to a strong fourth quarter. DMG predicts that 2011 will be a strong year where the market will increase by 5% and 6% over 2010.

The 2009 Quality Management/Liability Recording Mid-Year Market Share Report provides a detailed breakdown of revenue for the following 22 vendors: ASC, Aspect, Autonomy etalk, Cacti, Calabrio, CallCopy, CyberTech, Envision, HigherGround, Interactive Intelligence, KnoahSoft, Magnetic North, NICE, OAISYS, OnviSource, TantaComm, Telrex, TDI, Verint, VirtualLogger, VPI and Zoom International. These vendors comprise 98.8% of market revenue; the remaining 1.2% (23 vendors) is addressed in the "Other" category. Vendors of all sizes – leaders, contenders and emerging companies – are analyzed to provide deep insights into all aspects of this dynamic market.

### Reasons to Buy This Report

- Discover how the leading and contending WFO competitors are performing in various segments.
- Get 2010 and 2011 market projections by application segment for TDM Recording, VoIP Recording, Quality Assurance/Quality Management, Performance Management, Speech Analytics, eLearning, Coaching, Surveying and Workforce Management.
- Obtain the most current, accurate and detailed financial and market share analysis of the QM/Recording (WFO) market on a GAAP basis for total company revenue, contact center WFO segment and related applications.
- Understand how vendors are positioning themselves for the future by investing substantially in R&D.

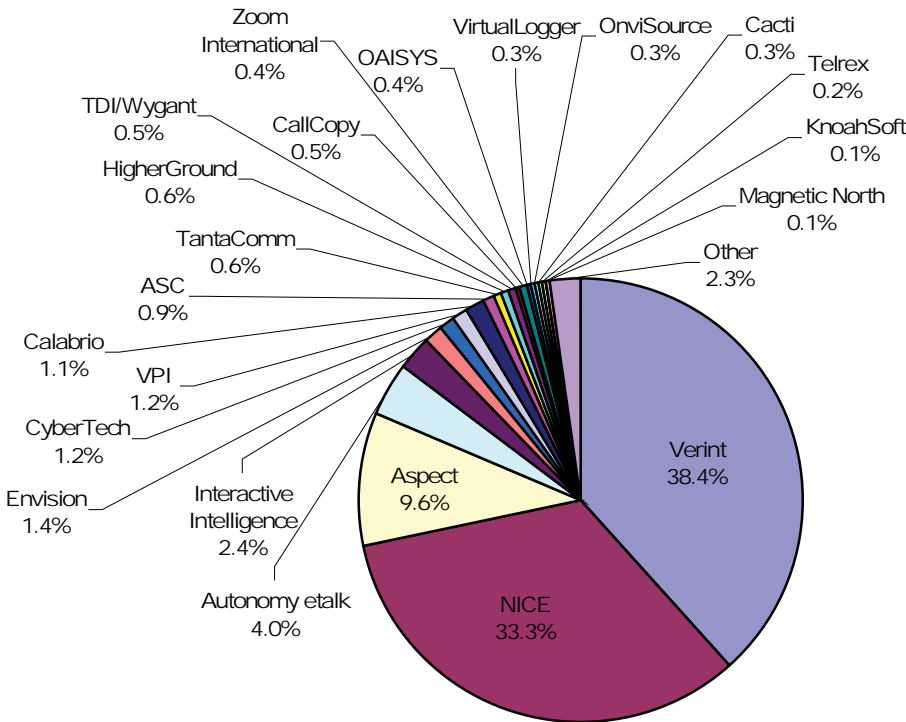
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To order a copy of the **2009 Quality Management/Liability Recording Mid-Year Market Share Report**, contact Deborah Navarra at 516-628-1098 or [deborah.navarra@dmgconsult.com](mailto:deborah.navarra@dmgconsult.com). You may also purchase the Report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

**Report Highlights**

- Total WFO revenue fell 1.6%, from an all-time high of \$1,336.2 million in the first six months of 2008 to \$1,315.5 million in the first half of 2009. The second half of 2009 is expected to recover slightly and come in flat or shrink by 1% to 2%, as compared to the same period in 2008. DMG predicts that the WFO market will show an increase of 2% to 4% over 2009, and that 2011 will be a strong year, with growth of at least 5%.
- Contact center WFO revenue decreased by 5.9%, from \$507.7 million in the first half of 2008 to \$477.7 million in the first half of 2009. This decrease shows how enterprises cut back on all but essential contact center investments during tough economic times.
- While the recession slowed purchases of WFO solutions in the first half of 2009, overall R&D continued at a surprisingly rapid rate; many of the competitors are setting themselves up to be in a stronger position when the market recovers.
- Total voice recording revenue decreased by 13.6% between the first six months of 2009 and the same period in 2008. This segment shrank from \$280.9 million in the first six months of 2008 to \$242.5 million in the first half of 2009. This contraction is significant because recording remains the foundation module for WFO suites.
- For the first half of 2008, non-contact center voice recording revenue was greater than contact center revenue. During the first six months of 2009, the proportion flipped, showing that in tough economic times organizations are more likely to invest in contact center recording than non-contact center recording.

**Sample Figure: First-Half 2009 Total Contact Center WFO Market Share**



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