

2010 – 2011

## Quality Management/Liability Recording (Workforce Optimization) Product and Market Report

DMG Consulting's 7th annual **Quality Management/Liability Recording (Workforce Optimization - WFO) Product and Market Report** provides contact center and IT managers with invaluable vendor, product, functional, technical and pricing information. This Report is designed to help end users properly assess available suites and applications and their significant differentiators, in order to make the right technology and vendor selection for their contact center. This 445-page Report also looks at trends and challenges in the market, and arms contact center managers with the best practices to realize the greatest continuing return on their investment.

After nearly three decades, the contact center quality management (QM)/liability recording (also known as workforce optimization (WFO)) market continues to evolve and progress at a surprisingly rapid pace. While many consider QM and recording solutions to be commodities, the **2010 – 2011 Quality Management/Liability Recording (Workforce Optimization) Product and Market Report** reveals quite the opposite. The core concepts of QM, recording and WFO have certainly become standardized, a clear benefit in a mature market. However, the ways in which vendors are delivering functionality – such as software-based recording, PCI and automated QA workflows – vary greatly.

It is generally accepted that WFO suites consist of at least four, and as many as all of the following eight modules: recording, quality assurance, coaching, eLearning, performance management, surveying, speech analytics and workforce management. Two new modules, desktop analytics and text analytics, are also increasingly being offered as part of WFO suites. The **2010 – 2011 Quality Management/Liability Recording (Workforce Optimization) Product and Market Report** concentrates on analyzing the WFO suites, their two core applications – quality management/quality assurance and recording – as well as coaching and eLearning. Performance management, surveying, speech analytics and workforce management (WFM) are analyzed at a high level. (These applications are covered in-depth in separate DMG Consulting reports.)

2010 was a strong year for the WFO market, and 2011 is looking to be even better. Contact center WFO revenue increased by 10.5%, growing from \$472.7 million in the first half of 2009 to \$522.1 million in the same period in 2010. The contact center segment of the WFO market is now larger than it was during the first six months of 2008 (\$507.7 million), which was its previous first-half peak. Revenue numbers for the first half of 2010, combined with vendor discussions that revealed the second half of the year was even stronger, demonstrate that the WFO market has recovered quickly from the recession. DMG Consulting believes that this is due in part to the vendors' significant and continuous investment in research and development, even during the worst of the recession. The result is innovation now coming to market, and a greater quality and variety of solutions from which end users can choose.

DMG Consulting expects 2011 and 2012 to be years in which contact centers will make substantial technology investments. The WFO market will benefit from this trend. DMG predicts that the WFO suite market will grow by 7% in 2011, 6% in 2012 and 5.5% in 2013. The 10 modules will grow at different rates, based on their maturity. The growth will be attributable to product innovation that is attracting a new round of upgrades, and to

flexible, attractive pricing that will enable more companies to invest in WFO applications.

For the first time, Software-as-a-Service (SaaS) is a viable delivery alternative for WFO, although the market at large has a long way to go in this area. The increasing breadth of functionality and attractive pricing of SaaS-based solutions, as well as their availability from leading and contending vendors, is fueling their popularity.

WFO suite vendors also continue to enhance the flow of data between modules to increase quantifiable benefits for end users. Some yield obvious benefits, such as tying QA output to coaching so an automated workflow can initiate an appropriate coaching or eLearning course for an agent. In other areas of the suite, however, the benefits are not yet discernable. Vendors are going to have to work hard to demonstrate WFO suite synergies to end users.

In addition, end users are pushing vendors to automate the QA process – an activity that has been enabled by technology, but remains almost entirely a manual undertaking. DMG expects this to be a growing area of innovation and differentiation between solutions over the next five years. Workflow automation and analytics are the keys to making findings from QA and other WFO modules more actionable. These applications are instrumental in giving end users better ways to gain insights into agent performance while capturing the voice of the customer.

**The 2010 – 2011 Quality Management/Liability Recording (Workforce Optimization) Product and Market Report** also reveals the vendors' aggressive pricing strategies, clearly indicating that this a buyer's market. While price should not be the primary factor when making a technology purchase, it should be prioritized along with product functionality, future direction and customer satisfaction rankings.

**The 2010 – 2011 Quality Management/Liability Recording (WFO) Product and Market Report** is the most comprehensive, fact-based and timely analysis of this mature yet dynamic technology sector. This Report covers 18 vendors in total, and features detailed product and company assessments for the top 13 leaders and contenders, including: Aspect, Avaya, Calabrio, CallCopy, dvsAnalytics, Interactive Intelligence, KnoahSoft, NICE, OASYS, OnviSource, Verint, VPI and Zoom. Four of these vendors – Avaya, Interactive Intelligence, dvsAnalytics and ZOOM – were either not previously covered, or were addressed at a high level. Demonstrating the market's continued evolution, all four now meet DMG's participation criteria, qualifying them to be analyzed in-depth. Five vendors – Cybertech, Genesys, inContact, Nexidia and UTOPIA – are also addressed at a high level.

Order Information: To order a copy of the *2010-2011 Quality Management/Liability Recording (Workforce Optimization) Product and Market Report* contact Deborah Navarra at [deborah.navarra@dmgconsult.com](mailto:deborah.navarra@dmgconsult.com) or 516-628-1098. You may also purchase the report online at [www.dmgconsult.com](http://www.dmgconsult.com).

## Key Reasons to Buy This Report

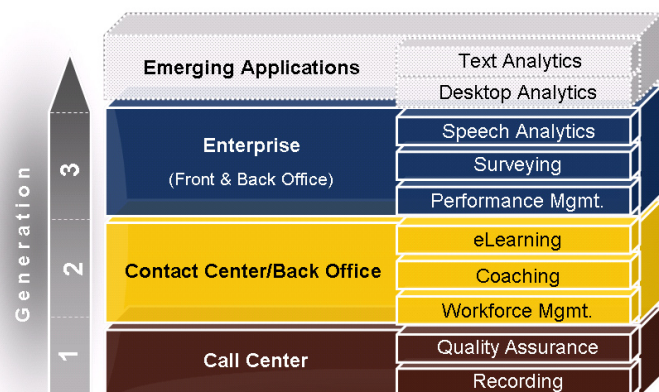
- ⇒ Overview, outlook and projections for the WFO market and each of its individual applications – recording, quality assurance, performance management, speech analytics, eLearning, coaching, surveying, workforce management, desktop analytics and text analytics
- ⇒ Contact center workforce optimization trends and challenges for end users and vendors in 2011, as well as an in-depth review of product innovation delivered during the past 12 months and what is planned for the upcoming year
- ⇒ Analysis of WFO market share and activity for total company revenue, contact center revenue and voice recording revenue for each of the top 26 competitors
- ⇒ Thorough review of the WFO competitive landscape with company snapshots and reports, product information, and analysis of functional and technical product differentiators and new and emerging packaged applications from the top 13 leading and contending WFO competitors
- ⇒ Discussion on the emergence and opportunity for hosted/software-as-a-service (SaaS)-based solutions in the WFO market
- ⇒ Review and comparison of vendor pricing for premise-based, hosted and managed service offerings for the 13 top market competitors
- ⇒ Analysis of end-user satisfaction with vendors, products, implementations, innovation, pricing and support
- ⇒ Updated Payment Card Industry-Data Security Standard guidelines, their impact on enterprises and a detailed assessment of PCI capabilities of the top 13 WFO vendors
- ⇒ Comprehensive Market Directory

## Report Highlights:

- **The QM/WFO market is NOT commoditized:** The WFO market continues to evolve and progress at a rapid pace. While the core concepts of what QM and WFO are have become standardized, the ways in which vendors are delivering functionality vary greatly and are steeped in innovation.
- **Assessing product differentiation is key to making the right technology investments:** This Report helps end users assess available WFO suites, the two core applications within the WFO suites – quality management/quality assurance and recording – as well as coaching and eLearning. From company overviews to technical specs and future innovation, this Report provides in-depth coverage of vendor and product differentiators to help end users choose the right technology and partner.
- **2010 was a strong year for the WFO market:** Contact center WFO revenue increased by 10.5%, growing from \$472.7 million in the first half of 2009 to \$522.1 million in the same period in 2010. The contact center segment of the WFO market is now larger than it was during the first six months of 2008 (\$507.7 million), which was its previous first-half peak.
- **The WFO market will continue to grow through 2013:** DMG predicts the WFO suite market will grow by 7% in 2011, 6% in 2012 and 5.5% in 2013. The 10 modules will grow at varying rates, from 3% to 42%, during the three years, based on their maturity and market acceptance.
- **Innovation and competitive pricing gives end users more choice than ever before:** The high quality and wide variety of solutions is expanding end users' range of choices. The vendors' innovations in workflow automation, integration between WFO modules, analytics and SaaS, are sparking fierce competition. The vendors are also using aggressive pricing strategies to attract prospects, making this a buyer's market.
- **Fact or fiction – debunking WFO myths:** The Report reviews the eight leading misconceptions about WFO, and gives end users a valuable perspective on the facts about the market, its vendors, their solutions and the future.

## Sample Figure: Workforce Optimization Suite

Source: DMG Consulting LLC, January 2011



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