ABSTRACT



2017-2018 Cloud-Based Contact Center Infrastructure Market Report

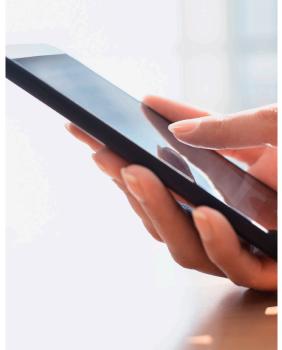




DMG Consulting's 10th annual edition of the Cloud-Based Contact Center Infrastructure Market Report presents the foremost, authoritative analysis of this dynamic and rapidly growing IT sector. The Report provides detailed coverage of the competitive landscape, vendors, products, and trends and challenges that are driving this market; it also addresses market share, projections, adoption rates, benefits, return on investment, pricing, customer satisfaction and implementation best practices.

Please contact Deborah Navarra at deborah.navarra@dmgconsult.com or 516-628-1098 with any questions. To order your copy of the report, visit www.dmgconsult.com.





2017 was the breakthrough year for the cloud-based contact center infrastructure (CBCCI) market. The momentum, which has been building for years, has created a large and lucrative ecosystem of partnerships among many types of vendors. There are over 150 CBCCI competitors world-wide, and hundreds of system integrators, value-added resellers (VARs), distributors, technology partners, and more, who are dedicated to building this sector. While this is positive for the market in general, it makes it difficult for customers who need to differentiate between the offerings. This Report provides prospects with the information they need to help them select the best CBCCI solution for their operating environment.

Cloud-based contact center infrastructure solutions offer many benefits. Primarily, they free a company's IT department to dedicate their time to more high-value activities than implementing and maintaining a solution with which they may have little expertise. CBCCI solutions also offer a geographically redundant environment, simplified upgrades, timely access to new features, and no annual maintenance fees. The CBCCI vendors have invested millions of dollars over the past 20 years to build their solutions and supporting networks. These solutions are generally much more technologically current than their premise-based counterparts. And the innovation keeps coming, including the introduction of artificial intelligence, machine learning, natural language understanding and analytics into CBCCI solutions.

Companies need solutions that protect them from security breaches such as hacking, fraud and industrial espionage. They also need to secure their customers' private and sensitive data, such as social security, credit card or account numbers, and protected health information. At the same time, they

need to comply with a proliferation of regulatory requirements around the world, including the Health Insurance Portability and Accountability Act (HIPAA) in the US, the world-wide Payment Card Industry Data Security Standard (PCI DSS), the UK's Data Protection Act, the BDSG Federal Data Protection Act in Germany, the upcoming EU General Data Protection Regulation (GDPR), and many more. The CBCCI vendors are working to address these concerns and stay current with rapidly evolving security and regulatory requirements.

DMG estimates that the revenue size of the cloud-based contact center infrastructure market was at least \$2.8 billion (excluding carrier revenue) as of the end of 2016. This represents only 11.4% of total contact center seats, so the revenue potential of this market is in the tens of billions. DMG predicts that the number of seats will grow by 22% in 2017, 22.5% in 2018, 23% in both 2019 and 2020, and then the growth will slow to 21% in 2021. This exciting and adaptable market has vendors who have what it takes to succeed, and this IT sector is poised for great growth and success in the next 10 years.

The 2017-2018 Cloud-Based Contact Center Infrastructure Market Report covers 12 leading and contending vendors: 8x8, BroadSoft (who agreed to be acquired by Cisco), Content Guru, eLoyalty, Enghouse Interactive, Five9, Genesys, NewVoiceMedia, NICE inContact, Serenova, Sharpen and Twilio. New to the Report in 2017 are: BroadSoft, eLoyalty, Genesys, Sharpen and Twilio. 8x8, Content Guru, Enghouse Interactive, Five9, NewVoice Media, NICE inContact (NICE acquired inContact in November 2016) and Serenova were included in the 2016 — 2017 edition of this Report. The Report also includes a comprehensive Vendor Directory that lists providers of cloud-based contact center infrastructure systems around the world.



Key Reasons to Buy this Report

- ⇒ Review of the service deployment options for cloud-based contact center infrastructure solutions
- Overview of the core functional components of cloud-based contact center infrastructure solutions
- ⇒ High-level technical analysis of each of the 12 solutions, including their multitenancy, integration, security and compliance capabilities
- The market and solution trends and challenges that are driving enterprise investments and influencing the direction of vendor research and development (R&D)
- ⇒ Cloud-based contact center infrastructure market innovation, including a review of recently introduced capabilities, and functionality that is planned to be introduced in the next 12 − 18 months
- ⇒ Candid discussion of what end users want most from their cloud-based contact center infrastructure vendor partner
- ⇒ Examination of the omni-channel capabilities, supporting systems and applications, and best practices that are required for digital transformation
- ⇒ Practical recommendations and practices for developing and retaining agents in the Millennial workforce
- ⇒ A review of the WFO capabilities of the 12 leading and contending cloud-based contact center infrastructure vendors
- ⇒ Cloud-based contact center infrastructure market activity and market share analysis, adoption rate, and 5-year projections
- ⇒ Review and assessment of the cloud-based contact center infrastructure competitive landscape
- Overview of the 12 leading and contending cloud-based contact center infrastructure vendors, including company snapshots, vendor go-to-market strategies and product overviews, including offerings targeted at small and midsize businesses (SMBs)
- ⇒ In-depth side-by-side comparative analyses of the key functional and technical capabilities of the 12 featured cloud-based contact center infrastructure solutions
- ⇒ Implementation analysis, including a review of the vendors' processes, training, professional services, support and best practices
- ⇒ Comprehensive customer satisfaction survey results that measure and rank the vendors across 19 product components and 13 categories
- ⇒ Vendor pricing analysis for 50-, 250- and 500- seat cloud-based contact center infrastructure implementations from the 12 featured providers
- ⇒ Detailed company reports for the 12 leading and contending cloud-based contact center infrastructure vendors, analyzing their products, functionality and future R&D plans
- ⇒ Cloud-Based Contact Center Infrastructure Vendor Directory

Report Highlights

- A vast ecosystem of vendors in the CBCCI market presents a wide variety of choices for prospects and customers: Vendors from many categories are participating in this sector, expanding its presence and reach.
- *CBCCI solutions offer many benefits:* CBCCI solutions allow companies to concentrate on using its capabilities instead of spending their time implementing and maintaining the system. Other important benefits include built-in system redundancy, simplified upgrades, timely access to new features and ongoing innovation, and elimination of annual solution maintenance fees.
- The CBCCI vendors are working to address users' concerns about security and regulatory compliance: Users require solutions that protect data from hacking and data tampering; sensitive customer information must also be secured. CBCCI solutions must also be able to address a growing number of regulatory requirements around the world, particularly for users in the financial services and healthcare verticals.
- A great deal of innovation is occurring in the cloud-based contact center sector: Two decades of investment have yielded cloud-based solutions that are more current than their premise-based counterparts. The next step for the CBCCI vendors is to introduce artificial intelligence, machine learning, natural language understanding and analytics into their solutions.
- The cloud-based contact center infrastructure market is poised for strong growth over the next few years: The CBCCI market is growing rapidly, and a tremendous untapped opportunity remains as more companies transition to the cloud. The revenue potential of this market is in the tens of billions, and DMG estimates that the number of seats will grow by 22% in 2017, 22.5% in 2018, 23% in both 2019 and 2020, and 21% in 2021.



SAMPLE FIGURE

Cloud-Based Contact Center Infrastructure Solution

Optional Modules							Integrations				
WFM		QM/Screen Capture		ССРМ	Coaching/ eLearning		Gamification V		oC/Survey	K	PBX
CRM/ Servicing				sktop alytics	Real-Time Guidance/NBA		Predictive Analytics		CJA	k	ACD
Core Functionality											
ACD	UQ	I۷	/R	СТІ	Outbound		Campaign M	lana	igement	K	IVR/IVA
UC/Presence Reco		ecord	ding Reporting			Unified Messaging		K	Unified Messaging		
Core Capabilities											
Inbou	ound Outbound			und	Blended Omn			ni-cl	hannel	K	CRM
Underlying Technology							K	Social Media/ Messaging			
SIP/TDM				Web Technologies					3 3		
Data Networks				WebRTC					Back-office		
Private/Public/Hybrid Cloud				Integration Tools							
Virtualization					SIPRec					Third-party Apps	
Network Mgt. & Automation Tools				Database Technologies				party_rapps			

Source: DMG Consulting LLC, November 2017

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6 Crestwood Drive, West Orange, NJ 07052 (973) 325-2954 www.dmgconsult.com