

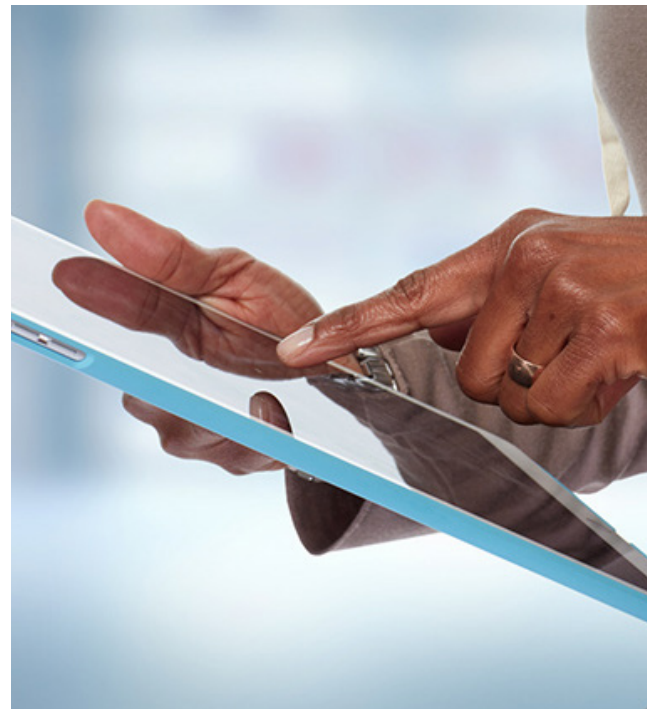


# **2019 Contact Center Workforce Optimization Market Share Report**



*This is DMG Consulting LLC's 16th annual **Contact Center Workforce Optimization (WFO) Market Share Report**. The Report analyzes revenue and market share for the approximately 39 worldwide WFO suite vendors in 2018. It presents the most thorough and accurate coverage of the WFO market landscape, including an examination of the vendors, their offerings, and 5-year trends for the WFO sector.*

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2018 was a very good year for the WFO market, with full-year total company GAAP revenue of \$3,609.8 million, a year-over-year increase of 8.2% compared to 2017. Contact center WFO revenue grew at an even faster rate, 12.1% higher in 2018 than 2017, increasing by \$200.1 million to \$1,855.2 million. While the number of contact center seats has not grown substantially during the year, the WFO vendors are seeing impressive sales numbers because they are delivering innovation that addresses the evolving business needs of their customers.

Contact centers of all sizes are confronted with ever-changing business conditions, increasingly challenging regulatory requirements, and the needs of a new generation of employees. Managers are looking for tools to help them traverse rapidly changing business landscapes. The WFO vendors are focusing on providing solutions with enhanced capabilities to assist in improving the customer journey and facilitating the sometimes complicated process of digital transformation.

New and enhanced functionality make today's WFO suites almost unrecognizable compared to the solutions of just a few years ago. Innovations in WFO offerings include omni-channel capabilities, a full suite of analytics (speech, text, desktop, customer journey and predictive), analytics-enabled quality management (AQM), real-time adaptive scheduling and adherence, attended and unattended robotic process automation (RPA) and feature-rich contact center performance management (CCPM) applications.

Artificial intelligence (AI) is powering many of these capabilities. AI is being used in different ways in WFO suites: machine learning is improving the accuracy of workforce management (WFM) forecasts, and natural

language processing (NLP)/natural language understanding (NLU) and deep neural networks (DNN) are enhancing speech and text analytics by enabling users to better mine contact center trends and opportunities and collect voice-of-the-customer (VoC) data. Additionally, AI is being used to automatically assess employee performance, identify skill gaps, and assign coaching and/or eLearning sessions to agents. Knowledge management (KM) is also benefitting from AI, ensuring consistency in source information so that customers in all channels receive accurate, reliable and customized responses to their inquiries.

Today, WFO vendors and their clients recognize that employee engagement is critical for delivering an outstanding customer experience. As a result, the focus of WFO solutions has shifted from productivity and cost containment to employee empowerment. Employee self-service capabilities now include automated approval for shift swaps, time-off requests, schedule changes, agent-requested overtime and voluntary time off. These features help staff members "control" their day-to-day activities, and can help companies acquire and retain the right employees.

This Report provides a detailed analysis of 99.3% of revenue for the vendors in the WFO suite market; the remaining 0.7% of revenue is addressed in the "Other" category. The **2019 Contact Center Workforce Optimization Market Share Report** provides a detailed breakdown and analysis of revenue for the following 22 named vendors: 8x8, ASC, Aspect, Avaya, Calabrio, ComputerTel, Coordinated Systems, Inc., DVSAalytics, Enghouse, Envision, Genesys, HigherGround, Mitel, NICE, OnviSource, OpenText, Serenova, TantaComm, Verint, VirtualLogger, Xarios, and ZOOM International. Revenue for Avaya is included at the WFO level, but not in the detailed analyses.

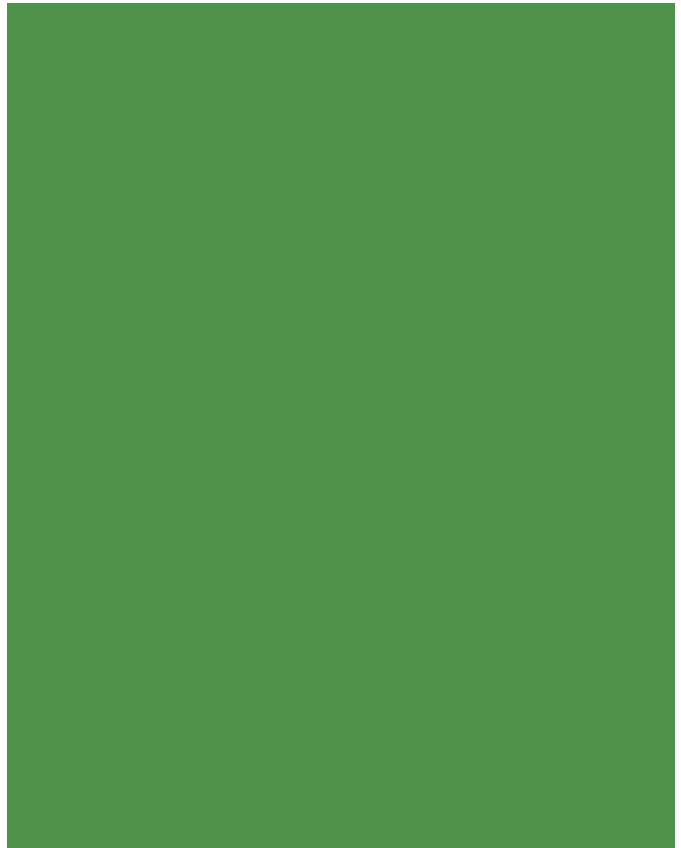
## Key Reasons to Buy this Report

- ⇒ Total company GAAP revenue and market share analysis for all vendors who sell workforce optimization suites for contact centers and other uses
- ⇒ Revenue analysis and market share for the two primary industry categories: enterprise and security
- ⇒ Drill-down analyses of WFO market revenue and market share, from total company to contact-center-only views of the data
- ⇒ Revenue and market share analyses for recording and QM/QA, the two core applications of WFO suites
- ⇒ Growth comparisons analyzing 2017 and 2018 revenue and market share for total company on a GAAP, contact center WFO, revenue source and sales-channel basis
- ⇒ Five-year revenue trend analyses for total company revenue based on GAAP, contact center WFO, geography, vertical, revenue source and sales channel
- ⇒ Five-year revenue trends by application for 15 workforce optimization segments, including: recording (contact center, non-contact center and video), QM/QA, WFM (contact center and non-contact center), speech analytics, performance management, surveying/VoC, desktop analytics, RPA, knowledge management, text analytics, eLearning/coaching and gamification
- ⇒ Geographical analysis of revenue and market share for North America, Europe, Asia Pacific, and Caribbean and Latin America (CALA)/Middle East and Africa (MEA) (combined), by vendor for each region
- ⇒ Back-office/branch revenue and market share analysis
- ⇒ Revenue source (license/software, cloud/hosted/software as a service (SaaS), services, and hardware) revenue and market share analysis, by vendor

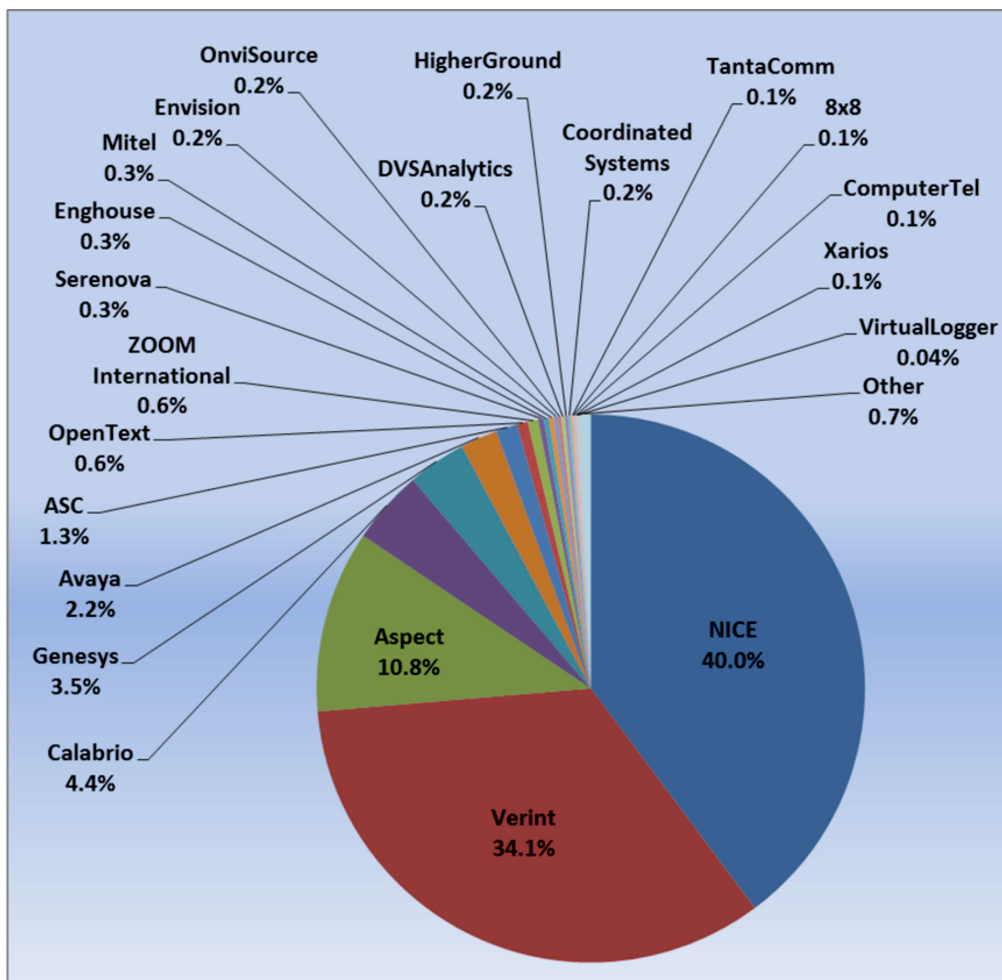


## Report Highlights

- **The WFO market showed strong revenue performance in 2018, and the future looks bright:** Full fiscal year 2018 total company GAAP revenue for the WFO market was \$3,609.8 million, up \$273.2 million from \$3,336.6 million in 2017, a year-over-year increase of 8.2%. And contact center WFO revenue grew at an even faster rate: 12.1% higher in 2018 vs. 2017. The contact center WFO segment increased \$200.1 million to \$1,855.2 million in fiscal 2018, up from \$1,655.3 million in 2017.
- **New and enhanced capabilities are revolutionizing WFO solutions:** AI is driving the performance of innovative functionality such as omni-channel capabilities, full-featured analytics suites, real-time adaptive scheduling and adherence for WFM, attended and unattended RPA, and feature-rich CCPM applications.
- **WFO vendors are increasingly offering knowledge management:** KM functions as a single repository of enterprise knowledge: Every organization needs a single source of “truth” to enable its digital transformation. Customers and employees must receive the same information or guidance regardless of the channel or resource with which they interact. Delivering accurate responses customized to each constituent requires the sophisticated capabilities of a KM solution.
- **Employee engagement and empowerment are critical to business success:** A new generation of employees is demanding greater control over their work/life balance. Delivering on this goal is the focus of today’s WFO solutions. Employees can use self-service capabilities, including AI-driven intelligent virtual agents (IVAs) and mobile apps, to manage their schedules.



## 2018 Total Company GAAP Revenue Market Share



Source: DMG Consulting LLC, May 2019

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