CCaaS

AVANT 9-1 REPORT

An Enterprise Decision-Maker's Guide to Maximizing CCaaS Implementation

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AVANT RESEARCH & ANALYTICS:

THE 9-1 REPORT

Each "9-1 Report" is developed by AVANT Research & Analytics with the assistance of technical teams within AVANT. These market research reports are backed by a wealth of data secured by AVANT in our normal course of business, our own primary research of end-customers, and other reputable industry sources.

9-1 Report: UCaaS

9-1: Security

9-1: SD-WAN

State of Disruption Report

Our reports focus on today's most disruptive technologies, those where the pace of change is rapid. Companies or technologies which – only a few years ago – may have been unknown, are now highly viable solutions that resolve the business needs that led to their creation. They have disrupted the IT landscape, a market already well known for its accelerating pace of change and innovation.

Every AVANT 9-1 Report gives enterprise technology leaders a contemporary and relevant overview of the featured subject suitable to making a purchase/non-purchase decision over the next six to 12 months. We select each topic based on the potential competitive advantages companies can realize if they adopt a given solution, depending on their particular industry, market space, or company size.

All currency values in this report are expressed in U.S. dollars.

AVANT enables Trusted Advisors (agents, managed service providers, consultants, and specialized channel partners) to assist with the decision-making process technology through our specialization in disruptive technologies and solutions. We accomplish this with our:
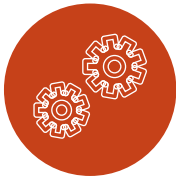
Engineering Team of consummate professionals who study the ins-and-outs of the latest IT products from the perspective of what best meets the needs of end users.

AVANT Assessment Data collected during thousands of customer assessments and decisions.

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Engineering Team of consummate professionals who study the ins-and-outs of the latest IT products from the perspective of what best meets the needs of end users.

AVANT Assessment Data collected during thousands of customer assessments and decisions.

We also collect content in conjunction with the Trusted Advisor community, through initial assessment data and various market research tools, including surveys, interviews, focus groups, and external reports.

KEY TAKEAWAYS

- The global CCaaS currently accounts for more than $3 billion; some predict sales will reach about $10.5 billion by 2027.

- Companies are most interested in CCaaS proposals when existing contracts approach end-of-term.

- While Covid-19 stimulated the CCaaS market, Artificial Intelligence (AI) has emerged as a key factor in energizing uptake.

- Although some companies may adopt an exclusively work-from-home structure, most will use a 60-40 mix, with at least 40% of employees working remotely.

- Effective and efficient contact center services have become critical to high customer satisfaction scores.

- In addition to AI, CCaaS systems often include a call distributor, interactive voice response (CDIVR), outbound predictive dialers (OPDs), and analytics capabilities.

- AI-enabled CCaaS will make organizations change selection and competency strategies for contact center staff.

- Effective security must be interwoven with every CCaaS migration.

CCAAS:
THE LANDSCAPE

This 9-1 Report focuses on Contact Center as a Service, better known as CCaaS, a cloud-based offering that combines the voice connectivity of legacy call centers with digital channels, text messaging and social media.

A modern CCaaS system includes an intelligent routing engine which routes, manages, delivers, and records a full range of interactions. In addition, Artificial Intelligence (AI) is increasingly integrated into this technology, providing a truly revolutionary approach to efficient and effective customer interactions. Organizations assign agents to channels based on their skills and the employer's needs. Thus, "workforce optimization" is becoming more important as a competitive advantage and as a component in building an effective, successful CCaaS strategy. In addition, analytics help convert raw data into actionable results that contribute to higher customer satisfaction and Net Promoter scores (NPS).

From the customer perspective, interactive voice response (IVR) provides the traditional menu of verbal or numeric options. Outbound predictive dialers allow call center operators to conduct proactive outreach to customers that improve connect rates and customer experience.
We explore all of these aspects, and more, in greater detail throughout this report.

ABOUT THE ANALYST

Ken Presti develops the strategic framework and manages the process of leveraging AVANT's internal data and external data to drive high-value market research designed to help consultants, agents, channel partners, and other members of the Trusted Advisor community more effectively help their business customers understand and evaluate Information Technologies (IT).

Presti brings a wealth of experience in market research, survey development, focus group moderation, interviewing, and content development for the technology industry. His primary area of expertise focuses on goto- market and channel strategies spanning networking, cloud, security, and telecom.

A former Research Director of IDC's Network Channels & Alliances service, he has served as a Trusted Advisor to several key networking vendors and service providers. Presti also has led his own market research and channel advisory firm, Presti Research & Consulting, and has worked with other prominent channel consultancies. Presti specializes in combining empirical data and his experience partnering with industry leaders to fully illustrate technology trends, business model evolution, likely outcomes, and strategies for success.

CCAAS
BY THE NUMBERS

Statistics for the global CCaaS market vary widely, depending upon the source.

The global CCaaS market was $3.1 billion in 2019 and is projected to reach $10.6 billion by 2027, exhibiting a CAGR of 16.1% during the forecast period, according to Fortune Business Insights. Other projections range as high as $72 billion by 2027. Year-over-year growth has run at more than 15% since 2015, Frost & Sullivan said. For its part, Verified Market Research pegs CCaaS software sales at $35.1 billion by 2026, versus $24.8 billion in 2018 – or CAGR of 4.4 % from 2019 to 2026.

The following charts outline end customer feedback based on AVANT's Interactive Quick Assessments which take a deep look into the drivers and details that lead end-customers to inquire about CCaaS. (While we provide the following tables as a one-stop shop, they are also included in the specific sections below.)

For example, customers are likely to make a CCaaS move when a current contract nears its expiration date. Many want to offload management of conventional contact center solutions. Others are highly interested in specific Artificial Intelligence capabilities to raise customer satisfaction scores.

The following charts show the specific data related to these questions and more.

Customers are likely to make a CCaaS move when a current contract nears its expiration date

CCaaS is also featured prominintely in AVANT's State of Disruption Report, 2021. To measure the rate at which newer technologies are displacing older ones, AVANT polled 500 US-based enterprise technology decision-makers (C-suite or vice presidents involved in the selection and/or implementation of new voice/ data networks, compute infrastructure and related products or services in their IT, security, or finance roles). Respondents include statistically significant subsets from the following industries: manufacturing; financial services; healthcare/ medical; e-commerce; and consulting/business services. Visit AVANT's 2021 State of Disruption Report, for more information.

The data shows that several key verticals plan significant uptake of CCaaS. It continues to be in strong growth mode, spurred partly by the work-from-anywhere model stimulated by Covid-19 and the emergence of Artificial Intelligence within CCaaS platforms.

TIMEFRAME FOR CCAAS ADOPTION

Timeframe for CCaaS Adoption
74% | 13% | 5%, | 8%

Manufacturing
63% | 18% | 4% | 14%

Legal
54% | 13% | 4% | 29%

High Tech
75% | 12% | 13%

Healthcare/Medical
85% | 12% | 13% | 17%

Financial Services
48% | 33% | 3% | 16%

Consulting/Business Services
44% | 37% | 4%, | 14%

Construction/Engineering
61% | 23% | 11% | 5%

Other
69% | 17% | 4% | 10%

| ■ Within 12 months | ■ 1-3 Years | ■ More than 3 Years | ■ No Plans |

BUSINESS DRIVERS

CCaaS leverages the cloud, combining the capabilities of the legacy PBX with those of several communications media. It delivers these contact center services remotely with the promised benefit of measurable total cost of ownership (TCO) and return-on-investment (ROI), while, simultaneously, strengthening customer satisfaction (CX).

Let's look at that statement piece-by-piece.

By capitalizing on cloud, CCaaS absolves an organization of the headaches associated with premisebased hardware and optimizes OPEX budgeting. It combines legacy PBX telephone switchboard functions with various media like text and chat. Some systems even can move communications dynamically from one media to another. For example, someone contacts your company via chat but finds a phone call easier for a more detailed exchange. In this case, the agent can initiate an outbound call to the customer.

Cost efficiency is largely dependent upon which factors a customer needs included in the equation.

"The economics are pretty easy because, in traditional telephony platforms, you have legacy costs, upgrades, hardware maintenance, and all of that," said Tim Montgomery, Managing Partner at Alamo Cloud Solutions, a San Antonio, Texas-based Trusted Advisor. "When you look at the true cost of those things, and then compare it to the per-seat, per-month cost of CCaaS, the results are typically pretty favorable to CCaaS. You can get to the point where it's more cost efficient – or at least neutral – to add the other channels. You save real dollars, but you also save soft dollars because your customers are happy to be able to use their [communications] channel of choice."

By capitalizing on cloud, CCaaS absolves an organization of the headaches associated with premise-based hardware and optimizes OPEX budgeting

Customer organizations should consider service costs and related fees in conjunction with offloading maintenance and management, reducing floor square footage (due to work-from-home), and cutting operational expenses, including the cost of agent training. We will explore each of these in greater detail. But the added functionalities, impact on customer satisfaction, and, as an extension, higher sales, drive most adopters to CCaaS. Agent retention and superior analytics also factor positively into the decision.

The business case, therefore, had already built itself. Then the socio-business shock wave of Covid-19 pushed momentum into an even higher level.

"Contact centers, like most businesses, had to find solutions that provided support and services from somewhere other than brick and mortar environments of old," said Ryan McCormick, Workforce Optimization Strategy Director at Five9, a San Ramon, Calif.-based provider of cloud contact center solutions. "Many organizations found that sending people home could often work quite well. We are currently in a state of uncertainty about future implications and what the best options will be. Some agents are fine working at home. The benefit for the company is the ability to recruit remotely, save money, and leverage technology like workforce optimization to drive performance and deliver, while still making personal connections."

Although some companies may move to an exclusively work-from-home structure, most are likely to adopt a hybrid environment, after having found success with work-at-home during the pandemic. Some experts anticipate a 60-40 mix, where about 40% of employees work remotely. Others predict that, as work-from-anywhere gains further ground, the legacy emphasis on brick-and-mortar facilities will decline even more – augmented by an opportunity for businesses to get reduced leases in commercial office space and a chance to hire the best-qualified applicants, wherever they live.

Regardless of where agents work, CCaaS helps make your customer engagements more efficient and effective, thereby contributing to increased customer satisfaction and higher Net Promoter Scores (NPS). The capabilities associated with CCaaS have increased customer expectations for support calls. As a result, companies without these functionalities have a pronounced disadvantage against competitors who do.

Organizations look to CCaaS for a variety of reasons, seeking many different benefits.

WHY ARE YOU CONSIDERING A NEW CONTACT CENTER PLATFORM?

30% Expiring Service Contract

30% Legacy Platform End of Life or Out of Warranty

25% Outgrown Platform/ Inadequate Scalability

23% Inadequate Tech support for current solution

22% System Consolidation

21% Current system is too costly

18% Need Enhanced Reliability

17% offload Contact Center Management

WHAT BENEFITS ARE YOU SEEKING FROM A NEW CONTACT CENTER PLATFORM?

51% Current solution Lacks Functionality

32% Enable or Expand a Remote Agent Workforce

46% Avoid Complex Day to Day Management

19% Incorporate Self Service Solutions

42% Unify Multiple Technology Systems

14% Seasonal Call Spikes

39% Disaster Recovery Plan

13% Better Elasticity for Seasonal Call Spikes

34% Improved Analytics

12% Compliance Requirements

32% Agents at home or Multiple Locations

11% Lack CAPEX Budget For Upgrades/Modifications

"Most consumers have higher expectations for service than they actually receive," said Rusty Jensen, Vice President of Revenue Generation at Nice inContact, a Sandy, Utah-based CCaaS vendor. "This has put a lot of pressure on vendors, from a strategic standpoint. Customers today are picking brands based on their customer experience, as opposed to product differentiation. So, brand loyalty and customer experience are more important than they have ever been."

Customer relationship management (CRM) software is an integral component of CCaaS and customer experience.

"In these days of the customer experience, if you make it difficult for your customers to reach you, you're going to get chewed up and spit out," said Andy Dignan, Senior Vice President of Global Partners & Services at Five9. "You need to make sure you have all the functionalities in a single, seamless CCaaS environment that integrates to your CRM solution and other places where your customer data lives, to provide a seamless customer journey."

CRM software supports the institutional knowledge of customer issues and what has been done in the past to resolve them that customer service representatives rely on whenever they interact with consumers. Eliminating duplicative communications not only increases agents' productivity, perhaps more importantly, it demonstrates that an organization cares for its customers, experts said.

"It's important to know what the customer is calling about, and it's important to know if they've called twice before and have already spoken to multiple departments, said Valerie Espie Bourseau, Director of Solution Consulting and Customer Experience at 8x8, a provider of cloud-based contact center products based in Campbell, Calif. "This will help to soothe the customer who might not be in the best of moods and will also help the agent engage the customer's concerns without having to ask a lot of repetitive questions. Knowing the customer journey is especially important these days because if a customer is upset with your company, they can use social media to convey that dissatisfaction to a lot of people."

TECHNOLOGY

In addition to supporting multiple communications media, (like voice, chat, and text), modern CCaaS systems include an intelligent routing engine, interactive voice response (IVR), predictive dialing capabilities, plus usage data and related analytics. Increasingly, they incorporate Artificial Intelligence to augment agents' case knowledge and ability to answer questions. Add to this list omni-channel and multi-channel features.

To use these capabilities, businesses must have sufficient connectivity and bandwidth. Companies must not only consider performance requirements for any brick-and-mortar sites. They also must also consider – and set policy for – connectivity at employees' homes, as well as anywhere else they might choose to work. After all, performance levels can vary greatly from place-to-place. While general DSL or cable modem functionality tend to suffice, carriers offer multiple price and speed packages to residential customers. These may (or may not) be adequate. Therefore, companies increasingly prescribe minimum network performance levels for home-based workers.
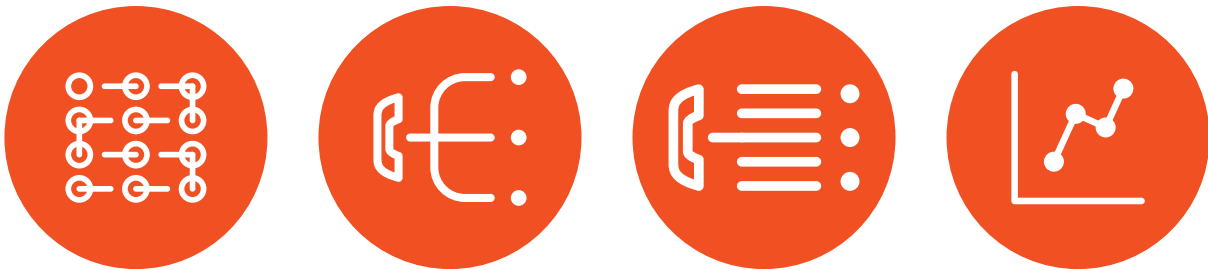
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CALL DISTRIBUTOR

A routing system that manages, delivers, and records a full range of interactions, including voice, chat, messaging, and social media. The call distributor then routes these exchanges to designated contact center agents based on individuals' skills, training, and other aspects a company has programmed into the system. For example, an employer may choose some agents as specialists in voice calls; it may select others for textbased interactions. This feature changes not only how agents work, but how the employers select them for their respective roles. We will explore this in more depth later.

INTERACTIVE VOICE RESPONSE (IVR)

This familiar feature enables incoming callers to route themselves to specific sub-groups in an organization's contact center based on a menu of options explained by a recorded voice and controlled by verbal responses or touch tones (DTMF tones). This also can be used to route incoming callers to self-service features for common requests such as bill paying or account balances. IVR systems may be integrated with ACD systems for enhanced data-sharing capabilities.

OUTBOUND PREDICTIVE DIALERS

These enable contact centers to proactively place calls to a defined customer list and then send those calls to an available agent when an outbound call is answered. Algorithms manage delay times for both contact center agents and customers. This boosts agents' productivity and time-management since many calls will go unanswered. Predictive dialers can help sales and customer service agents achieve higher connect rates. Queue call-back, where customers mark a position in line for subsequent contact center callback, is another important component.

ANALYTICS

Collecting data about customer interactions and agent performance, and leveraging it to be more actionable, contextual, and easy to consume, yields measurable business results. Resulting insights should help management better understand customer needs, and how they decide to purchase or upgrade your products (or why they don't).

OUTBOUND PREDICTIVE DIALERS

An amazing extension of analytics capabilities, AI-enriched solutions use data in ways that imitate humans' cognitiveb functions. Currently, it has varied, vemerging and maturing use in CCaaS. AI does not replace human agents today (or in the near future), and whether it ever will do so is subject to debate. But AI already has become a highly useful tool to augment customer interactions and measure results. Chatbots and voicebots are the more common entry points to AI. You've seen them pop up at the corners of web pages, offering to provide assistance with an almost human-like persona. These features can interpret your responses (with varying degrees of accuracy) and serve-up standard replies.

"Companies are starting their AI journeys with chatbots and voicebots," said Geoff Chretien, Vice President of Channel Sales at Genesys, which sells customer experience and call center technology to mid-sized and large businesses from its headquarters in Daly City, Calif. "The automation is continually evolving and establishing strong customer business cases. AI is developing in a way that enables predictive, prescriptive, and cognitive customer experiences. Having a suite of AI capabilities has become essential."

AI's next step is to take customer information and make it available to contact center agents, so they have context for inquiries without having to extensively question customers as they call in. When used to assist human agents, (as opposed to chatbots/voicebots), this reduces training and adds greater consistency in responses to questions.

"The ability to leverage AI to help your contact center agents decide what to do next decreases your cost of training and helps get them up-to-speed quickly," said Five9's Dignan. "That's a very important use case."

Some AI systems can even judge human emotions through vocal patterns, tone, and volume, thereby triggering escalation, management intervention, or supervisor monitoring of the call. AI can also track which questions are trending – a useful tool for message development.
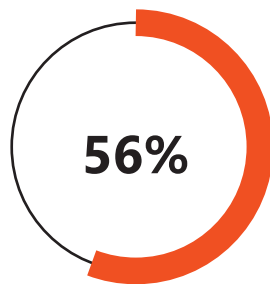
"An AI system can not only recognize the words that are being typed. It also has an ability to interpret the meaning of what's being asked for. It's not looking for keywords," said Nice inContact's Rusty Jensen. "It looks to recognize patterns from all its previous interactions with all the different ways that people have asked the same question, and it's able to answer much more accurately to give them real answers, and not just pre-programmed, canned responses."

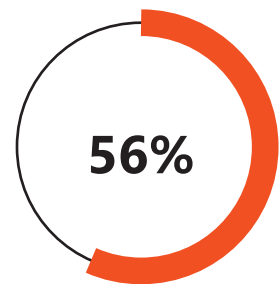Key components of AI that are in high demand include the following:

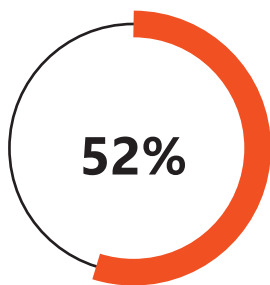## Do you require any of the following AI capabilities?
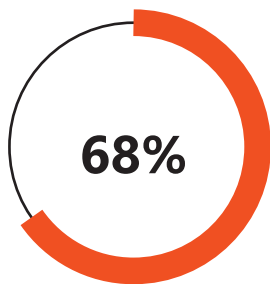
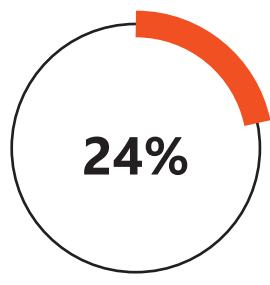|		
68%	**56%**	**56%**
Speech / Text Analytics	Staffing/ Scheduling Optimization	Virtual Assistants for Human Agents
52%	**24%**	**16%**
Virtual Assistants with Natural Language Processing	Customer/Agent Personality Mapping	Administration Automation
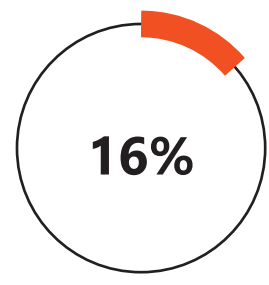
"AI is very real," said Jensen. "There are learning algorithms that come from people like Google and IBM, in which all these intelligence systems have the ability to recognize patterns, the ability to recognize mistakes, and make corrections. But a lot of times the data is incomplete. So sometimes when companies say, 'Hey, we have AI!,' they might not fully have the fundamentals for the AI to draw upon and actually functionally engage in a positive way. In some cases, it might be more aspirational."

Customers are advised to discuss how AI can fit into their organization with their Trusted Advisors.

People want better human connections and personalization in their contact center interactions. Predictive behavioral routing leverages a broad database consisting of billions of interactions, taking all data through an analytics engine to feed AI. The AI then looks at all that data to establish patternsof personalities, linking customer phone numbers to all of their interactions and calls, and classifies them into personality types. The system then can link the phone number to the personality type and route them to the available agent who best matches their profile.

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>
> **- Ryan McCormick (Five9)**

"Data feeds AI and AI drives engagement," said Geoff Chretien of Genesys. "Engagement drives personalization, and personalization creates empathy, loyalty, and trust."

AI also plays a role in hiring.

"I have a customer who is getting 7,000 applications per week who uses AI to identify the best candidates, and they're turning away something like 90% of their applicants," said Five9's McCormick. "The work-from-home model is ideal for them because it helps them to hire the best candidates and they can use tools to engage, manage and motivate agent regardless of where their agents are geographically."

MULTICHANNEL VS. OMNICHANNEL

Anyone interested in CCaaS is bound to encounter the terms multichannel and omnichannel. The two are very closely related. Multichannel is the ability to provide customer service across a variety of channels, such as voice, text, and chatbot. Omnichannel is the ability to seamlessly move communications from one channel to another, such as when a customer begins their inquiry on chat, then moves to the phone for a more detailed exchange. An omnichannel contact center can deliver these functions through an integrated queue.

"We hear a lot of people talk about omnichannel when what they really mean is multichannel," said Alamo Cloud's Tim Montgomery. "A lot of different organizations are kind of piecemeal. We see a marketing department handling social, we see a back-office department handling email, and a different department handling chat. That's multichannel. To move to omnichannel, we have to build it around the customer. There are two different ways to look at this. One is to use omnichannel to see the entire journey. They can start with email and then move to a chat, and then agents can see the interaction cradle-to-grave. But we also see it built around the agent in the contact center. This enables that agent to interact whether it's a phone call, an email, or a chat. All of those things can come into one platform. This enables us to send the customer to the agent with the greatest ability to handle the issue. This also changes the way companies onboard and train agents because, in an omnichannel environment, a chat with a customer will come in with suggested answers. You can get someone trained on that really quickly, and they're able to find those answers without having to do it in real time."

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> "

SECURITY

Like every technology, security must be fully considered (and integrated) within the context of any CCaaS migration.

"If they can gain access to users' devices or applications cybercriminals can elicit monetary value, often through the form of fraudulent calling," said Mark Marquez, Executive Vice President of Technology at Momentum Telecom, an Atlanta-based provider of cloud voice, managed network, and unified communications solutions. "There are features like voice encryption that can help, but there are also advanced features in voice and web portals that can enable call forwarding, and, if a fraudster enables call forwarding to an international destination, they can 'traffic pump" 'calls into those numbers. There are a lot of things that people wouldn't think about in the context of network security that can generate various types of fraud."

Cybercriminals will try to attack via customer devices, registration patterns, offshore IP addresses, scanning, and more. In addition to installing proper security systems, companies should monitor historical calls, call times, divergencies from call patterns etc. Compliance requirements also may be applicable. For more information, download AVANT's 9-1 Report on IT security at www.goavant.net/security-report.

Encryption, biometrics, multifactor authentication, and speech recognition are also important tools toward effective security.

SD-WAN is particularly useful for supporting security in CCaaS environments, Marquez added. "Companies have gravitated towards SD-WAN from a security perspective because they can get more bandwidth and utilize multiple circuits at the same cost that they used to pay for slower MPLS circuits," he said. "And then they can take encryption and encapsulation capabilities that SD-WAN incorporates for an additional level of security. Also, a lot of the SD-WAN offerings have built-in zero-trust firewall functionality, so they lock down automatically without having to build complex security policy. SDWAN is also fitting in with the cloud-native SASE architectures and offers a lot that makes managing the wide area network a lot more feasible without needing a large staff."

AVANT's initial assessments also show that customers often must satisfy specific compliance standards.

COMPLIANCE STANDARDS REQUIRED

69% PCI

41% HIPPA

14% GDPR

11% SOX

7% ISO27001

5% FedRAMP

4% CCPA

3% SSAE 16(Type 2)

3% SSAE 18

WORKFORCE IMPACTS

CCaaS has a number of human aspects that factor into the equation, as well. The technology's capabilities carry some unique operational ramifications for the contact center. For example, the ability to accommodate voice and text translates to changes in contact center agent selection, training, and operation methods.

Agents who are highly competent communicators in text may not be as good in the real-time medium of voice. They may be able to quickly look up the answers to questions, and even have the skills to revise or extend those answers based on the customer's circumstances. On the other hand, the written word is more likely to be referenced in the future, as compared to the spoken word. Where to start new contact center agents is the subject of debate.

There are two schools of thought: One is to start inexperienced agents on the voice side of the contact center, given that the written word is more easily retained and tracked and, therefore, needs to be precise – perhaps more precise than a newcomer can reliably deliver. The second school of thought is to start inexperienced agents on the text side of the house where they can cut-and-paste previously vetted responses to common problems as they build their expertise and experience. In most cases, the specific course of action may become clearer based on an individual's skills and traits.

The person who might be great on the phone might be awful with the written word," said 8x8's Valerie Espie Bourseau. "I would recommend hiring specifically for each different mode of communication. I'd test to determine their skills with the written word, and how good their spoken dialogue might be. In either case, you want them properly representing your company."

> "The person who might be great on the phone might be awful with the written word
>
> **- Valerie Espie Bourseau (8x8)**

Although the initial concept was to have each agent capable of working the entire stack of communications modes – voice, chat, and other channels – a degree of specialization has emerged in which some agents focus on voice and others specialize in asynchronous channels such as chat.

"When you're hiring people, you've got to consider the personality types that match, said Nice inContact's Rusty Jensen. "It's not just about emulating the one agent who's really good. You need to reflect the personalities of the customer base. In terms of scheduling, you need to have the right combinations of people on the floor."

Workforce optimization and workforce engagement management constitute the underpinning of strategies around using the contact center as a way to drive maximum customer satisfaction while minimizing operational expenses through effective agent performance. Facets include flexible scheduling, plus personalized training and coaching. Gamification, which uses leader boards to measure success, can also help agents to stay motivated, assuming it's not used in demeaning ways.

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> "

"Frequently, organizations rely too heavily on performance metrics to drive agent efficiency," said Geoff Chretien of Genesys. "That can result in employee disengagement and even unhappiness. When you are bombarding agents with a constant stream of numbers and targets, agents begin to become disenfranchised and eventually quit. It's not unlikely to see contact center turnover of 70-100 percent on an annual basis. Employers need to keep in mind that good customer experiences start with the agent.

"You need performance management to measure KPIs, but you also need accurate forecasting, the ability to trade shifts, and other things that accommodate work-life balance," Chretien continued. "It's important to reward agents for meeting and exceeding goals. Use agent surveys to gather their opinions. And, of course, automation overarches all of this."

Review the tools used in your contact center. Are they achieving desired outcomes? The contact center has largely become the new storefront. It has gained a crucial role in company success and needs to be viewed as such. Include operations teams in the development and use of these tools and practices.

CHOOSING YOUR SOLUTION

In many cases, selecting the best CCaaS solution is made in conjunction with choosing Unified Communications as a Service (UCaaS), which is the more general business-class telephony replacement – as opposed to a contact center solution. For more information on UCaaS, please download AVANT's 9-1 Report on UCaaS. The market is vibrant and continually evolving.

"Twenty years ago, customers were really interested in best-of-breed," said Five9's Andy Dignan. "Then they went down the path of consolidation to single player vendors that said you need to buy your PBX, your ACD, and your video from the same vendor. There were a lot of large communications vendors that had a great run with that model. But now we've transitioned into the cloud space, and you're seeing a really rapid transition from on-premise to cloud. That was really the first workload in collaboration to get moved to the cloud, which was followed by unified communications and then contact center.

"Contact center is the more complex solution of the collaboration stack, which is probably one of the main reasons why it was the last one to make that shift. This takes you to a new round of best of breed because cloud vendors tend to work really well together because of easier integrations with simple APIs," Dignan added. "A lot of CIOs are starting with their CCaaS solution because there's a big ROI there. Then they start looking at UCaaS. Ultimately, CIOs need to make sure that their choice in UC integrates very well with their CCaaS environment, in addition to all of their other applications, like CRM."

When choosing either system, engage your operations people to ensure you know their needs and develop a mutual understanding of how the technology can improve their performance, simplify their lives, upgrade customer satisfaction, and enhance overall efficiency. Once this is done, engage the IT team to secure their buy-in. This process will uncover numerous capabilities that map not only to your business, but how people within your business do their jobs. While this exercise is valid for both UCaaS and CCaaS, it's especially important with CCaaS.

> **When choosing either system, engage your operations people to ensure you know their needs and develop a mutual understanding of how the technology can improve their performance.**

"You have to know your business before you engage the provider," said Bourseau. "The provider will know the technology and best practices, but you also need to know what you must provide for your customers and define the level of experience you want to provide the callers. Enterprise leaders should also take a direct approach by calling their own support numbers and directly observing the customer experience. This can really open your eyes!"

Understanding the customer experience and related objectives is, therefore the crucial first step. You'll want to conduct that process with mindfulness. While your technology selection is not as "final" in the cloud as it would be with on-premises systems, you will sign a service contract for a specified timeframe – a decision typically difficult to undo without significant penalties. You want to ensure you understand what you want to provide your customers, and then ensure the solution you choose meets those needs.

> While you will want your system to accommodate all the popular modes of communication, voice is still king
>
> **- Andy Dignan (Five9)**

"While you will want your system to accommodate all the popular modes of communication, voice is still king," said Five9's Dignan. "You need a strong voice platform with high quality of service, first and foremost. Then you need to look at all the other communications channels with which you want to interact with your customer, and you need to make sure that the back end integrates to your reporting platform and to your CRM platform in order to maximize the contact center agent's visibility into the needs of the customer journey. Once this aspect is resolved, consider additional augmentations such as Artificial Intelligence. Since AI can mean several different performance aspects to different people, purchasers must analyze the specific functionalities that are most critical to their needs, verticals, and business models."

In addition, ascertain a solution that can quickly and easily scale up or scale down, commensurate with the changing needs of your business. Approach this capability for both the number of participating contact center agents and any additional features, tools, and service platforms you may add later.

If your company has an international presence, also consider data sovereignty requirements, long haul voice quality, and multi-lingual capabilities.

Your Trusted Advisor is a crucial enabler to help you select and implement the solution that is most appropriate for your business today (and in the future).

KEY ROLES

CCaaS involves companies serving in a variety of roles that represent different portions of the value proposition. The general categories listed below are not mutually exclusive, as different companies may have or merge diverse models. Here are the general categories:

PRODUCT VENDOR

These companies develop software, hardware, platforms, and solutions. You will likely find some products are more effective than others, and some will work together in the same environment better than others. When they don't interoperate well, they might cancel out one another's benefits or cause systems to work more slowly, due to the different products' poor interaction. Vendors often rely upon Trusted Advisors, managed service providers (MSPs), and indirect channel partners to bring their products to market, though some also may sell directly to the client. From the customer standpoint, direct sales efforts are led by people with quotas and allegiance to one vendor. Thus, the product they offer may or may not be the best fit for your circumstances.

MANAGED SERVICE PROVIDER (MSP)

MSPs use vendor products, sometimes with a portfolio of vendors to choose from, to deliver a solution. They are not product developers, although some combine different products into a bundled offer – perhaps with an additional homegrown service or software that differentiates them from their competition. MSPs often optimize a given solution to your needs and function in a mode very similar to consultants (see below). In most cases, the buyer will have certain options available but cannot make detailed requirements on which vendors and solutions. This limitation is typically balanced by enhanced simplicity. Carriers can provide managed security services working with an MSP model. In most cases, carrier-based offerings are made in conjunction with other offered services.

CONSULTANT/AGENT/RESELLER

These companies develop software, hardware, platforms, and solutions. You will likely find some products are more effective than others, and some will work together in the same environment better than others. When they don't interoperate well, they might cancel out one another's benefits or cause systems to work more slowly, due to the different products' poor interaction. Vendors often rely upon Trusted Advisors, managed service providers (MSPs), and indirect channel partners to bring their products to market, though

some also may sell directly to the client. From the customer standpoint, direct sales efforts are led by people with quotas and allegiance to one vendor. Thus, the product they offer may or may not be the best fit for your circumstances.

TRUSTED ADVISOR

A Trusted Advisor is a technology company that translates the offerings of technology vendors and service providers into integrated solutions that further customers' interests, typically by reducing costs or boosting productivity. They often are called "agents," "resellers," integrators," or "managed service providers," each of which has its own businessmodel variation. Trusted Advisors are third parties; they are neither owned by a vendor nor part of an internal IT department. They advise clients and make recommendations that customers then use in their decision making.

Trusted Advisors understand products and their key differentiators. However, their knowledge of technology must interweave with their knowledge of business functions in order to devise technology-based solutions that successfully resolve business problems. Their strategies are, therefore, highly consultative, and Trusted Advisors seek an ongoing and direct line of sight into each customer's needs.

They typically have a technology or vertical specialty that spans multiple technologies, although most will offer an array of services in allied sectors, either directly or via partners. How those specialties align, combined with the resources and footprint of the company, generally determines the portion of the market they serve, ranging from small business to large enterprise.

Trusted Advisors specializing in the technology-of-interest are generally the first step enterprise decision makers take in their acquisition process. While each customer brings different values to the equation, (and therefore seeks different types of partners), their presence in the technology lifecycle is generally viewed as a practical necessity.

ACTION ITEMS

- Ensure your CCaaS system includes all of the necessary technical capabilities, particularly, but not limited to, Artificial Intelligence.

- Make sure security is interwoven throughout your CCaaS strategy, as well as every other Information Technology in use.

- Prepare for the fact that AI-enabled CCaaS will change your requirements for contact center staff, given the emphasis on both voice communications and data communications.

- When considering a CCaaS migration, engage management, IT, security, finance and also contact center users.

CCAAS PODCASTS ON AVANT TECHNOLOGY INSIGHTS WITH KEN PRESTI

Each "9-1 Report" is developed by AVANT Research & Analytics with the assistance of technical teams within AVANT. These market research reports are backed by a wealth of data secured by AVANT in our normal course of business, our own primary research of end-customers, and other reputable industry sources.

CCAAS AND TOOLS

▶ **GREG FRANZEN: INTEGRATING TOOLS FOR UC & CC**

UCaaS and CCaaS both represent a chance to leverage software tools toward higher effectiveness and customer satisfaction. In this episode, Ken Presti tackles this topic with Greg Franzen of Vonage, who examines this opportunity and its impacts on the sales process.

▶ **RYAN MCCORMICK: WFO & SPEECH ANALYTICS WITHIN CCAAS**

Workforce optimization and speech analytics factor heavily into the future of CCaaS. In this episode, Ken Presti speaks with Ryan McCormick of Five9 about how all this impacts plans made by today's enterprise decision makers.

CCAAS AND CUSTOMER EXPERIENCE

▶ **GEOFF CHRETIEN: LEVERAGING DATA FOR ENHANCED CUSTOMER EXPERIENCE**

Customer experience has emerged as a key component of the sales offer. In this episode, Geoff Chretien of Genesys tells Ken Presti about the critical role of enhanced communication leveraging artificial intelligence and a host of other capabilities.

▶ **ANDY DIGNAN: BUILDING AWESOME CUSTOMER SERVICE THROUGH CCAAS**

CCaaS is increasingly augmented by AI as a means of building world class customer service. In this episode, Ken Presti talks to Andy Dignan, Senior Vice President of Global Partners & Services at Five9 about what all this can mean to YOUR business.

CCAAS SECURITY

▶ **MARK MARQUEZ: DELIVERING AIRTIGHT SECURITY OVER HOSTED VOICE**

Hosted voice has gathered huge momentum -- especially amidst the global pandemic. But what about the security aspect of this technology? AVANT's Ken Presti speaks with Mark Marquez of Momentum Telecom to assess the risks and the remedies.

CCAAS VENDORS

Your AVANT Trusted Advisor is familiar with the offerings of the following CCaaS providers, each of whom can make a significant positive impact on your migration opportunity:

3CLogic	EvolveIP	Momentum Telecom
8x8	Five9	NetFortris
AT&T Business	Fusion	Nice inContact
Avaya	Fuze	NTT
BullsEye Telecom	Genesys	RingCentral
CallOne	Intrado	SCB Global
Calltower	LifeSize	Talkdesk
CBTS	LogMeIn	TPX
Coeo	Masergy	Verizon
Convergia	MetTel	Vonage
Dialpad	Mitel	Windstream Enterprise

VENDORS WITH BOTH UCAAS & CCAAS

|		
8x8	Dialpad	Momentum Telecom
AT&T Business	EvolveIP	NetFortris
Avaya	Fusion	NTT
BullsEye Telecom	Fuze	RingCentral
CallOne	Intrado	SCB Global
Calltower	LogMeIn	TPX
CBTS	Masergy	Verizon
Coeo	MetTel	Vonage
Convergia	Mitel	Windstream Enterprise

Put the experience first.

Build a relationship to last.

NICE CXone works with organizations of all sizes to create extraordinary and trustworthy customer experiences that build deeper brand loyalty and relationships that last.

With NICE CXoneᴛᴍ, the industry's most complete cloud customer experience platform, we combine best-in-class Customer Analytics, Omnichannel Routing, Workforce Engagement, Automation and Artificial Intelligence, all on an Open Cloud Foundation, enabling an exceptional agent and customer experience— every time and on every channel. See how our customer-centric expert services, innovative software, extensive ecosystem of extensive partnerships, and over a decade of global leadership can help you transform every experience and customer relationship for lasting results.

Contact your Trusted Advisors or an Avant Channel Manager for more information.
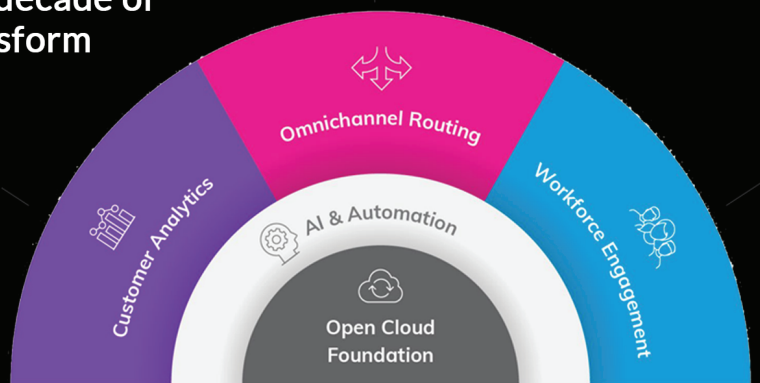
POWER DEEPLY CONNECTED, MEANINGFUL EXPERIENCES

Imagine a new world where contact centers run so smoothly that customers feel satisfied after every interaction - a world where employees are excited to go to work each day.

The Genesys Cloud™ solution makes that world possible. Thousands of businesses around the globe use this easy, all-in-one contact center solution to deliver seamless customer experiences.

SATISFIED CUSTOMERS
Create fluid customer conversations across digital and voice channels. Predict and understand customer issues before they escalate — or before they even happen.

HAPPIER EMPLOYEES
Make it easy for agents to resolve issues fast with an intuitive interface. Empower employees to find solutions together with collaboration tools that let them talk, video, chat and search.

BETTER BUSINESS OUTCOMES
Seamlessly integrate with Salesforce and other CRM tools to add context to customer journeys. Reduce costs, boost sales and automate routine tasks with Genesys AI.

Contact Your Trusted Advisor or AVANT Channel Manager for More Information

TECH SHORTHAND

- AI: Artificial Intelligence

- CAPEX: Capital Expense

- CCaaS: Contact Center as-a-Service

- CIO: Chief Information Officer

- CRM: Customer Relationship Management

- IVR: Interactive Voice Response

- KPI: Key Performance Indicator

- MSP: Managed Service Provider

- NPS: Net Promoter Score

- OPEX: Operational Expense

- PBX: Private Branch eXchange

- SD-WAN: Software Defined Wide Area Network

- SMB: Small-to-Medium Business

- UCaaS: Unified Communications as-a-Service

ACKNOWLEDGEMENTS