The Aragon Research Globe™ for the Intelligent Contact Center, 2025

The Race to AI-based Agents and Next-Generation CX Experiences

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Topic: Intelligent contact center

Issue: Who are the intelligent contact center providers and how will they evolve?

November 12, 2024 | Research Note 2024-38

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SUMMARY

Aragon Research releases its sixth Aragon Research Globe™ for intelligent contact centers (ICCs). The ICC market has shifted, and now virtual agents are coming online, ready to work with and help human agents and customers. As digital labor continues to grow, the 15 major vendors in this report are amid some of the biggest changes since this market came to fruition 25 years ago.

Key Findings:

Prediction: By YE 2024, 70% of ICC providers will use third party LLMs that they train on their own product and service information (80% probability).

Prediction: By YE 2025, to keep up with the need for self-service support, 60% of enterprises will offer virtual agents that are trained to answer common questions (70% probability).

Prediction: By YE 2024, 55% of contact center providers will enable the development of an enhanced customer profile that will enable a more personalized customer experience (70% probability).

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Introduction

As we head into 2025, there is little doubt that digital workers are emerging in the form of agents and assistants. The two must-have experiences are agent assistants and basic customer assistants. There is no doubt that generative AI has caused a next-generation approach to building virtual agents, and this has caused a new race to both understand what they can do and find the right providers that can help enterprises build and deploy them.

There is no doubt that we are in the transformation of the contact center and that, in many cases, there will be new applications that emerge that use contact center technology but aren't focused on agents sitting at a desk. An example is the need for advanced prescription refill applications that are conversational in nature and not based on IVR or a touch-tone phone. Contact centers are under severe pressure to modernize and transform not only for better omni-channel interactions but for quicker and more accurate answers. Going forward, virtual agents will be doing more work to answer foundational questions and answers, leaving the heavy lifting to humans.

There's more pressure than ever on the enterprise and on the contact center management team to modernize their approach to customer support by focusing less on features and more on how they can help customers both inbound and outbound. AI is here to stay, and digital labor is poised for significant growth as many providers roll out new products in 2025. This Research Note evaluates the trends in the market and identifies 15 key providers that are making a difference in intelligent contact centers.

Transform or Get Left Behind

The needs of users and customers trump everything. With that in mind, enterprises need to look at the best ways to support both users and customers, and, in some cases, in 2025 and beyond, it may be that a virtual agent is better at answering basic questions. Besides the need for a modern contact center, there is now significant pressure on enterprises to understand both AI and virtual agents while they look to deploy them, with agent assistance being the first priority.

In discussions with enterprise buyers, many have expressed concern about the best way to get started, and obviously there will be a need for enterprises to hire systems integrators and vendors themselves that offer the virtual agents.

While there are many decisionmakers that believe in the need for digital workers / virtual agents, there are also many that don't. However, just given the number of new product offerings launched in 2024, with more coming in 2025, the advancement of digital labor technology has

been profound. The need for education of what AI-based agents is still great, and that should be as big of a priority as vendor selection.

Digital Labor involves real virtual agents that can help solve the problems that customers have. The bigger challenge of customer experience gets at the crux of the intelligent contact center. Providers that are investing in automation and intelligence will need to be able to demonstrate to buyers that their product knows more and can react quicker to support a growing number of use cases.

Omnichannel Communications: Chat Is Here, and Video Is Coming

Voice is still the dominant channel because people feel that if they call, they should be able to get an answer from a human. However, voice technology for live conversations with callers is still maturing, but it has improved significantly. That said, most enterprises that have customer-facing support centers defer to chat because it's easier and faster to deploy and most of the virtual agents that are ready for prime-time don't speak well—but can type well.

We should expect to see much better voice agents in 2025. However, it doesn't mean that the voice agent has to be called on the phone—it may be a voice agent that talks to you via a chat interface. Relative to video, a majority of the vendors do not offer video capabilities at this time. However, with growing demand for telehealth we do expect the ability to do a video call either for product installation or customer healthcare will see more movement in the next three years.

Obviously, email is still here and will be here for a long time. In many cases, email is the validation or confirmation that a ticket has been logged, but it is not the communication channel. Still, it plays a role because it's proof that a transaction or ticket was registered, and it is a defense mechanism because providers use email as a way to communicate that they have not responded and closed the ticket.

Social Channels—Communicating Where the Customer Is

Besides traditional channels mentioned above, it's also becoming clear that customers want to communicate on channels that they're comfortable with as well including most social chat apps like WhatsApp Facebook Messenger add more. Most of the ICC providers in this report do support social interactions and now they are being louder about that due to the fact that they've matured the capabilities and made them native in the platform.

Advanced Communications that Include Contact Center and UC&C

We are seeing a growing demand for significant capabilities that allow for contact centers and communications to be part of a more critical workflow or business process. Customer onboarding, healthcare admittance, and prescription refills are all examples that involve significant back-and-forth communication either to construct a transaction or clarify customer needs to solve a problem. While this market has been coming together for several years, what Aragon is seeing is that new applications are driving the need to bundle two formerly distinct categories into one advanced communications bundle. You can expect to hear more from Aragon Research about this new category in the coming months.

A Contact Center is, in essence, an advanced communications platform. For a growing number of small and midsize enterprises, the idea of one communications stack that is integrated with the Intelligent Contact Center is gaining traction. We see more providers making a combined UCC and ICC bundle. In these enterprises, particularly in small businesses, it is often common to see either finance or business owners making decisions on their tech stack, which is one of the business drivers causing increased demand for the Uber suite. So, the demand for an integrated stack that combines UC&C and intelligent contact centers is growing.

The demand for ICC and UCC is also seen in sales, where advanced contact center-like capabilities are needed, but often, teams don't know what a contact center is. While there are many growing providers that only focus on the sales use cases and are not included in this report, we also see many ICC vendors in this report realizing that sales organizations often need the strength and power of a contact center service.

A number of providers in this report offer a combined UC&C and contact center offering. This includes 8x8, Avaya, Cisco, Dialpad, Mitel, NEC, Nice, RingCentral, and Vonage. Note that it is the combination of an integrated client with growing capabilities in intelligence that will bring new levels of automation to a combined offering.
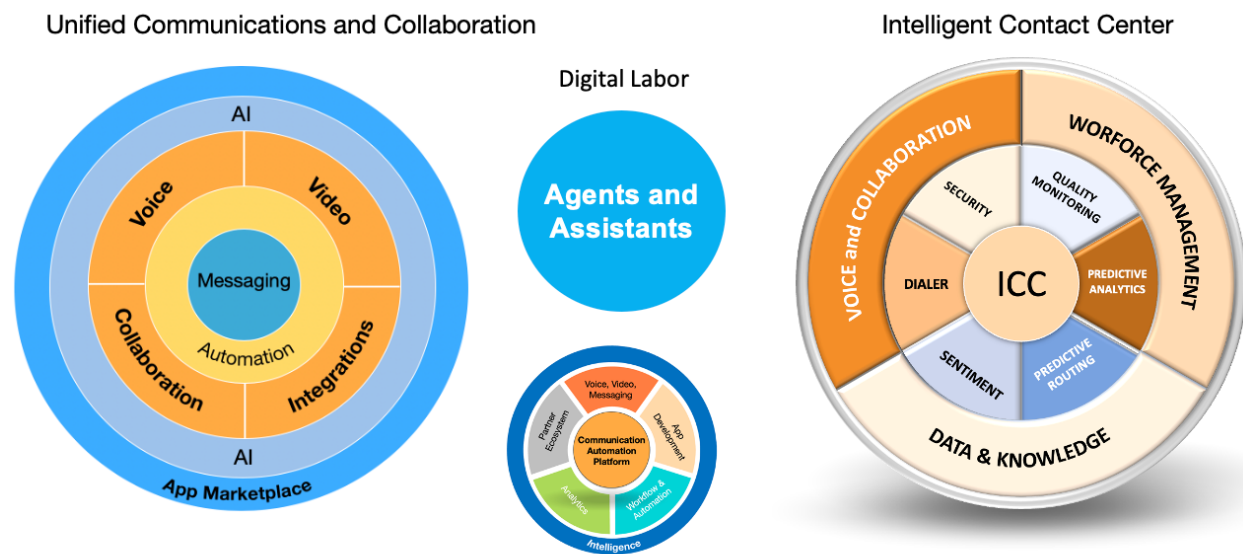
Figure 1: Enterprises are increasingly looking for an integrated communications stack that can blend UC&C with intelligent contact centers and virtual agents.

New Use Cases: Telehealth and Prescription Refills will Leverage ICC and UCC

The near term opportunity for Contact Center providers is Prescription Refill – and more bids are coming out than ever before – to enable Virtual Agents to help people with their refill needs – not just the old IVR approach of "Press 1 for your refill". Aragon has seen growing demand for this application – which supports the idea that Contact Centers with Virtual Agents can do much more than serve as a support line.

There is also interest and growing demand for telehealth, which is currently in its first generation of capability. Aragon feels that the next generation of Telehealth will be powered by ICC-based Video routing. In many cases, sophisticated routing will be needed in hospital and urgent care telehealth use cases. Today, many telehealth solutions do not offer that level of sophisticated routing with video capabilities.

Enterprises need to evaluate ICC providers for their omni-channel communications, including the ability to tailor those interactions based on customer preferences. As the Hospital Systems see growth, the first generation of API- based Telehealth providers will either evolve or give way to new providers that have an ICC as the engine for handling patient telehealth sessions.

Generative AI and LLM Reasoning Engines as Foundational for Virtual Agents

The technologies that will be used to build virtual agents include large language models that are part of the generative AI category. However, large language models don't just

run in the cloud—they will run on device and, Aragon feels that for many virtual agent needs, it will be more cost-effective to run on a local device such as an iPhone or Android device.

The age of reasoning engines is here. With offerings from Google, Microsoft, OpenAI, and Salesforce, Aragon sees a horizon where better answers can be provided since LLM will be able to understand context before providing an answer.

LLM-based reasoning is expected to come online in Q1 of 2025; however, providers are making these models available now. While it's advisable to start building your own agents right now, enterprises should understand that the types of questions that a virtual agent can answer and answer accurately will increase significantly in 2025.

We are beyond just talking about generative AI and LLMs at this point. It is about building agents and buying agents that are preconfigured. Today, agent assist should be considered foundational and one of the things that are expected to come online is the idea of daisy-chaining agents so that these mini-agents can handle specific tasks and be updated frequently.

Prediction: *By YE 2025, 50% of ICC providers offer their own Agent Platforms for the development of specific virtual agents (70% probability).*

Building Virtual Agents with Low-Code Configurability

The challenge for building virtual agents has always been coding and connectivity. Now, with next-generation agents from many of the providers in this report, even a business user can select the options that they want and get a virtual agent into test mode with no coding whatsoever.

For a number of providers, the exercise to configure an agent is very much a configuration exercise where the user selects from a series of menus about what they want it to do and where the source of the information is, and clicks start, enabling the system to configure the virtual agent that can be trained and communicated with.

One of the things that's also emerging is the ability to have agents that can talk to each other with minimal coding. The biggest change that has come to contact centers is the fact that virtual agents are much easier to build than ever before. The use case for virtual agents should start with Q&A as a training exercise before moving to more complex deployments.

What makes Intelligent Contact Center AI offerings so unique is that digital labor will learn how to deal with more complex interactions as it learns more about customer requests and solutions. As mentioned above, this means digital labor will need to be managed to ensure it is being used for the appropriate level and complexity of tasks it is able to be used for.

Virtual Agents that Work with Each Other

While this is being discussed in development circles, the ability of a virtual agent to hand off tasks to another agent is something that's been around with conversational AI platforms for a number of years. However, it has not been a common practice to roll these types of connected agents out into production.

That said, Aragon envisions the idea of small task or knowledge-based agents that can do specific things and hand off tasks from themselves to another agent that's more equipped to deal with the given task. Enterprises should use the idea of role-based agents with a workflow that allows for handoffs as part of their next-generation virtual agent implementations.
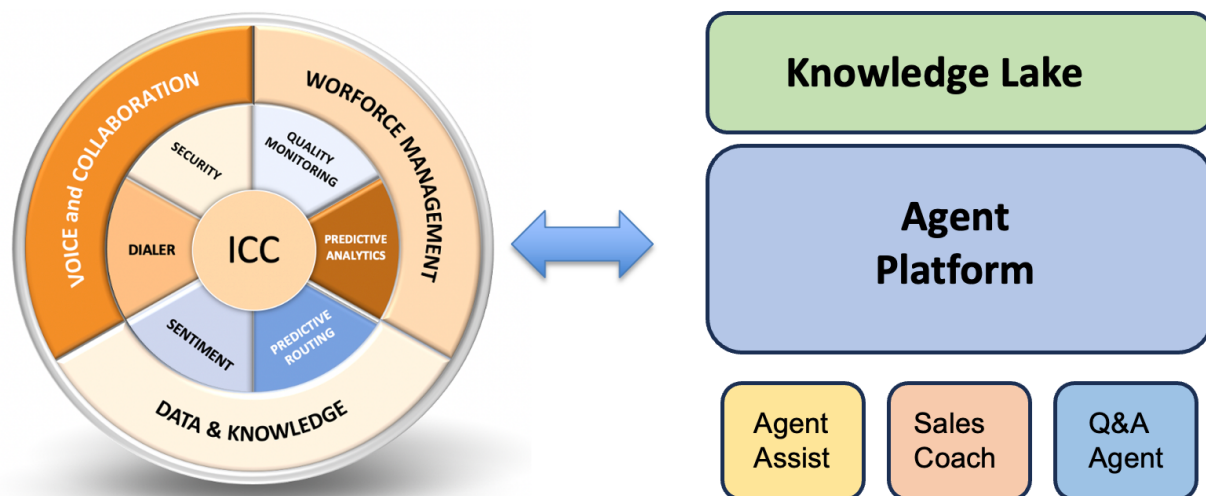
Figure 2: The intelligent contact center will start to have more configurable Virtual Agents, including Agent Assist.

Knowledge Lakes Will Be Foundational and Require Planning

The race to own knowledge is here, and Aragon is predicting the rise of knowledge lakes that will house both information profiles and the ability to leverage that information to help humans make better decisions.

While data is the fuel, the race is really about knowledge and that is why customer knowledge is valuable and needs to be protected. A knowledge Lake is different than a Data Lake in that it is a collection of a series of knowledge objects that, when used by Generative AI—can formulate intelligent answers to both simple questions today—and increasingly complex questions over the next five years. Figure 3 shows how Generative AI knowledge levels for roles and industries will increase over time.

There will be many battles to own enterprise knowledge and that is why knowledge lakes will be foundational going forward. Contact center providers will provide knowledge

repositories and so will CRM providers. The enterprise will need to decide where it keeps its mission-critical knowledge—we suggest that this be an architectural decision.

Aragon suggests that knowledge lakes should be part of an enterprise content repository that the LLMs and virtual agents can tap into. While controversial, many enterprises are making a strategic decision not to store all of their enterprise knowledge in a public cloud but rather keep it in local repositories that they manage.

However, Given the nature of both contact centers and CRM, there will be a significant amount of knowledge that is part of those applications, and that needs to be part of the overall knowledge architecture. Figure 3 shows how Generative AI knowledge levels for roles and industries will increase over time.

Prediction: *By YE 2025, 50% of contact center providers will leverage knowledge lakes that incorporate multiple information sources (60% probability).*

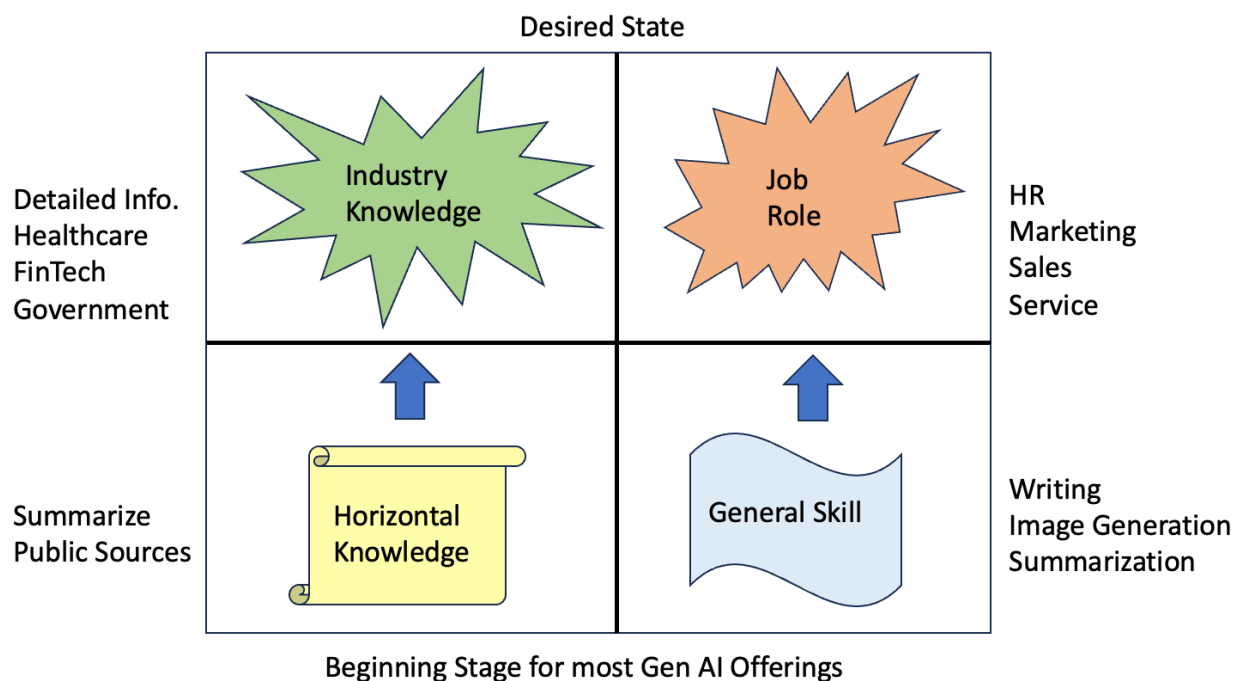*Figure 3: ICC providers and Enterprises will increasingly need to deal with skills and knowledge.*

Focus on Agent Assist as a Starting Point

Most enterprises could benefit from agent assist in an era of complex customer needs and agent turnover. Agent assist should be considered foundational. If not in production, it should be planned for production in 2025.

Aragon sees Agent Assist as an increasingly configurable offering—not totally out of the box—but an Agent that can learn your information and start working to help agents right away.

Not only can virtual agents be turned on, but they can also be configured and adapted much more rapidly given low code platforms and the rise of reasoning engines, which was mentioned earlier.

Real-time agent assistants are also incredibly valuable when onboarding or training new human agents, especially during the era of remote onboarding. With agent assist, new human agents can become proficient much faster and avoid rookie mistakes, thanks to having a real-time digital coach that can guide them in their interactions with users.

Agent Coaching Is Here with Automated Quality Management

Configurable Agent Coaches will operate after a call and sometimes in conjunction with Agent Assist during a call. Agent coaches can help with skills and with dealing with customer inquiries. Some providers offer both Agent Assist and Agent Coaching, and part of this is what we call Automated Quality Management.

With Generative AI, transcription becomes a standard capability. This enables the complete documentation of the entire conversation, but, more importantly, it can leverage AI technologies to analyze the call and identify specific areas where the agent excelled or may be able to improve. This information can be provided to the agent as real-time or summary feedback and provides supervisors

Note 1: The Different Types of Virtual Agents

There are a number of different virtual agents that should be evaluated for development and deployment in an ICC.

Greeting Agents
Client greeting and issue identification.

Agent Assist
These agents guide the agent towards a successful outcome with suggestions on what the human agent should say in a given situation.

Questions and Answer Virtual Agents

Virtual agents are ideal at handling basic questions and answers, and they can do it very quickly.

Refund Agents

Refund agents are trained to be able to look up a customer account and determine if the customer is owed a refund or not. There are a growing number of examples of Refund Agents in production.

with information to accurately assess their agent's performance. Enterprises should explore many types of virtual agents. See Note 1 for an overview.

The Roadmap to Leverage the Broken-Down ICC Maturity Model

The Aragon ICC Maturity Model continues to offer a roadmap to modernizing the overall approach to Contact Centers and the insertion of Virtual Agents (see Figure 4 below). One item to note is that Virtual Agents do not have to be sourced directly from your primary contact center provider. Enterprises can source them from a number of providers, providing that they offer integration with your existing providers.

The time to start with Virtual Agents is now – and it starts with Agent Assist. Enterprises may find that in evaluating where they are in the ICC maturity model, the conclusion may be to switch ICC providers or to pilot virtual agents from more than one provider.
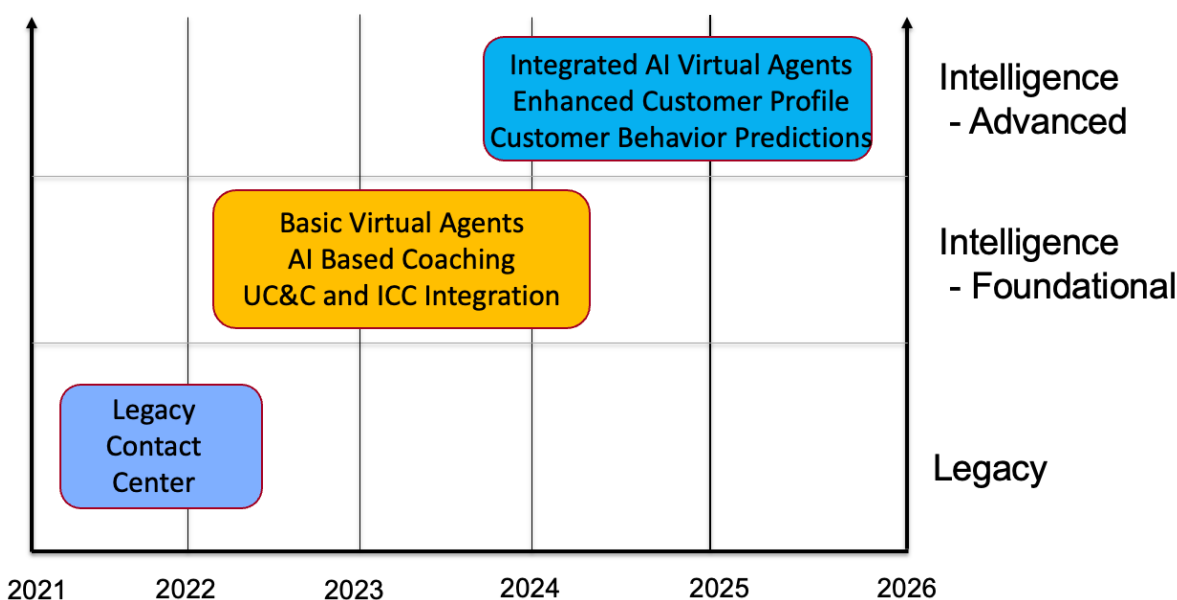
Figure 4: The ICC Maturity Model.

Don't Get Caught Off-Guard; Virtual Agents Are Here Now

As AI technologies improve, mature, and collect more information, digital labor will become only more capable of supporting and augmenting activities that today are primarily performed

by humans. Digital labor entities are able to process information and make response decisions independently and much faster than their human counterparts.

Business and IT leaders must realize that the emergence of digital labor will slowly augment and grow within their workforce; it will not be a single or multiple pivotal or momentous event as theorized in "singularity." Singularity refers to a point in time in which technology becomes uncontrollable and irreversible, resulting in a significant impact on humans.

We can debate if this shift is a single point in time or a gradual evolution. However, your business, workforce, customers, and partners may become reliant on digital labor before you have even recognized its impact and the need to manage your hybrid workforce effectively.

While documents and conversations are primary information sources for today's virtual agents, over time, expect both images and videos to increasingly be used as knowledge sources.

The Aragon Research Globe™ for the Intelligent Contact Center, 2025
(As of 10/30/2024)
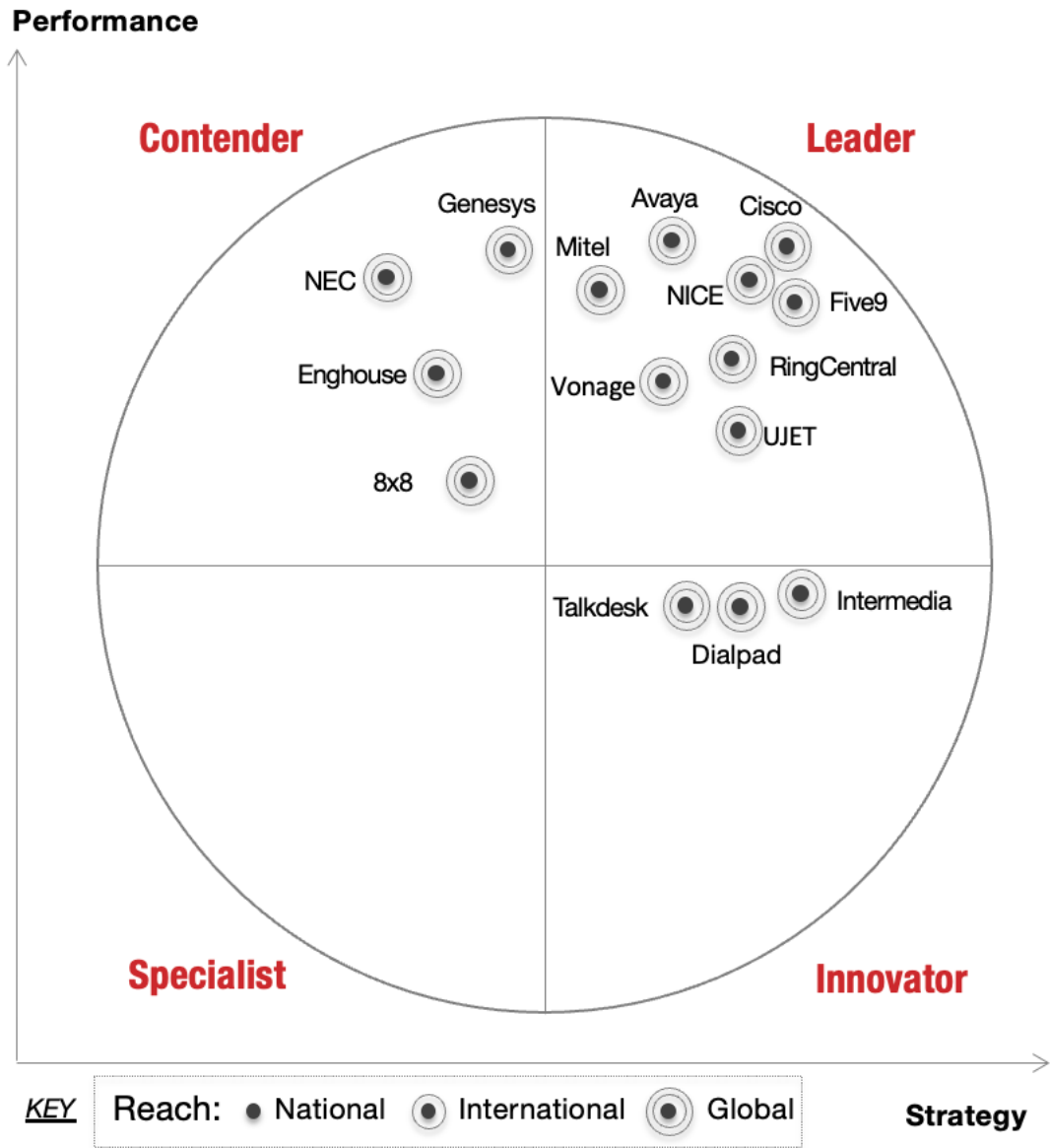
Figure 5: The Aragon Research Globe for Intelligent Contact Centers, 2024.

Leaders

Avaya

Recently appointed CEO Patrick Dennis took over as CEO at New-Jersey-based Avaya on 1st September 2024, having been Chair of the Board for the global CX company for much of the tenure of predecessor CEO Alan Masarek. Masarek announced his retirement plans earlier in the year and will remain at the company as advisor through December 2024. Avaya maintains a strong foothold in enterprise UC&C and contact center markets globally, and they continue to have one of the largest install bases in both markets. This can be attributed, in part, to Avaya's ability to securely scale its solutions to meet the needs of the very largest organizations across all verticals.

Avaya is focused on CX solutions for large enterprise, leading with their Avaya Experience Platform (AXP). AXP is Avaya's AI-powered intelligent contact center platform. Avaya continues to offer its product offerings as on-premise, Cloud, and as a Private Cloud or dedicated instance. The Avaya Aura Private Cloud with Avaya Experience Platform Private Cloud (formerly Avaya Enterprise Cloud), its dedicated cloud UC&C and contact center service is powered by Microsoft Azure.

In addition to Contact Center, Avaya Communication APIs, Avaya Cloud Office, Avaya Spaces, and Avaya Aura Private Cloud, Avaya continues to support its on-premise solutions like Avaya Experience Platform On-Prem (formerly Avaya Call Center Elite), Avaya Aura, and Avaya IP Office. Avaya has continued to announce strategic relationships with key UCC partners, including Zoom, Microsoft Teams, and RingCentral, allowing Avaya Aura customers to integrate cloud collaboration and meetings services with Avaya's embedded voice services.

Avaya is actively integrating Artificial Intelligence (AI) across its portfolio. The Avaya Experience Platform, its flagship AI-powered contact center solution, now incorporates Generative AI. This enables the creation of advanced virtual agents capable of integrating with leading conversational AI engines like Google, IBM Watson, and Nuance. The Avaya AI Workflow capability, combined with Generative AI, enables the building of new virtual agents that can integrate Google, IBM Watson, Nuance, and other conversational AI offerings into custom or pre-built solution virtual agents. Avaya primarily targets large enterprises with complex communication needs, particularly in sectors like financial services, healthcare, and government. Its solutions are designed to address the scalability, innovation, and reliability requirements of these demanding and frequently regulated environments.

While Avaya has strategically partnered with Microsoft Azure for its cloud offerings, the company remains committed to customer choice, and best-of-breed ecosystem partners. This approach allows Avaya to leverage various cloud platforms, including AWS, Google Cloud, and IBM, and integrate with providers such as Verint, Google, Afiniti, and Nuance. With a new CEO at the helm, a renewed focus on AI innovation, and a flexible strategy based on an open ecosystem, Avaya appears well-positioned for continued growth and success in the evolving enterprise communications landscape.

Strengths	**Challenges**
● Avaya portfolio that includes CX and EX focused solutions across public cloud, private cloud and on-premises solutions.	● Balancing its on-premise and cloud offerings
● Large deployment and cloud migration expertise	
● Huge install base	
● Native AI expertise and AI partner network	
● Extensive technology and alliance partner network and ecosystem	

- Global channel partner network with service expertise at all levels through all major markets
- Path to cloud for every customer to minimize cost and risk
- Composable communications platform architecture focused around CCaaS to provide agility, speed & value

Webex by Cisco

The Cisco Webex Business Unit, now led by Anurag Dhingra, SVP/GM of Cisco Collaboration, continues its push for innovation in both the Intelligent Contact Center (ICC) and its Communication and Collaboration product offerings. Cisco has seen significant growth in its Contact Center business, driven by strong leadership and its early investment in AI with the Webex Intelligent Assistant. Cisco offers its Webex Intelligent Contact Center and its flagship Webex Meetings, Calls, and Messaging, all available within the Webex One suite.

A key development in 2024 is the introduction of the new Webex AI Assistant for Contact Center. This advanced assistant goes beyond basic chatbots to provide agents with real-time assistance during customer interactions. It leverages generative AI to offer features like automated call summaries, suggested responses, and relevant knowledge base articles. The AI Assistant aims to improve agent efficiency, reduce handling time, and enhance the overall customer experience. Cisco continues to build upon its existing conversational intelligence capabilities. Features like real-time transcription, wrap-up notes, and action items remain central to its offering. The company also maintains its partnership with Google for speech-based AI, ensuring high accuracy and performance in voice interactions.

Cisco has integrated into its ICC offering Cisco Webex Experience Management, which includes advanced customer profiles, predictions on how customer experience will be impacted, and sentiment analysis. Cisco also offers Webex Workforce Optimization. Cisco Webex Experience Management offers a host of channels to engage with customers. Its flexibility and customer focus have also allowed it to win some large opportunities. Webex Contact Center also integrates with Salesforce Service Cloud, Microsoft Dynamics, and Zendesk as part of a subscription license.

Throughout 2023 and into 2024, Cisco has focused on delivering a comprehensive and user-friendly platform. Webex Experience Management includes advanced customer profiles, predictive analytics for customer experience, and sentiment analysis. Webex Workforce Optimization remains a key component of the suite. All administrative controls are now centralized in the Webex Control Hub, simplifying management for administrators.

Webex Contact Center serves a wide range of industries, including financial services, healthcare, retail, and technology. Its flexibility and robust feature set cater to businesses of all sizes and complexities. Cisco maintains a strong emphasis on security across its Webex platform, including support for privacy, encryption, data loss prevention, mobile security, and regulatory compliance. With 47 data centers globally, Webex Contact Center supports data residency and sovereignty requirements. Cisco's customer-centric approach, continuous innovation in AI and intelligence, and commitment to security position Webex Contact Center for continued growth and market leadership.

Strengths	**Challenges**
• Cisco brand	• Balancing multiple CC offerings
• Contact center install base	
• Focus on AI, including Generative AI	
• Flexible cloud, premises, and hybrid deployment options	
• End-to-end encryption	
• Overall UCC capabilities	

Aragon
Research

Five9

Five9, headquartered in San Ramon and led by Chairman and CEO Mike Burkland, has demonstrated consistent growth due to its early focus on its Intelligent CX Platform offering. Five9 offers a comprehensive suite of contact center solutions, including Intelligent Virtual Agent (IVA), AI Agent Assist, Global Voice, Agent Desktop Plus, Supervisor Plus, and Engagement Workflow, along with a robust ecosystem of integrations, APIs, and SDKs. Five9 supports both inbound and outbound use cases, offering global call support, intelligent routing, and omnichannel engagement. While maintaining partnerships with leading WEM providers, Five9 now provides a complete ICC solution, including Five9's own WEM capabilities.

In 2024, Five9 launched GenAI Studio, a significant advancement in its AI capabilities. GenAI Studio provides a low-code environment for businesses to customize and manage their generative AI models and prompts. This empowers organizations to tailor AI-driven interactions, ensuring they align with specific business needs and objectives. Beyond GenAI Studio, Five9 continues to enhance its core AI offerings. Agent Assist 2.0, with AI Summaries powered by OpenAI, provides agents with valuable insights and support during customer interactions. Five9's IVA remains a leading solution for automating routine tasks and delivering efficient self-service options.

In August 2024, Five9 acquired Acqueon, a real-time revenue execution platform. This acquisition enhances Five9's outbound capabilities and enables proactive, AI-driven customer engagement across marketing, sales, and service. The integration of Acqueon allows Five9 to orchestrate personalized interactions across the complete customer journey, improving connection rates and business outcomes for enterprises.

In 2023, Five9 strategically acquired Aceyus to accelerate cloud migration for enterprise customers transitioning from on-premise contact centers. Aceyus brings pre-built integrations and tools that streamline the migration process and ensure a smooth transition to the Five9 cloud platform. Five9's open platform approach is evident in its extensive library of over 300 APIs and SDKs. With its continued focus on Intelligence and its growing global presence, Five9 is well-positioned for the future.

<u>Strengths</u>	<u>Challenges</u>
• Integrated Virtual Agent and Agent Assist	• Awareness outside of North America
• Cloud offering	
• Inbound and outbound focus	
• Omnichannel features	
• Salesforce integration	
• Customer support	

Mitel

Mitel, US & Canada based and founded by President and CEO Tarun Loomba, added Eric Hanson as CMO in February, and it spent much of 2024 integrating Unify, which it acquired in 2023. Mitel is now one of the largest global providers of communications, collaboration, and contact center offerings, providing UC solutions for all customers, from large enterprises to small businesses. Mitel is focused on delivering to the Hybrid Cloud Communications needs of the market, expected to be a significant segment of the large enterprise Unified Communications market going forward. The Mitel portfolio of offerings now includes applications, collaboration, intelligent contact center, unified communications platforms, and solutions + cloud UCaaS via a new Zoom partnership.

Mitel announced its Common Communications Framework, a simplified framework for delivering the right hybrid communications solution to any customer, and the launch of Mitel Secure Cloud, which includes Hosted, Trusted, and Sovereign Cloud options, in September 2024. Mitel also announced a new strategic partnership with Zoom that includes the ability to offer the full Zoom Workplace portfolio as part of the Mitel Hybrid Cloud offerings. This will allow both Mitel and Zoom customers the opportunity to leverage the battle-tested Mitel MiVoice and OpenScape phone systems, including the Mitel 6900 & CP Series IP Phones and the 700 series of Digital Enhanced Cordless Telecommunications (DECT) handsets. The 700 series includes the 712dt, 722dt, 732d, and 742d handsets, which are hardened and ready for the Frontline workers that use them.

In 2024, in addition to integrating Unify acquisition assets, Mitel has continued to build its customer experience solutions Mitel MiContact Center Business & Enterprise with significant improvements to its AI-Powered virtual agents and agent assistants, Mitel Interaction Recording AI Insights and agent and supervisor UI improvements. These solutions provide omnichannel customer engagement, workforce optimization, and advanced analytics capabilities. It is designed to be flexible and scalable, catering to the needs of businesses of all sizes.

Mitel's comprehensive portfolio now includes a wide range of solutions, from on-premises and hybrid deployments to cloud-based offerings through its partnership with Zoom, a broad range of Vertical Products and integrations to best-of-breed vendors like PolyAI, Fiserv, Jack Henry, Epic, ServiceNow and numerous leading CRM platforms. With the integration of Unify, Mitel has gained valuable expertise and enhanced offerings, such as Mitel Critical Event Management, Mitel OpenScape Alarm Response, Mitel OpenScape Xpert, Mitel OpenScape HiMEd, and Mitel OpenScape Virtual Care Collaboration Service (VCCS) into its portfolio. This industry focus allows Mitel to offer tailored solutions that address specific business challenges in various industry verticals, including healthcare, hospitality, financial services, government/education, retail, and manufacturing. Mitel's expanded global footprint, combined with its comprehensive product portfolio and industry expertise, positions it as a leader for continued growth and success in the evolving UC and CC markets.

Strengths	Challenges
- Private/Public Cloud (dedicated instance) and on-premise deployment options - Hybrid cloud capabilities globally - End-to-end offerings - Large Enterprise and mid-market expertise - Flexible CapEx and OpEx purchasing and deployment models - Global partner ecosystem - Strong vertical expertise and offering	Simplifying its portfolio of offerings to easy to understand / adoption framework.

NICE CXone

NICE, headquartered in Hoboken, United States, and under the leadership of CEO Barak Eilam, continues to focus on the ICC space with a significant focus on AI. The company's flagship product, CXone, remains a central offering in its comprehensive suite of customer experience solutions. This suite includes Enlighten AI, digital and self-service options (featuring Enlighten Autopilot Conversational AI and chatbots), journey orchestration, CX analytics, and workforce engagement tools.

Nice also entered the UC&C market in 2024 with a low priced offer intended to disrupt competitors but also at the same time meeting the growing demand for Contact Center and omni-channel voice, chat and meetings. NICE has further solidified its position in the market with the successful acquisition of LiveVox in early 2024 and it strengthens its ability to serve the small and medium-sized business (SMB) market.

NICE continues to invest in the development of advanced AI capabilities. Enlighten AI, NICE's core AI platform, has been enhanced with generative AI functionalities, including domain-trained models, auto summaries, and AI-based routing. These advancements are coupled with robust security measures to ensure data protection and maintain customer trust.

The introduction of the Integration Hub in September 2023 provides a low-code interface that simplifies the process of connecting CXone with other business applications. Nice also integrates with various CRM solutions, including those from Salesforce and Microsoft. NICE's cloud strategy, known as the NICE Open Cloud Platform, leverages the strengths of different cloud providers, with CXone becoming available on Microsoft Azure in 2023, further expanding its global reach.

NICE's focus on key industries such as healthcare, financial services, government, insurance, retail, telecommunications, travel and hospitality, and business process outsourcers, combined with its ongoing investments in AI and the successful integration of LiveVox, positions the company for continued growth and leadership in the rapidly evolving market for digital labor and intelligent customer experience solutions.

Strengths	**Challenges**
• Cloud offering	• Balancing between direct and third-party partners for implementation
• Integrations	
• AI focus	
• Partner network	
• Growing Industry focus	
• Endpoints	
• Global partner ecosystem	

RingCentral

RingCentral, headquartered in Belmont, CA, and led by founder and CEO Vlad Shmunis, has maintained a strong presence in the contact center market for over six years. Following the August 2023 launch of its native contact center solution, RingCX, the company has continued to innovate and expand its offerings. RingCX is an AI-first, easily deployable platform that provides a comprehensive omnichannel experience. It seamlessly integrates with RingCentral MVP, leveraging existing functionalities such as Voice Calling, Team Messaging, and RingCentral Intelligent Video.

Beyond RingCX, RingCentral offers a growing suite of AI-powered products and services, including Intelligent Phone Solutions, Intelligent Meetings and Messaging, Webinars/Events, and its robust Contact Center offering. The RingCentral Intelligent UCC platform, with high-quality, reliable voice and video conferencing, mobile messaging, and a cloud contact center, is now available in 46 countries.

In 2024, RingCentral introduced innovative virtual agent capabilities within RingCX. These include RingCX AI Agent Assist and RingCX AI Supervisor Assist, which leverage AI to provide real-time guidance and support to agents and supervisors, analyze conversations, and offer recommendations for improved customer interactions. This focus on AI-driven solutions has fueled significant growth in RingCentral's contact center business, as organizations increasingly seek intelligent and streamlined customer service solutions.

RingCentral focuses on a diverse range of industries, including healthcare, financial services, education, retail, and government. The company's focus on providing reliable and secure communication and collaboration tools makes it a suitable choice for businesses of all sizes and across various sectors.

The RingCentral Open Platform remains a key driver of growth and now boasts over 85,000 registered developers. It supports over 300 integrations and over 9,000 custom apps, including those for Microsoft Teams, Google G Suite, NetSuite, and Salesforce. With the growth of its new Contact Center offering and its focus on AI RingCentral is well positioned with its Intelligent Contact Center offering.

Strengths	**Challenges**
• Overall portfolio	• Managing its growing set of partner and OEM channels
• RingCentral brand	
• Growing AI capabilities	
• Team messaging and collaboration functionality	
• Unified client	
• Ease of configuration and deployment	
• Open platform	
• IUC&C marketplace	

UJET

UJET, which just raised its 76m Series D funding round in September, announced that COO Vasili Trian would be Co-CEO with Founder and CEO Anand Janefalkar. The Series D funding was led by Sapphire Ventures, with participation from new investors KeyCorp and IonPacific, and existing investors GV, Kleiner Perkins, Citi Ventures, DCM, and Ericsson Ventures. This funding will further accelerate the development and deployment of generative AI capabilities within its contact center solutions.

The core UJET offerings include voice and digital channels, IVR, virtual agents, agent assist, smart actions (smart device capabilities like biometric authentication, location awareness, and media sharing), UJET WFM, and the UJET Agent Mobile app. With its strong partnership and OEM relationship with Google, UJET is offering SMBs and enterprises alike a fresh approach with an offering that scales to meet the needs of medium and large enterprises. Additionally, since UJET runs natively in the Google Cloud Platform (GCP), UJET customers can take advantage of all the Vertex AI capabilities, including its low code Agent Builder offerings.

UJET's platform caters to a wide range of industries, with a particular focus on financial services, healthcare, retail, and travel and hospitality. Their solutions are designed to meet the needs of both small businesses and large enterprises, offering flexible deployment options and pricing to accommodate various organizational sizes and budgets.

In addition to its existing integrations with CRM providers like Freshdesk, Kustomer, Microsoft Dynamics 365, Oracle, Salesforce, and Zendesk, UJET announced a key integration with Microsoft Teams in May 2023. This integration facilitates first-contact resolution by enabling agents to seamlessly connect with internal subject matter experts via Microsoft Teams. UJET's commitment to innovation, strategic partnerships (including its collaboration with Google Cloud), and robust AI capabilities position it for growth in the intelligent contact center (ICC) market.

<table>
<tr><th>Strengths</th><th>Challenges</th></tr>
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- AI Contact center offering
- Virtual Agents and Agent Assist
- Deep integration with CRM providers
- Google partnership
- SMB and Enterprise focus
- Modern Architecture and Mobile Capabilities

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- Brand recognition outside of North America

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Vonage

Vonage, now under the leadership of CEO Niklas Heuveldop (appointed February 2024) and headquartered in Holmdel, New Jersey, continues as a wholly owned subsidiary of Ericsson. Vonage continues to provide a comprehensive suite of cloud communications solutions, including Unified Communications as a Service (UCaaS), Contact Center as a Service (CCaaS), and Communications Platform as a Service (CPaaS). Vonage has been leveraging its strengths in Connectivity (APIs) and partnerships with Salesforce to offer its Vonage Business Communications (VBC), Vonage Contact Center (VCC) with a growing focus on AI and Virtual Agents.

Vonage has been actively investing in AI across its portfolio. The Vonage AI Studio enables the development of virtual agents and bots that can leverage various channels, including chat, voice, and SMS applications like WhatsApp. In 2024, Vonage further enhanced its AI capabilities by integrating generative AI into VCC's agent assist features, automating tasks like after-call work and sentiment analysis. These enhancements build off Vonage's experience in Conversational Commerce.

Building off its longstanding partnership with Salesforce, in September 2024, Vonage announced its participation in Salesforce's Bring Your Own Channel for Contact Center as a Service (BYOC for CCaaS) pilot program. This deal will enable Vonage to offer enhanced capabilities, including integrating Vonage's omnichannel and AI-powered capabilities into existing contact center solutions. This builds on Vonage's historical strengths in Communication APIs and Automation. In addition to the Salesforce news, Vonage also launched Vonage RCS, a new business messaging solution. This deal will enable Vonage to offer enhanced capabilities, including branding capabilities, rich content and functionality, and conversational marketing and commerce.

Vonage continues to focus on delivering a unified and integrated experience for its users. The Vonage Communications Platform (VCP) brings together VCC, VBC, Vonage AI, Vonage Conversational Commerce, and Vonage CPaaS into a single platform. Security is also a focus for Vonage, which continues to offer the Vonage Protection Suite, enhancing security and authentication for all communications. With a growing and refreshed portfolio and its focus on AI, Vonage is well positioned for the growing demands for communication and collaboration as part of existing business processes.

Strengths

- Contact center offering
- Fully integrated UCaaS and CCaaS
- Growing focus on AI
- Deep integration and focus on Salesforce
- Vonage brand recognition
- Integration extended to ServiceNow and Microsoft Dynamics, Microsoft Teams, and Zendesk
- CPaaS API flexibility

Challenges

- Balancing focus on UC&C and contact center

Contenders

8x8

8x8, which focuses on both UC&C and intelligent contact center, is led by newly appointed CEO Samuel Wilson. The 8x8 eXperience Communications (XCaaS) platform includes contact center, voice, video, chat, and API solutions. 8x8 Contact Center is a certified Microsoft Teams solution. The integration can be used in conjunction with 8x8 Voice for Microsoft Teams, a direct routing solution used to support high-quality voice calling to Teams users in 56 countries.

8x8 has been investing in intelligence for its UC&C and Contact Center offerings. In January 2024, 8x8 announced AI capabilities that include smart summaries and action items for Meetings. In contact center it added improved speech analytics and call summarization. Those summaries also can be automatically pushed to a Customer Relationship Management (CRM) offering, such as Salesforce.

8x8 Work is a cloud-based app that brings together voice communications, business SMS, fax, voicemail, call routing, video meetings, and team messaging via desktop and mobile apps or web browsers. It also offers the ability to manage the system from a single administration interface for user provisioning and management. 8x8 Work includes performance and usage dashboards, plus reporting options for insights and sentiments. 8x8 continues to offer the AV1 Codec, which enables high-quality video meetings.

In April 2024, 8x8 announced 8 by 8 Operator Connect, a native PSTN calling solution for Microsoft Teams. 8x8 Operator Connect for Microsoft Teams supports high-quality voice calling to Teams users in 59 countries via an expanded list of global carriers.

In July 2024, 8x8 shifted to offering more tailored Industry Solutions. It announced its Active Assessor offering, which is a solution specifically designed for UK housing associations. It utilizes 8x8's AI capabilities to streamline property evaluations. The platform enables proactive tenant engagement through SMS messaging and video technology, facilitating faster identification and resolution of potential issues. It also automates data collection and reporting, ensuring compliance with social housing regulations while minimizing agent intervention. 8x8 continues to be one of the few providers in the industry to offer a platform-wide, financially backed 99.999% uptime SLA across UC&C and contact center.

Strengths	Challenges
• 8x8 Voice for Microsoft Teams direct routing solution	• Slow to market with AI
• Agent Workspace	
• Single platform delivering cloud-native UCaaS, CCaaS and CPaaS	
• Remote/hybrid approach to QM/Coaching/Interaction Analytics	
• Customer support and satisfaction	
• Integration friendly, either through APIs, pre-built or partner network	
• Service Management options	
• Brand awareness	

Enghouse

Enghouse, headquartered in Toronto and led by Stephen Sadler, offers a comprehensive suite of contact center solutions designed to enhance customer experience and streamline operations. This includes solutions from acquired companies Altitude and Lifesize, alongside their core contact center offerings.

Enghouse continues to invest in AI to augment its contact center solutions with the March 2024 announcement of its EnghouseAI suite, which leverages years of expertise in Natural Language Processing (NLP) and Machine Learning (ML) to deliver solutions for enhancing performance and delivering deep customer insights.

Enghouse contact center solutions cater to a wide range of industries, including financial services, healthcare, government, and education. Its flexible deployment options and diverse feature set make it suitable for businesses of all sizes, from small contact centers to large enterprise operations.

Throughout 2024, Enghouse has focused on expanding its cloud contact center capabilities. This includes enhancing its Enghouse CCaaS platform with increased scalability, security features, and integrations with popular CRM and communication tools. Enghouse continues to expand on integrations it has possessed for several years. This allows businesses to seamlessly connect their contact center with existing technology investments. With its new investment in AI and cloud technologies, combined with a strong portfolio of contact center solutions, Enghouse is well-positioned to meet the evolving needs of businesses seeking to optimize their customer service operations.

Strengths	**Challenges**
• Broad ICC platform capabilities	• Maintaining and enhancing multiple product offerings
• Partnerships	
• Install base	
• Conversational AI	
• Large enterprise deployments	
• Integrated workforce optimization	

Genesys

Genesys, led by CEO Tony Bates, continues to focus on Experience Orchestration. Its core offering is Genesys Cloud CX. In January 2024, Genesys agreed to acquire Radarr Technologies. This deal will enable Genesys to offer comprehensive public social media capabilities, including listening, analytics, and consumer engagement.

Genesys continues to expand its AI capabilities. In May 2024, Genesys announced new AI capabilities to transform customer and employee experiences. These capabilities, including Agent Copilot, Virtual Agent, Empathy Detection, and Modern Agent Workspace, will enable organizations to improve customer loyalty, boost employee performance, and provide managers with new insights and tools.

In 2023, Genesys announced a deeper partnership with Salesforce, resulting in a new solution called CX Cloud. This offering enables bi-directional data sharing between the two platforms, streamlining workflows for agents and supervisors. Genesys also continues to strengthen its unified communications capabilities through partnerships with Microsoft, 8x8, and Zoom.

Genesys supports organizations of all sizes, across a wide range of industries, including financial services, healthcare, retail, and technology. Its FedRAMP authorization at the Moderate Impact level, achieved in 2023, has further expanded its reach into the public sector. With a robust product portfolio, strategic partnerships, and a strong focus on innovation, Genesys is well-positioned for continued growth and leadership in the CX market.

	Strengths	Challenges

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Strengths

- Broad ICC platform capabilities
- Management team experience
- Install base
- Conversational AI
- Large enterprise deployments
- Strong partnerships
- Usage-based pricing
- FedRAMP Authorized
- Unified native WEM

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Challenges

- Maintaining and enhancing multiple product offerings

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NEC

NEC, a long-standing provider of communications and contact center solutions for SMB and large enterprise segments, is also a major multinational provider of IT infrastructure and communications technology. However, in a significant strategic shift in 2024, NEC announced its exit from the hardware business in North America, including its line of handsets and on-premises equipment. The company is now focusing on its cloud-based UNIVERGE BLUE platform and related services.

UNIVERGE BLUE encompasses a range of solutions, including UNIVERGE BLUE CONNECT (UCaaS) and UNIVERGE BLUE ENGAGE (CCaaS, powered by Intermedia). These cloud services offer a complete suite of communication and contact center capabilities accessible through a single pane of glass. NEC continues to support hybrid deployments, integrating its cloud services with existing on-premises UNIVERGE SV9000 Series and UNIVERGE 3C systems.

NEC offers a comprehensive set of contact center features, catering to both small (five agents) and medium/large (up to 2,000 agents) deployments. Its offerings include omnichannel contact routing, self-service IVR, automated outbound dialing, and real-time CRM updates. NEC partners with DVSAnalytics for workforce optimization (WFO), providing capabilities like forecasting, scheduling, recording, speech analytics, and live monitoring.

In November 2023, NEC introduced UNIVERGE BLUE PULSE, its AI technology engine integrated into the UNIVERGE BLUE platform. PULSE enhances both CONNECT and ENGAGE, empowering businesses with intelligent features that improve productivity, efficiency, and customer care. NEC emphasizes responsible AI development, ensuring data privacy and security.

NEC focuses on key vertical industries, including education, government, healthcare, and retail. While exiting the hardware business, NEC continues to invest in software and cloud-based solutions. This includes its Biometrics solutions, featuring facial recognition, fingerprint identification, and intelligent perimeter intrusion detection, which complement its UNIVERGE BLUE offerings.

With its growing focus on AI, cloud-based solutions, and strategic exit from the hardware market, NEC is well-positioned to address the evolving needs of SMB and large enterprise customers. Aragon expects to see continued growth in NEC's UNIVERGE BLUE CLOUD SERVICES as businesses transition to cloud-based communication and collaboration platforms.

Strengths	Challenges
• Cloud and on-premise voice support	• Overall focus on video meetings
• Global cloud infrastructure	
• Industry solutions focus	
• Computer vision, including video analytics	
• Endpoints	

Innovators

Dialpad

Dialpad, headquartered in San Ramon, California, and led by Founder and CEO Craig Walker, continues its strong focus on AI innovation across its product suite. With the recent appointment of Jen Grant as CMO in early 2024, the company is well-positioned for continued growth and market penetration. Dialpad's Ai-Powered Customer Intelligence Platform provides a unified solution with Ai Contact Center, Ai Sales Center, Ai Messaging, Ai Meetings, and Ai Voice, catering to both sales and customer experience professionals.

Dialpad Ai Contact Center offers a comprehensive, AI-driven omnichannel platform. This includes voice, digital channels (spanning web messaging, social media, in-app messaging, and more), and intelligent chatbots. Leveraging DialpadGPT, their domain-specific large language model, the platform delivers features like Ai Recap for concise conversation summaries, Ai Playbooks for agent guidance, and Ai Scorecards for performance evaluation. These AI-powered tools enable businesses to automate tasks, improve customer service, and enhance agent coaching.

In 2024, Dialpad further enhanced its AI capabilities with the introduction of real-time agent assist. This feature provides agents with instant knowledge base access and recommended responses during live interactions, leading to faster resolution times and improved customer satisfaction. Additionally, Dialpad expanded its integration capabilities with Salesforce, allowing for seamless data synchronization and workflow automation between the two platforms.

Dialpad focuses on contact center for sales organizations and HR/Talent Acquisition teams. Dialpad continues to expand its API offerings and maintains its strategic partnership with Google, leveraging Google Cloud Platform's global data centers for scalability and reliability. With its ongoing commitment to AI innovation, expanding integrations, and a new CMO driving marketing strategy, Dialpad is poised for continued success in the evolving communications landscape.

Strengths	**Challenges**
● Natively integrated AI capabilities	● Focus on team collaboration
● Real-time analytics and transcription	
● Integrated Contact Center with Collaboration and Sales	
● Automated workflows	
● Visual bot builder	
● HD-Quality Voice and Video	
● Pre-built integrations, including CRM	
● Sales and Recruiting use case	

Intermedia

Intermedia, headquartered in Sunnyvale, California, and led by CEO Michael Gold, continues to expand its portfolio of communication and collaboration solutions. Its flagship UCaaS platform, Intermedia Unite, is complemented by Intermedia Contact Center, email and content management offerings, and archiving solutions.

Intermedia has made significant strides in AI. In 2023, the company launched Spark AI, a suite of AI-powered features that includes AI Meeting Notes & Action Items, AI Evaluator, AI Interaction Summary, AI Call and Voicemail Transcription, AI Transcription Redaction, and AI Sentiment Analysis.

In 2024, Intermedia introduced more Spark AI-powered features like AI Meeting Summary, evolving sentiment analysis, keyword and topic tagging, and agent performance metrics (talk vs. listen ratio, talk speed). "AI Agent Assist", due out this year, will provide real-time suggestions and guidance to contact center agents during customer interactions using a combination of Generative AI and dedicated knowledge bases using unstructured data (PDFs, txt, doc). Agents use natural language in a collaborative chat format to only access information approved for specific queues (e.g., return policies, troubleshooting instructions, account access protocols, etc.)

Intermedia primarily serves small and medium-sized businesses (SMBs) across various industries. Its channel-focused strategy relies heavily on resellers, including white-label partnerships.

Intermedia Unite offers a comprehensive suite of cloud-based communication tools, including telephony, messaging, video conferencing, and webinars. Its integrations with popular platforms like Google Workspace, Microsoft Teams, and Slack enhance its value proposition. The company's OEM relationship with NEC has been instrumental in expanding its global footprint.

With its robust UCaaS and CCaaS offerings, commitment to AI innovation, and partnership with NEC, Intermedia is well-positioned to serve the evolving needs of the SMB market.

Strengths	**Challenges**
• Cloud PBX	• Market awareness
• Growing AI Capabilities	
• Call center	
• Mobile app	
• Native CRM integrations	
• Channel focus	

Talkdesk

Talkdesk, headquartered in San Francisco and led by CEO Tiago Paiva, continues to expand its leadership team and enhance its platform. In 2024, Talkdesk introduced standalone AI capabilities (Talkdesk Ascend Connect) for on-premises contact center technologies, while not losing their focus on delivering a comprehensive and innovative Intelligent Contact Center (ICC) solution. Its offerings include the core ICC platform, Talkdesk CX Cloud, which is powered by Talkdesk Ascend AI.

Talkdesk Workspace allows for personalization of the user interface and unifies all CX applications and data. It leverages Talkdesk Builder, a low-code/no-code tool that enables the customization of workspaces, routing, reporting, automation, and integrations. Talkdesk continues to expand its platform's reach, achieving the US Government FedRAMP In-Process designation in 2023, paving the way for broader adoption within federal agencies.

Talkdesk is deeply invested in the Talkdesk Ascend AI platform. In 2023, they announced the integration of generative AI across their platform, introducing features like automated summaries, topic discovery, and bias detection. Talkdesk AI Trainer empowers users to update AI models and put guardrails on the outputs with no coding, while Talkdesk Autopilot provides next-best-action recommendations during live interactions. Talkdesk Navigator offers generative AI-powered routing & orchestration. Talkdesk Copilot empowers agents with real-time recommendations and guidance, as well as tools to help any agent communicate in most languages. These generative AI capabilities enhance existing features like Talkdesk QM Assist, which originally focused on transcription.

Talkdesk caters to specific industry needs with tailored solutions with deep integrations to industry systems of record and pre-configured workflows including Talkdesk Financial Services Experience Cloud, Talkdesk Healthcare Experience Cloud, and Talkdesk Retail Experience Cloud. The Talkdesk AppConnect marketplace offers 1-click access to over 80 contact center applications, extending the platform's capabilities and providing flexibility for businesses.

With its ongoing focus on industry-specific solutions and commitment to platform development, Talkdesk is offering a differentiated go-to-market for its products and services.

Strengths	**Challenges**
• Cloud contact center	• Brand awareness outside of the U.S.
• APIs	
• Focus on AI	
• Industry products & solutions	
• Workforce management	
• Partner ecosystem	
• Analytics	

Aragon Advisory

- The age of virtual agents is here and enterprises need to pilot and deploy virtual agents to assist employees and eventually with customers.

- Enterprises should evaluate both their ICC provider and third parties that can offer virtual agents for both agent and customer support.

- The AI market is moving fast, and enterprises need to invest in education to keep their employees and partners up to date.

Bottom Line

The contact center market is changing faster than it ever has. With new use cases and growing demand to automate knowledge delivery with virtual agents, the pressure on enterprises has never been great to deliver the best possible customer experience. Given the speed of innovation with AI, enterprises need to gauge where their current providers are and determine if AI-based virtual agents can be delivered by the current provider or if new providers need to be evaluated. Labor shortages and new use cases such as prescription refill will drive enterprises to automate the processes more than ever before.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness**: Market awareness of the firm and its product.
- **Customer experience**: Feedback on the product, installs, upgrades and overall satisfaction.
- **Viability**: Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging**: Is the offering priced and packaged competitively?

- **Product**: The mix of features tied to the frequency and quality of releases and updates.

- **R&D**: Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international* or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)

- **EMEA** (Europe, Middle East, and Africa)

- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide

- Time zone and location of support centers

- Support for languages

- References in respective hemispheres

- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators* or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand, and effectively perform against those strategies.

- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.

- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.

- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

The inclusion criteria for this Aragon Research Globe is
- a minimum of $6 million in primary revenue for contact center or a minimum of $8 million in revenue in a related market (voice, video conferencing, collaboration, and team collaboration/messaging).
- **Shipping product**. Product must be announced and available.
- Customer References. **Vendor must produce customer references in each hemisphere that the vendor participates in.**

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process. This determination was not applied to this report as all vendors participated in the Globe process.

New vendors included in this report:

- ***Enghouse –*** *which acquired Altitude and Lifesize*

Noteworthy vendors not included in this report:

The following vendors were not included in the report but are notable:

- ***Nextiva***
  - o Nextiva will be included in our ICC Globe for SMB.