

Everest Group PEAK Matrix[®] for CXM in EMEA Service Providers 2020

Focus on Webhelp
October 2020



Background and scope of the research

The Customer Experience Management (CXM) market in Europe, Middle East, and Africa (EMEA) has experienced steady growth over the last few years, driven by increasing adoption of digital services and by emerging verticals and countries. While economic uncertainty created by COVID-19 has impacted the market, enterprises are trying to overcome the challenges presented by the pandemic and ensure superior customer experience. To this end, they are looking at areas such as digital CX and alternate delivery models such as Work At Home Agents (WAHA). Enterprises in the region expect service providers to help them fast-track digital adoption and transform their businesses. As a result, many service providers are experiencing a steep rise in the demand for digital services and are investing in digital capabilities such as analytics, automation, Artificial Intelligence (AI), and omnichannel solutions to support evolving client expectations. They are also offering value-added services beyond technology, in the form of CX consulting and design thinking-led customer journey orchestration. To effectively cater to these requirements, providers are developing capabilities through internal investments, their partnership ecosystem, and acquisitions.

In this research, we present detailed assessments of 21 CXM service providers in EMEA featured on the CXM Services PEAK Matrix® Assessment 2020. Each assessment provides a comprehensive picture of the service provider's market success, vision and strategy, service focus and capabilities, digital and technological solutions, domain investments, and buyer feedback. The assessment is based on Everest Group's annual RFI process for the calendar year 2020, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

This report includes the following 21 leading CXM service providers in EMEA featured on the CXM PEAK Matrix®:

- **Leaders:** Capita, Comdata Group, Majorel, Sitel, Teleperformance, and Webhelp
- **Major Contenders:** Atento, Bosch Service Solutions, Concentrix, Conduent, Firstsource, Sutherland, Sykes, Tech Mahindra, TELUS International, Transcom, and Wipro
- **Aspirants:** Genpact, HCL, Infosys, and Startek

Scope of this report:



Geography
EMEA



Service providers
21



Services
CXM

CXM services in EMEA PEAK Matrix® characteristics

Leaders:

Capita, Comdata Group, Majorel, Sitel, Teleperformance, and Webhelp

- Leaders have been consistent in the delivery of CXM services in EMEA through expansion in new regions, verticals, and serving various buyer sizes. They also have better client satisfaction scores due to greater technological capabilities, ability in implementation and transition management, and proactiveness in their engagements
- Further, they offer advanced digital capabilities such as RPA, AI, omnichannel, and analytics, and are driving innovation beyond technology by targeting areas such as outcome-based pricing and consulting, to offer a more compelling value proposition to their clients. They have also been more successful at building scale across high-, medium-, and low-cost locations, which enables them to deliver a balanced shoring mix to clients

Major Contenders:

Atento, Bosch Service Solutions, Concentrix, Conduent, Firstsource, Sutherland, Sykes, Tech Mahindra, TELUS International, Transcom, and Wipro

- Major Contenders are also building capabilities in serving different regions and industry segments to serve a diverse set of buyers. However, most of these providers serve a limited set of countries in EMEA as of now
- They have been able to develop digital solutions and have been successful in their implementation across their client base in EMEA, with some providers relying on third-party vendors to fill capability gaps

Aspirants:

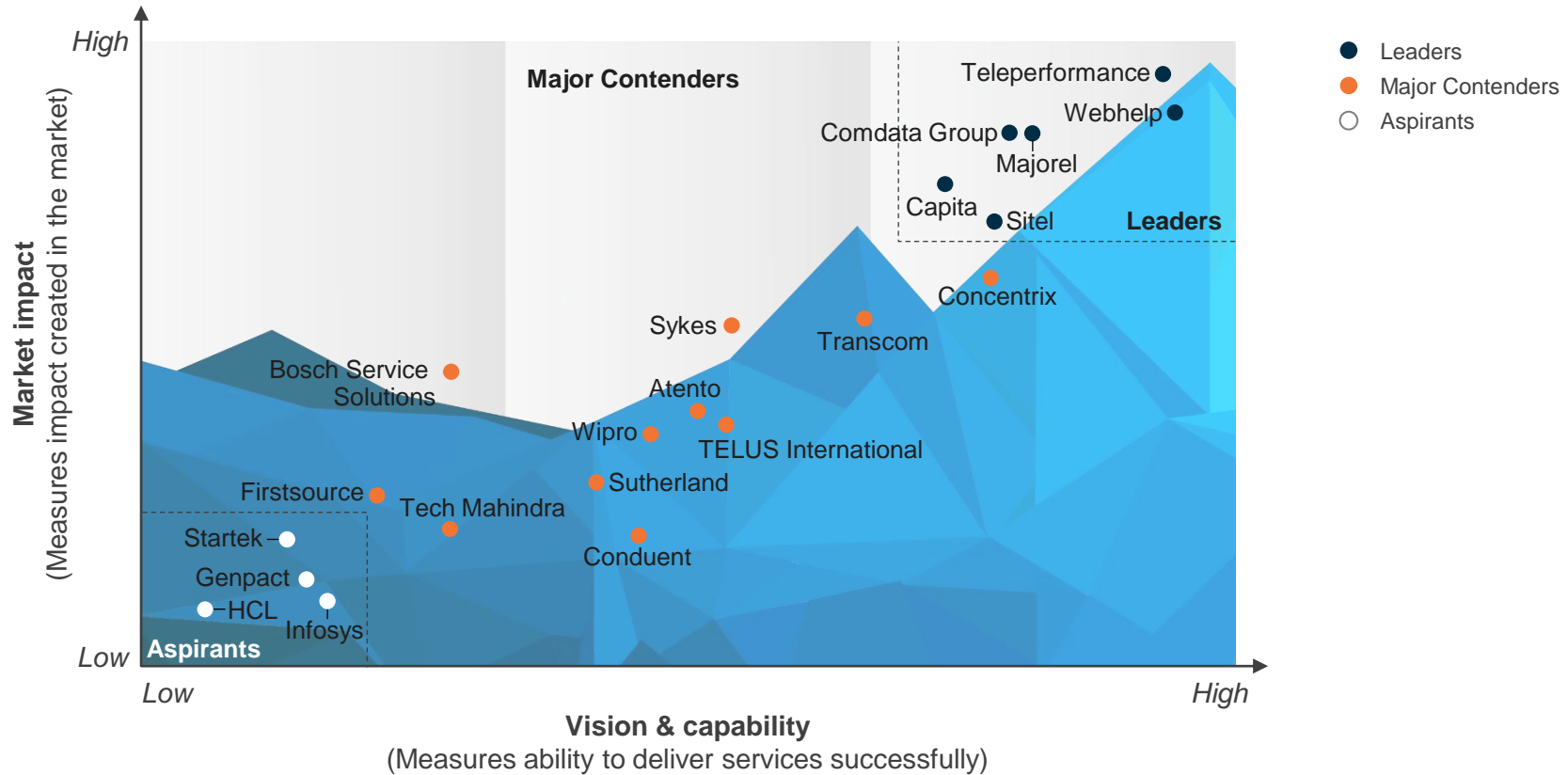
Genpact, HCL, Infosys, and Startek

- Aspirants are either focused on a limited set of countries or verticals or currently have relatively small-scale CXM operations in this region
- They are building digital capabilities and offer innovative pricing and staffing models, but currently have limited implementation of these solutions across their client base

Everest Group PEAK Matrix®

Customer Experience Management (CXM) in EMEA with Services PEAK Matrix® Assessment 2020 | Webhelp positioned as Leader

Everest Group Customer Experience Management (CXM) in EMEA with Services PEAK Matrix® Assessment 2020



Source: Everest Group (2020)

Webhelp | EMEA CXM profile (page 1 of 5)

Overview

Company overview

Webhelp is a pan-European CXM services and specialist outsourcing provider. It offers a range of services across the customer journey. It has over 50,000 customer care and sales advisors covering over 30 languages from more than 140 onshore, nearshore, offshore, and multi-lingual delivery centers.

Key leaders

- Frédéric Jousset, CEO and Co-founder
- Olivier Duha, Co-founder

Headquarters: Paris, France

Website: www.webhelp.com

Recent developments

- **2019:** Acquired by Groupe Bruxelles Lambert
- **2019:** Acquired Pitech Plus, a Romania-based leading software solution expert, to strengthen its capabilities in back-office processes
- **2018:** Acquired OEE Consulting, a UK-based consultancy specializing in operations and customer excellence
- **2018:** Acquired IQ-to-Link, a leading multi-lingual nearshore firm located in Kosovo
- **2018:** Acquired Runway, a multi-lingual CX firm
- **2018:** Acquired Sellbytel, a CRM & BPO player specialised in B2B sales and support with expertise in multi-lingual operations in EMEA, North America, and Asia Pacific
- **2018:** Acquired MEDTOMED, a leading French healthcare customer relationship management firm
- **2018:** Acquired MEDED (Medical Education), launched in 2012 by Pierre FERRAN and Laurie SALORD
- **2018:** Acquired Teknofix (TR)
- **2017:** Partnered with Salesforce to integrate its web-based platform to enable the internal sales & marketing teams to track new opportunities and manage existing clients

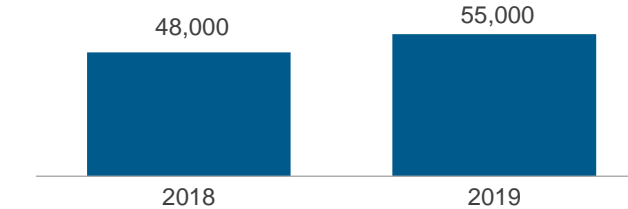
EMEA CXM revenue

In US\$ million



Scale of EMEA CXM

Number of FTEs



EMEA CXM client base

Number of clients



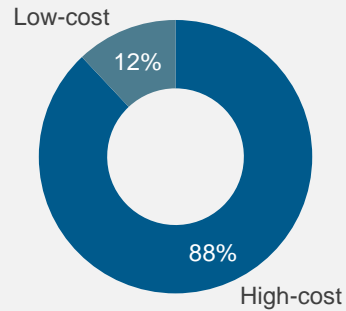
Webhelp | EMEA CXM profile (page 2 of 5)

Capabilities

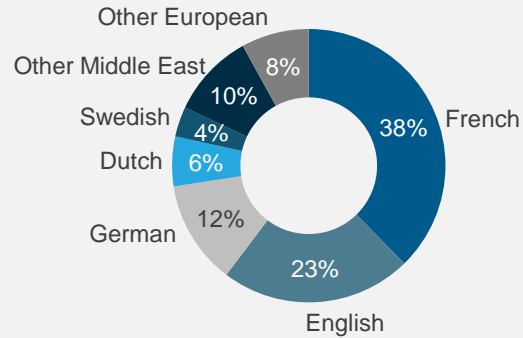
Split of EMEA CXM FTEs

Number of FTEs

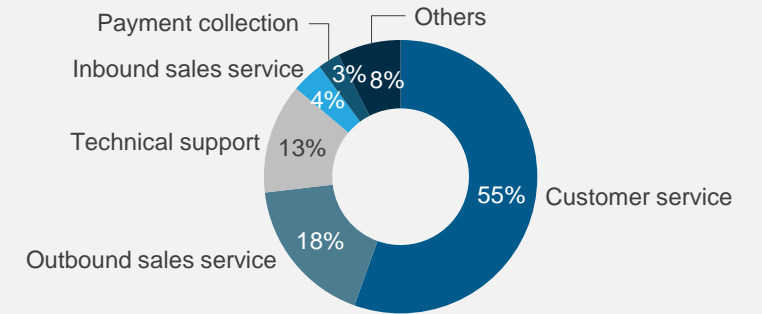
By location



By European languages



By process



Key EMEA-specific CXM investments

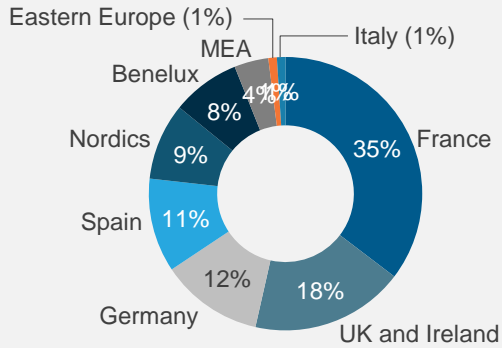
Description	Investment type	Year of investment	Comments
Call recording	Internal	2020	Design and build of a proprietary platform for call recording. The platform ensures dual channel call recording to facilitate voice transcription and integrate advanced features such as automated pause & resume (for security, data privacy, and PCI DSS compliance)
Alta Voce	Partnership	2019-2020	Partnered to test the impact of transforming agent voice for outbound sales campaign and measure a potential impact on sales and client satisfaction
POLYGLOT	Internal	2019-2020	Developed for multilingual projects covering languages difficult to staff (rare languages and small volumes) or to move offshore campaigns covering expensive languages difficult to offshore. It is used for email and chat services and include connectors with CRM platforms such as Zendesk or Salesforce

Webhelp | EMEA CXM profile (page 3 of 5)

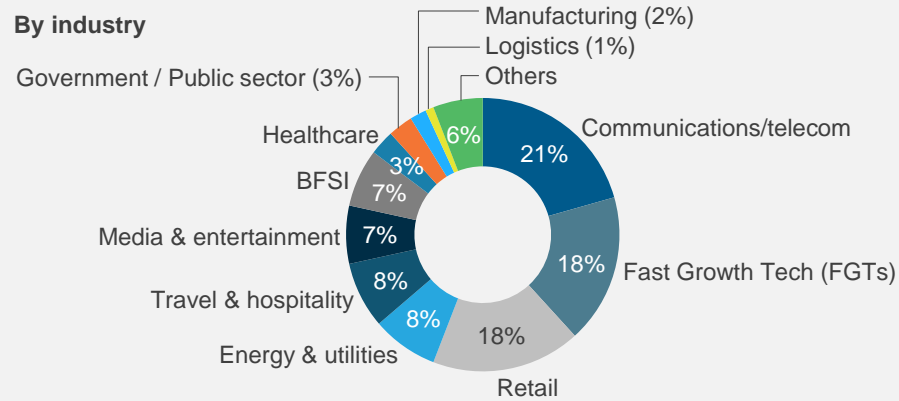
Client portfolio

EMEA CXM revenue mix
US\$ million

By country



By industry



By buyer size

Not disclosed

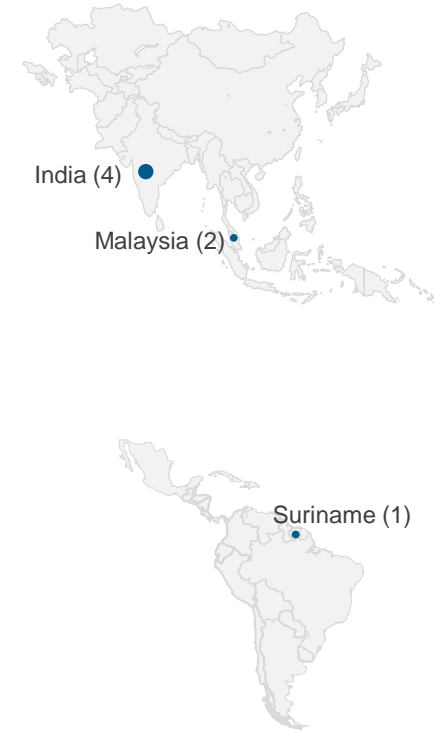
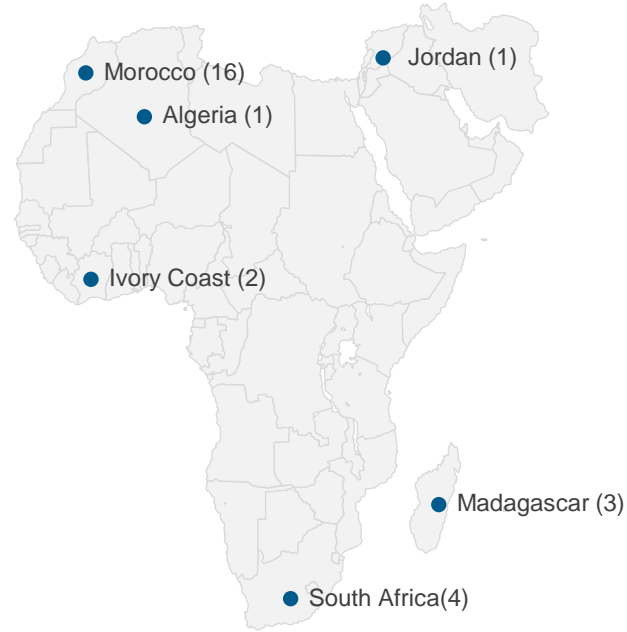
Key contact center engagements

Client name	Region	Client since
Xaomi	Morocco, Greece	2019
EasyJet	France, Morocco, Madagascar, Romania, The Netherlands	2015
Total	The United Kingdom, South Africa, India, Romania	2009
Eni	The United Kingdom, South Africa	2008
Bouygues	The United Kingdom, India	2008
ING	Morocco, Ivory Coast, Romania, Portugal, France	2001
Vodafone	The United Kingdom, Romania	2001

Webhelp | EMEA CXM profile (page 4 of 5)

Location landscape










EMEA CXM delivery locations



Webhelp | EMEA CXM profile (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  High  Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Webhelp is a major CXM service provider in EMEA delivering services in countries including France, the United Kingdom, Ireland, Germany, and Spain. It serves industries including telecom, fast growth technology, energy & utilities, travel & hospitality, and retail
- It has a well-balanced delivery footprint with significant onshore delivery footprint in the United Kingdom, Germany, France, and Spain, and nearshore/offshore presence in Romania and Morocco. It serves its clients in multiple European languages such as French, German, Spanish, Dutch, Swedish as well as other Middle Eastern languages
- It is driving its CX strategy with a focus on outcome-based pricing models that exhibit its capability to foster partnership-driven engagements with clients
- Webhelp has been building capabilities through internal developments such as self-augmented agents (AI/IVA) and predictive attrition models (analytics), and by partnerships with third-party vendors including UiPath, Mindsay, Brandwatch, and Zendesk, to create digital offerings
- Clients in EMEA have highlighted its people-centric culture, competent leadership, and large CX domain expertise as major areas of strength

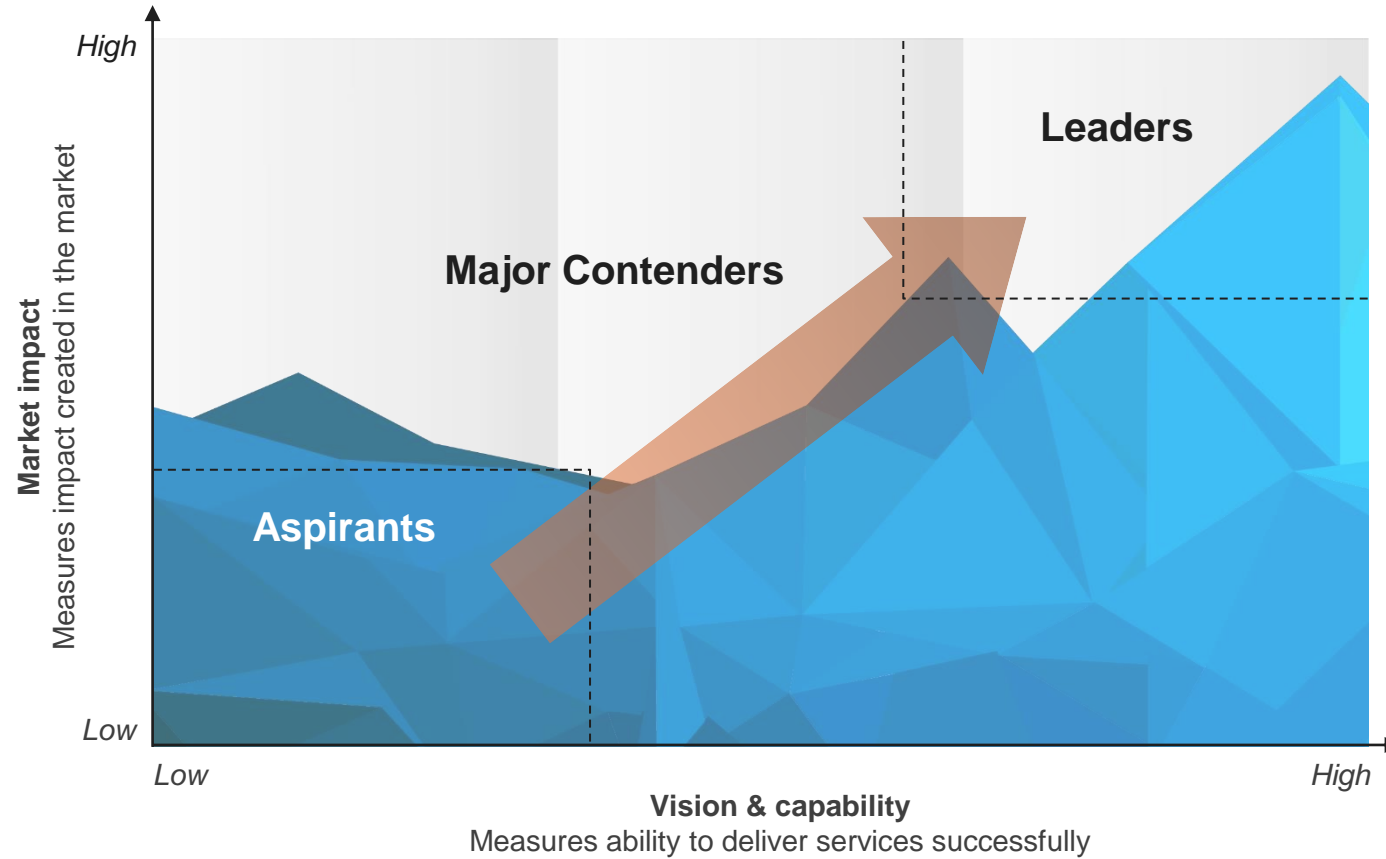
Areas of improvement

- While Webhelp has made aggressive investments in digital CX technologies, its experience in implementing these solutions, especially for RPA and analytics, remains low compared with its peers
- It lacks experience in working with clients in major markets such as Portugal, Italy, and countries in Eastern Europe
- Webhelp still has a heavy reliance on voice channels as compared to non-voice channels such as chat and social media, which may be a deterrent for clients having large omnichannel or multi-channel requirements
- Clients in EMEA also highlighted the need to improve implementation of different technologies and automation initiatives as an area of improvement

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

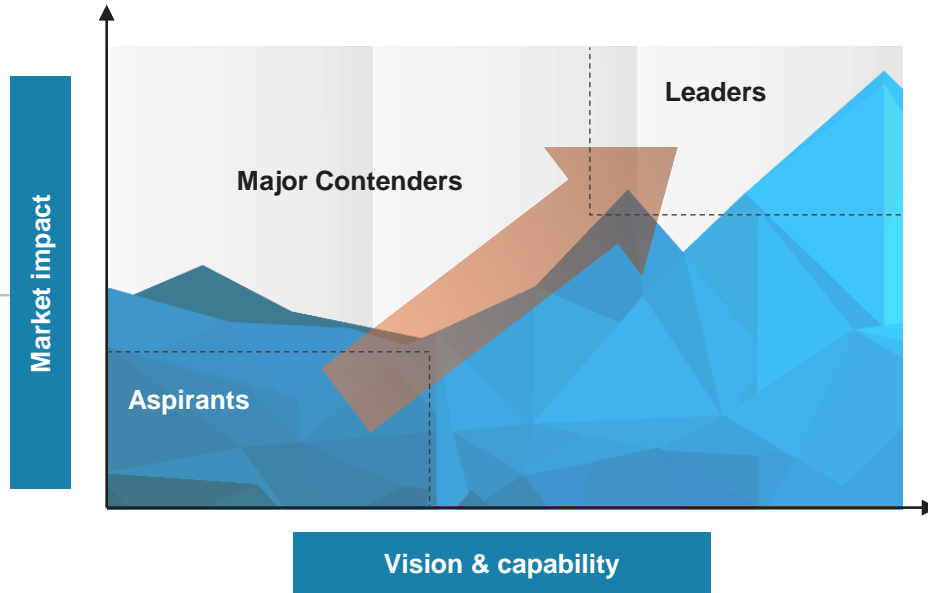
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, and M&A
- Delivery footprint**
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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