



Everest Group Customer Experience Management (CXM) Services PEAK Matrix[®] Assessment 2025

Focus on TELUS Digital
September 2025



Introduction

The CXM market across the Americas, APAC, and EMEA regions has progressed from post-crisis stabilization to AI-native execution. Businesses worldwide are now developing intelligent systems that can predict customer needs and take automated action using the evolving solutions surrounding agentic AI. At the same time, gen AI has transitioned from pilot to production, enabling dynamic content creation, agent assistance, and proactive engagement. CXM providers are becoming experienced orchestrators, combining AI, process and domain knowledge, and consulting expertise, supported by ecosystem partnerships that sharpen differentiation and measurable impact. Consequently, CXM is now viewed as a growth engine and resilience pillar, essential for attracting, retaining, and delighting customers in an intensely competitive landscape.

In the report, we present an assessment and detailed profiles of 61 CXM service providers featured on the [Customer Experience Management \(CXM\) Services PEAK Matrix® Assessment 2025](#). Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments,

and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2025, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

The full report includes the profiles of the following 61 leading CXM services providers featured on the CXM services PEAK Matrix:

AlmaViva Experience, Alorica, Altius Link, Arise, Atento, Bosch Service Solutions, BellSystem24, Capita, CCI, Cognizant, Concentrix, Conduent, Datamark, Datamatics, Daythree, Digitide, eClerx, Etech Global Services, EXL, Firstsource, FiveS Digital, Foundever®, Fusion CX, Genpact, HCLTech, HGS, ibex, IGT Solutions, Infosys, Intelcia, IntouchCX, iQor, iSON Xperiences, Konecra, MerchantsCX, Mplus, Nutun, Pentafon, Probe CX, Qualfon, ResultsCX, SourceCX, Startek®, Sutherland, TaskUs, TCS, TDCX, Tech Mahindra, TELUS Digital, TMJ, TP, Transcom, transcosmos, TTEC, Ubiquity, UnifyCX, Ventrica, VXI, Welsend, Wipro, yoummday

Scope of this report

Geography: global

Industry: all

Services: CXM services

Scope of the evaluation


The evaluation spans all these layers, assessing provider maturity and capabilities across strategy, operations, and value-added layers, and enabling technology integration


Focus of research


 <p>Operational services</p> <ul style="list-style-type: none"> • Customer service • Technical support • Sales services • Order fulfillment and transaction processing • Payment collections 	 <p>Value-added CXM services</p> <ul style="list-style-type: none"> • Social media management • Talent management • Knowledge management • Customer retention management • Analytics and insights services • Compliance and security management 	 <p>CX consulting and process optimization</p> <ul style="list-style-type: none"> • Operational assessment • CX strategy and planning • Customer journey design • Technology advisory • Workforce planning • Digital transformation design 	 <p>Technology</p> <ul style="list-style-type: none"> • CX orchestration • Automation and AI • Insights and analytics • Security and compliance • Implementation
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Scope boundaries

Include in scope:


 End-to-end outsourced CXM services


 Technology-enabled service delivery


 Consulting and transformation capabilities as tied to CX operations

 Industry-specific CXM offerings

Excluded from scope:

 Pureplay technology platforms or CRM tools without managed service

 In-house CX functions without external provider involvement

 Back-end functions enabling CX, such as F&A, HR, and supply chain operations

We break down each element into subprocesses of the customer interaction value chain



CX consulting and process optimization

- Operational assessment
- CX strategy and planning
- Customer journey design
- Technology advisory
- Workforce planning
- Digital transformation design
- Compliance and risk management



Compliance and security management

- Regulatory compliance
- Risk and security management
- Training and awareness

Social media management

- Reputation management
- Social listening
- Campaign and influencer coordination

Talent management

- Forecasting and scheduling
- Performance tracking
- Workforce performance monitoring
- Workforce optimization
- Agent training
- Quality assurance

Knowledge management

- Knowledge base design and maintenance
- AI-driven content creation and update
- Knowledge lifecycle management

Customer retention management

- Customer life cycle management
- Customer experience management
- Loyalty programs
- Customer health monitoring
- Win-back

Analytics and insights services

- Data collection and integration
- Customer insights
- Voice of Customer (VoC) programs
- Operational metrics



Customer service

- Digital-first engagement
- Traditional voice support
- AI-assisted agent workflows
- Query handling
 - Service support
 - Complaint handling
 - Call escalation
 - Query resolution / callbacks

Technical support

- Product/application support
 - Query resolution / callbacks
 - Setup support
 - Remote diagnostics
 - Life cycle support
- Hardware support
- Warranty/post-warranty support

Sales services

- Cross-sell/Up-sell programs
- Customer onboarding and education
- Subscription and renewal management
- Customer success management
- Inbound and outbound sales (B2B/B2C)

Order fulfillment and transaction processing

- Omnichannel order management
 - Order validation
 - Order entry
 - Order processing
- Order amendment / exception handling
- Return/Refund/Rebate processing
- Billing and delivery queries
- Fraud detection
- Audit trail maintenance

Payment collections

- Pre-collection
- Early-stage collections
 - Channel identification
 - Customer loyalty maintenance
- Late-stage collections
 - Customer-at-risk analysis
 - Customized treatment plans
- Compliance monitoring
- Account reconciliation
- Third-party collection agency management



CX orchestration

- CRM and ERP
- CX platforms
- Routing, IVR, and ACD
- WFM technologies

Automation and AI

- AI (gen AI and conversational AI)
- RPA and workflows
- Knowledge management
- Self service tools

Insights and analytics

- CDP and data lakes
- Customer interaction analytics
- Operational analytics (WFM)
- Process mining

Security and compliance

- Fraud detection and prevention
- Compliance management
- Data security and encryption
- Cloud resilience

Implementation

- Deployment and integration
- Customization and data migration
- Training and enablement
- Support and optimization

Americas CXM services PEAK Matrix® characteristics

Leaders

Concentrix, Foundever®, IntouchCX, TELUS Digital, and TP

- Leaders have consistently provided high-quality CXM services and broadened their client base throughout 2024 by leveraging both organic growth and strategic acquisitions. They have extended their presence into new regions and are broadening their capabilities into complementary areas such as T&S marketing services and interactive experience services
- Leaders continue to serve clients of different scales with diverse needs through their proprietary solutions, strategic partnerships, and innovative delivery models. They have gained significant experience in educating the enterprises about new digital CXM solutions and implementation of those solutions thereafter. They are now actively investing in the development of advanced solutions centered around AI agents and agentic AI

Major Contenders

Almaviva Experience, Alorica, Arise, Atento, CCI, Cognizant, Conduent, Datamark, Datamatics, Digitide, eClerx, Etech, EXL, Firstsource, Fusion CX, Genpact, HCLTech, HGS, ibex, IGT Solutions, Infosys, iQor, Konecra, Probe CX, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, TTEC, Ubiquity, UnifyCX, VXi, and Wipro

- The majority of the Major Contenders experienced stagnant growth over the last year due to technological disruption and increasing margin pressures from enterprises. Major Contenders serve clients across various verticals such as telecom and communications, technology, BFSI, healthcare, and retail through both traditional and digital channels. Buyer have recognized their strengths in areas such as innovation, operational consistency, talent management, and digital CXM solutions
- Major Contenders have embarked on initiatives around offering CX consulting and value-added services to their clients and expanding delivery capabilities in tier-2 cities

Aspirants

Intelcia, Mplus, Nutun, Pentafon, SourceCX, and Welsend

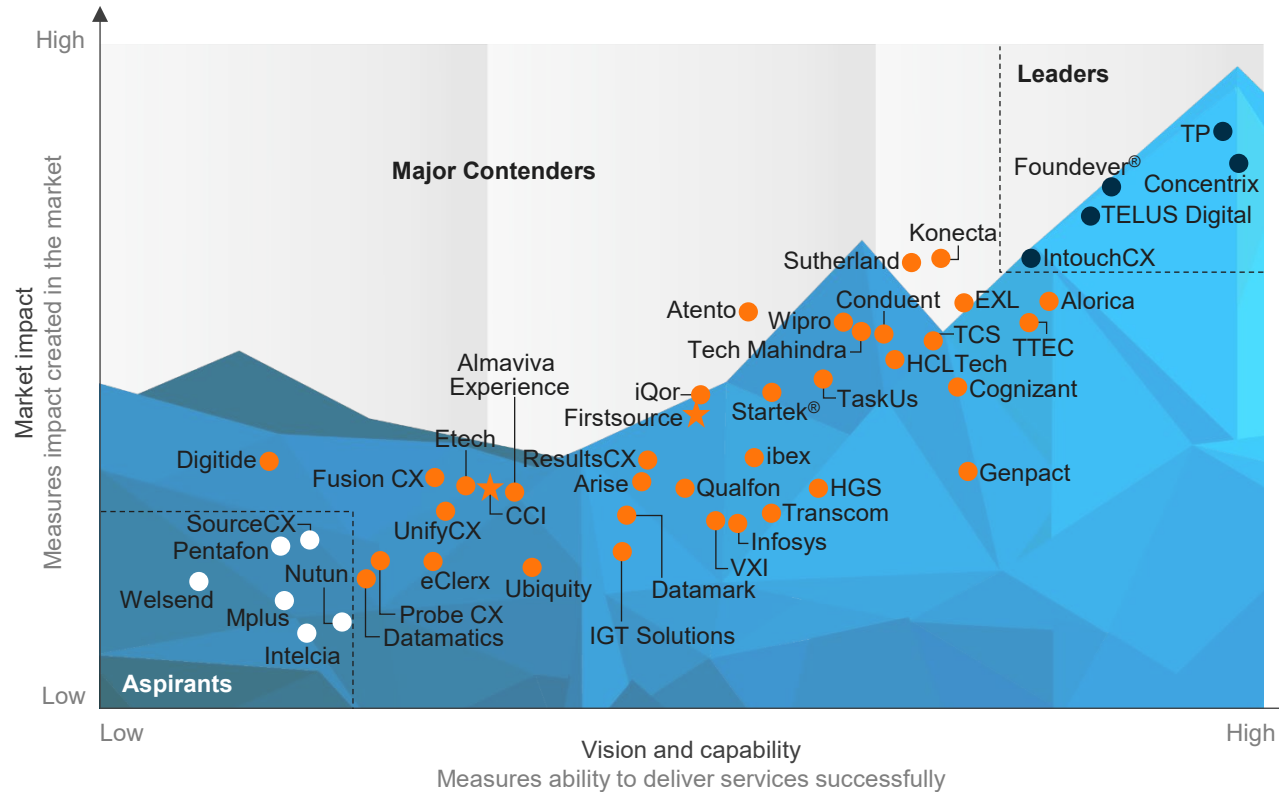
- In 2024, aspirants have established delivery centers across multiple countries to provide both nearshore and offshore support to clients in the Americas. Their operations typically focus on serving specific regions, verticals, or buyer segments, and are characterized by smaller number of languages, limited pool of agents, and an uneven shoring mix
- They are actively investing in alternative delivery models, strategic partnerships with technology providers, and the creation of proprietary tools and platforms to differentiate themselves in the market. While buyers acknowledge their strengths in relationship management, adaptability, and flexibility in addressing client requirements, there remains room for improvement in ensuring consistency across delivery locations, enhancing talent and workforce management, and strengthening transition management practices

Everest Group PEAK Matrix®

Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2025 – Americas | TELUS Digital is positioned as a Leader

Everest Group Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2025 – Americas¹

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers












¹ Assessments for Alimaviva Experience and Intelcia excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with CXM services buyers
Source: Everest Group (2025)

TELUS Digital (page 1 of 2)

Everest Group Americas assessment – Leader

Measure of capability:  Low  High

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










Strengths

- TELUS Digital, headquartered in Canada, leverages its large workforce of over 63,000 CXM agents to primarily serve North America and Continental Europe across various verticals such as telecom and communications, media and entertainment, technology, BFS, retail, travel and hospitality, energy and utilities, and healthcare
- It has demonstrated experience across processes such as customer service, sales support, order fulfillment and transaction processing, technical support, and value-added services. It also offers bundled people and technology offerings to its clients
- TELUS Digital has experience in working with different types of enterprises, from emerging businesses with revenue below US\$250 million to global enterprises generating over US\$10 billion in revenue
- TELUS Digital launched TELUS Expert Messaging to provide asynchronous messaging support powered by Fuel iX gen AI bot
- It has invested in Fuel iX Core, an AI platform for managing, monitoring, and integrating gen AI capabilities for enterprises; Fuel iX Fortify, an LLM-powered application for improving cybersecurity in AI solutions; and Fine Tuning Studios (FTS), an omnichannel, multilingual dataset creator for LLMs
- Through its Agentic AI Jumpstart Program, it is also integrating agentic AI into its service offerings through agentic AI use case identification and prioritization, prototype and custom AI agents development, and the establishment of internal AI governance practices
- It is also leveraging Fuel iX Agent Trainer, Fuel iX Agent Copilot, and Fuel iX Agent Quality to form a Bionic Toolbelt to support its agents throughout the customer support journey and help them improve their performance and efficiency
- TELUS Digital has garnered positive client feedback for its service quality, relationship management, and operational expertise

TELUS Digital (page 2 of 2)

Everest Group Americas assessment – Leader

Measure of capability:  Low  High

	Market impact				Vision and capability				
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Americas									

Limitations

- Although TELUS Digital has a large market presence in North America and Continental Europe, it has demonstrated limited experience in serving clients across LATAM and the Middle East and Africa
- TELUS Digital’s experience in offering services to clients from verticals such as insurance, consumer packaged goods, manufacturing, and public sector remains largely untested
- Clients highlighted talent and workforce challenges, service scalability, and limited options for flexibility in pricing and commercial models as key areas of improvement for TELUS Digital

Market trends

The CXM outsourcing market experienced a flattish, but stable demand growth driven by digital adoption. However, enterprises demand more value from their partners

Market size and growth

- The CXM outsourcing services market grew by 2-4% in 2024-25, reaching \$117-119 billion
- Providers are experiencing growth through:
 - New logo acquisition in small, mid-sized and digital-native segments
 - Incremental wallet share expansion via high-impact services such as analytics, agent-assist, multilingual support, and journey redesign
- Overall, this growth trajectory signals a move from cost arbitrage to transformation-focused CXM, where value delivered will define future expansion

Key drivers for CXM services

Adoption of gen AI-powered tools for productivity and CX gains	Enterprises are scaling gen AI tools such as agent copilots, auto-summarization, and knowledge assistants to boost efficiency and enhance customer experience
Push for digital containment and channel optimization	Enterprises are accelerating the shift to asynchronous, multilingual, and self-service channels to reduce voice volumes and improve service agility
CX as a lever for revenue and loyalty	Companies are expecting measurable impact on NPS, retention, upsell/cross-sell, and CSAT, and seek CX partners who can drive that accountability
Support for agile, variable delivery models	Enterprises are increasingly looking for flexibility across delivery constructs, spanning gig, remote, hybrid, and traditional models to suit cost, scale, and risk needs
Need for regional language and shoring diversity	The growing complexity of global operations and compliance is accelerating demand for multilingual support, regional shoring, and culturally aligned customer engagement

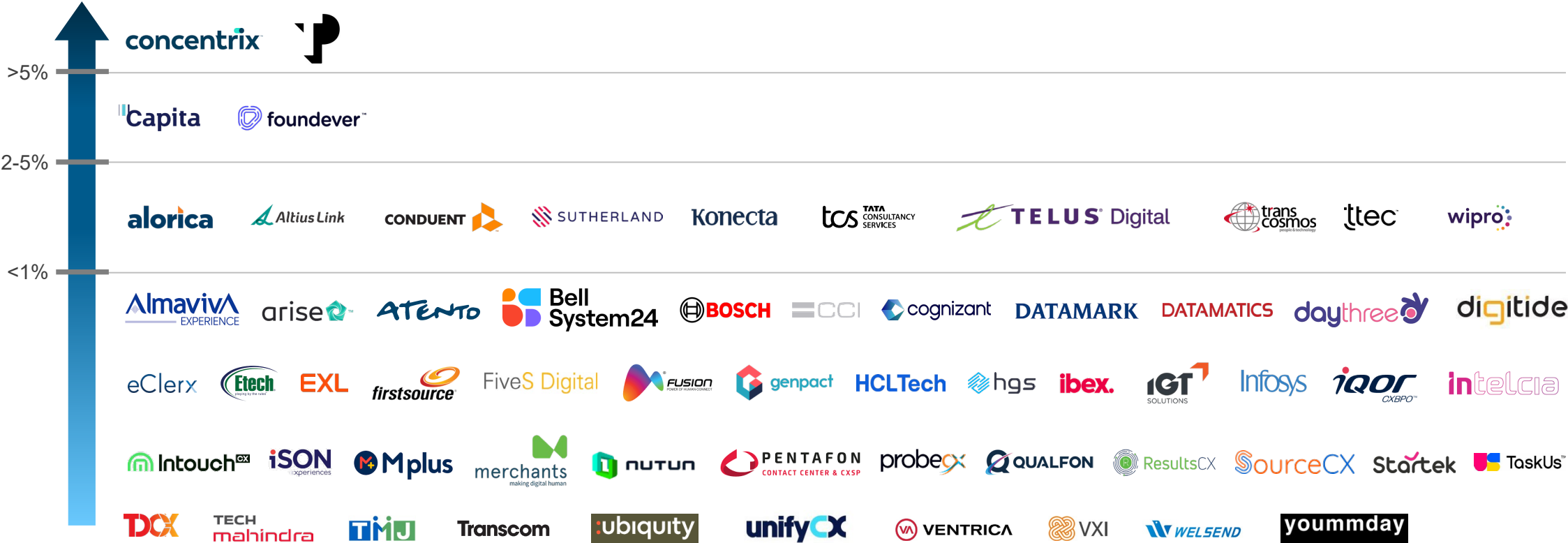
Opportunities and challenges

Outcome-based pricing remains an untapped differentiator	Most providers still rely on input-based pricing; buyers are seeking shared-risk models tied to revenue, retention, or operational KPIs, especially for AI-enabled services
Enterprises want more from AI investments	While nearly all providers now tout gen AI capabilities, enterprises increasingly seek real, scaled deployments and integrations across the CX stack, not siloed tools
CX transformation needs vertical and journey-specific expertise	Clients are looking for transformation partners who understand the nuances of their industry's journeys, especially in BFSI, healthcare, retail, and tech
B2B CX remains under-served and ripe for disruption	As complex ecosystems emerge across sectors such as SaaS, fintech, and logistics, there's a growing need for B2B-centric CX capabilities such as stakeholder orchestration, intent modeling, and knowledge management
Scalable, multilingual support is a basic expectation	Emerging markets and Tier-2/3 cities across EMEA, LATAM, and APAC are becoming growth centers, creating demand for robust delivery and local language coverage

Provider landscape analysis

Capita, Concentrix, Foundever®, and TP stand out as the largest service providers in terms of market share on a global level

Market share analysis of the providers
2025; percentage of overall market of CXM service

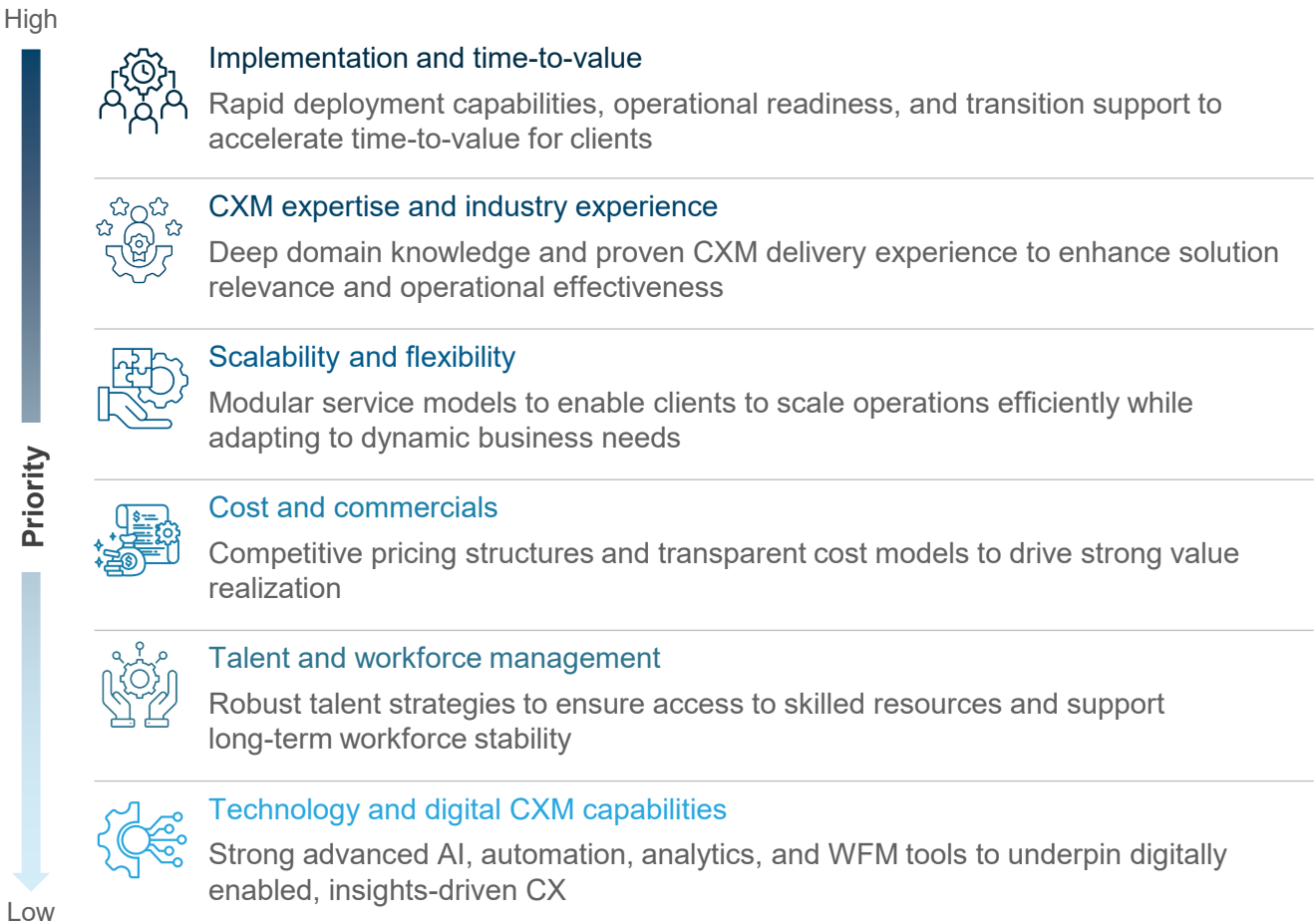


1 Providers are listed alphabetically within each range

Key buyer considerations

Enterprise sourcing decisions increasingly favor providers that combine rapid execution, deep domain expertise, and scalable digital delivery to accelerate and sustain value realization

Key sourcing criteria



Summary analysis

The recent shifts in provider capabilities, especially around domain-focused delivery, IP-led innovation, and digital maturity, are reshaping enterprise sourcing priorities. As buyers place greater emphasis on faster implementation and time-to-value, providers demonstrating seamless transition support and operational readiness are gaining a distinct edge. Additionally, CXM expertise and vertical-specific experience now play a critical role in vendor selection, as enterprises seek partners who can align delivery models with evolving customer expectations.

Scalability and flexibility emerge as pivotal differentiators in today's volatile business environment, with buyers preferring providers that offer modular solutions that are adaptable to volume fluctuations and multi-channel demands.

Talent and workforce management continue to be a concern amid the rising attrition and evolving skill requirements. Providers that ensure workforce stability through proactive engagement and career development are better positioned to deliver consistent CX. Technology and digital CXM capabilities, especially those around AI, automation, and advanced analytics, have become key levers for performance improvement, innovation, and real-time personalization.

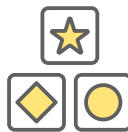
Key takeaways for buyers

CXM providers are gradually transitioning from transactional delivery to transformation partners, integrating AI, journey design, analytics, and experience orchestration into their offerings. As this shift accelerates, buyers should align their sourcing strategies to balance innovation, scale, compliance, and contextual depth. Evaluating provider fit across delivery models, pricing structures, and domain-specific capabilities is essential to building a future-ready CX portfolio.



Mandate CX outcome tracking, especially for AI-influenced processes

Go beyond SLAs to measure outcomes such as CSAT, resolution speed, and conversion for AI-enabled use cases. Ask providers for pre- vs. post-AI baselines, attribution methods, and closed-loop feedback mechanisms



Experiment with outcome-based models

Consider outcome-based or shared-risk or gain-sharing pricing models for high-impact functions (e.g., sales support, tech troubleshooting), while retaining traditional models for stable, transactional work. Treat this as a hybrid strategy



Demand resilient shoring and language depth

Look beyond delivery footprint to assess operational resilience, language support depth, business continuity maturity, and cultural alignment, especially in Tier-2/3 locations or regulated markets. Enterprises can also evaluate emerging capabilities such as real-time translation and accent neutralization, which can be leveraged for meeting regulatory requirements, managing geopolitical sensitivities, and delivering inclusive, high-quality support

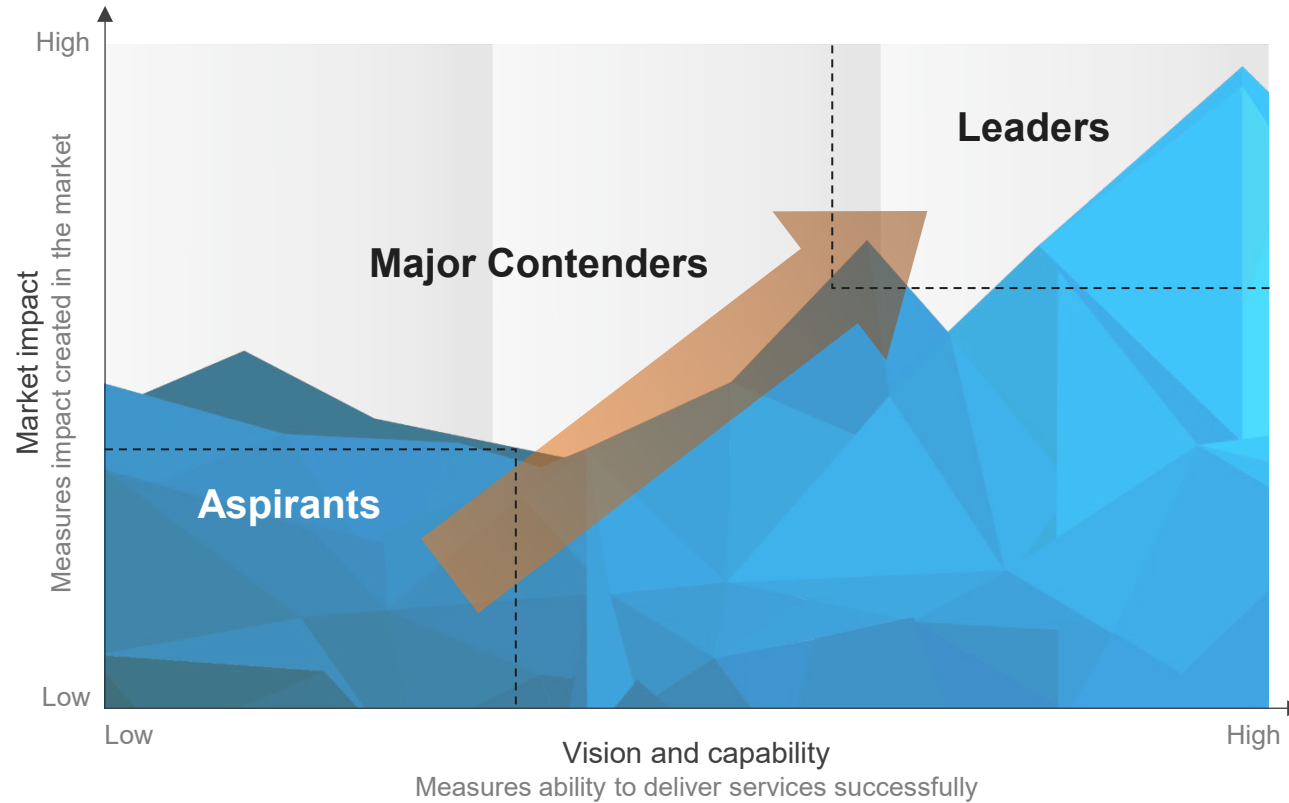
Appendix

PEAK Matrix® framework

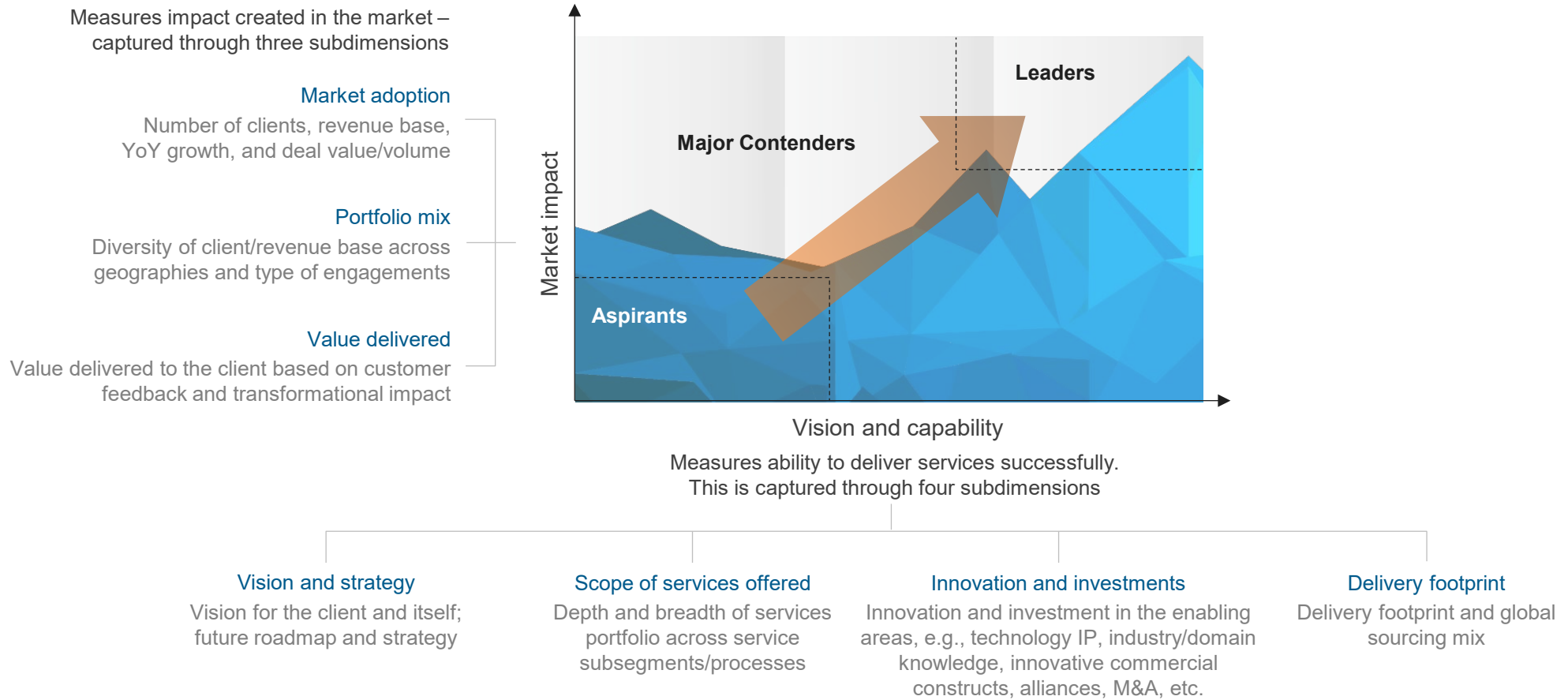
FAQs

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

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

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

A: No. The PEAK Matrix highlights and positions only the best-in-class 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.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

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

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for 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 Everest Group; please contact your CD or contact us

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

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.

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