

From Efficiency to Excellence:

Driving Enterprise Value Through Customer Experience Partnerships



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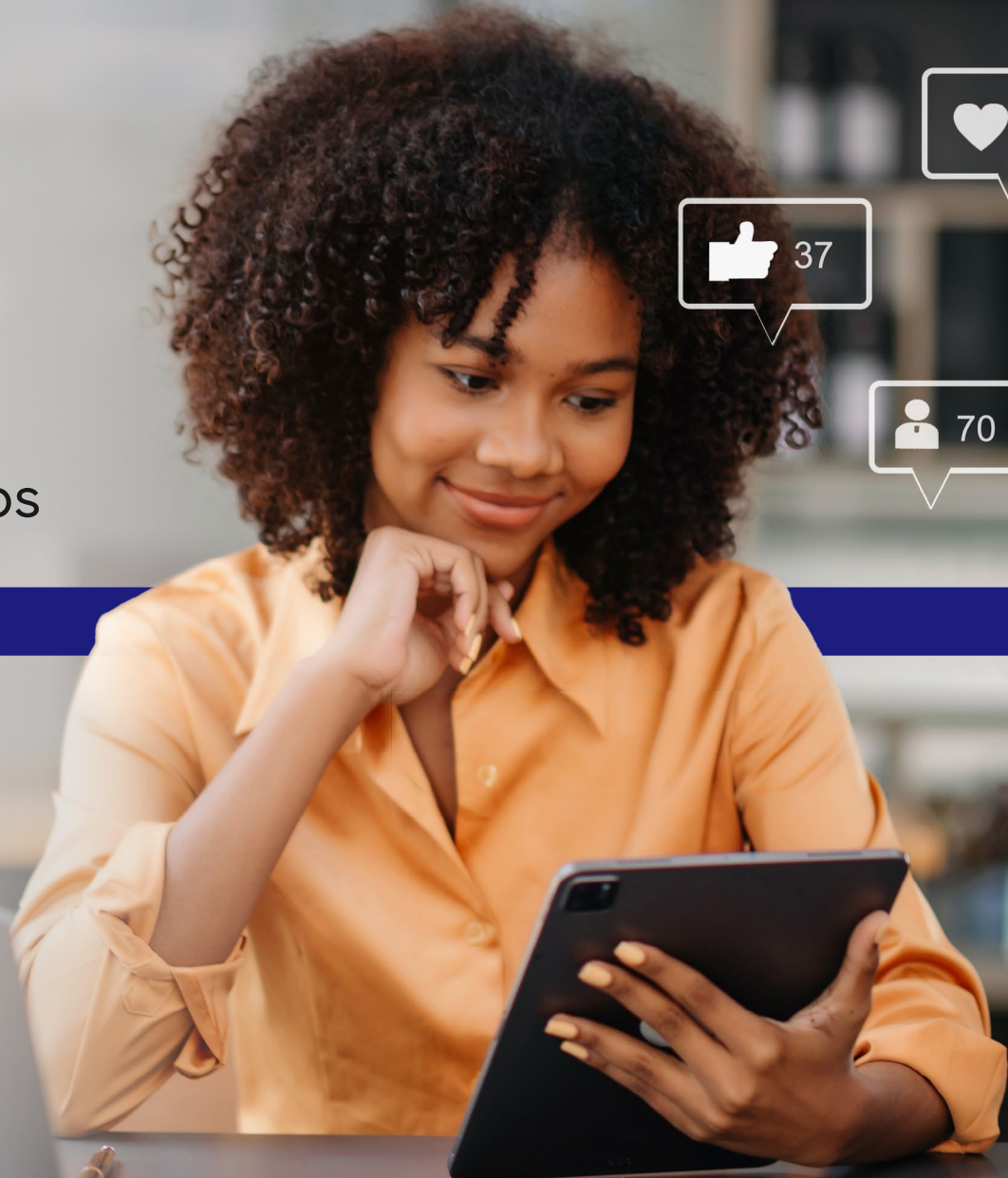


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In this InfoBrief

Customer experience (CX) directly impacts enterprise competitiveness, often prompting organizations to seek CX service partners who can transform their customer interactions. The challenge lies in identifying providers who deliver beyond operational efficiency to offer strategic technology expertise, workflow innovation, and quantifiable business outcomes.

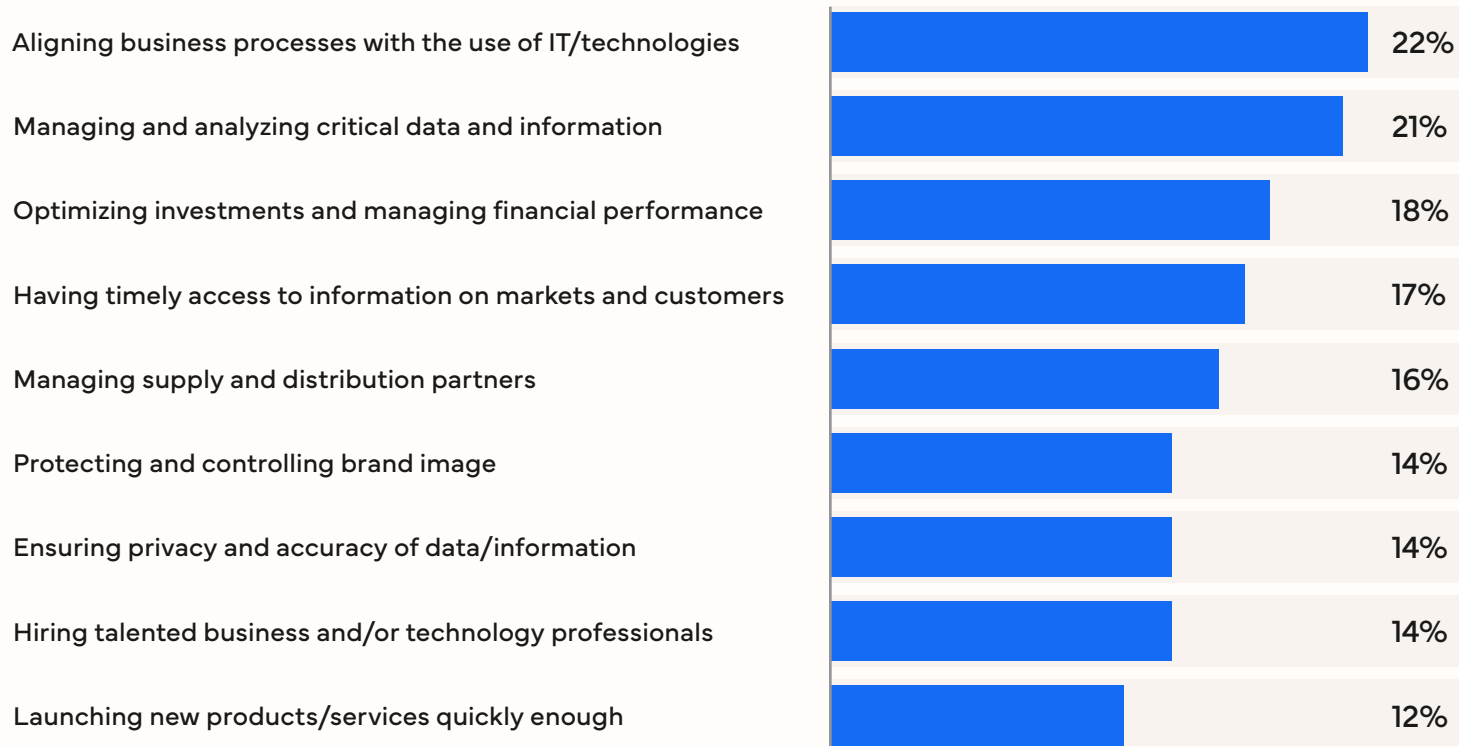
- A successful partner delivers operational value aligned with an enterprise's business outcomes. Enterprises seek strategic and forward-looking organizational insights and process innovations, not just cost arbitrage and incremental transactional improvements. IDC survey data indicates that successful CX providers offer consultative guidance, think long term, and deliver transformative technology systems and solutions.
- This InfoBrief contains data from IDC's *2025 Worldwide Business Process Outsourcing Services Survey*, which queried enterprises on their existing and future business challenges, requirements, and expectations of CX services partners. Respondents were enterprise buyers and decision-makers who use customer care and contact center services from CX services providers. Respondents came from various vertical markets and companies with 1,000+ employees, and they had to be well versed in business process services and outsource at least one functional activity.

Current business and operational challenges for enterprises

Over 20% of 287 enterprises say that IT system alignment and data management present their top challenges, as they impact timely and accurate decision-making and operational efficiency.



Which are the major operational challenges that your company/organization currently faces?



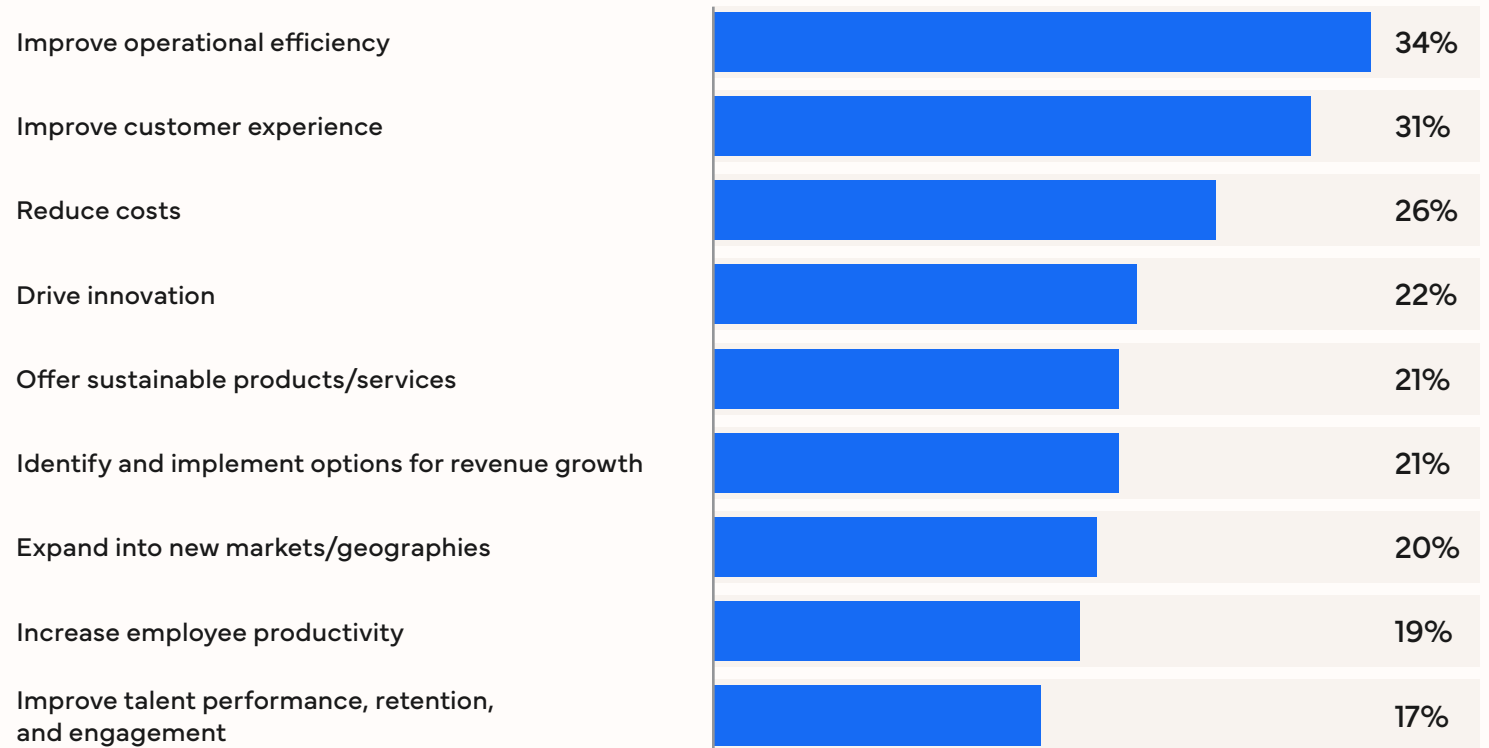
n = 287; Source: IDC's Worldwide Business Process Outsourcing Services Survey, July 2025

Enterprises prioritize operational efficiency and CX improvements

Enterprises are less satisfied with cost arbitrage or temporary savings from their CX partners, but rather seek ongoing scalable value from operational efficiencies and improved CX.

Enterprises seek CX partners that leverage technologies such as AI, machine learning, and data analytics for organizational agility and workflow process transformation.

What are the most important business priorities for your customer care company/organization over the next 12–24 months?



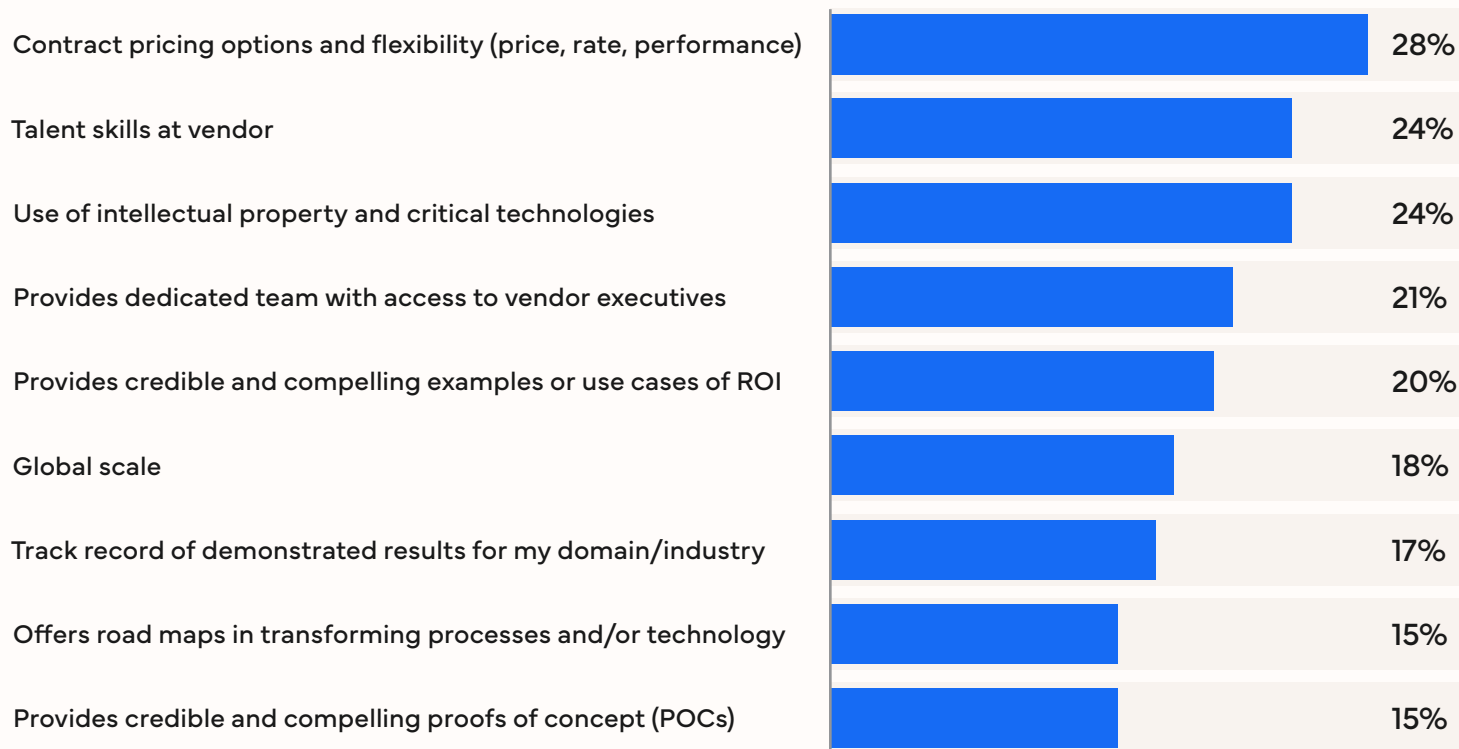
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CX partner selection criteria

While pricing options rank as the primary selection criterion, enterprises emphasize flexibility in contract structures rather than cost minimization alone. The ability to adjust pricing models based on performance and changing needs reflects expectations for dynamic partnerships, not static vendor arrangements.



In selecting a third-party provider for business process outsourcing services, which of the following criteria would your organization use to down select/shortlist vendors?



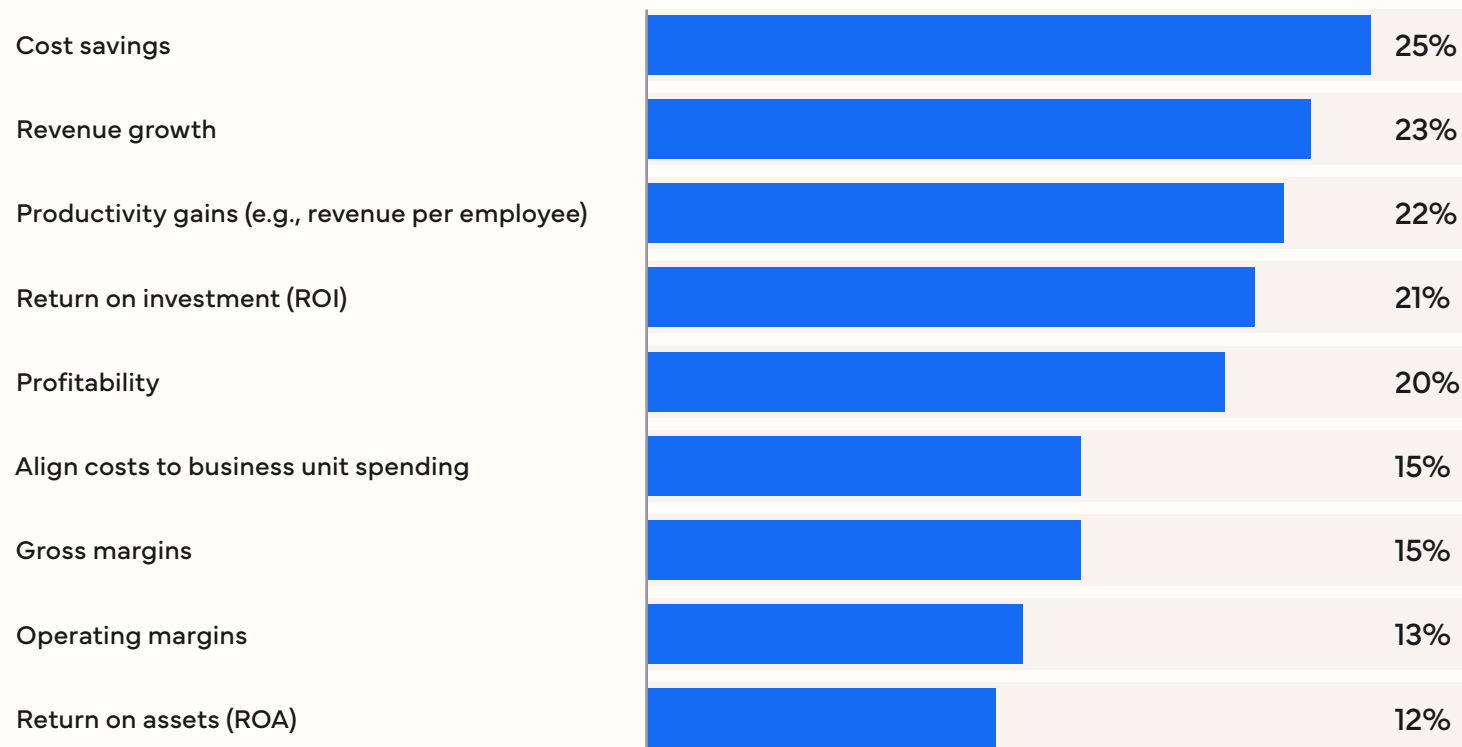
n = 287; Source: IDC's *Worldwide Business Process Outsourcing Services Survey*, July 2025

CX providers must demonstrate financial value beyond cost saving

Though cost savings ranks as the primary outcome, enterprises evaluate CX partnerships across multiple financial dimensions. Operational efficiencies, such as process productivity, also have a direct impact on financial results.

72% of enterprises expect 10%–19% cost savings when partnering with a CX provider.

What quantifiable business outcomes and cost efficiencies do organizations achieve when partnering with CX service providers?



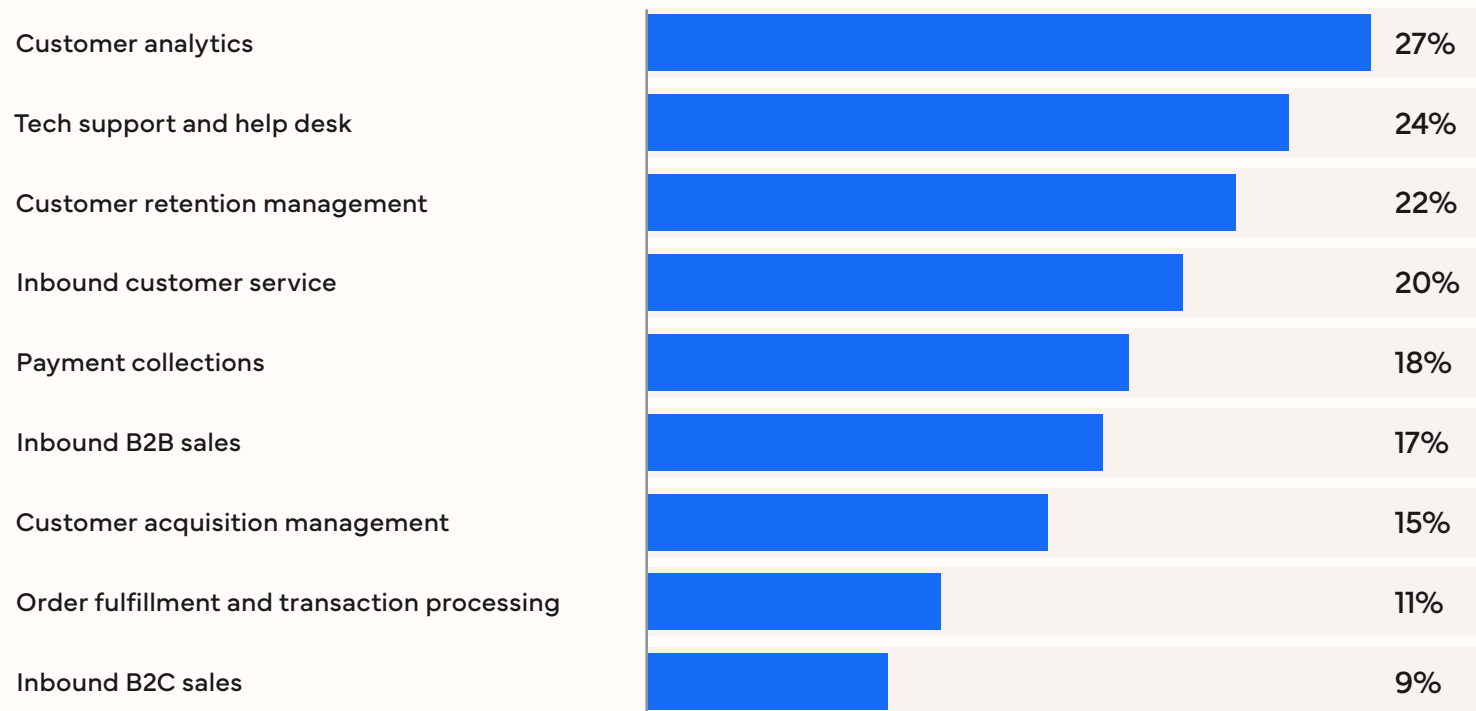
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Enterprise functions most likely outsourced to a CX partner

IDC's 2025 survey shows customer analytics as the service most likely to be outsourced, compared with the 2023 survey, which had fulfillment/transaction processing in the top spot.

Enterprises now prioritize customer analytics that reveal behavioral patterns and predict outcomes, such as using contact center data to identify churn signals or uncover cross-sell opportunities.

Which are the main customer care/contact center functions you currently outsource or would most likely outsource to a third-party business process outsourcing provider?



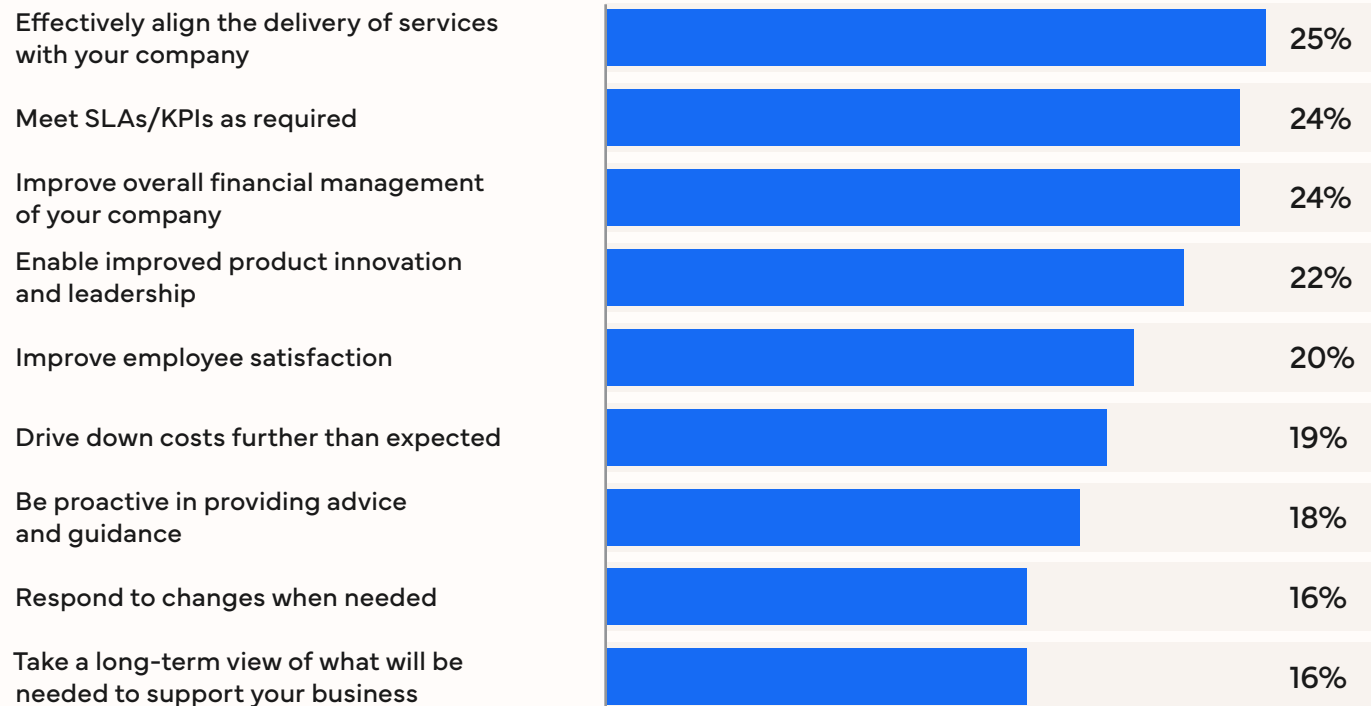
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Holistic execution separates leading CX providers

25% of enterprises view basic deliverables (including delivery alignment, SLA/KPI fulfillment, and improved financial management) as the most important elements that determine enterprise satisfaction. They also value provider partnerships that include contract flexibility for service-level adjustments.

In contrast, related data finds that the highest level of enterprises (24%) are dissatisfied when service providers exceed expected costs.

Which of the following factors drive the highest level of satisfaction with the business process outsourcing provider(s) that your company/organization utilize(s) to support your function?



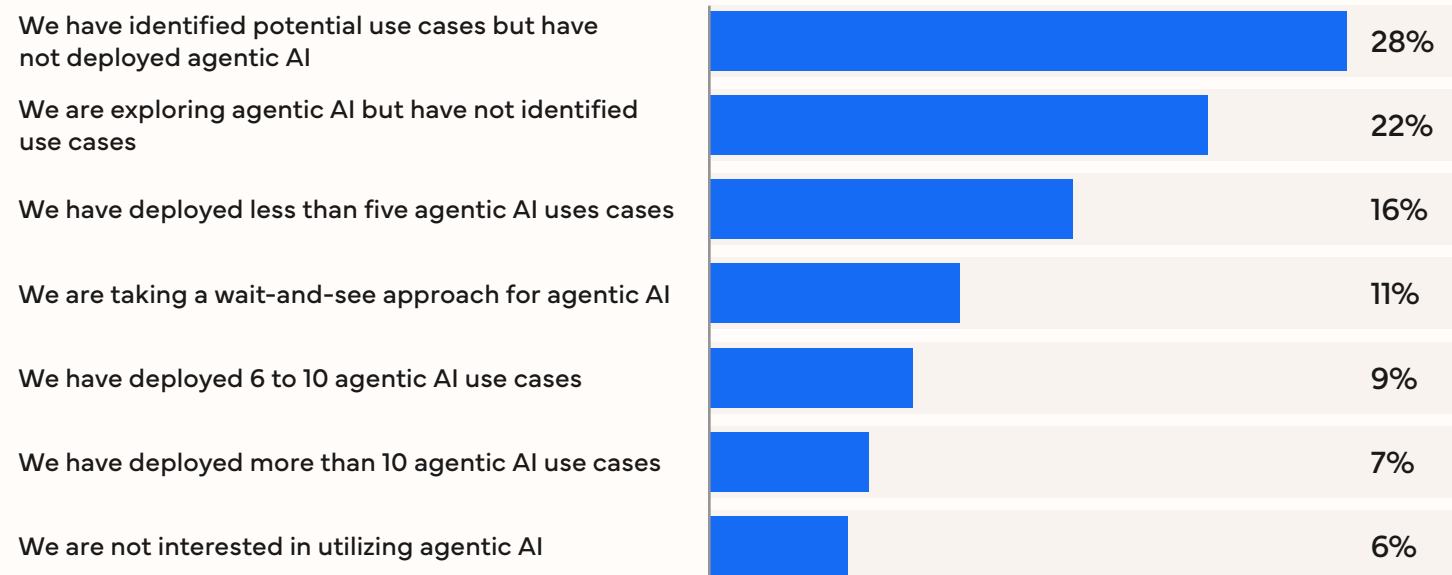
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Where the market is heading: Emerging agentic AI technology in CX services

While generative AI (GenAI) infuses many mainstream solutions, agentic AI goes a step beyond in CX services. For example, an agentic AI system could detect a customer’s billing issue, autonomously coordinate with payment and account systems to resolve it, and proactively notify the customer before they ever need to call.

Today, 32% of enterprises deploy agentic AI, while only 6% report no interest in this technology.

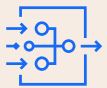
Please indicate what stage your company/organization is at in utilizing agentic AI as part of its business process outsourcing services.



n = 287; Source: IDC's *Worldwide Business Process Outsourcing Services Survey*, July 2025

Essential guidance for choosing a CX services partner

Enterprises should seek the following capabilities from a CX services partner:



Transformation

A provider should have a modernization plan for business processes utilizing digital technologies to improve employee productivity and enhance the customer journey.



Domain expertise

Look for an understanding of the dynamics and complexities of your organization's specific industry needs. Risk, compliance, and regulations vary by sector, requiring partners to possess specialized competencies in CX services.



Data governance and security

Competency in data quality is important, as are privacy standards that include information security, legal oversight, and regulatory compliance. The provider should have a risk management function that assigns risk levels to AI technologies for CX services and tests these technologies to confirm reliability.



AI strategy

A provider should have the ability to build an AI strategy, maturity assessment, and operating model. They also need to support responsible AI policy development, reskill staff, and handle business process and workflow productivity.



Agentic AI

Ask about the provider's knowledge of agentic AI solutions in customer care and CX scenarios and how they propose to use them to boost productivity and enhance customer engagement across multiple channels.

About the IDC analyst



Raymond Pucci

Research Director, Intelligent Finance and Customer Care Business Process Services, IDC

Raymond Pucci is research director for IDC's Intelligent Finance and Customer Care Business Process Services program. Pucci's research focuses on providing valuable insight at the worldwide level into the dynamics of business process services markets (also referred to as business process outsourcing services) and the competitive landscape serving these markets. These markets include coverage of customer care, finance and accounting, procurement, and logistics business functions. In developing research for this program, this practice also provides analysis on how technology solutions and capabilities such as AI, machine learning cloud and analytics impact the use, and adoption of these business process services. Additionally, this program develops research that examines buyer adoption patterns in utilizing these services and in what areas vendors need to invest to help enterprises achieve critical objectives, such as process improvement, workforce digitization, cost effectiveness, revenue optimization, and higher profitability.

[More about Raymond Pucci →](#)

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