



## Contact Center, UC and Collaboration Flexibility for All

A Frost & Sullivan Buyers Guide Excerpt

Contact Center Buyers Guide, North America, 2020

## THE STUDY

This buyers guide examines the North American contact center market, and covers the contact center on-premise systems and hosted/cloud markets. This study is based on extensive primary and secondary research and is divided into 2 sections.

**Section 1** provides analyst commentary on the most important forces affecting the North American hosted/cloud contact center market. A number of trends, including movement to the cloud, have been gaining steam for a decade. Others, such as creative pricing strategies or the creation of app stores for customers to more easily add new capabilities from third-party suppliers, are growing in strength. Frost & Sullivan expects that these trends will extend well beyond 2023.

**Section 2** highlights and assesses the capabilities of the top-performing North American cloud contact center providers. The list is not exhaustive: Frost & Sullivan chose vendors based on the strength of vision and ability to execute; some offer complete contact center solutions while others offer compelling suites focused on areas such as agent performance optimization. Solution providers are listed in alphabetical order.



## EXECUTIVE SUMMARY: THE COMPETITIVE LANDSCAPE AT A GLANCE

This buyers guide examines the North American contact center market for both premise- and cloud-based solutions. It considers full-suite, pure-play, cloud-based providers and those that provide premise, cloud-based, and hybrid solutions. It also includes a handful of telco-based providers that offer business process outsourcing (BPO) and hosting, as well as premise and cloud-based solutions directly to enterprise customers.

### Key Trends

In the 2018 Cloud Contact Center Buyers Guide, Frost & Sullivan noted 3 primary trends driving the customer care industry: the adoption of cloud as standard; the continuing move toward omnichannel delivery in the context of digital transformation; and a focus by providers on developing solutions that address the needs of a changing workforce. These trends continued unabated in 2019, with further refinement, as Frost & Sullivan discussed in the 2019 combined premise and cloud buyers guide.

Cloud is still a given, but **hybrid cloud** is a hot topic. Companies are using the cloud not just to host contact center services but also to get a head start on innovation when rip and elevate isn't yet an option. As such, providers have adapted by:

- Continuing to bolster on-premise offerings so customers can get additional value out of their existing operations.
- Creating and stocking app stores for third-party cloud applications to deliver innovation for cloud customers and to supplement on-premise systems.
- Ensuring tight integration between cloud and on-premise applications.

**Workforce engagement management** (WEM) made its debut as one of the trends driving the industry in 2018 and 2019. Listen, Free, Motivate, Empower, Protect, and Enable are all descriptors of design considerations for workforce engagement.

The industry has finally reached the edge of the hype cycle for the umbrella term **artificial intelligence** (AI) and is actively harnessing a set of AI technologies to infuse intelligence across the customer contact landscape. Just as important, providers in this guide are learning how to properly market and position their AI wares in addition to building professional services and consulting resources to assist customers with strategic AI plans.

Frost & Sullivan has found that these trends are still driving the industry. For buyers, the good news is that the industry is in a stage of refinement and innovation related to the trends rather than introduction of new segments that result in diverse and confusing marketing messages. For instance, rather than gamification being an oft-dismissed request for proposal (RFP) check-off item, customers generally understand what it is, and providers need to discuss whether they have full gamification suites or are just using game mechanics to enhance WEM solutions. Or, rather than a supplier saying it has an AI chatbot or speech-enabled interactive voice response (IVR) solution, it can now talk about how its solutions provide process automation across all segments in its portfolio.

## INTRODUCTION

Revenue for the North America hosted and cloud contact center market grew 12.5% in 2018 and is forecast to increase at a compound annual growth rate (CAGR) of 12% through 2023. While swiftly losing ground to the cloud, during 2018 systems revenue grew 3.8% year-over-year and is forecast to increase at a CAGR of 2.9% over that same forecast period. One caveat, however, is that as of publication of this guide the 2019 market share and forecast are still being determined; Frost & Sullivan expects the forecast for different application segments for both cloud and premise will shift due to the effects of the rapid shift to a work-at-home model because of COVID-19.



## SECTION 1: MARKET TRENDS

The key trends that were discussed in the Executive Summary have matured over the past two to seven years and have remained remarkably solid in the last three. As noted in last year's guide, "After decades of focusing on cost-cutting and isolating performance issues in the contact center, the industry turned its attention toward improving the experience of customers, and then to the workforce that serves them. In this decade, the key trends have revolved around the concept of people being facilitated by technology. Omnichannel customer care addresses the functional silos and breakpoints in context continuity of the customer journey. Digital transformation (the process of using digital technologies, including advanced communications, to remove cumbersome obstacles to growth that have built up in an organization over time) is now at the core of strategic planning. Intriguingly, the use of AI in the contact center has moved front and center as the industry has matured past using AI as point solutions, such as virtual assistants and bots, to infusing AI across the customer contact landscape in a variety of ways and methods. Finally, WEM has emerged as a familiar term and essential concept, and is at the heart of the development and application of solutions geared toward improving EX in the same way as improving the CX."

The industry has not been without other changes taking place, however, as detailed below.

### COVID-19 Ready

Impossible to predict or ignore is the impact that the COVID-19 epidemic has had on customer contact. 2020 added pandemic to the list of events in the phrase "unforeseen events" that is often tagged onto discussions about BCDR initiatives. Alongside fires, floods,

hurricanes, and other natural disasters, COVID-19 brought to the forefront the need for the contact center backup plans the industry has long pushed for. Almost overnight, millions of people including contact center employees were conscripted candidates for working remotely. The industry quickly responded in kind with WAH models, free or trial offers for remote agents, and generous pricing models, even as they dealt with their own shift to WAH.

Many vendors were prepared for the move. For example, CoreDial's CoreNexa Contact Center was designed using WebRTC with teleworkers in mind, so from a technology (not management) perspective, agents merely had to go home and log in through a Chrome browser and everything was the same. Edify, with its next-gen cloud contact center platform, as well as Thrio, were designed with a work-from-anywhere model in mind.

Overall, solution providers did a spectacular job in moving masses of workers home. On the UCC front, companies such as RingCentral, 8x8, Cisco, Mitel, Enghouse, OnviSource, and Avaya provided communication and collaboration software for free for months. Cisco threw in free security services as well.

On the contact center side, providers quickly put together packages with temporary complementary remote agent solutions. Along with this appeared dozens of websites with information on WAH including best practices and use cases to act as guides for companies struggling with the sudden change.

In some cases, such as with Avaya, providers set up their own technical support contact centers to assist customers in making the change. Talkdesk announced a solution aimed at connecting skilled WAHA talent with companies seeking to hire agents. Talkdesk CXTalent is a talent job matching service for agents, supervisors, and system administrators that connects skilled individuals seeking WAH jobs with companies hiring a contact center workforce. It comes with free training available through Talkdesk Academy for job seekers to develop essential skills through four progressive levels of coursework and Talkdesk certification. Within 10 days of launch, the CXTalent platform was supporting 9,000 Talkdesk certified agents and 1,000 professionals with supervisor experience.

We will always have events that trigger a rapid response and the need to put a Plan B in place. If it's not COVID-19 it will be COVID-20 or something else. However, this particular event just added fuel to trends we were already seeing in customer contact. Better work/life balance, the need to increase employee engagement, and the desire to be empowered and more mobile had been growing in importance for years, and the WAHA model that has been used as a perk for employees is a core component of these and other trends. And the "no choice if you want to stay in business" aspect of the pandemic simply forced many businesses to put aside their reluctance and dive right in.

Some vendors tweaked solutions to more fully assist with BCDR. For instance, Verint's WAH support program included pre-built COVID-19 categories for Verint Speech Analytics to help identify customer and employee business challenges and aid compliance, as well as a

KM starter package and WAH intelligent assistant. NICE, in addition to its CXone@Home program, also introduced one for its NICE Employee Virtual Attendant (NEVA) solution in a NEVA@Home package. Aspect was on the verge of introducing the latest version of its WFO suite when the pandemic hit, and introduced several upgrades to the suite including an improved mobile UI with the look and feel of the agent desktop, expanded cloud options, improved quality management, intra-day scheduling, and improved performance tools.

What Frost & Sullivan expects to see is a continuation and broadening of WAHA adoption, not just because companies had to do it, or as a perk, but because of other benefits as well. Many will see it as a way to cut down on the cost of physically running brick-and-mortar contact centers, and might continue with some form of WAH to scale back. But something even bigger might push the model to continue as the world has now witnessed something almost no one expected to see: the clearing of air pollution, reductions in traffic accidents and fuel consumption, and other factors that are hard to ignore. As we come out of this crisis, many companies will take social consciousness into account, and try to do their part in creating a better global sociological and environmental situation. From interviews with the suppliers in this guide, on average we expect anywhere from 45% to 65% of agents to remain in a WAH situation.

## Cloud: Ready or Not

All of this just accelerated the move to the cloud for millions of agents across all suppliers. This also somewhat pushed another trend we are seeing in cloud, but in one particular segment: telco providers. When Frost & Sullivan published its first Cloud Contact Center Buyers Guide in 2018, the majority of telco suppliers were offering enterprise customers premise-based systems from the same vendors that they themselves use for BPO and managed services offerings, primarily Cisco and Avaya. A few also had offered customers the ability to license cloud seats as well. Now these providers have all forged deep relationships with other cloud platform providers.

For instance, early on Bell Canada partnered with 8x8 for its on-demand cloud platform. CenturyLink's cloud platform was based on Genesys for interaction routing and IVR, but was expanded in 2020 to include Genesys Cloud, giving CenturyLink a global, unified cloud service for network services and applications and contact center. Similarly, AT&T started off with a broad array of platforms, including those from Cisco, Avaya, Genesys, NICE inContact, TTEC, and CSG International (CSGi). In 2020, however, AT&T shifted its approach with the launch of AT&T Cloud Contact Center platform, which is based on the Five9 service. TTEC, which is the largest Cisco reselling partner in the United States, has solidly maintained the relationship that has spanned 16 years.

The end result is that the majority of telco providers have rethought their portfolios, and customers will have to evaluate not just the core contact center components but the value-added services these suppliers provide, whether it's the use of the company's network

or additional services, such as CenturyLink's Voice Clarity Measurement and Enhancement service. Certainly, these providers' ability to partner and help lead a company through digital transformation are key criteria in accessing further engagement.

## Acceleration of Process Automation

The infusion of AI across the entire contact center landscape continues apace. AI, as it applies to the contact center, is an umbrella term that encompasses AI, ML, NLU, DL, and other related technologies to improve the CX. Since 2019, companies moved from talking about AI in a narrow way (focused on point solutions such as speech-enabled IVR or virtual assistants) to the matter of how to effectively plan for and deploy AI-enriched solutions across the customer contact landscape in a way that improves both the CX and the EX.

Now the number of companies doing so has mushroomed. Many have business units that focus solely on AI, and some have developed a CoE with a focus on integrating AI-infused solutions into customer environments. Now we have a vast array of applications including virtual assistants, predictive routing, process automation, voice biometrics, assisted and unassisted RPA, and automated forecasting and QA.

Frost & Sullivan further sees a shift with companies pushing the adoption of process automation as an integral part of business optimization strategies. Marketing of the benefits of process automation has ramped up, particularly as it applies to offloading agents of tedious, error-prone work but also in the broader goal of improving EX. Then suddenly when COVID-19 hit, process automation got a further boost as a tool to assist agents in times of change. NICE's Neva@Home again provides an example of blending a virtual and live workforce to reduce costs and improve CX and EX.

## Conclusion

The contact center industry was already experiencing a time of great innovation when unforeseen events both tested and accelerated change. In 2020 and in the next year or two, Frost & Sullivan expects to see some fallout of smaller, start-up companies that didn't have the financial resources to make the necessary course corrections. Some will cease to exist and others will get acquired for their talent and intellectual property. Acquisitions will allow more established companies to continue on the path of innovation and bolster their ability to help end-user customers innovate and change as well. The ability to help customers transform their customer contact organizations may well end up being one of the top differentiators in the coming years.

Choosing a contact center provider is an important decision that must be based on a robust evaluation methodology that includes a thorough check of customer references. The following provider profiles offer detailed company and solution portfolio information as a way to start this process.



## SECTION 2: COMPANY PROFILE

### Enghouse Interactive

#### COMPANY BACKGROUND AND CURRENT PERFORMANCE

Enghouse Interactive is a subsidiary of Enghouse Systems Limited, a Toronto-based software and services company. With deep roots in all aspects of the contact center, Enghouse Interactive owes its longevity to its keen acquisition strategy and the manner in which it supports its global partners. Along with Enghouse Interactive (customer communications software and services), Enghouse Systems is composed of Enghouse Networks (telecommunications and utility software) and Enghouse Transportation (transportation and operations software). Enghouse Interactive, the largest piece of the company, delivers a comprehensive suite of contact center technology on-premise and in the cloud. Enghouse Interactive has thousands of customers worldwide, supported by a global network of partners across the company's international operations.

The company, founded in 1984, is headquartered in Toronto and is publicly held and traded on the Toronto Stock Exchange (TSX: ENGH). It has more than 1,600 employees globally, with 700 Enghouse Interactive dedicated employees. The company also supports more than 10,000 global customers across 100+ countries.

Enghouse's goal of delivering products to market faster than the competition has been the key motivation behind its numerous investments to enhance its portfolio. For instance, in 2019, the company announced that it had acquired Vidyio, which enhanced its video conferencing and contact center video capabilities, as well as embedded video for use in telehealth and Fiserv applications.

The company has made numerous similar investments in the past decade, strengthening capabilities in existing areas as well as filling holes in its portfolio. Chief among them was the 2012 acquisition of Zeacom, which enabled the company to better address the SMB market and to enter the Microsoft SfB (now Microsoft Teams) market. Zeacom, one of the leaders in contact centers with Microsoft platforms, enabled Enghouse to quickly offer a feature-rich, Lync (now Skype)-compliant contact center solution with Communications Center. Enghouse currently leads the market with more than 600 contact center and customer service solutions deployed globally on SfB.

This has resulted in a lucrative market niche for the company, which continues to be a strong suit today. Enghouse and Microsoft are working together as co-development partners, with



Enghouse as a preferred (High Touch) partner for both contact center and attendant console, and just presented as a key Teams contact center partner at Microsoft Ignite in November 2019. Most recently, it used the strength of its partnership with Microsoft to continue to provide contact center solutions for Office 365 users. As Microsoft is supporting Office 365 and Microsoft Teams over Skype (and discontinuing SfB Online as of July 2021), there is a product gap as Teams does not directly provide contact center applications. Enghouse has solutions that fill that gap, providing customers with choices for on-premise or hosted SfB, or full cloud voice-only contact center through Office 365 Teams. Enghouse Interactive is engaged with Microsoft's Connected Contact Center for Microsoft Teams Certification Program.

In 2019, Enghouse's acquisition strategy continued to pay off with additional acquisitions across its business units. In February, the company acquired ProOpti for telecom expense and asset management; in March, it acquired Espial for SaaS streaming video and entertainment (for Enghouse Networks); and in October, it acquired Eptca, which brought with it KM, AI-based email management, and text analytics and high-end linguistic capabilities. In January 2020, the company acquired Dialogic Group, an industry leader in media processing software.

The company has consistently shown solid growth for more than 35 years, with a 14% CAGR from its fiscal year 2014 to 2018. The company has no debt, and large cash reserves that it uses in part to fund its acquisition strategy.

One of the largest areas of growth for Enghouse Interactive's Communications Center and CCE products is through the strategic alignment with UC platforms such as SfB. Some of the largest IP/PBX VARs, such as ConvergeOne, SPS, GCI, Enabling Technologies, and NTT, have partnered with Enghouse Interactive to address the migration to UC platforms, which are displacing traditional PBX environments.

Supporting this trend, Enghouse Interactive has more than 600 contact centers and 100 operator consoles deployed on SfB (more than double 2019) and is almost always displacing a variety of standard PBX environments. Often included in these deployments are CRM integrations and Enghouse's imbedded QM Suite.

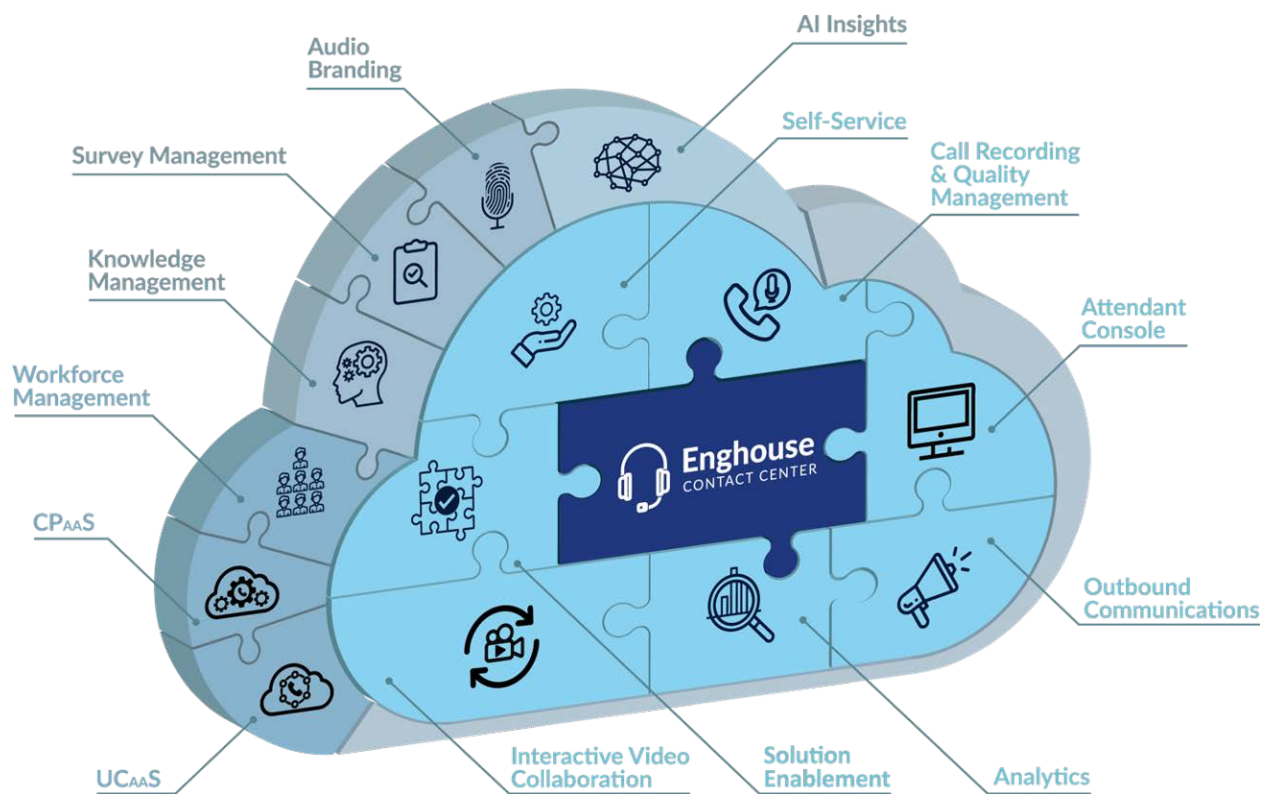
Another area of focus and growth for Enghouse Interactive is a global business unit for CCaaS solutions, which it created in response to the high demand for cloud contact center services. This unit focuses directly on Contact Center Service Providers (CCSP), BPO and service providers to help them deliver contact center as a service, including partners such as British Telecom, Orange Business Services, Mtel, Tata, Telenor, TELUS, and Telefonica.

## PORTFOLIO DESCRIPTION AND ANALYSIS

Enghouse provides contact center and related CX solutions for on-premise and cloud customers or those requiring hybrid configurations, as shown in exhibit 15. Historically it has provided cloud solutions as a managed services offering or through its CCSP offer. Starting

in 2019, Enghouse rebranded the cloud platform to EnghouseCloud; added functionality to the platform, including knowledge management, survey management and AI insights; and started directly selling cloud contact center. The Enghouse portfolio is now branded Enghouse CX and includes small to mid-sized contact center (Enghouse Contact Center for SMB), options for enterprise contact center (Contact Center for Enterprise), and Enghouse CCaaS, a contact center as a service offer. Enghouse provides flexible deployment options: Either on premise, as a private (hosted) cloud, or as EnghouseCloud, a true public cloud service. In order to provide an added measure of reassurance that customer data housed in the cloud remains safe and secure, Enghouse Interactive Americas earned its ISO 27001 Certification for its Information Security Management System supporting the CCaaS and private cloud Contact Center for Enterprise solutions.

EXHIBIT 15: Enghouse Interactive CX Solutions



Source: Enghouse Interactive

Enghouse is committed to ensuring that its customers attain a positive ROI with lower TCO. As such, the solutions are designed for quick installation and ease of use. They are telephony platform agnostic, allowing them to fit easily into existing environments and provide connectivity migration strategies. The company maintains four contact center platforms to address specific line segments:

- **EnghouseCloud** includes private cloud options for both the SMB Contact Center and Enterprise Contact Center and a true-cloud CCaaS option. EnghouseCloud is an omnichannel contact center offering that includes voice, voicemail, instant messaging, SMS, email, social message chat and web chat solutions, along with call recording and QM, and CRM and WFM integration options.
- **Enghouse CCaaS** is based on CCSP, a multi-tenanted cloud platform, hosted on IBM Cloud. Historically CCSP was positioned only to global service providers and carriers that used the platform to take their own cloud contact center solutions to market. Enghouse CCaaS now brings cloud contact center directly to the Enghouse customer. The CCSP architecture is designed to provide cloud operators infrastructure economies of scale, operational efficiencies, and flexible scalability. Enghouse and its service providers can turn on a new tenant in minutes (with an easy-to-use provisioning portal) and provide timed subscriptions; simple, easy-to-learn and use interfaces; and integration to premise-based or other cloud-based applications. The platform provides telephony routing to any kind of telephony endpoint anywhere in the world, and has a built-in SIP softphone so calls can be delivered directly to the agents multimedia PC wherever they are, in the contact center or remote working.

The EnghouseCloud solutions offer fully featured multimedia support including inbound and outbound voice, voicemail, IM, SMS, email, social messaging, and chat interactions delivered to the agent's universal queue. Feature highlights include:

- AI insights
- Analytics
- Attendant services
- Audio branding (voice talent and audio recording)
- Call recording/quality management
- Integrations (CTI, CRM, and other third-party solutions)
- KM
- Outbound communications
- Self-service
- Survey management
- WFM

Enghouse CCaaS includes TouchPoint, a web-accessible agent, supervisor, and admin UI. Built on HTML5 and AngularJS, TouchPoint is browser-agnostic with a minimal footprint,

taking up only a half inch on the desktop, allowing for users to easily have access to other customer information from other systems such as CRM and ERP.

**Enghouse Contact Center** for Enterprise is a high-scale, high-reliability solution for multi-location environments with up to 10,000 seats. The architecture is designed to provide numerous options to protect against site, hardware, or network failure, with continuous transparent operation regardless of failure type. With integrations to Cisco, Avaya, Mitel, Microsoft Lync/SfB, and other PBXs, it is available on-premise or deployed in a private cloud. Two key features of the enterprise suite are redundancy and failover. A customer can deploy geographically distributed nodes, and in the event of WAN failure the two nodes will automatically separate, with only local traffic queued to agents in each node. However, once the network recovers, a single blended queue is repopulated from all locations, without any requirement for IT intervention.

**Enghouse Contact Center for SMB** is a contact center solution targeted at the mid-market, typically ranging from 10 to 250 seats. With integrations to Avaya, Cisco, NEC, and Microsoft SfB/Teams, it is available on-premise or deployed in a private cloud with the option of subscription payment models. The solution provides full omnichannel interaction management and a complete picture of the customer journey, with drill-down content, functions, and actions available at every step.

Enghouse Interactive also provides a portfolio of integrated technologies that share a common UI across platforms and can be added on to optimize customer communications. It includes:

## SELF-SERVICE APPLICATIONS

- **Mobile IVR Navigator** provides the ability to quickly deploy mobile IVR applications, with visual content, reusing existing self-service structures across mobile and voice interfaces and connecting to the contact center to request live help while providing the agents with context to the customer interactions.
- **Communications Portal** provides voice and text-based IVR solutions with scalable and graphical scripting, ASR, TTS, proactive notifications, and packaged applications and integrations.
- **Corporate Directory Solution** combines the functionality of an attendant console with a corporate directory, tailoring each call handling automatically, and supporting complex, multi-tiered directory structures.
- **Knowledge Management Suite** enables web self-service, customer and agent community forums, and tools to measure and optimize article usage.

## QUALITY MANAGEMENT SUITE

- **Call and Screen Recording** provides call (and soon multichannel) recording, screen capture, and agent evaluation. It supports all leading industry PBXs and communication servers, enabling compliance with PCI and HIPAA regulations.
- **Speech Analytics** analyzes spoken phrases as well as tone, stress, volume, cross-talk, and other characteristics, providing analysis on recordings or in real time.
- **WFM** operates through the Quality Management Suite, leveraging partnerships with Teleopti and WFM Software Group.
- **Call Billing and Accounting** provides detailed accounting records based on PBX utilization.

## INTEGRATION AND DEVELOPMENT TOOLS

- **CTI Connect** provides a PBX-independent layer for applications to incorporate click-to-dial, call control, queuing and routing, event management, and reporting.
- **CRM Connect** packages CTI functions for Salesforce.com, SAP, and Microsoft Dynamics.
- **IVR Development Toolkit** enables RAD for self-service applications.
- **Voice Extensible Markup Language (VXML) Test Suite** simulates user calls to analyze and diagnose all call flow paths in VXML IVR scripts to greatly decrease time to test and deploy self-service applications into production.

## ATTENDANT CONSOLES

Enghouse offers a suite of operator/attendant console applications that support a range of deployment footprints, from client-side-only applications to full server-based operator queuing and routing engines. These consoles are targeted at mid-market and enterprise opportunities, with integration to Microsoft Lync/SfB, NEC, Cisco, and Avaya platforms. The consoles are specifically designed to improve operator efficiency and awareness, with integrated and scalable directory search capability. Three models include:

- **ArcPro Console for Cisco**, a high-end, scalable attendant console for CUCM, with rich directory, presence, routing, recording, real-time statistics, and UI designed for speed and accuracy.
- **Intuition Console for Avaya**, a scalable attendant console for ACM, with rich directory, presence, routing, recording, statistics, and feature-rich UI.
- **Operator Console for Communications Center** (a part of the CC contact center suite), allowing centralized queuing and routing, directory, presence, recording, analytics, and a single point of administration and reporting across attendants and contact center users.

- **Operator Console for SfB TouchPoint Attendant**, a fully integrated attendant console for Office 365 that provides professional call handling solutions with superb voice quality and no additional hardware. It also takes advantage of users' presence and the unique collaboration tools available in Microsoft's cloud-based phone system and Teams.

Customers also are given the option of using more affordable open source solutions and cloud-based integrations if they are unable to invest heavily. For example, contact centers that require email can make use of Office 365 as a platform, with tight integration to contact center queuing and routing. On the telephony side, Enhouse provides an inexpensive open source alternative to third-party telephony interface cards or SIP stacks with its CTI Connect product, which leverages open source PBX and SIP functionality to reduce the cost of implementation.

In terms of quality, Enhouse is ISO 9000 certified and invests time in gaining a deep understanding of all customer requirements to ensure that its roadmap is well-aligned to current market demands.

## SALES AND SERVICES MODEL

Enhouse Interactive is increasingly a direct business model, offering all its applications directly to the end customer and managing those direct relationships via a customer success organization. It continues to have channel partner relationships that drive business, and it maintains a set of dedicated regional consultants and professional services, training, and support teams that work with customers and partners to ensure that projects are defined, designed, and deployed efficiently and accurately.

The company takes a regional approach, meaning executive management, R&D, and services and support in each region report to global management, in essence treating each region as a channel. This ensures that each region has the critical local support it needs to deliver solutions tailored to the geographic needs of each client. In addition, it creates solution pricing that is market and regionally dependent, offering concurrent or named agents and subscription or perpetual software licenses depending upon need.

While others in the industry sometimes disagree, Enhouse believes that a completely different architecture for the underlying platform is absolutely required (particularly for cloud vs. on-premise), as virtually everything is different from deployment and activation strategy, application integration, and call routing to redundancy and resiliency. For example, Enhouse CCaaS is built to allow service providers and its own direct cloud business to manage and administer the application, and to grow its installed base using the platform.

Although the core routing platforms are separately architected, adjunct applications, such as IVR and QMS, can integrate with any of the platforms, and have a common UI for ease of administration.

In order to understand customer needs, refine products, and build product roadmaps, Enhouse Interactive runs annual user groups to gain feedback from its customer groups, including major telcos and business and enterprise customers. Enhouse also sponsors market research surveys of global contact center managers.

STRENGTHS	CONCERNS
<p>Consistent profitability and growth ensure financial stability.</p>	<p>Lack of brand awareness due to a history of selling primarily through channel partners and OEMs that often brand the solutions with their names. Rebranding to EnhouseCloud and selling more direct should alleviate this.</p>
<p>Each of the contact center suites and the combined portfolio support all leading PBXs and communication servers available in the market.</p>	<p>Enhouse provides a compelling argument in counteracting the hype around offering just a single platform for all line sizes and deployment models.</p>
<p>It offers a single queue for all interactions, including tasks, with push/pull capability. Two of its offers, Enhouse Contact Center for Enterprise and Enhouse CCaaS, do true blended inbound and predictive outbound blending, enabling agents to handle predictive outbound calls when inbound volumes are decreased.</p>	<p>As with other companies that acquire numerous companies, Enhouse has to prove its integration story to prospects.</p>
<p>Enhouse Contact Center for Enterprise provides multi-node resiliency, so if a network fails between physical locations it can move the interactions from one to the other, and have the queues automatically restored when the initial node is up. The platform also handles component or server failure and entire site failure by allowing interactions to be automatically rerouted to other sites.</p>	

**STRENGTHS****CONCERNS**

With its Enghouse Contact Center portfolio, Enghouse is one of the few vendors offering SfB and Teams-based platforms. The contact center products are natively integrated to SfB. Teams integration is using a fully Microsoft-endorsed and certified method that supports omnichannel interaction management capabilities. Enghouse Contact Center for SMB, Enghouse Contact Center for Enterprise and Enghouse CCaaS all provide Skype and Teams integration. Enghouse is a Microsoft Gold Certified Partner.

Enghouse retained in-country resources to take care of regional needs rather than centralize management, as was the case with the acquisition of ITSonix in Germany. It also spreads out R&D, with centers that cater to different regions.

**CUSTOMER RECOMMENDATIONS****Best Fit**

- Enghouse does not provide networking or a PBX offering; however, its platforms are architected to be vendor-neutral, enabling Enghouse to fit easily in a multivendor IP-PBX environment, provide connectivity migration strategies, and move into competitors' accounts.
- Enghouse has paid particular attention to acquired numerous best-of-breed components over the years that are then integrated into the portfolio, no matter which of its core platforms the customer chooses. Changes made to applications, such as quality monitoring or video, are available to all.



- Customers looking for superior fault tolerance should look at EnghouseOn-Premise multinode resiliency, and failover protection. The ability to reroute and restore provides a compelling proposition for multinode environments.
- Customers invested or interested in Teams, SfB, or Office 365 would do well to short-list Enghouse Interactive. The company has been working with Microsoft since 2006 to natively integrate its contact center and communications offerings, and it has multiple offerings to address different needs.

## Caution

Those companies looking for all-in-one capabilities that includes PBX functionality might not short-list Enghouse Interactive.

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## THE FROST & SULLIVAN STORY

Frost & Sullivan, the Growth Partnership Company, helps clients accelerate growth and achieve best-in-class positions in growth, innovation, and leadership. The company's Growth Partnership Service provides the CEO and the CEO's growth team with disciplined research and best practices models to drive the implementation of powerful growth strategies.

Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from more than 40 offices on 6 continents to clients accelerate growth by:

- Delivering the broadest industry and market coverage of any research and consulting firm worldwide—10 industries, 35 sectors, and 300 markets—ensuring that clients understand their industry challenges and opportunities, growth opportunities in aligned industries and competitive pressures from previously unknown sources;
- Providing a 360-degree perspective, integrating 7 critical research perspectives to significantly enhance decision-making accuracy and lower the risk of implementing growth strategies with poor return;
- Leveraging extensive contacts in the value chain, including manufacturers, distributors, end users, and other industry experts;
- Offering a global perspective of opportunities and threats built on regional expertise;
- Documenting best practices worldwide that overcome tough business challenges; and
- Partnering with the client's team to ensure success.

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