



# Everest Group Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2024 – Americas

Focus on TELUS Digital  
September 2024



# Background and scope of research

The Customer Experience Management (CXM) market has grown moderately in the Americas, buoyed by bullish sentiments due to stronger-than-expected economic conditions, particularly in the United States. This environment has prompted service providers to increase investments in their Americas operations. Enterprises in the region are advancing digital transformation, leading service providers to offer a wide range of digital CX solutions, including automation, analytics, conversational AI, chatbots, self-service, omnichannel delivery, and cloud-based contact center solutions.

To support the ideation, development, and implementation of various digital CX tools including gen AI solutions, a considerable number of service providers have established Centers of Excellence (CoEs). Many gen AI solutions are being deployed including knowledge-as-a-service tools, learner co-pilots, QA & QC co-pilots, conversational gen AI chatbots, and agent assist tools. Additionally, almost all service providers are partnering with hyperscalers and AI start-ups to deliver gen AI-centric offerings, further enriching their service portfolios.

In the report, we present an assessment and detailed profiles of 43 CXM service providers featured on the

[CXM Services in the Americas PEAK Matrix® Assessment 2024](#). 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 2024, 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 43 leading CXM providers featured on the CXM Services in the Americas PEAK Matrix:**

- **Leaders:** Alorica, Concentrix, Foundever®, Teleperformance, TELUS Digital, and TTEC
- **Major Contenders:** Arise, Atento, CCI, Cognizant, Conduent, Datamatics, eClerx, Etech, EXL, Firstsource, Genpact, GlowTouch, HCLTech, HGS, ibex, IGT Solutions, Infosys, Intelcia, IntouchCX, Konecta, Probe CX, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, and VXI
- **Aspirants:** Auxis, Centro, Conectys, Ignition CX, MerchantsCX, Pentafof, and Welsend

## Scope of this report

**Geography:** Americas

**Industry:** All

**Services:** Customer Experience Management (CXM)

# CXM services in Americas PEAK Matrix® characteristics

## Leaders

Alorica, Concentrix, Foundever®, Teleperformance, TELUS Digital, and TTEC

- Leaders in CXM services expanded their client portfolios in 2023 through both organic and inorganic growth, enhancing their presence in new geographies, languages, and verticals. These Leaders boast strong language capabilities, including English, Spanish, Portuguese, and French Canadian, and operate an extensive network of delivery locations across North America, LATAM, and Asia
- Quick to adopt gen AI, Leaders have formed partnerships with a variety of technology providers to deliver targeted solutions and proprietary tools, including advanced analytics, automation, and cloud-based solutions. They have also established Centers of Excellence to enhance their digital tool library and proprietary offerings. Their focus on digital transformation, process innovation, talent management, and customer relationships underpins their overall strength

## Major Contenders

Arise, Atento, CCI, Cognizant, Conduent, Datamatics, eClerx, Etech, EXL, Firstsource, Genpact, GlowTouch, HCLTech, HGS, ibex, IGT Solutions, Infosys, Intelcia, IntouchCX, Konecta, Probe CX, Qualfon, ResultsCX, Startek®, Sutherland, TaskUs, TCS, Tech Mahindra, Transcom, and VXI

- Major Contenders, proficient in English, Spanish, Portuguese, and Canadian French, serve clients across the Americas with delivery locations in the US, Canada, Honduras, Jamaica, Nicaragua, Guatemala, South Africa, India, and the Philippines, providing a diverse shoring mix
- They have developed proprietary tools such as gen AI-powered chatbots, agent assist tools, advanced analytics, talent management frameworks, and automation solutions. They have established extensive networks of partnerships with leading technology providers to enhance their digital capabilities and omnichannel solutions. Buyers recognize their strengths in service delivery, digital transformation, talent management, pricing flexibility, performance management, and customer relationships

## Aspirants

Auxis, Centro, Conectys, Ignition CX, MerchantsCX, Pentaфон, and Welsend

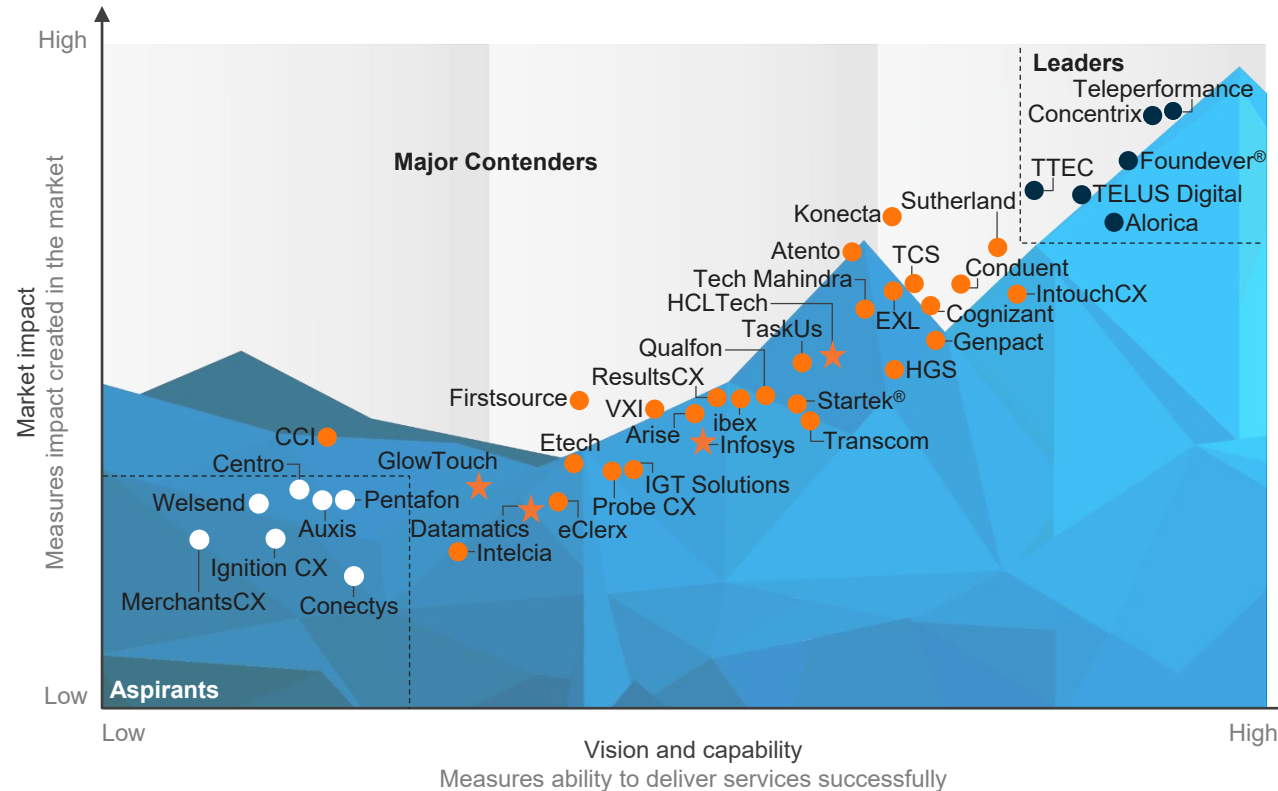
- Aspirants are focused on specific regions, verticals, or buyers and have smaller CXM operations, fewer agents, and a skewed shoring mix
- They are developing digital CX solutions such as gen AI-powered chatbots, analytics platforms, automation, virtual assistance, and use case-specific digital CX solutions such as recruitment bots and QA and QC bots. They are partnering with technology providers to further enhance their gen AI services. Buyers recognize their strengths in scalability, domain expertise, responsiveness, and relationship management. While they offer innovative digital capabilities, they currently have limited capacity to serve large buyers with complex needs

# Everest Group PEAK Matrix®

Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2024 – Americas | TELUS Digital is positioned as a Leader

## Everest Group Customer Experience Management (CXM) Services PEAK Matrix® Assessment 2024 – Americas<sup>1</sup>

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



<sup>1</sup> Assessment for Intelcia excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers  
Source: Everest Group (2024)

# TELUS Digital profile (page 1 of 8)

## Overview

### Company profile

TELUS Digital is an AI-fueled CX partner that designs, builds, and delivers next-generation digital solutions, including Artificial Intelligence (AI) and content moderation, for global and disruptive brands. Its goal is to implement specialized solutions as well as solutions that assist in the digital CX journey.

**Headquarters:** Vancouver, Canada

**Website:** [www.telusdigital.com/rebrand](http://www.telusdigital.com/rebrand)

### Key leaders

- Jeff Puritt, President and Chief Executive Officer
- Gopi Chande, Chief Financial Officer
- Jose-Luis Garcia, Chief Operating Officer
- Michael Ringman, Chief Information Officer
- Tobias Dengel, President WillowTree, a TELUS Digital Company
- Michel Belec, Chief Legal Officer
- Monty Hamilton, Chief Product and Marketing Officer

### Recent deals and announcements (excluding ESG initiatives)

- 2024: announced the beta release of Fuel iX, an enterprise-grade AI engine designed to assist businesses in upgrading their generative AI pilots to production scale, deploying customized solutions faster, and effectively managing the technology responsibly. Solution has 2 solution layers, core and apps, each with several modules and connectors to third-party solutions
- 2024: established partnership with Local Measure to offer clients an omnichannel cloud contact center solution built on Amazon Connect
- 2024: launched Fine-Tune Studio, a multi-modal and multilingual task-execution platform that creates high-quality fine-tuning datasets for LLMs and GenAI models in 100+ languages
- 2023: launched Experts Engine, an experts-on-demand, fully-managed sourcing capability that algorithmically matches human expertise to a wide range of data creation, collection, annotation and validation tasks for GenAI
- 2023: partnered with Five9 to offer clients an AI-fueled, CCaaS solution to offer clients an end-to-end cloud platform experience with AI insights and intelligent routing capabilities
- 2023: expanded global operations to Africa, with sites in South Africa and Morocco, increasing its offshore delivery capabilities for digital CX, trust and safety, and AI services
- 2022: acquired WillowTree, rebranded to a TELUS Digital Company, a full-service digital agency providing AI, digital consulting, design, engineering, and digital marketing. GenAI JumpStart to further strengthen its digital consulting, transformation, and gen AI capabilities
- 2021: acquired Playment, an innovator in data annotation and computer vision tools and services specializing in 2D and 3D image, video, and LiDAR
- 2020: acquired Lionbridge AI, a leading global provider of crowd-based training data and annotation platform solutions used in the development of AI algorithms to power ML, to increase its capabilities to help leading global technology businesses create the next generation of AI and data annotation
- 2020: acquired Competence Call Center (CCC), this acquisition has diversified the operation and client base in Europe and provides considerable content moderation and German language capability

### Americas CXM revenue (in US\$ million)



### Scale of Americas CXM (number of agents)



### CXM client base (number of clients)



# TELUS Digital profile (page 2 of 8)

## Capabilities

### Americas CXM revenue mix

US\$ million

#### By geography

United States	50%
Canada	49%
Mexico	1%

#### By buyer size

<US\$250 million	33%
US\$1-10 billion	28%
>US\$10 billion	26%
US\$250-500 million	9%
US\$500 million-US\$1 billion	4%

#### By industry

Telecom and media	58%
BFSI	12%
Travel and hospitality	10%
Technology	7%
Energy and utilities	5%
Retail and CPG	3%
Healthcare	2%
Manufacturing	1%
Others	1%

#### By process

Customer service	47%
Value-added services <sup>1</sup>	18%
Technical support	11%
Inbound sales	6%
Payment collection	5%
Order fulfillment and transaction processing	4%
Outbound sales	4%
Others <sup>2</sup>	5%

#### By channel

Voice	NA
Chat	NA
Social media	NA
Email	NA
Video	NA
Others	NA

### Split of Americas CXM FTEs

Number of FTEs

#### By location<sup>3</sup>

Medium cost	54%
Low cost	42%
High cost	4%

#### By percentage of FTEs supporting a specific language

English	81%
Spanish	12%
French	5%
Others	2%

<sup>1</sup> Includes channel management, customer analytics, customer retention management, and performance management and reporting




























































<sup>2</sup> Includes CX consulting, Customer Journey Mapping (CJM), etc.

<sup>3</sup> High-cost regions include the UK, the US, and Western Europe; medium cost regions include Eastern Europe, Middle East and Africa, and Latin America; and low-cost locations include India, the Philippines, and Rest of Asia

# TELUS Digital profile (page 3 of 8)

## Key CXM investments | partnerships

Key partnerships  
Strategic CX investments

	Advanced analytics												
	RPA/Automation												
	Conversational AI												
	Gen AI												
	Omnichannel / Agent Assist												
	CCaaS/Cloud												
	Others												

# TELUS Digital profile (page 4 of 8)

## Key CXM investments | proprietary solutions

Key proprietary solutions

Product	Details
Fine Tuning Studios (FTS)	It is a multi-modal and multilingual task-execution platform that generates high-quality fine-tuning datasets for LLMs and gen AI models across over 100 languages. It can be used across sectors that demand specialized solutions.
Intelligent Virtual Assistant (iTIA)	It is powered by generative AI and provides personalized and engaging experiences to customers across all platforms and channels.
Knowledge Base Automation	It is a generative knowledge base automation platform that enables rapid, personalized, and context-sensitive searches and recommendations.
Language Translation	It is a translation platform with pre- and post-processing capabilities for customized translation. Chatbots, knowledge aid, grammar and paraphrasing, and writing assistance are among the integrations that use generative AI.
Experts Engine	A fully-managed, tech-enabled experts-on-demand sourcing solution for GenAI model builders, used to efficiently and accurately match human expertise to GenAI tasks essential for building high-quality training datasets, including data creation, collection, annotation, and validation.
Intelligent Insights	It is an intuitive RPA and chatbot management platform that monitors bot performance, reports cost savings, creates process efficiencies, and controls bot life cycle.
GenAI Jumpstart Accelerator Program	Eight-week engagement program helps unlock the GenAI potential in an organization by rapidly identifying gen AI use cases, building powerful risk mitigation tools, and delivering a bespoke prototype to help demonstrate the value of AI to client's business.
TELUS SPACE	It is a platform that offers a distinctive onboarding experience via a gamified map-based environment in which users can explore and interact with numerous items, resources, and tools in a client-specific setting.
SAFE solution	It is an authentication and environment detection platform that ensures remote workspace security. Its AI algorithms detect prohibited machine use and initiate alarms and security protocols.
GT Studio	It is an AI training platform that helps construct quality AI training datasets, handling all data formats across 500+ languages and dialects.
Data Ingestion Platform (DIP)	It is a real-time data ingestion platform used to stream data into big data system.
Visual IVR solution	It provides users with graphically guided menus, allowing them to self-serve and interact directly with the system to resolve problems.
Fuel iX	It is a corporate AI platform that provides flexibility, control, and productivity advantages by combining generative AI technologies across many cloud and model providers for secure, effective business operations. Solution is made up of 2 layers: core and apps. Fuel iX Core offers integration and administration with features for observation, arbitration, orchestration, moderation, and security. Fuel iX Apps offers templates for gen AI applications, third-party support and channel integration for customer and employee experiences.



# TELUS Digital profile (page 5 of 8)

## Client portfolio and Environmental, Social, and Governance (ESG) initiatives

### Key CXM clients

Client name	Region	Client since
A US-based company operating an online marketplace for short- and long-term homestays and experiences	Global	2014
A US-based video game and software developer and publisher	Global	2018
A US-based multinational corporation and technology company	Global	2009
A US-based video game developer and publisher	Global	2018
A Canadian mobile flanker brand started by TELUS	NA	2009

### Environmental initiatives

- It is working towards its goal to have carbon neutral operations by 2030. It is currently working on the approved SBTi target of 46% reduction in absolute Scope 1 and 2 emissions by 2030 and 100% renewable electricity by 2025
- It is committed to promote a sustainable planet by remaining on-track with various environmental efforts, including funding environmental programs/projects globally through its five community boards, prioritizing team members' education on environmental matters, committing to reduce its carbon footprint, and supporting its clients to reach their carbon neutral commitment
- Its new building in Morocco obtained three green certifications and generates more energy than it needs, which it returns to the grid. Sites in Noida, India, have received the India green building council platinum certification – bringing the total certified green real estate portfolio to 17 buildings globally

### Social initiatives

- The global team volunteered 93,815 hours (equal to 12,509 days) in 2023, building houses and schools, installing eco stoves, and helping educate, mentor, and teach language classes to young people, with a focus on women, around the world
- It donated more than US\$1.6 million locally in grants and in-kind contributions, including US\$500,000 donated to 67 projects by NGOs and charitable organizations through its Community Boards
- It hired 7,178 team members through impact sourcing programs in 2023. It collaborated with organizations such as Yayasan International Cahaya Fajar (YICF) in Indonesia to assist the refugee population awaiting resettlement, and SETU in India to provide training and skills to young women from economically challenged neighborhoods
- It runs the TELUS Wise program to help keep children safe online

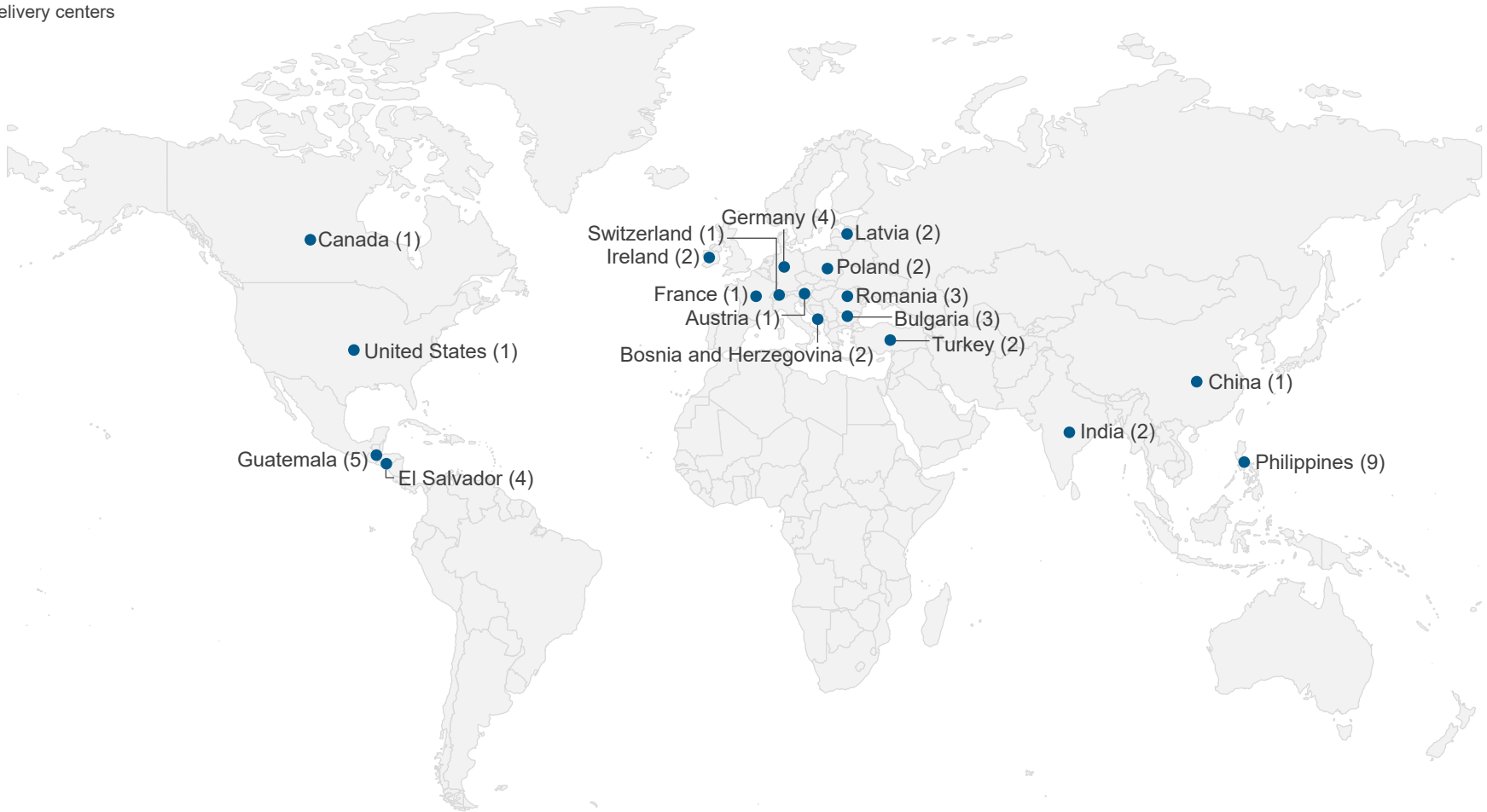
### Governance initiatives

- It strives to uphold the ideal standards of ethics and integrity in all its transactions. Its board of directors, made up of qualified professionals, is dedicated to creating a diverse and inclusive atmosphere. It places an emphasis on integrity and fostering an ethical culture, as seen by its code of conduct
- It is committed to ensuring privacy and security by investing in systems and robust training for team members
- It gives its customers annual carbon, water, and waste reports to aid them with their sustainability reporting. It also produces an annual sustainability and ESG report, which increases transparency about business performance and efforts

# TELUS Digital profile (page 6 of 8)



## Location landscape










(XX) implies the number of delivery centers



# TELUS Digital (page 7 of 8)

Everest Group 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
								


Strengths










- TELUS Digital, is a global CXM services provider with a workforce of over 48,000 agents primarily serving its clients in the US and Canada across verticals, including telecom and media, BFSI, travel and hospitality, and technology, as well as FGT clients from gaming and FinTech
  - It offers a comprehensive range of solutions across the customer life cycle, encompassing marketing and sales services, technical support, and customer support, across English, Spanish, and Canadian French languages to effectively service its clients in North America
  - TELUS Digital has a diverse portfolio and possesses expertise in serving companies of different sizes, including small-scale businesses, midsize enterprises, and large corporations generating revenue surpassing US\$1 billion
  - It has developed Fuel iX, a modular set of gen AI apps, consisting of Fuel EX, an agent assist co-pilot for IT, retail sales, commercial sales, coding, legal, and finance support; and Fuel CX consisting of iTIA, a gen AI-driven customer experience chat bot for end-customers of its clients
  - TELUS Digital completed the acquisition of WillowTree, a digital product provider adding
- key front-end design and build capabilities to enhance its suite of offerings, benefiting from cross-selling opportunities and diversifying its client base. It further offers gen AI Jumpstart Accelerator, which designs and develops a generative AI-powered virtual assistant in eight weeks under a fixed-fee model

  - It has partnered with Google cloud, AWS, Microsoft, Adobe, Avaya, Five9, Verint, Automation Anywhere, Blue Prism, Salesforce, and Sisense, among others, to offer solutions such as advanced analytics and automation, enterprise platforms, remote agent assistance, self-serve solutions, computer vision AI platform, omnichannel solutions, and consulting
  - Buyer highlighted culture, strong management team, language skills, policy adoption, rapidity in implementation, availability, ease of doing business, performance management, skilled talent pool, and innovation as TELUS Digital’s strengths

# TELUS Digital (page 8 of 8)

Everest Group 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
								

Limitations

- While TELUS Digital has an established client base in the US and Canada, its capability to serve Latin American markets remains largely untested
- TELUS Digital faces a concentration risk as around two-thirds of its overall revenue comes from its 10 largest clients
- Its shoring mix leans heavily toward nearshore and offshore locations such as El Salvador, Guatemala, and India, which may restrict its ability to serve buyers seeking significant onshore presence
- While TELUS Digital serves a wide range of industry verticals, it has relatively limited experience in assisting clients within the energy and utilities, manufacturing, public sector, and healthcare sectors
- Although it offers a diverse array of services, its expertise is limited in certain areas, such as order fulfillment and transaction processing, payment collections, and value-added services
- Buyers identified timely of problem resolution, implementation and transformation management, and proactiveness in communication as areas of improvement for TELUS Digital

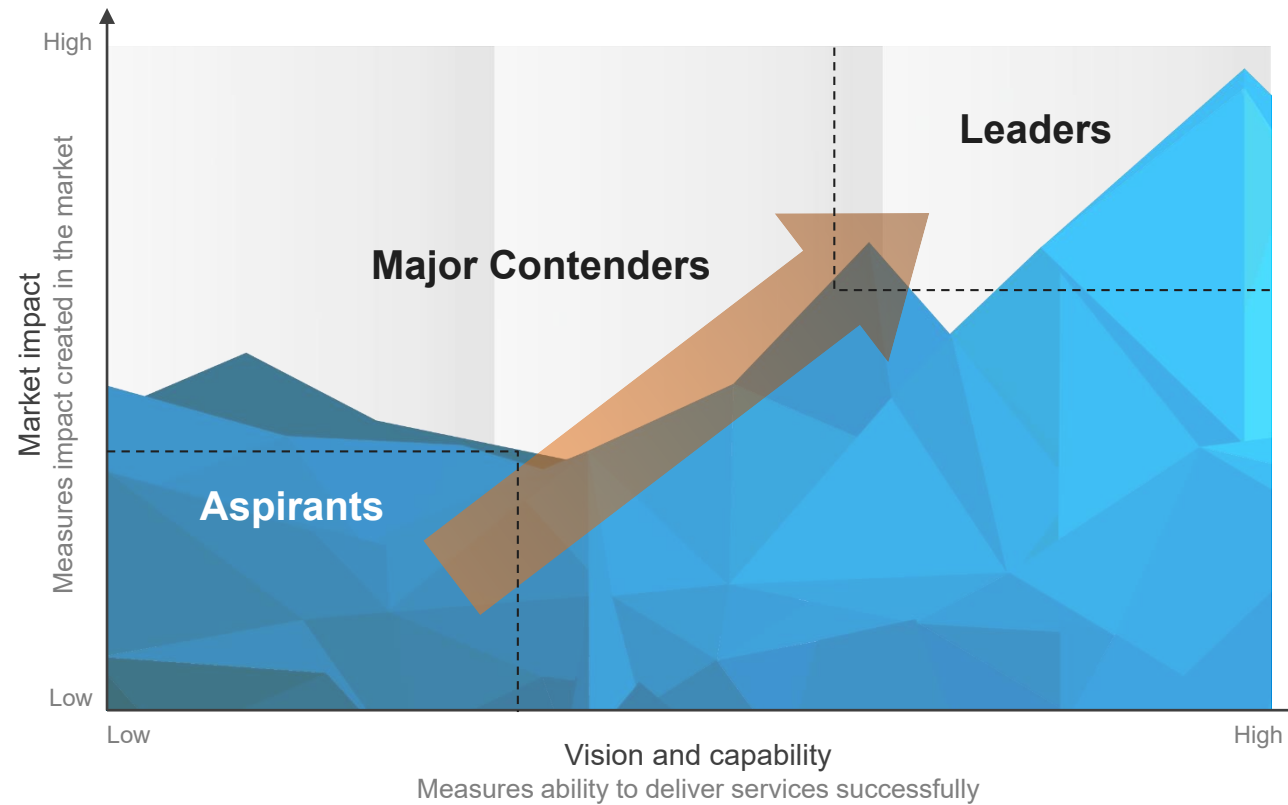
# Appendix

PEAK Matrix® framework

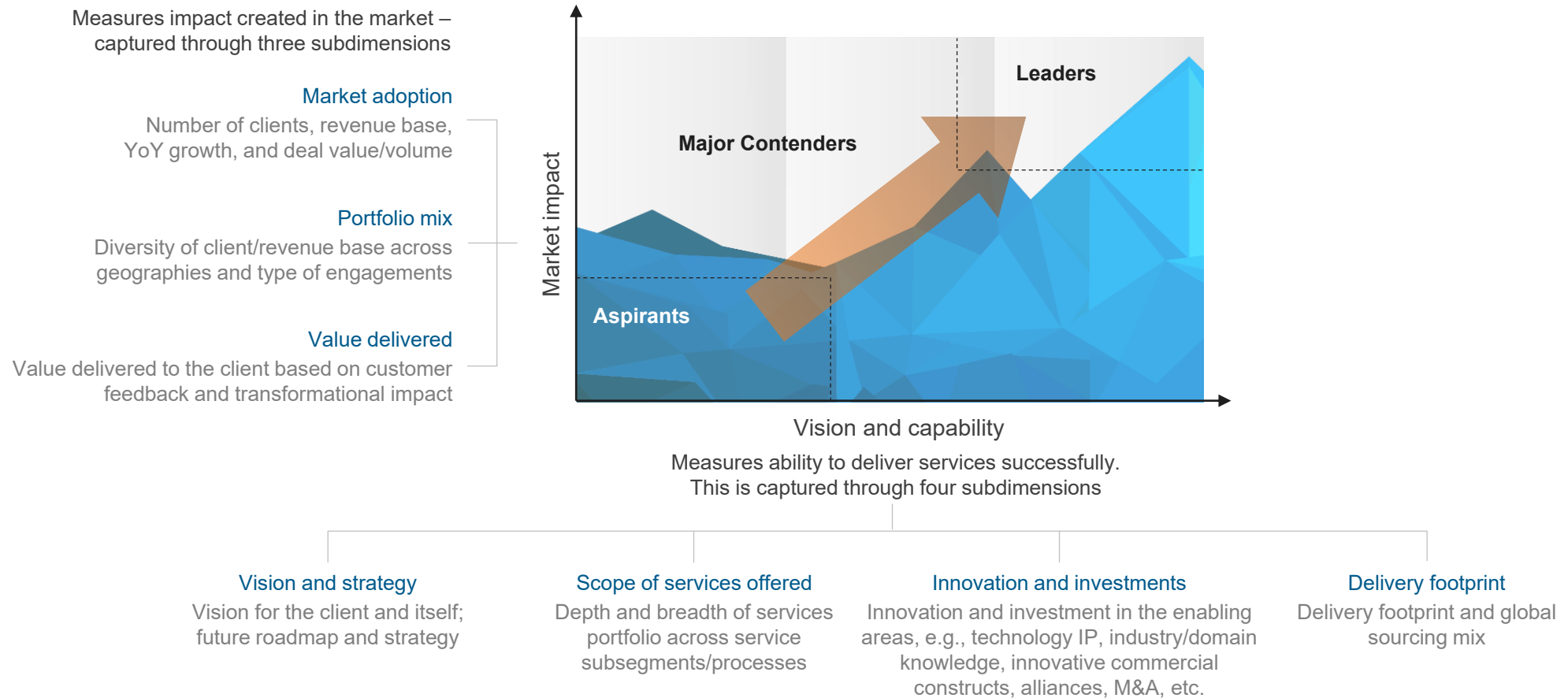
FAQs

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.



# Stay connected

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