

# The Forrester Wave™: Insights-Driven Business Process Outsourcing, Q4 2020

The 13 Providers That Matter Most And How They Stack Up

by Vasupradha Srinivasan and Leslie Joseph  
November 12, 2020

## Why Read This Report

In our 21-criterion evaluation of insights-driven business process outsourcing (BPO) providers, we identified the 13 most significant ones — Accenture, Cognizant, Concentrix, Conduent, DXC Technology, EXL, Genpact, IBM, NTT DATA, Sitel Group, Sutherland, Sykes, and Teleperformance — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) professionals select the right one for their needs.

## Key Takeaways

### **EXL, Accenture, Genpact, And NTT DATA Lead The Pack**

Forrester's research uncovered a market in which EXL, Accenture, Genpact, and NTT DATA are Leaders; Cognizant and Sitel Group are Strong Performers; Concentrix, IBM, Sutherland, Teleperformance, DXC Technology, and Sykes are Contenders; and Conduent is a Challenger.

### **Data Science, Automation, And Analytics Are Key Differentiators**

As traditional contact centers cede ground to an insights-driven business model, deep insights capabilities will dictate which providers will lead the pack. Vendors that can provide embedded data science, automation, and analytics position themselves to successfully deliver next-level outsourcing value to their customers.

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## The 13 Providers That Matter Most And How They Stack Up

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## Insights-Based Services Are The Future Of BPO

Over the past decade, the word “transformation” has taken on several meanings within the business process outsourcing industry. Clients used to view BPO as a way to transform cost structures via offshore wage arbitrage and process standardization — but no longer. As the classic bastions of BPO competitiveness erode, clients demand more strategic engagement and deeper digital capabilities from their vendors. In response, BPO vendors are investing in building technology capabilities and tools around advanced analytics, automation, and data science to reposition themselves as transformation partners for their clients.<sup>1</sup> Insights-driven BPO vendors represent the future of a rapidly changing business model that is driven by thought partnerships, enhanced focus on outcomes, and a diminishing appetite for effort-based engagements.

As a result of these trends, BPO customers should look for providers that:

- › **Use analytics and insights to boost operational delivery.** BPO providers can access lots of structured and unstructured interaction data and mine it for customer and performance insights. The ability to build partnerships for technology and skills to analyze interaction data and glean insights to boost operational performance is fundamental to insights-driven BPO. Some BPO firms have established go-to-market partnerships for solutions like robotic process automation (RPA) and speech/text analytics and created in-house data science practices to analyze data from these platforms. This helps them proactively and predictably manage the customer experience (CX) and service levels and continuously improve KPIs.
- › **Have frameworks to repeat and scale insights-enabled services.** BPO vendors focused on insights-driven operations often have extensive methodologies for opportunity discovery, implementation, and optimization and fungible analytics and automation templates that are codified to ensure extensibility across industries. Some providers have dedicated analytics and automation practices that use their enterprise platforms to build custom process models. They have transformed processes like claims management, order to cash, and source to pay and have reusable templates for verticals like insurance, healthcare, and banking with predictive and prescriptive analytics coupled with process and interaction automation.
- › **Invest in making fundamental changes to become insights-led.** Insights-driven BPO will disrupt traditional outsourcing. BPO engagements are rapidly morphing: from people-only solutions to innovation and transformation partnerships, and from legacy contracting and effort-based commercial models to outcome-driven engagements. To cater to the emerging market, some providers have made changes that affect all aspects of BPO service delivery. They have custom frameworks for commercial models, service levels, KPIs, HR practices, and tech innovation and have sharpened their focus on being comprehensively insights-led by building proprietary platforms and frameworks via organic development or acquisition.

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## Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on insights-driven business process outsourcing.<sup>2</sup>

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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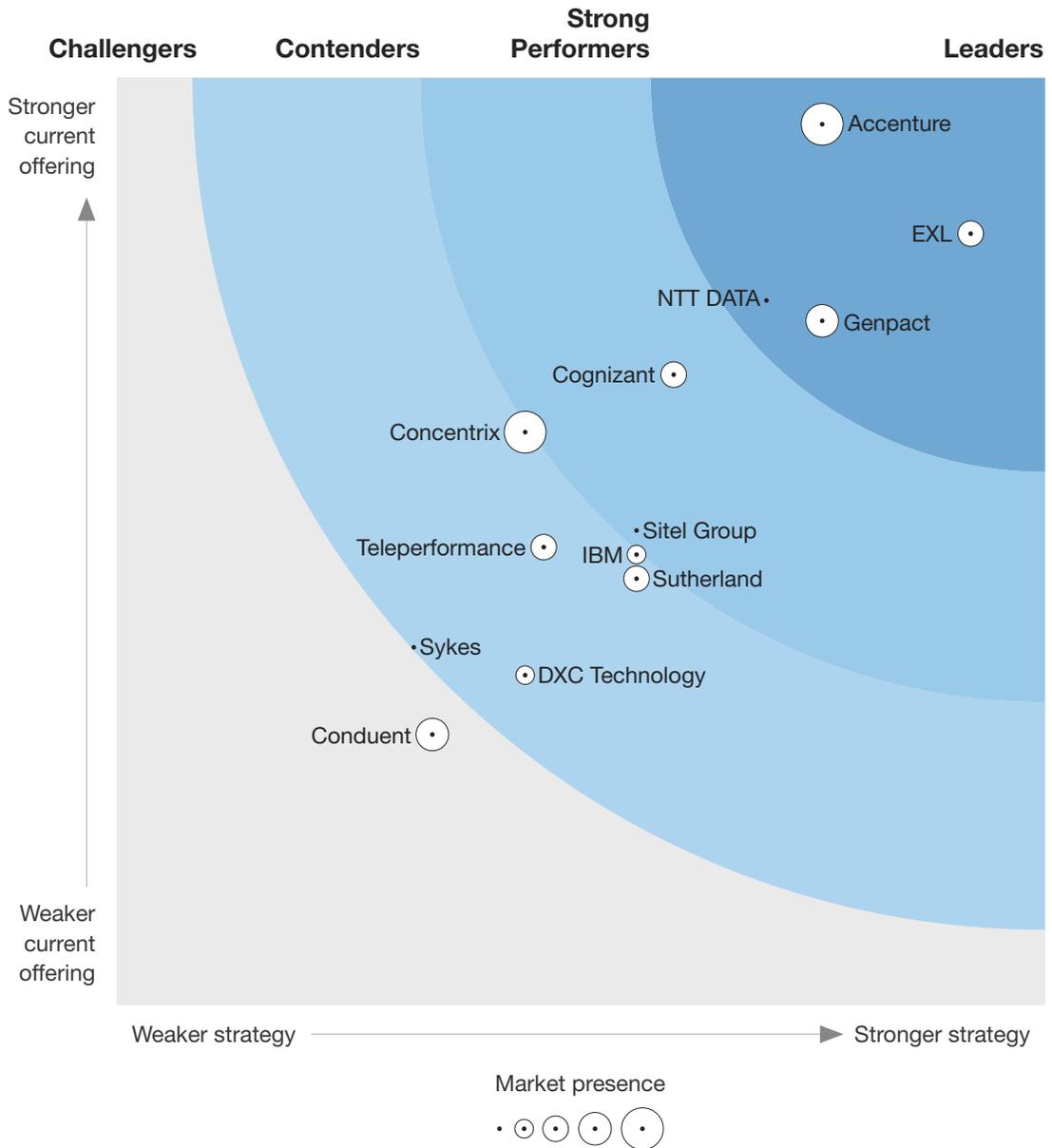
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**FIGURE 1** Forrester Wave™: Insights-Driven Business Process Outsourcing, Q4 2020

# THE FORRESTER WAVE™

## Insights-Driven Business Process Outsourcing

Q4 2020



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**FIGURE 2** Forrester Wave™: Insights-Driven Business Process Outsourcing Scorecard, Q4 2020

	Forrester's weighting	Accenture	Cognizant	Concentrix	Conduent	DXC Technology	EXL	Genpact
<b>Current offering</b>	50%	4.75	3.40	3.09	1.46	1.78	4.16	3.69
Breadth of services	20%	5.00	3.00	2.30	2.80	1.00	2.80	4.80
Client-facing methodologies and frameworks	25%	4.00	3.40	2.60	1.00	2.00	4.60	4.00
Internal service delivery approach and tools	25%	5.00	4.20	2.70	1.00	2.70	3.80	3.30
Customer results and business outcomes	25%	5.00	3.00	5.00	1.00	1.00	5.00	3.00
Public digital transformation proof points	5%	5.00	3.00	1.00	3.00	3.00	5.00	3.00
<b>Strategy</b>	50%	3.80	3.00	2.20	1.70	2.20	4.60	3.80
Vision	25%	5.00	3.00	3.00	1.00	1.00	5.00	5.00
Market approach	20%	5.00	3.00	3.00	3.00	3.00	3.00	3.00
Innovation roadmap	25%	3.00	3.00	1.00	1.00	1.00	5.00	3.00
Performance	5%	1.00	3.00	3.00	1.00	3.00	5.00	3.00
Partner ecosystem	15%	3.00	3.00	1.00	3.00	3.00	5.00	5.00
Commercial model	10%	3.00	3.00	3.00	1.00	5.00	5.00	3.00
<b>Market presence</b>	0%	5.00	3.00	5.00	4.00	2.00	3.00	4.00
Number of customers	50%	5.00	3.00	5.00	3.00	1.00	3.00	5.00
Revenue	50%	5.00	3.00	5.00	5.00	3.00	3.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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**FIGURE 2** Forrester Wave™: Insights-Driven Business Process Outsourcing, Scorecard, Q4 2020 (Cont.)

	Forrester's weighting	IBM	NTT DATA	Sitel Group	Sutherland	Sykes	Teleperformance
<b>Current offering</b>	50%	2.43	3.80	2.56	2.30	1.93	2.47
Breadth of services	20%	3.00	3.00	2.30	2.10	1.00	4.10
Client-facing methodologies and frameworks	25%	2.60	4.00	1.80	2.00	2.40	1.60
Internal service delivery approach and tools	25%	2.70	3.60	3.00	1.90	1.30	1.80
Customer results and business outcomes	25%	1.00	5.00	3.00	3.00	3.00	3.00
Public digital transformation proof points	5%	5.00	1.00	3.00	3.00	1.00	1.00
<b>Strategy</b>	50%	2.80	3.50	2.80	2.80	1.60	2.30
Vision	25%	1.00	3.00	3.00	3.00	3.00	1.00
Market approach	20%	3.00	5.00	1.00	3.00	1.00	5.00
Innovation roadmap	25%	5.00	3.00	3.00	3.00	1.00	3.00
Performance	5%	3.00	1.00	3.00	5.00	3.00	1.00
Partner ecosystem	15%	3.00	3.00	3.00	1.00	1.00	1.00
Commercial model	10%	1.00	5.00	5.00	3.00	1.00	1.00
<b>Market presence</b>	0%	2.00	1.00	1.00	3.00	1.00	3.00
Number of customers	50%	3.00	1.00	1.00	3.00	1.00	3.00
Revenue	50%	1.00	1.00	1.00	3.00	1.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

## Vendor Offerings

Forrester included 13 vendors in this assessment: Accenture, Cognizant, Concentrix, Conduent, DXC Technology, EXL, Genpact, IBM, NTT DATA, Sitel Group, Sutherland, Sykes, and Teleperformance.

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## Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

### Leaders

- › **EXL leads with robust insights-led transformation but needs better integrations.** EXL has a solid vision for insights-driven BPO. It puts skin in the game by driving innovation on both technology and commercial models; for example, it worked with HSBC to create and market an automated digital know-your-customer process. On the other hand, EXL can do a better job in creating awareness of its lab-based innovation among its customers by better marketing its think tank. EXL continues to build on its already impressive capability footprint with a distinct roadmap to provide sophisticated insights-driven BPO capabilities at scale to clients in financial services, healthcare, and energy.

In addition to its broad and strategic capability matrix, EXL excels at measuring and reporting on the business impact of insights-driven initiatives. Going beyond a few BPO sweet-spot technologies such as speech analytics or chatbots, EXL has demonstrated the ability to think both wide — across the scope of a business process — and deep, from data to insight to action and outcome. These include standard and nonstandard forms of insights-driven process and technology interventions. However, the operations and technology pieces of EXL's delivery engine can sometimes come across as lacking coordination. Clients commend EXL's deep bench of insights-driven skills and say that it has "better analytics than anybody else." EXL is a strong fit for a variety of clients, but particularly those looking to infuse complex business processes with breakaway value through insights.

- › **Accenture leads with a broad portfolio and know-how to support insights at scale.** As a large global systems integrator, Accenture has the advantage of being able to tap a diverse pool of insights-centric talent from its technology and operations businesses. The company's strategy lies in systematically transforming its talent pool into a workforce that combines traditional BPO skills, specialized skills, and a robotic workforce. While Accenture shines in technology-infused BPO engagements, it has some room to improve its own processes for optimizing the measurement and reporting of insights interventions in their customers' businesses. The company's roadmap includes significant investments in its solution portfolio and in innovation through its labs, studios, and innovation hubs.

SynOps, a homegrown platform that leverages human insight and machine intelligence to improve and automate outsourced processes, is a core feature of Accenture's offering. This library of distinct analytics apps, AI advisors, and automation assets is a major strength that enables the company to infuse analytical insights and predictive intelligence into specific client business processes. Reference customers consider Accenture's investments in analytics labs, platforms, and talent as strong enablers for bringing innovation into processes and report strong and meaningful

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improvements. Accenture should be on the short list for companies looking to tap into a broad portfolio of skills and AI-infused intellectual property (IP) that can systematically improve processes through automation and analytics.

**› Genpact leads with sophisticated analytics, but commercialization needs refinement.**

Genpact is the Ferrari of insights-driven BPO. Its client engagements test the limits of BPO by delivering insights as a service, particularly in high-performance process environments. Its insights-driven BPO vision is a sophisticated mix of domain, data, analytics, and technology. Genpact has bolstered this vision through its partner ecosystem, innovation around platforms like its CORA digital platform, and acquisitions of firms such as OnSource, riskCanvas, and Rage Frameworks. Despite its big strategic bet on CORA, Genpact has not quite nailed the science of building viable and compelling commercial models for its own platforms. CORA is a common core that supports a large variety of in-house accelerators and “productized” domain solutions and forms a major element of its future roadmap.

Basic customer analytics and simple automation are table stakes for Genpact engagements. The company’s sweet spot lies in sophisticated analytics and automation engagements featuring advanced interventions such as predictive modeling, demand forecasting, and unlocking the value of data — both traditional and alternative. Customer references appreciated Genpact’s ability to flexibly build and deploy custom technology to embed intelligence deep within a business process. However, it sometimes struggles to assemble specific expertise in third-party technologies for a given engagement. Genpact is a strong choice for companies looking for a partner to not just run but also transform processes through data, technology, and process excellence.

**› NTT DATA has strong vertical IPs but lacks full-spectrum BPO focus.** NTT DATA’s early focus on data governance and platforms has shaped it into a nuanced insights-driven BPO services provider. Its strength lies in a heavily verticalized go-to-market for insights as a service within healthcare, insurance, and the public sector backed by investments in in-house, productized platforms such as Nucleus and domain-specific cognitive solutions. NTT DATA also leads in commercial model innovation focused on as-a-service and outcome-based pricing. However, the provider could strengthen its position as a broad-based insights partner by casting its net wider than its current focus on select verticals. NTT DATA’s roadmap is focusing on developing predictive and prescriptive insights capabilities on the Nucleus platform to solidify its insights-led BPO footprint.

NTT DATA’s focus on operationalizing insights for specific high-value processes at scale is a major differentiator of its current offering. Its maturity in deep analytics for specific verticals makes for unique and sometimes industry-first use cases, although there is room for improvement in its service delivery approaches to talent development, performance management, and reporting for insights-driven services. NTT DATA is a strong fit for enterprises in healthcare, insurance, and public sector that deal with diverse data sets and need unique, advanced insights.

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**Strong Performers**

- › **Cognizant aces insights execution but needs to enhance its consulting skills.** “Digital first” has long been Cognizant’s strategic rallying cry; the firm’s digital operations group is one of three pillars of its client-facing organization. Beyond this, its strategy for insights-driven BPO is middle-of-the-road. As an integrated BPO, Cognizant benefits from integration points with its technology investments, a joint go-to-market approach, and several key domain- and insights-centric acquisitions. However, its strategy skews toward technology rather than process innovation. Cognizant recognizes this and continues to invest in client-facing enterprisewide solutions for automation and analytics and in tools for insights operationalization and process optimization.

The strengths of Cognizant’s offering are twofold. First, its technology focus allows it to build strong digital-led, cognitive solutions, including custom-built technology; for example, it recently divested its content moderation business and is shifting some of its R&D spending toward AI-based alternatives. Second, its reporting frameworks and tools, such as the LiveInsights reporting framework, provide strong support for insights-driven BPO. The firm’s main area for improvement is its lack of a rigorous, consulting-driven approach to identifying and qualifying opportunities to drive digital BPO innovation. Customers consider Cognizant to be a solid execution partner for insights-driven initiatives but characterize its approach as customer-directed rather than proactive or direction-setting. Cognizant is a good bet for companies that want digital BPO infused with automation and AI but are willing to be hands-on with strategy formulation.

- › **Sitel Group enhances CX with analytics but needs a bold, prescriptive insights vision.** Sitel Group’s vision aligns with the digital-first narrative. It has a good spread of partnerships across omnichannel tools such as live chat, social engagement, RPA, chatbots, speech analytics, and IP such as Innso, its omnichannel engagement platform. However, the firm’s vision and market approach seem constrained by its BPO legacy rather than aligning with the evolving insights needs of the market. Sitel Group’s roadmap focuses on continuing to enhance interactions through analytics interventions such as language support and emotion detection.

Sitel Group augments customer interactions by fusing omnichannel solutions with operational insights to improve cross-channel CX. Through this, it is able to continuously weave insights-based tweaks into long-running customer contracts, which is a strength. However, its framework for delivering insights appears weak and needs to mature beyond channel deflection and operational insights. Prescriptive recommendations that help clients improve end-to-end processes will enhance the maturity of its insight services. Customers cite Sitel Group’s core operational strength and a highly engaged executive management team as impressive but indicated that it has yet to break the scale and scope barriers of its contact center scope of work and engage as a holistic insights partner. Sitel Group is a good fit for companies that value customer service simplification and channel rationalization programs.

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**Contenders**

- › **Concentrix nails foundational insights but needs to evolve its offering footprint.** Concentrix sees the writing on the wall; it has an internal mandate to weave insights-driven services into all customer engagements and train its large agent base to leverage these insights. The company's strengths are its strong operational experience as a large BPO provider and long list of current customers. However, its innovation focus is muddled and does not come across as strong as that of other providers we evaluated. Its relationships with key ISVs such as Automation Anywhere, CallMiner, and UiPath are of a vendor/reseller nature rather than partnerships — that is, Concentrix deploys out-of-the-box products with limited joint go-to-market approaches or co-innovation. Its acquisition of Convergys gave it an analytics practice that sits adjacent to the core contact center operations, which is a focus of its roadmap.

Concentrix is good at assembling third-party technologies such as chatbots, text, and voice analytics and more to create “better, faster” customer interactions and enhance agent performance. However, its overall insights-driven capability comes across as a patchwork of standard artifacts and skills rather than a well-rounded offering. Concentrix needs a stronger consultative capability to systematically identify and unlock sources of insights-driven value for customers. Customers value it as a strong BPO partner but see its insights capabilities and tools as undifferentiated or merely adding incremental value. Concentrix is a solid choice for clients looking for a global BPO provider that can drive efficiency within data-rich front-office processes using standard forms of interaction analytics and automation.

- › **IBM bridges the insights-to-automation gap but needs to crystallize its focus on BPO.** IBM's insights-driven services revolve around Watson, the company's native cognitive backbone, and are bolstered by vertical-specific acquisitions such as Oniqua and Armanta. IBM sees itself as the cognitive partner that sits atop a company's contact center volumes even if other vendors provide these services. While IBM's strength lies in its innovation around the cognitive capabilities of the platform, its strategy bets the house on Watson. The firm has resisted human-centric contact center work, making it an outlier for core customer service operations, which is a weakness. IBM's roadmap continues to focus on improving its cognitive enterprise services and intelligent workflows across verticals as a way to reduce dependence on human talent.

IBM's strength is the capability footprint that it brings to cognitive solutions, conversational AI, and process automation. It delivers this via the Garage methodology, which wraps tools, technology, and talent into a single design, collaboration, and execution framework. The outcomes its insights interventions deliver are sometimes siloed, because customer service operations are typically not in the scope of engagement. Reference customers rated IBM highly on its use of insights to improve CX and contact center productivity but were lukewarm about the firm's talent and process interventions in areas such as building insights centers of excellence. IBM is a good fit for enterprises that are not looking for a people-led BPO services partnership but rather a technology-led transformation partner.

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**› Sutherland’s human-centric approach shines, but its technology needs refinement.**

Sutherland takes a consultancy approach to insights-driven BPO engagements. Its investment in its own IP for AI and automation plays to its strengths and gives it end-to-end control over front- and back-office processes. The weakness of this approach is that Sutherland has chosen to reinvent the wheel rather than build and supplement a best-of-breed partner strategy. Sutherland’s roadmap includes sustained investments in tools such as in-house RPA platform Robility and data-science-as-a-service platform sBaaS.

Sutherland’s strength is its focus on identifying and delivering value through insights at scale. To this end, it has been investing in high-end technical talent that works closely with its BPO operations. However, Sutherland has work to do to increase client adoption of its internal IP, mature its industry-ready vertical templates, and evolve a stronger approach to performance management and reporting. Clients cite Sutherland’s focus on human-centered experience design as a differentiator and its innovation labs a mechanism through which the company “always brings something new to the table.” Sutherland is a good partner for enterprises that are starting out on their insights-driven journeys and need actionable insights and recommendations.

**› Teleperformance lights it up with the right ideas but needs to evolve its execution.**

Teleperformance is a leading digital BPO with strong strategies for channel management and omnichannel service. The firm’s vision acknowledges digitization and automation as primary forces for the future of BPO — a refreshing aspect of its market approach. However, the firm is hobbled by a pervasive traditional BPO mindset, causing great ideas to be stymied by a lack of proper planning, execution rigor, or delivery commitment. Teleperformance’s integration of Intelenet indicates a roadmap to strengthen its back-office expertise and improve its roster of proprietary point solutions in support of integrated business services, virtual operations management, and digitalization.

Teleperformance’s current offering benefits from the firm’s operational prowess, agent augmentation focus (including support for work-at-home agents and behavioral analysis of staff), and ability to harness data from its contact centers to build BPO-relevant solutions. Its Achilles’ heel is a disjointed point-solution approach to improving customer touchpoints rather than focusing on improving end-to-end processes. One reference customer felt that Teleperformance looks at insights-driven opportunities “through the lens of what it can offer instead of what the client needs.” Teleperformance is a good fit for companies that are looking for a solid BPO partner first and are willing to invest in the oversight of insights delivery.

**› DXC has unique technology, but its future as an insights-driven BPO is uncertain.** While DXC Technology’s consulting and systems integration business and its business process services (BPS) division share a common analytics group, the firm is a stronger technology services vendor than a BPO provider. A core strength of its strategy is its ability and willingness to craft outcome-based commercial models around a combination of technology transformation and process outsourcing. However, its vision and commitment to innovation around its BPS offering are questionable. DXC Technology has also stated its intent to divest its horizontal BPS unit in the near future.

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DXC has some capability to deploy analytics and intelligent automation across an end-to-end process chain, enabled by its investments in third-party and internally developed automation-focused platforms such as Agile Process Automation, which applies discovery, process assessment, and automation orchestration to its BPO operations. However, it lacks fungible, codified vertical frameworks or horizontal accelerators and a value-based reporting and performance management structure. While reference customers see value in DXC's ability to function as an advisor, uncovering opportunities for value primarily through automation, they noted that the company has consistently missed opportunities to showcase its capability or identify and exploit these opportunities to drive insights-driven value. Choose DXC Technology as an automation technology partner or for contexts where insights-driven BPO is embedded within a broader technology-centric transformation program.

- › **Sykes specializes in marketing BPO services but has a nascent insights footprint.** Sykes has chosen to specialize by focusing its insights-driven interventions on marketing, sales, and customer service use cases. The company's acquisitions — Clearlink for customer acquisition, XSELL for AI-based engagement, QELP for interactive self-service, and Symphony for RPA — hint at a vision of the future of insights-driven BPO. Sykes' main weakness is the muddled and disintermediated nature of its technology capabilities, which are siloed and have limited credentials for adoption or sustained usage in context of BPO services. Its roadmap focuses on continuing to develop insights capabilities specifically for marketing, sales, and customer service.

Sykes' insights-driven offerings combine one or more of its acquired technologies with BPO services and analytics. Its focus on sales and marketing automation is a strength, which makes it a specialized provider. However, the digital office and breadth of its insights solutions are nascent for traditional BPO processes, keeping the firm from competing even with mainstream BPO service providers. Customers consider Sykes to be an effective execution partner but give its insights-driven capabilities mixed reviews. Despite the firm's comprehensive automation offerings, customers feel that they are left wanting for innovation and ideas. Sykes is best suited for enterprises looking to transform sales and marketing processes with customer engagement insights, content, and digital asset management.

## Challengers

- › **Conduent has immense scale but is still searching for its insights mojo.** Conduent divested its voice-only customer contact center business to Skyview Capital in 2019 but still provides contact center services, either standalone or integrated with back-office engagements. Its strengths are a respected brand and pedigreed partnerships. However, the articulation of and innovation within Conduent's strategy for creating strong and insights-driven transformation needs improvement. Its investments focus on extending value across its mainstay business: digital mailrooms, document analytics, OCR, natural language processing, and other insights from unstructured data streams.

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Conduent has built a handful of solid point solutions and has early-stage investments in internal platforms such as DARA for conversational AI and the Conduent Automation Platform. However, its overall capability lacks breadth and depth, and only a limited number of its customers use these services. While customers consider Conduent a responsive partner for running largely document-centric back-office processes, they also say that Conduent is often unable to translate early conversations into specific implementations or detailed roadmaps within accounts. Choose Conduent for its evolving focus on document-centric workflows and for automation of customer processes with a heavy back-office component.

## Evaluation Overview

We evaluated vendors against 21 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include the breadth of insights services, client-facing methodologies and frameworks, internal service delivery approaches and tooling, customer results, and public proof points.
- › **Strategy.** Each vendor's placement on the horizontal axis indicates the strength of its strategy. We evaluated market vision, market approach, innovation roadmap, performance, partner ecosystems, and commercial models.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of customers, number of large customers, and revenue from insights-driven BPO services.

## Vendor Inclusion Criteria

Forrester included 13 vendors in the assessment: Accenture, Cognizant, Concentrix, Conduent, DXC Technology, EXL, Genpact, IBM, NTT DATA, Sitel Group, Sutherland, Sykes, and Teleperformance. Each of these vendors has:

- › **A broad range of insights-based BPO services.** Providers included in this Forrester Wave evaluation must provide a broad range of insights-based services including analytics and automation across different channels, industries, and verticals.
- › **At least \$200 million in insights-driven BPO revenue.** We included providers that had a minimum annual revenue of \$200 million for their insights-driven BPO business in 2018.
- › **Demonstrated interest from Forrester's clients.** Forrester clients regularly consider these providers for insights-driven BPO work.

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## Supplemental Material

### Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

### The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

**The Forrester Wave™: Insights-Driven Business Process Outsourcing, Q4 2020**

The 13 Providers That Matter Most And How They Stack Up

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 5, 2020 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

### Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with [the Integrity Policy](#) posted on our website.

### Endnotes

<sup>1</sup> See the Forrester report "[Say Hello To Insights-Driven BPO.](#)"

<sup>2</sup> See the Forrester report "[Say Hello To Insights-Driven BPO](#)" and see the Forrester report "[Now Tech: Insights-Driven Business Process Outsourcing, Q1 2020.](#)"

We work with business and technology leaders to drive customer-obsessed vision, strategy, and execution that accelerate growth.

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