Customer Management Services

Market Analysis
Abstract

March 2016
research.nelson-hall.com

Who Is This Report For?

NelsonHall's "Customer Management Services" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within the customer management services outsourcing market

- Operational decision makers exploring the benefits and inhibitors of customer management services

- Vendor marketing, sales and business managers developing strategies to target CMS opportunities

- Financial analysts and investors specializing in the BPO sector, including customer management services.

Scope of the Report

The report analyzes the worldwide market for customer management services and addresses the following questions:

- What is the current and future market for customer management services?

- What is the market size and projected growth for the global customer management services market by geography?

- Who are the leading customer management services vendors globally and by geography?

- What is the market size and projected growth for the global customer management services market by industry vertical?

- What is the market size and projected growth for the global customer management services market by service line?

- What is the market size and projected growth for the global customer management services market by supported channel?

- What are the top drivers for adoption of customer management services?

- What are the benefits currently achieved by clients of customer management services?

- What factors are inhibiting client adoption of customer management services?

- What pricing mechanisms are typically used within customer management services and how is this changing?

- What combination of services is typically provided within customer management services contracts and what new services are being added?

- What is the current pattern of delivery location used for customer management services and how is this changing?

- What are the selection criteria, challenges and critical success factors within customer management services?

Key Findings & Highlights

The global CMS market is highly fragmented, with the top ten vendors representing less than a third of the market, and has low barriers to entry. Its current high level of M&A activity will continue, with vendors acquiring delivery capacity and new technical and service capabilities.

Main adoption drivers for clients include customer experience improvement, cost take-out, revenue generation, and expanding capability in multi-shore, multi-channel, multilingual delivery. Provided services cover the full customer lifecycle, separated into service lines, and are delivered over multiple channels, with voice representing the largest share. In CMS, vendors' provide analytics to monitor performance and usage patterns and implement automation, primarily in back-office processes.

Nearshore and offshore delivery and process optimizations are the principal mechanisms for reducing costs and achieving cost take-out targets, with per FTE, per time and per transaction pricing models dominating the contract structures.

Deep transformation of customer experience including channel optimization, and delivering immediate improvements in customer experience while maintaining low delivery cost, are becoming the leading drivers and success criteria. The application of analytics and automation are the focus of vendors' investments, and are underpinning their CMS offerings.

Contents

Report Length

82 pages, consisting of 9 chapters

Report Author

Ivan Kotzev

ivan.kotzev@nelson-hall.com

Vendors Researched

Aegis, Alorica. Capita, Concentrix, CSS Corp, EGS, Hewlett Packard Enterprise, HGS, Firstsource, Intelenet, Minacs, Sitel, Sutherland, Sykes, Tech Mahindra, Teleperformance, TeleTech, Transcom, transcosmos, Webhelp, Wipro, WNS, Xerox