The Forrester Wave™: Workforce Optimization Suites, Q3 2016

The Nine WFO Providers That Matter Most And How They Stack Up

by Ian Jacobs
August 31, 2016

Why Read This Report

In our 39-criteria evaluation of workforce optimization (WFO) suite providers, we identified the nine most significant vendors — Aspect Software, Calabrio, Genesys, inContact, Interactive Intelligence, NICE, OpenText, TelStrat, and Verint Systems — and researched, analyzed, and scored them. This report shows application development and delivery (AD&D) professionals how each provider measures up and helps customer service application pros recommend the best one for their organization.

Key Takeaways

Verint Systems, NICE, And Calabrio Lead The Pack

Forrester's research uncovered a market in which Verint Systems, NICE, and Calabrio lead the pack. Aspect Software, OpenText, Genesys, and Interactive Intelligence offer competitive options. inContact and TelStrat offer contending solutions.

AD&D Pros Look For WFO Tools That Support Omnichannel Service Organizations

The rise of omnichannel customer service raises the profile of WFO as a driver for both operational performance improvements and business transformation. This market growth is in large part due to the fact that AD&D pros increasingly trust WFO providers to act as strategic partners, advising them on top customer service experience decisions.

Interaction Analytics And Partner Ecosystems Are Key Differentiators

As WFO suites have evolved, the basics of interaction recording and voice-focused workforce management have become common. Vendors that provide broad interaction analytics, including historical and real-time speech, text, and desktop analytics, as well as a broad system of partners stand out from the rest.

The Forrester Wave™: Workforce Optimization Suites, Q3 2016

The Nine WFO Providers That Matter Most And How They Stack Up

by Ian Jacobs
with Stephen Powers, Art Schoeller, Bill Seguin, and Peter Harrison
August 31, 2016

Table Of Contents

Notes & Resources

Forrester conducted product evaluations in June and July 2016 and interviewed 15 vendor and user companies, including Aspect Software, Calabrio, Genesys, Interactive Intelligence, NICE, OpenText, TelStrat, and Verint Systems.

Related Research Documents

Brief: Three Key Practices To Succeed With Speech Analytics

Market Overview: Workforce Optimization Solutions

Vendors Battle For The Heart Of The Contact Center

FORRESTER®

Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA
+1 617-613-6000 | Fax: +1 617-613-5000 | forrester.com

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

A Focus On Customer Experience Shifts The WFO Landscape

Companies have started to recognize customer service as a critical component of overall customer experience. Dimension Data reports that 83% of companies view the contact center as a competitive differentiator, up 30% since 2012.[1] Customer service application pros see WFO tools as the gasoline that powers customer service organizations. As a result, the more obviously customer experience-focused WFO tools, such as speech analytics, are seeing more rapid adoption growth (see Figure 1).

WFO applications have historically focused on optimization of contact center operations as tools for taking cost out of the business. But in the age of the customer, WFO increasingly acts as a hub for tuning the customer journey across touchpoints, including contact center, midoffice, back office, and brick and mortar. This new focus raises the profile of WFO with other groups, such as marketing and eCommerce, that can use the customer interaction data that's currently locked up in the contact center to enhance marketing, products, and services. To better serve the growing demand for this more customer experience-focused approach to WFO, vendors have been:

› **Consolidating like mad.** The WFO market has largely developed through the consolidation of best-of-breed applications into increasingly integrated software suites. In the past two years, market consolidation has increased, helping vendors construct suites that provide a wide range of contact center operational functions and tools appropriate for contact centers of all sizes. An extreme example? Queuing-and-routing specialist inContact acquired WFO providers AC2 Solutions, Attensity, and Uptivity to form the basis of a WFO suite. In turn, inContact was acquired by NICE, which also recently bought WFO players Nexidia and VPI.

› **Expanding beyond the contact center.** WFO can drive both efficiency and experience gains into the contact center process, and vendors have begun to believe that they can drive the same gains into other organizations within the enterprise. They now talk about back-office WFO and branch WFO. AD&D professionals can support smoothing out customer experience across multiple internal organizations if all of these groups move to the same WFO tools.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

FIGURE 1 WFO Adoption Rises Across The Board

Share of firms that are planning, are implementing, or have implemented workforce optimization upgrades in their contact centers

2016
- Implemented/expanding
- Planning to implement
- Not planning/don't know

2015
- Implemented/expanding
- Planning to implement
- Not planning/don't know

Workforce management
71% 19%
69% 17%

Performance management
73% 16%
70% 18%

Quality monitoring
70% 19%
72% 16%

Full-time recording/logging for risk and compliance
67% 19%
64% 22%

Text analytics
64% 20%
61% 22%

Speech analytics
62% 19% (Post-call)
62% 18% (Real-time)
54% 22%

Base: 776-783 global telecommunications technology decision-makers (20+ employees and 50+ seats in their contact centers)

Source: Forrester's Global Business Technographics® Networks And Telecommunications Survey, 2016, and Forrester's Global Business Technographics Networks And Telecommunications Survey, 2015

Cloud Drives WFO Toward A "Do You Want Fries With That?" Model

Contact center buyers with simpler demands have been migrating to the cloud for several years. But in the past two years, companies with more complex needs have started considering the cloud. Retailer Talbots, for example, moved its customer service onto Cisco Systems' cloud product.[2] As more companies follow suit, the decision to purchase WFO changes from what once was a separate choice to an add-on option, akin to adding French fries to a purchase of a Big Mac at McDonald's. This shift disrupts the channel and development strategies of the existing WFO vendors.

Vendors that provide cloud-based queuing and routing must decide between the buy, build, or partner model when it comes to WFO. The approaches have varied, with some choosing acquisitions and partnerships and others doing homegrown development. Whatever the model, vendors have seen the

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

attach rate of WFO sales to their core queueing-and-routing sales rise. This shift in decision-making also drives consolidation across functional areas.[3] For example, it's one of the reasons NICE acquired cloud-based contact center provider inContact.

Customers' Omnichannel Behavior Creates Demand For New WFO Features

Customers increasingly use digital communication channels for service because these channels offer minimal interaction friction. This year saw several brands begin to offer customer service through mobile messaging applications, such as Facebook Messenger.[4] But customers also often suffer from Groundhog Day syndrome when they move across channels, with brands forcing them to repeat basic information such as their customer IDs or the reason for the contact. Only 22% of enterprises have fully integrated their service channels today, but just shy of three-quarters of them expect to have omnichannel integration within two years, according to Dimension Data.[5]

As AD&D pros help their companies move toward that omnichannel customer service future, they increasingly have new demands for their WFO tools, including:

› **Distinct forecasting and scheduling algorithms for each service channel.** Traditional forecasting products in contact centers rely on models, such as the much-used Erlang C model, that assume that the volume of calls has no impact on the average handle time of those calls.[6] However, this idea does not hold up with many digital channels where an agent works on multiple simultaneous sessions. To successfully match available agent resources with current customer demand, WFO tools must incorporate distinct algorithms that understand the idiosyncrasies of each channel.

› **Analytics that help map customers' movements across channels.** In order to avoid the frustrating Groundhog Day experiences we've referenced above, WFO providers have begun to develop tools to analyze and map customer service journeys across touchpoints and channels. The eventual goal? Allow AD&D pros to create both winning service experiences for customers and optimized service processes internally.

To Support Customer Obsession, WFO Vendors Must Create True Suites

Few WFO vendors developed all the applications in their suites at one time. Many vendors, in fact, have acquired several of the components of their suites. This has meant that customer service application pros faced disconnected applications with, at times, quite dissimilar interfaces, integrations, and processes. Many cloud-based routing customers will accept some disparities to reduce the number of vendor relationships they need to manage. But not all companies use cloud-based routing today. If AD&D pros are to use WFO tools to help drive broader business transformation, WFO suites need to embrace:

› **Unified and consistent interfaces.** Several WFO vendors, including Aspect Software and Calabrio, worked with design, user experience, and strategy firms, such as frog design, to transform their portfolio of applications into more unified suites. These suites now sport modern

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

interfaces — in many ways similar to consumer-focused tools. Vendors that have not gone through this exercise or that brought new functionality into the fold via acquisition must accelerate the process of integrating the new tools into the suite interface.

› **Processes and workflows that seamlessly cross application boundaries.** In the past, workforce planners were happy to use scheduling and forecasting tools in a silo. But to move toward a customer-obsessed operating model, AD&D pros now need functionality to bridge multiple WFO applications. For example, if a quality analyst gives three of an agent's calls low scores, the suite should be able to check the workforce system to find the best time for that agent to take an eLearning refresher course, schedule it, and then deliver that training. Such a scenario requires workflows that cross at least three different applications.

› **Agent and manager portals.** Contact center employees benefit from a centralized workspace because they can easily access all of the functions of the suite relevant to their roles. On the agent side, these portals provide access to data on individual and team performance, coaching and training, schedule information, and work tasks. Managers and supervisors can use their portals to both access agent performance data and take action on that data.

Workforce Optimization Suites Evaluation Overview

By examining past research and through conversations and inquiries with customer service professionals and vendors, we developed a comprehensive set of 39 evaluation criteria. Combined, these criteria provide a detailed look at the breadth of capability, strategy, and market presence of nine workforce optimization suite solutions. We grouped the criteria into three high-level buckets:

› **Current offering.** To establish the capabilities of each vendor's current offering, we evaluated each suite's architecture, including its user experience and suite approach. Additionally, we reviewed functionality in individual application areas, including interaction recording, quality management, workforce management, interaction analytics, performance management, eLearning and coaching, and strategic planning. Based on a survey of each vendor's customers, we also rated customer satisfaction.

› **Strategy.** We reviewed each vendor's strategy to assess its ability to compete and grow in the WFO suite market. We assessed the strength of each vendor's corporate strategy, overall market approach, and supporting services. We also assessed each vendor's third-party ecosystem and commercial model. We used a combination of vendor evaluation responses, documentation, customer feedback, and vendor strategy briefings to complete this evaluation.

› **Market presence.** The size of each vendor's bubble on the Forrester Wave graphic indicates its market presence. We gauged the size of each vendor's customer base in terms of number of live installations and WFO revenue.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

Evaluated Vendors And Inclusion Criteria

Forrester included nine vendors in the assessment: Aspect Software, Calabrio, Genesys, inContact, Interactive Intelligence, NICE, OpenText, TelStrat, and Verint Systems. Each of these vendors has (see Figure 2):

› **A strong presence in the WFO market.** To ensure that we included the workforce optimization vendors with the greatest relevance to our clients, we set a threshold of $10 million in revenues for the past fiscal year as well as hundreds of deployed customers.

› **A WFO suite, not just disconnected components.** Each vendor we've included in this Forrester Wave has functionality in at least these four categories of workforce optimization: interaction recording, quality monitoring, workforce management, and interaction analytics. The vendors may also provide eLearning, strategic planning, performance management, and customer surveying. Cross-application workflows allow for a holistic approach to optimizing the performance of the customer service organization.

› **Frequent interest from Forrester clients.** Each vendor receives frequent interest from Forrester clients in the form of questions about or mentions of the vendor in the context of inquiries about workforce optimization solutions.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

FIGURE 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated
Aspect Software	Aspect EQ Workforce Optimization Suite	8.2
Calabrio	Calabrio One	9.5
Genesys	Customer Experience Platform	8.5
inContact	inContact Workforce Optimization	16.2
Interactive Intelligence	Customer Interaction Center	CIC 2016 R3
NICE	NICE Workforce Optimization	N/A
OpenText	OpenText Explore and OpenText Qfiniti	Explore 5.2 and Qfiniti 10.6
TelStrat	Engage WFO	5.2
Verint Systems	Verint Workforce Optimization	15.1

Vendor selection criteria

To ensure that we included the workforce optimization vendors with the greatest relevance to our clients, we set a threshold of $10 million in revenues for the past fiscal year as well as hundreds of deployed customers.

Each vendor we've included in this Forrester Wave™ has functionality in at least these four categories of workforce optimization: interaction recording, quality monitoring, workforce management, and interaction analytics. The vendors may also provide eLearning, strategic planning, performance management, and customer surveying. Cross-application workflows allow for a holistic approach to optimizing the performance of the customer service organization.

Each vendor receives frequent interest from Forrester clients in the form of questions about or mentions of the vendor in the context of inquiries about workforce optimization solutions.

Vendor Profiles

This evaluation of the workforce optimization market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 3).

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

FIGURE 3 Forrester Wave™: Workforce Optimization Suites, Q3 '16

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016
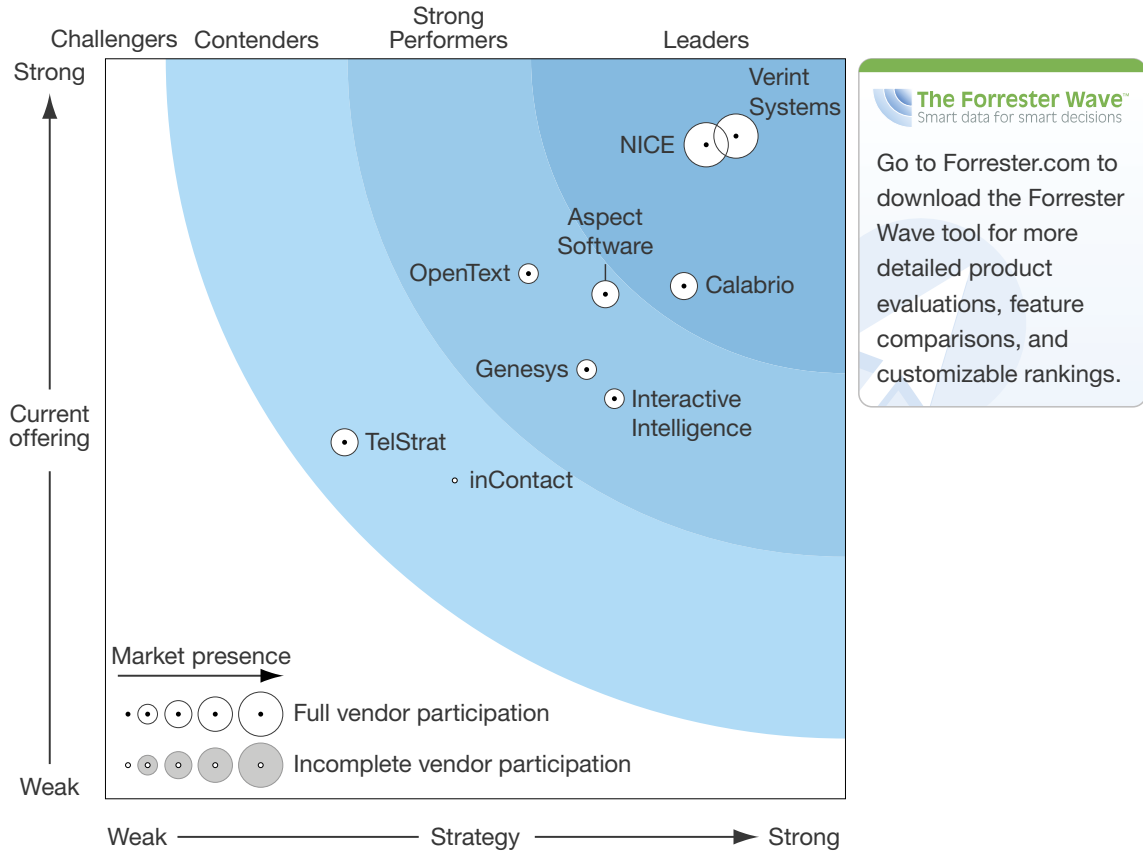
The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

FIGURE 3 Forrester Wave™: Workforce Optimization Suites, Q3 '16 (Cont.)

	Forrester's Weighting	Aspect Software	Calabrio	Genesys	Interactive Intelligence	NICE	OpenText	TelStrat	Verint Systems
CURRENT OFFERING	50%	3.41	3.47	2.90	2.71	4.42	3.55	2.41	4.48
Product architecture	15%	3.60	3.50	2.20	2.40	3.80	4.20	1.60	5.00
Interaction recording	10%	3.00	5.00	3.00	4.00	5.00	5.00	3.00	5.00
Quality management	14%	3.80	2.70	4.20	3.10	4.60	3.10	1.65	4.60
Workforce management	14%	4.20	3.80	3.00	2.60	4.60	3.40	1.00	3.80
Interaction analytics	17%	2.65	2.65	2.50	1.70	4.70	3.85	3.05	4.55
Performance management	5%	5.00	5.00	3.00	1.00	5.00	1.00	3.00	5.00
eLearning and coaching	5%	3.00	3.00	5.00	1.00	5.00	5.00	3.00	3.00
Strategic planning	8%	3.00	1.00	1.00	5.00	5.00	1.00	1.00	5.00
Customer satisfaction	12%	3.00	5.00	3.00	3.00	3.00	4.00	5.00	4.00
STRATEGY	50%	3.38	3.91	3.25	3.44	4.06	2.86	1.62	4.26
Corporate strategy	38%	3.60	4.40	3.00	3.00	4.40	3.20	1.40	5.00
Market approach	16%	3.00	3.00	4.00	3.00	4.00	2.00	2.00	4.00
Supporting products and services	19%	3.80	4.40	3.80	4.40	4.40	3.60	0.40	4.40
Third-party ecosystem	19%	3.00	3.60	3.60	3.20	4.40	3.20	2.40	4.60
Commercial model	8%	3.00	3.00	0.85	4.70	1.00	0.45	3.00	0.15
MARKET PRESENCE	0%	3.00	2.34	1.67	1.67	5.00	1.67	2.01	4.33
Revenue	33%	3.00	1.00	1.00	1.00	5.00	1.00	0.00	5.00
Number of live installations	67%	3.00	3.00	2.00	2.00	5.00	2.00	3.00	4.00

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

Leaders

› **Verint Systems combines analytics-driven transformation and customer engagement.** Melville, New York-based Verint Systems leads the WFO pack in terms of actual suite customers. Unique among vendors in this Forrester Wave, Verint Systems brings a customer engagement focus to the mix, stemming from its acquisition of customer service specialty vendor Kana Software. The company has remedied some past issues with professional service quality. "Verint got the message loud and clear about professional services," one customer told us. Verint has beefed up its business consulting services, both through acquisitions and equity investments in services organizations.

Many of the company's customers specifically cited the unification of its WFO suite as a reason for selecting Verint. The company uses actionable intelligence as the overarching theme within that suite. Its speech analytics tool, for example, allows users to enter a keyword, and a spider web of

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

clustered concepts appears. While its eLearning tools do a good job with coaching, they do not feature full course-creation capabilities. Verint should sit comfortably on the shortlist for mid- to large-size enterprises seeking a broad set of tools linked together with workflows or for companies looking to extend WFO into back-office or branch/retail environments.

› **NICE drives consolidation in the market with broad and deep functionality.** In the past year, Ra'anana, Israel-based NICE has shaken up the WFO market with its acquisitions of Nexidia, VPI, and most recently, inContact. These acquisitions brought an improved speech analytics engine, a recording platform for the midmarket, and a cloud-based routing platform. NICE has had troubled relationships with some customers, but it has made a concerted effort to improve areas such as support. One customer said, "A few years ago, it was like beating our heads on the wall to get them to respond, but things have improved dramatically."

NICE's suite includes heavy-duty functionality in every category we considered for this Forrester Wave. In particular, NICE excels at delivering tools designed to help companies respond to changing conditions in real time, including real-time speech analytics and customer journey analytics and optimization. Although NICE has increased its sales focus on the benefits of the complete suite and workflows that cross applications, some of its newly acquired tools still have their own look and feel. NICE fits well on the shortlist for any large service organization looking for robust functionality across multiple WFO applications.

› **Calabrio offers customers both "Minnesota nice" and a truly unified WFO suite.** Unlike most other vendors in this Forrester Wave, Minneapolis-based Calabrio built the components of its suite in-house with no acquisitions. Most of the company's sales come through a mature channel of Avaya and Cisco Systems partners, and it just inked a bidirectional reseller agreement with cloud-based routing provider Five9. The company prides itself on its customer-friendly model. As a customer put it, "It's not just the technology; it's the way that Calabrio actually listens to you." Calabrio, however, has limited reach outside of the US and minimal name recognition globally.

The Calabrio One suite offers innovative analytics, including a tool that predicts customer satisfaction before an interaction occurs. In the same vein, Calabrio will soon add a tool that predicts agent turnover before the agent is hired. Unlike many competitors, Calabrio provides licenses for the entirety of a functional area: A customer that buys analytics receives speech, text, and desktop analytics. Calabrio does not, however, offer real-time speech analytics and needs to beef up its mobile tools. Companies looking for a close partnership with their WFO provider and a unified suite built on a single code base should consider Calabrio.

Strong Performers

› **Aspect Software emerges from Chapter 11 with renewed focus on omnichannel WFO.** In March 2016, Phoenix-based Aspect entered a "prepackaged bankruptcy," shifting many debtholders into equity owners, a process it completed in May. While stability fears linger in the marketplace, customers said that the company communicated very well with them during the

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

process and were bullish on the company's prospects. The company includes innovative ideas in its road map — particularly, a virtual assistant for agents. And its consulting organization has a strong focus on business assessments and building processes for the Millennial mindset.

Across its suite, Aspect's user interface sports a modern design similar to ones used by consumer online services such as Intuit's Mint. Its forecasting tool handles digital channels with distinct algorithms. Its quality monitoring tool automatically pulls in calls that might be related to the one that the analyst is currently listening to. Aspect's lack of a unified desktop analytics tool remains a notable gap for the company. While its recent financial situation has scared some prospects off, today its suite would make a good fit for Aspect routing customers and for companies looking to expand WFO beyond the voice world.

› **OpenText brings HP WFO into its customer engagement management (CEM) strategy.** In April 2016, Waterloo, Ontario-based OpenText bought HP's WFO assets — assets that HP acquired in 2011. OpenText has three main strategic thrusts for the technology: 1) integrating it into a broad CEM play; 2) using analytics to drive improved customer service; and 3) providing numerous as-a-service consumption models. Countering the tumult caused by multiple changes in ownership? The team's willingness to bring customers into its decision-making process. "We have had a seat at the table to influence the overall product road map," one customer told us. HP was flying under the radar in terms of market awareness; OpenText must expand its marketing efforts to grow the customer base.

Despite the multiple owners over the years, the WFO tools have shown a remarkable consistency and unification of look and feel, administration, and security model. The suite's shining star, its interaction analytics tool Explore, has saved one customer more than seven figures from just the analysis on 20,000 calls. OpenText needs to expand its footprint in surveying and real-time speech analytics to become a leader in the market. If OpenText continues to invest in WFO, its suite would make a good fit for companies looking to use analytics to drive broader business transformation.

› **Genesys uses WFO to provide added value for its large base of routing customers.** Daly City, California-based Genesys sells its WFO suite to its routing customers in a "would you like fries with that?" model. This approach has seen the greatest success in the cloud, where the company has a nearly 80% attach rate for WFO. The development of its WFO suite has mirrored that of its routing systems, decreasing the focus on operational efficiency while increasing the focus on employee engagement issues. The company has been moving to simplify complex pricing based on an editions model, but customers say this shift remains a work in progress.

Genesys workflows cross its WFO and routing solutions. For example, routing decisions can incorporate an agent's schedule state. However, Genesys needs to port its workforce management and analytics tools to its modern UI. Genesys' WFO suite offers a great deal of customizability and flexibility. The flipside? It requires a "high level of technical skill to be developed by the enterprise"

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

August 31, 2016

to fully realize the benefits, as one customer put it. Genesys' WFO should be on the shortlist for most Genesys routing customers. With continued focus on developing employee engagement benefits, it could soon appeal to non-Genesys customers as well.

› **Interactive Intelligence faces a taxing transition to a cloud-first approach.** After 20 years developing its Customer Interaction Center (CIC) platform, including integrated WFO, Indianapolis-based Interactive Intelligence has shifted gears and now focuses its strategy, development resources, marketing, and sales primarily on a new cloud platform called PureCloud. Obviously fraught with major risks, including the difficult task of moving its healthy channel to the new platform, this extreme transition could eventually make Interactive Intelligence's WFO solutions the natural add-on to its routing platform. Additionally, the cloud strategy will provide a simpler entrée into the sub-200-seat small- and medium-size business (SMB) market.

While PureCloud will increasingly be the crux of the company's future, its customer base today is using the CIC-based workforce optimization suite. That all-in-one suite includes a powerful strategic planning tool with the ability to analyze profitability by metrics such as service level. The lack of traditional historical speech analytics and reporting-based performance management shows clear room for improvement. Because it is pre-integrated with Interactive Intelligence's core routing solution, the WFO suite makes a good fit for existing customers, although many may prefer to defer a new purchase until the PureCloud offer matures.

Contenders

› **inContact faces integration challenges following acquisition by NICE.** Salt Lake City-based inContact was acquired by NICE after we began the research for this Forrester Wave. This has shifted much of the company's strategy toward integrating its offerings with its new owner's. inContact was a pioneer in proving that cloud-based routing decisions could drag along an integrated WFO offer. This strategy has been paying off: The company's share of revenue from WFO went from 13% to more than 18% in a year. Much of that revenue came through an energetic collection of resellers — partners that inContact will need to bring over to the NICE world.

Pre-acquisition, inContact offered an OEMed version of Verint Systems' solution to large enterprises, but Forrester evaluated its small and midsize enterprise-focused inContact Workforce Optimization suite, consisting primarily of technology from recent acquisitions (AC2 Solutions, Attensity, and Uptivity). This suite provides an intuitive user experience and an omnichannel-focused workforce management application, particularly strong in forecasting, but that lacks any real cross-application workflows or robust mobile functionality. inContact's solution would work well for smaller organizations looking for an easy on-ramp to cloud-based WFO solutions but requiring room to grow.

Note that inContact did not fully participate in the research for this Forrester Wave, so we based our findings on briefings, past product demos, and client inquiries.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

August 31, 2016

› **TelStrat struggles to raise awareness and modernize its antiquated look and feel.** An engineering-first company with anemic marketing, Allen, Texas-based TelStrat leverages its robust channel of more than 300 resellers to tap into the lower end of the WFO market. As a smaller vendor, TelStrat can provide a real personal touch. Its customers provided consistently excellent feedback on its account management, the ease of doing business, and professional services. Its road map includes scalability enhancements and expansion into true omnichannel WFO — moves that could bring it more in line with the current expectations of larger enterprises.

TelStrat offers a wide array of deployment options, including a single-server solution for SMBs, a more customized offering for customers with more than 200 seats, and a multi-tenant offer for the BroadSoft and ShoreTel markets. Many of the suite's components sport a dated UI, with a Microsoft productivity application look and feel: a grave problem for brands with agents and supervisors raised on touchscreens. TelStrat's offer should appeal to smaller companies looking for rapid time-to-value, especially in emerging WFO areas such as interaction analytics that are often out of reach for such customers.

Engage With An Analyst

Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

Analyst Inquiry

To help you put research into practice, connect with an analyst to discuss your questions in a 30-minute phone session — or opt for a response via email.

Learn more.

Analyst Advisory

Translate research into action by working with an analyst on a specific engagement in the form of custom strategy sessions, workshops, or speeches.

Learn more.

Webinar

Join our online sessions on the latest research affecting your business. Each call includes analyst Q&A and slides and is available on-demand.

Learn more.

Forrester's research apps for iPhone® and iPad®
Stay ahead of your competition no matter where you are.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

Supplemental Material

Survey Methodology

Forrester's Global Business Technographics® Networks And Telecommunications Survey, 2016, was fielded in December 2015. This online survey included 3,563 respondents in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with two or more employees.

Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester's Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Forrester's Global Business Technographics Networks And Telecommunications Survey, 2015, is an online survey fielded in January 2015 of 3,627 business and technology decision-makers located in Australia, New Zealand, Brazil, Canada, China, France, Germany, India, the UK, and the US from companies with two or more employees.

Forrester's Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by August 18, 2016.

› **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

August 31, 2016

› **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with a minimum of three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] Much of that increase has come in just the past few years. The figure was just under three-quarters of respondents in 2014. Source: "2016 Global Contact Centre Benchmarking Report," Dimension Data (http:///www.dimensiondatacx.com/).

[2] Source: "Collaboration Case Study: Talbots," Cisco Systems (http://www.cisco.com/c/en/us/solutions/collaboration/talbots.html).

[3] For more on the merging of workforce optimization, customer service applications, and contact center queueing and routing, see the "Vendors Battle For The Heart Of The Contact Center" Forrester report.

FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS

August 31, 2016

The Forrester Wave™: Workforce Optimization Suites, Q3 2016
The Nine WFO Providers That Matter Most And How They Stack Up

⁴ For examples of brands such as Everlane and Hyatt that have opened up Facebook Messenger as a customer service channel, see the "Brief: It's Time To Provide Customer Service Through Facebook Messenger" Forrester report.

⁵ Today, 20% of enterprises have no integration across channels at all. Source: "2016 Global Contact Centre Benchmarking Report," Dimension Data (http:///www.dimensiondatacx.com/).

⁶ Erlang models, named after Danish mathematician A.K. Erlang, are used to forecast traffic in networks. Designers use the models for everything from cars on a road to phone calls into a contact center. Erlang began by observing a village telephone exchange. He then created a formula to calculate the percentage of people attempting to call someone outside the village that were forced to wait because all of the lines were in use. Although Erlang developed his models more than 100 years ago, the models still form the basis of most forecasting tools for contact centers. For more on Erlang and his models, check out the source provided. Source: "Agner Krarup Erlang (1878-1929)," Plus Magazine, May 1, 1997 (https://plus.maths.org/content/os/issue2/erlang/index).

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

PRODUCTS AND SERVICES

› Core research and tools
› Data and analytics
› Peer collaboration
› Analyst engagement
› Consulting
› Events

Forrester's research and insights are tailored to your role and critical business initiatives.

ROLES WE SERVE

Marketing & Strategy Professionals	Technology Management Professionals	Technology Industry Professionals
CMO	CIO	Analyst Relations
B2B Marketing	› Application Development & Delivery	
B2C Marketing	Enterprise Architecture	
Customer Experience	Infrastructure & Operations	
Customer Insights	Security & Risk	
eBusiness & Channel Strategy	Sourcing & Vendor Management	

CLIENT SUPPORT

For information on hard-copy or electronic reprints, please contact Client Support at +1 866-367-7378, +1 617-613-5730, or clientsupport@forrester.com. We offer quantity discounts and special pricing for academic and nonprofit institutions.