

The Aragon Research Globe™ for AI Agent Platforms in the ICC, 2025

Virtual Agents become a reality in the Contact Center

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Topic: Agent Platforms (formerly Conversational AI)

Issue: Who are the providers of Agent Platforms in the ICC and how do they compare?



SUMMARY

Aragon Research releases its third annual Aragon Research Globe™ for Agent Platforms in the Intelligent Contact Center (ICC).

This report covers 22 major providers in this market and the growing use cases for virtual agents in the Contact Center.

[Watch the Visual Research in AIN](#)

KEY TAKEAWAYS

- AI Agent Platforms are here to stay and are low code.
- Deploying an Agent Assist offering is a must.
- Leverage a configurable Virtual Agent before starting to build custom ones.

TABLE OF CONTENTS

Introduction.....	3
Evolution to Revolution: The Rise of Agent Platforms.....	3
What Are AI-based Agent Platforms for the Contact Center?.....	4
The Rise of LLM-Based Reasoning Engines for Smarter Answers	6
Agent Platforms Mean More Digital Agents, Not Less	6
Grounding Your LLM in Reality	7
New Use Cases In 2025 Due to Increased Reasoning.....	7
Role-Based Agents on the Rise.....	9
Security and AI Governance—Trust Models Are Key	10
Voice-Based Agents Are Important in Many Industries.....	11
The Role of Training Virtual Agents.....	12
Getting Started—Start with Agent Assist	12
How to Use This Globe.....	13
The Aragon Research Globe™ for AI Agent Platforms in the ICC, 2025	14
Leaders.....	15
Contenders	23
Innovators.....	29
Specialists	35
Final Considerations for AI Agent Platforms in the Intelligent Contact Center.....	37
Aragon Advisory	37
Bottom Line	37
Aragon Research Globe Overview.....	37
Dimensions of Analysis	38
The Four Sections of the Globe	39
Inclusion Criteria	39

Introduction

The virtual agent market is changing, and part of this is due to the rapid rise of Generative AI. In the last year, we have seen Generative AI merge with conversational AI, and we are calling this market AI Agent Platforms. The result of all these technological advancements is better virtual agents that are smarter and faster to deploy—fueled by the demand for automated customer service, personalized experiences, and 24/7 availability. However, traditional conversational AI solutions often struggled with complex queries, lacked contextual awareness, and were limited in their ability to learn and adapt.

Today, the contact center is facing tremendous change. With AI-based Agent platforms now available, the ability to build and deploy virtual agents is here. With the ability to understand and respond to customer queries in a more human-like manner, these AI systems have raised the bar, significantly improving the efficiency and quality of customer service.

The emergence of LLMs like Google Gemini Ultra, OpenAI GPT-o1, and Meta's Llama has ushered in a new era of possibilities, including the ability to deal with more complex problems and tasks. These platforms leverage the power of LLMs to deliver more intelligent, human-like interactions, enabling enterprises to build and deploy sophisticated digital agents capable of handling a wider range of tasks.

This report complements the Aragon Research Globe™ for AI Agent Platforms, which focuses on the broader AI Agent Platform market, and the Aragon Research Globe™ for Intelligent Contact Centers (ICC), which focuses on vendors' strengths and challenges as they pertain to the entirety of the contact center stack. This globe on AI Agent Platforms for the ICC focuses on 22 providers who are making a difference in the market.

Evolution to Revolution: The Rise of Agent Platforms

Aragon has seen a significant shift over the last year as two distinct AI technologies have converged to form what we are calling AI agent platforms. The technologies we are discussing are generative AI and conversational AI and together they are forming the basis for faster development of agents. With training and the right knowledge base these agents can also give more accurate answers or perform tasks at a faster rate than humans.

Platforms represent a new way forward for both offering preconfigured agents with fixed capabilities or providing a development platform for which enterprises can develop new agents with new skills and knowledge.

While there is significant interest for agents and contact centers, Aragon is focused on that market in a separate report. Providers in this report focus on multiple use cases and multiple industries.

Today's intelligent virtual agents can identify and track multiple intents within a sentence and provide human-like contextual understanding, leading to highly engaging natural conversations between people and machines. The ability of these chatbots to easily use voice as just another communication channel has improved the usability of chatbots in general across industries.

What Are AI-based Agent Platforms for the Contact Center?

AI Agent Platforms are comprehensive solutions that combine the power of conversational AI and LLMs to enable the creation and deployment of intelligent digital agents. In the Contact Center, Agent Platforms offer both out-of-the-box agents such as Agent Assist and Agent Coaching.

These platforms provide a range of tools and capabilities, including:

- **Conversational AI**
 - **Natural Language Understanding (NLU):** Accurately interprets user input, including complex and nuanced language.
 - **Natural Language Generation (NLG):** Generates human-like responses that are contextually relevant and personalized.
 - **Dialogue Management:** Manages the flow of conversation and ensures that agents respond appropriately to user queries.
- **Generative AI**
 - A combination of Large Language Models (LLM) and Small Language Models (SLM) that may work together
 - The emergence of Reasoning for more accurate information and recommendations.
- **Process and Orchestration** Because Agents will need to be able to perform many roles, the need to incorporate process and orchestration be key. Note many providers already offer these capabilities embedded in their platform.
- **Access to Specific Content, Data, and Profiles—and the Emergence of Contact Center Knowledge Lakes**
 - One of the most critical aspects of Agent platforms is supplying them with relevant and accurate information, particularly for roles. Knowledge Lakes is what this information will evolve into.

- **Integration with Enterprise Systems:** Connects agents to backend systems and data sources, enabling them to access and process information in real-time.
- **Prebuilt Agents, that can be configured.** These include Questions and Answers, Shopping Agents, Booking Agents, and more.
- **Configurable Agent Assist Offering.** Most providers are offering an Agent Assist offering that can be configured using the product or support knowledge to help the agent during a call with a customer.
- **Studio Tools for building custom Agents.** Offer the ability to easily develop agents or connected agents that can tap into an existing knowledge lake.
- **Agent Training and Optimization:** Provides tools for training agents on specific tasks and optimizing their performance.

AI Agent Platforms have evolved quickly and with them the ability to create role based agents with role based and company specific information to be able to better perform the role. LLMs can be fine-tuned for specific use cases or industries, enabling enterprises to offer personalized conversational experiences for their customers enhancing their overall satisfaction (See Figure 1).

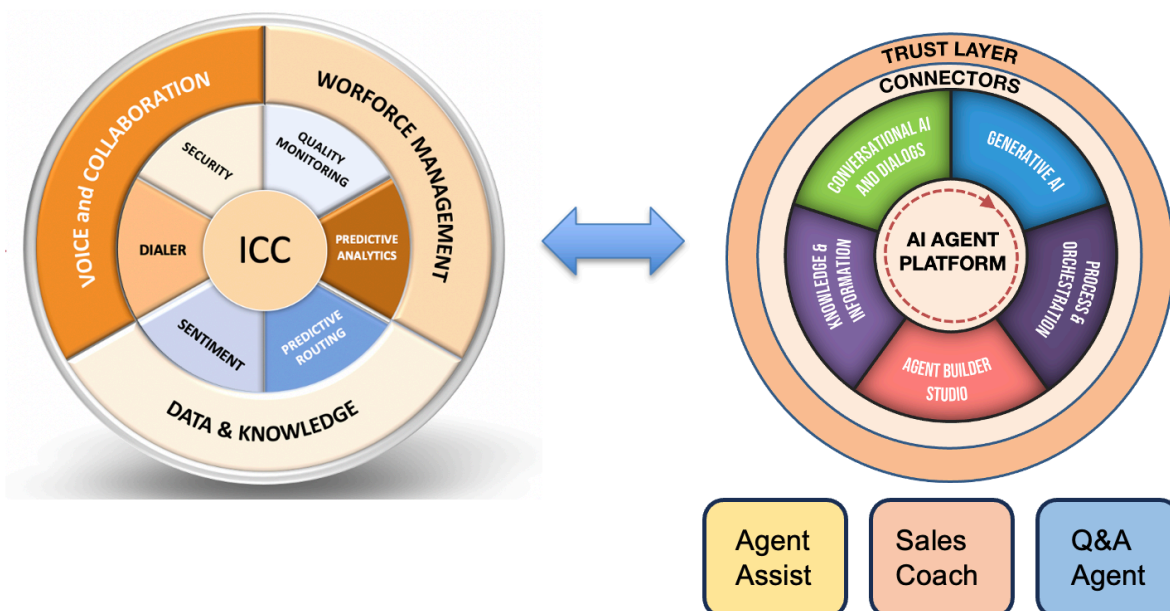


Figure 1: AI Agent Platforms are quickly becoming part of the Intelligent Contact Center.

Agent Platforms and the Convergence of Conversational AI and Generative AI

The convergence of conversational AI and large language models (LLMs) is rapidly transforming the agent platform market. LLMs provide the advanced natural language understanding (NLU) and natural language generation (NLG) capabilities necessary for agents to engage in more human-like conversations, understand complex language with multiple layers of meaning, and adapt to new information through continuous learning.

This is creating a new breed of agent platforms that offer more comprehensive and powerful solutions for enterprises, blurring the lines between traditional conversational AI and LLMs. Essentially, LLMs are the key to unlocking the true potential of conversational AI, enabling agents to move beyond basic interactions and truly understand and respond to user needs.

This convergence is blurring the lines between traditional conversational AI and LLMs, creating a new category of Agent Platforms that offer a more comprehensive and powerful solution for enterprise needs.

The Rise of LLM-Based Reasoning Engines for Smarter Answers

Agent platforms are evolving beyond simple information retrieval to incorporate more sophisticated reasoning capabilities. While Retrieval Augmented Generation (RAG) has been useful for improving the accuracy and relevance of agent responses, it falls short of delivering truly intelligent interactions. This limitation is driving the rise of LLM-based reasoning engines that enable agents to go beyond basic question-answering.

These advanced reasoning engines empower agents to perform logical deduction and inference, analyze information from multiple sources, and draw logical conclusions. This allows them to solve problems and answer complex questions more effectively. Furthermore, they enable contextual awareness and memory, allowing agents to retain a history of past interactions and provide more personalized and relevant responses.

Crucially, these LLMs enhance explainability and transparency by providing insights into the reasoning behind their answers, fostering trust and confidence with users. This shift towards deeper understanding and more insightful responses marks a significant advancement in the evolution of agent platforms. By moving beyond basic information retrieval and embracing complex reasoning, agents are better equipped to meet the growing demands of enterprise users.

Agent Platforms Mean More Digital Agents, Not Less

The increased capabilities of Agent Platforms are not leading to a reduction in the number of digital agents. Instead, we are seeing a proliferation of specialized agents designed to handle specific tasks or address the needs of particular user groups. This trend is driven by several factors:

- **Improved scalability and cost-effectiveness:** Agent Platforms make it easier and more affordable to deploy multiple agents, enabling enterprises to tailor their digital workforce to specific needs.

- **Increased personalization and engagement:** Specialized agents can provide more relevant and personalized experiences, leading to higher levels of user satisfaction.
- **Enhanced efficiency and productivity:** By assigning specific tasks to dedicated agents, enterprises can optimize their workflows and improve overall productivity.

This trend is leading to the emergence of a diverse ecosystem of virtual agents, each with its own unique capabilities and expertise.

Grounding Your LLM in Reality

Large Language Models (LLMs) like GPT o1 and Google Gemini Ultra excel at generating human-quality text and engaging in seemingly intelligent conversations. However, their ability to provide accurate and relevant information for specific industries is often limited. This is because their training data, while vast, may lack the nuanced domain knowledge and terminology required for industry-specific applications.

For instance, while Gemini Ultra might excel in general knowledge and creative writing, it may falter when asked to provide expert advice on, say, financial regulations or medical diagnoses. Similarly, GPT o1, despite its impressive language processing capabilities, might struggle to generate accurate code for a niche programming language used in a specific industry.

To overcome these limitations, organizations are increasingly looking beyond basic Retrieval Augmented Generation (RAG) techniques and exploring more advanced methods to ground LLMs in reality. This involves:

- **Fine-tuning:** Adapting models like GPT o1 and Gemini Ultra to specific industries by training them on domain-specific datasets. This allows the models to learn the nuances of industry-specific language and knowledge, improving their accuracy and relevance.
- **Knowledge Lakes and Reasoning Engines:** Integrating LLMs with knowledge lakes that store vast amounts of structured and unstructured industry data. By leveraging advanced LLMs with reasoning capabilities (reasoning engines), these models can analyze the data, identify patterns, and draw inferences, enabling them to generate more accurate and contextually relevant responses.

This approach goes beyond simply retrieving and presenting information. It empowers LLMs to understand the meaning behind the data, reason about it, and generate insights that were previously unattainable. Imagine Gemini Ultra, fine-tuned on a vast repository of legal documents, coupled with a reasoning engine capable of analyzing case law and providing legal advice. GPT o1, trained on a comprehensive dataset of financial transactions, assisting analysts in identifying fraudulent activities and predicting market trends.

New Use Cases In 2025 Due to Increased Reasoning

By combining the strengths of advanced LLMs that can tap into specific organizational

knowledge or knowledge about just an account, new use cases are emerging, including:

- **Decision-making Assistant:** Virtual Agents that leverage reasoning LLMs, Deep Learning predictions, and knowledge lakes can analyze complex data, identify critical factors, and provide data-driven recommendations to support strategic decision-making.
- **Problem-solving Agent:** LLMs can diagnose problems, generate potential solutions, and evaluate their effectiveness, assisting in complex problem-solving scenarios. This type of advanced Agent can be used in an Agent Assist scenario or, in certain cases, be deployed directly to a customer.
- **Creative collaboration:** In Marketing use cases, Virtual Agents can participate in brainstorming sessions, generate innovative ideas, and provide constructive feedback on creative projects, fostering collaboration and innovation.

AI Sales Development Rep Agent (AI SDR) or AI Service Agent: New use cases around automating the process of interacting with and connecting with Prospects is an example of an advanced Agent. This AI SDR Agent needs to understand context, objectives, objections and be able to navigate all that and get to the objective of getting an appointment for their human Sales Representative.

For an AI Service Agent, it means being able to schedule a service call or troubleshoot a customer situation before escalating it to a human. We are seeing CRM providers making moves here, so the market for both Sales and Service Agents will get more crowded.

All this means that there is a need to move beyond basic RAG techniques. By leveraging knowledge lakes and reasoning engines, organizations can empower models like GPT o1 and Gemini Ultra to become truly valuable assets in industry-specific applications.

This will enable LLMs to not only understand and process information but also reason about it, generate insights, and contribute to solving complex problems. See Figure 2 below illustrating a generative AI powered conversation flow using RAG to ground the conversation using domain knowledge and personalized using user profiles and previous journey histories.

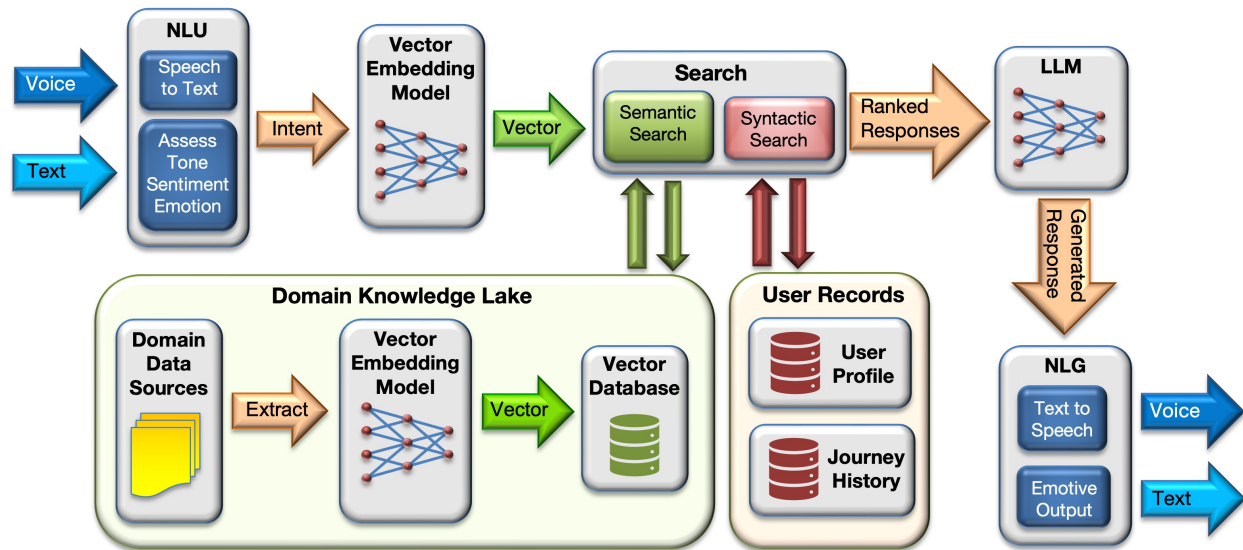


Figure 2: Generative AI conversation flow using RAG that is grounded using domain knowledge and personalized with user data.

Role-Based Agents on the Rise

The emergence of specialized large language models (LLMs) tailored for specific roles or domains of knowledge is fueling the development of role-based agents. While last year saw a focus on role-specific LLMs in fields like healthcare and security, 2025 is witnessing an expansion of this trend. Now, businesses can build role-based agents that leverage these specialized LLMs or utilize custom knowledge bases to deliver highly targeted and effective customer interactions. This shift reflects a growing recognition that generic virtual agents often lack the nuanced understanding and expertise required to address complex or industry-specific inquiries.

By deploying role-based agents, businesses can ensure that customers are connected with the most appropriate virtual assistant for their needs. A healthcare agent, for example, can be equipped with the medical knowledge and terminology necessary to answer patient questions, schedule appointments, or provide information about specific conditions. Similarly, a financial agent can be trained on investment strategies, market trends, and regulatory compliance to assist customers with their financial planning needs. This specialization not only improves the accuracy and efficiency of customer interactions but also fosters greater trust and confidence in the virtual agent's capabilities.

The implications of this trend are significant for businesses seeking to optimize customer service and enhance operational efficiency. Role-based agents can handle a wider range of inquiries, reducing the need for human intervention and freeing up valuable resources. Furthermore, the ability to tailor agents to specific customer segments or business

functions allows for more personalized and effective support experiences. As LLMs continue to evolve and specialize, we can expect to see even more sophisticated and capable role-based agents, further transforming the customer service landscape.

Single vs. Multi-Agent Systems in the Contact Center

The customer service landscape is undergoing a significant shift, moving away from single, monolithic virtual agents towards more dynamic and specialized multi-agent systems. This trend is driven by the increasing complexity of customer interactions and the desire for more personalized and efficient support experiences. In the past, virtual agents were often limited in their capabilities, leading to frustrating hand-offs to human agents when inquiries went beyond basic questions. Now, with the advent of multi-agent systems, businesses can deploy a network of specialized virtual agents, each equipped to handle specific tasks or domains of knowledge. This approach allows for seamless transitions between agents, ensuring that customers receive the most relevant and accurate information without the need for repetitive explanations or transfers.

The modular nature of multi-agent systems offers significant advantages in terms of development and maintenance. Individual agents can be designed, updated, and optimized independently, making it easier to adapt to changing customer needs or incorporate new information. This agility is crucial in today's rapidly evolving business environment, where customer expectations are constantly rising. Furthermore, the ability to break down complex tasks into smaller, more manageable components allows for greater scalability and efficiency. Businesses can deploy additional agents as needed to handle peak demand or address specific customer segments, ensuring consistently high levels of service without overburdening individual agents.

By leveraging multi-agent systems, enterprises can provide more personalized and efficient support experiences, leading to increased customer loyalty and reduced operational costs. The ability to seamlessly integrate specialized agents into existing workflows allows for a more natural and intuitive customer journey, minimizing friction and maximizing engagement. As artificial intelligence and natural language processing continue to advance, multi-agent systems will likely play an even greater role in shaping the future of customer service, enabling businesses to deliver truly personalized and intelligent support at scale.

Security and AI Governance—Trust Models Are Key

Enterprises still have due diligence to do when selecting AI Agent Platform providers. A key consideration for any organization adopting AI agent platforms is the infrastructure they utilize and how customer data is managed within that infrastructure. Some LLMs may require access to customer data to perform their functions, while others operate

without any direct interaction with sensitive information. Understanding these nuances is paramount when evaluating vendor trust models.

Organizations should embrace zero-trust platforms, employ robust governance measures, implement data access controls, and use AI-enabled security solutions that monitor and block anomalous network or data access behavior. A “walled garden” can be created where strict boundaries are set up within a closed environment. This allows the generative AI access to the information it needs, but it can’t inadvertently expose that data outside of its closed environment.

To ensure data security, organizations must demand complete transparency from AI agent providers. Service Level Agreements (SLAs) must explicitly stipulate that customer data will not be leveraged, used for training purposes, or shared with third parties without explicit consent. This commitment to data protection is non-negotiable in an era where AI agents are increasingly entrusted with critical business processes and sensitive information.

Voice-Based Agents Are Important in Many Industries

When they want to get a transaction done, many customers feel that calling for support is the best option. More than any other market, the demand for Voice based Agents is critical.

Many people prefer talking over texting, especially if the voice on the other end sounds natural. Recent advancements in speech-to-text (STT) and text-to-speech (TTS) technologies are attracting more users to choose voice as their preferred communication channel. TTS and STT technologies are benefiting from the underlying improvements in NLU, and NLG brought about by generative AI to create intelligent and fluent voice responses to natural language voice requests, driving a new wave of voice-enabled conversationally fluent virtual agents.

Voice-based Virtual Agents have matured significantly over the last year and one of the suppliers to this market is a firm called Deepgram, based in Silicon Valley.

Several leading conversational AI providers can generate very natural-sounding voices that include tonal variations and tailor responses based on the user’s sentiment, making people much more comfortable conversing with a machine. Some providers also offer libraries of different voices to select from, and some provide the ability to record a voice to generate unique, personalized chatbots to reinforce an enterprise's brand.

The Role of Training Virtual Agents

Training is essential for virtual agents to successfully perform their designed tasks. This involves defining the agent's scope and objectives, which means clearly outlining the tasks the agent will handle and the goals it should achieve.

To effectively train a virtual agent, developers need to create a comprehensive dataset of sample conversations and scenarios for the agent to learn from. Using machine learning techniques like supervised, unsupervised, and reinforcement learning helps train the agent on this data. Continuous monitoring and optimization are crucial, meaning regularly evaluating the agent's performance and making adjustments to its training data and algorithms as needed.

Getting Started—Start with Agent Assist

For enterprises, it's important to leverage your list of providers and start with basic virtual agents before you go all the way to advanced intelligent ones. A great place to start is with an AI virtual agent in the contact center, Agent Assist.

Configuring and deploying an Agent Assist offering provides a lot of learning for the enterprise. It is advisable for an enterprise to hire professional services for the initial deployment of Agent Assist.

After that, a basic question-and-answer virtual agent for customer assistance is also relatively easy to build and deploy in a trusted test mode before going to production. It is important to have AI Agents interconnected, and this, too, may require planning and design work before deployment.

Once a provider has been selected and initial virtual agents have been rolled out, the process of building more complex intelligent virtual agents can begin; however, it's very important for enterprises to realize that they must test these virtual agents extensively before they put them into production. See Figure 3 below.

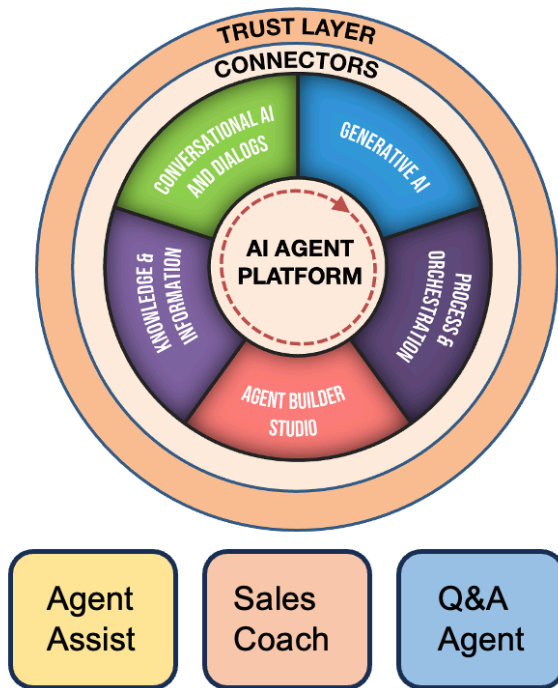


Figure 3. Enterprises should start with basic Virtual Agents before progressing to complex ones.

How to Use This Globe

From a buyer's perspective, this Globe represents a wide assortment of vendors in the conversational AI market. Within this market, there are different focuses from many of the vendors, ranging from internal employee support to external customer support, with additional differentiation across many verticals like pre-sales, e-commerce, or support.

Our advice to enterprise buyers is to first consider what your core requirements are with respect to your conversational AI use cases. We encourage buyers to go beyond just the positions on the Globe graph: consider which capabilities and products best fit the required use cases that pertain to your enterprise or buying center. For example, if your requirements are for the introduction of conversational AI in your existing contact center, then a provider that offers seamless integration to your contact center solution may be the best fit.

The Aragon Research Globe™ for AI Agent Platforms in the ICC, 2025
(As of 11/15/24)

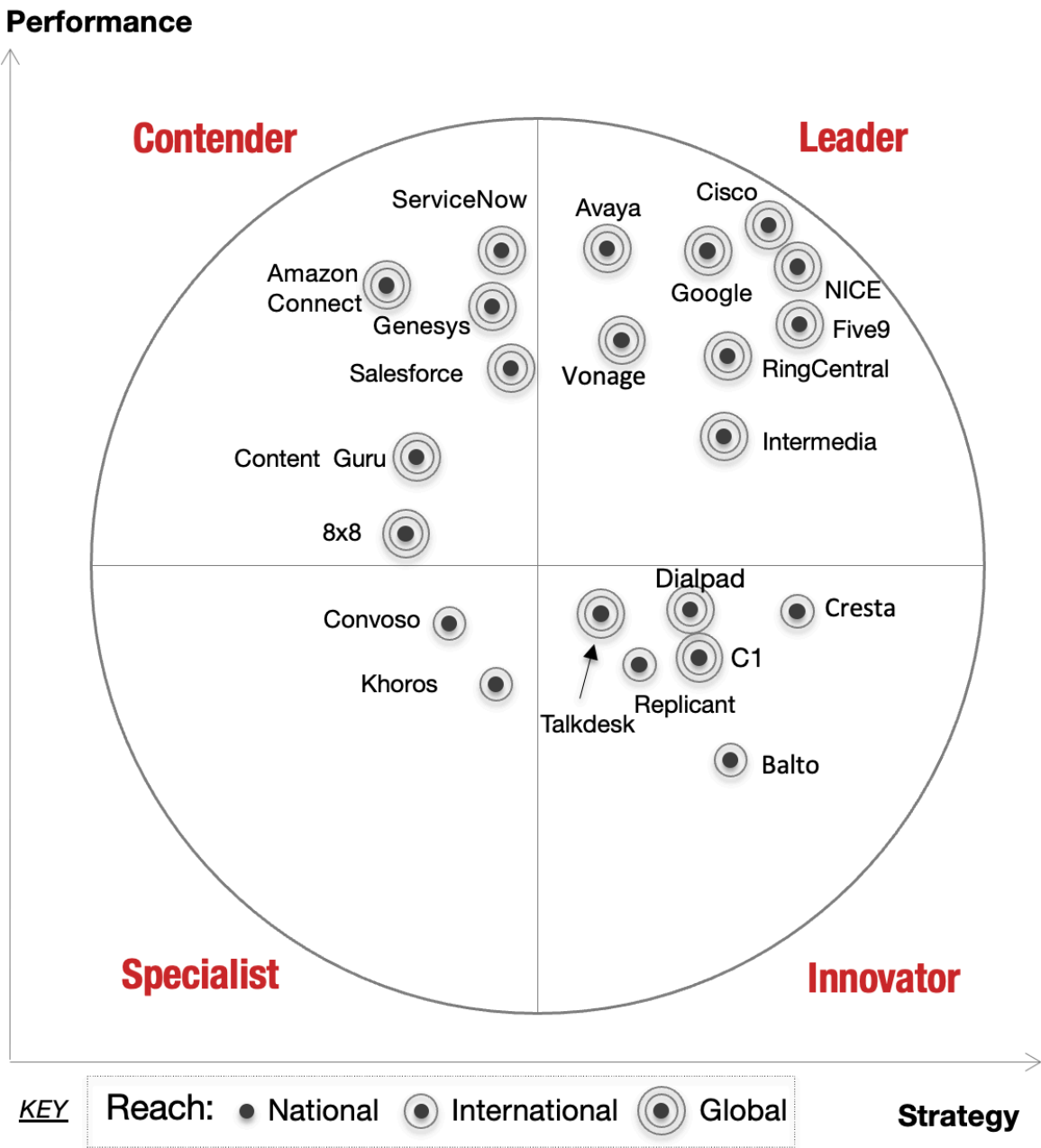


Figure 4: The Aragon Research Globe for AI Agent Platforms in the ICC.

Leaders

Avaya

Avaya, a leader in customer experience solutions, recently appointed Patrick Dennis as its new CEO, succeeding Alan Masarek. The company maintains a strong presence in the enterprise communications and contact center markets, particularly among large organizations with complex needs. Avaya is committed to both cloud and on-premises deployments, offering flexibility to its customers.

The Avaya Experience Platform (AXP) is the company's AI-powered intelligent contact center solution, available in Private, Public, and hybrid deployment models. It incorporates Generative AI to enable the creation of advanced virtual agents capable of integrating with leading conversational AI engines like Google, Cognigy, IBM Watson, and Nuance. This platform, along with Avaya's broader portfolio, including Avaya Communication APIs, Avaya Cloud Office, Avaya Spaces, and Avaya Aura Private Cloud, empowers businesses to deliver exceptional customer experiences. Avaya also continues to support its on-premises solutions, such as AXP On-Prem (formerly Avaya Call Center Elite), Avaya Aura, and Avaya IP Office.

In October 2024, Avaya announced its "Virtual Operations Manager" concept, an AI-powered tool designed to assist human managers in optimizing contact center performance. This innovative solution utilizes AI to unify contact center data and provide centralized insights, ultimately boosting operational efficiency. Other updates in 2024 to its Agent Assist offering include real-time intent detection, tailored suggestions, and summarization of agent interactions with customers.

Avaya is actively integrating AI across its portfolio and has a strategic partnership with Microsoft Azure for its cloud offerings while remaining committed to a multi-cloud ecosystem. This approach allows Avaya to leverage various cloud platforms, including AWS, Google Cloud, and IBM, and integrate with providers such as Verint, Google, Afiniti, and Nuance.

With its new leadership, focus on AI innovation, and flexible multi-cloud strategy, Avaya is well-positioned for continued growth in the evolving enterprise communications landscape.

Strengths

- Multitude of deployment options
- Extensive partner network and ecosystem
- Omnichannel
- Generative AI
- Real-time transcription
- Speech and text analytics

Challenges

- Continuing to expand AI offerings
- Continual balancing of on-premise and cloud offerings

Cisco (Webex by Cisco)

The Cisco Webex Business Unit, now led by GM Anurag Dhingra, continues its push for innovation in both the Intelligent Contact Center (ICC) and its Communication and Collaboration product offerings. Cisco has seen significant growth in its Contact Center business, driven by strong leadership and its early investment in AI with the Cisco AI Assistant for Webex. Cisco offers its Webex Customer Experience portfolio (combined CCaaS & CPaaS) and its flagship Webex Meetings, Calling, and Messaging, all available within the Webex Suite.

A key development in 2024 is the introduction of the new Cisco AI Assistant for Webex Contact Center. This advanced assistant goes beyond basic chatbots to provide agents with real-time assistance during customer interactions. It leverages generative AI to offer features like automated call summaries, suggested responses, and relevant knowledge-based articles. The AI Assistant aims to improve agent efficiency, reduce handling time, and enhance the overall customer experience.

Cisco has also announced the upcoming release of its Webex AI Agent, a sophisticated virtual agent designed to revolutionize self-service by combining conversational intelligence with real-time automation. This new solution aims to provide more authentic, human-like interactions that effectively resolve customer inquiries. To build and customize these AI Agents, Cisco is also launching AI Agent Studio, a user-friendly tool that allows business users and IT administrators to easily design and deploy self-service workflows.

Furthermore, the Cisco AI Assistant for Webex Contact Center offers a range of features designed to support agents and supervisors. These include suggested responses for agents, wrap-up summaries for efficient documentation, context summaries for seamless handoffs between AI agents and human agents, dropped call summaries, and agent well-being features to identify signs of burnout.

Cisco offers Webex Experience Management that includes advanced customer profiles, predictions on how customer experience will be impacted, and sentiment analysis. Cisco also offers Webex Workforce Optimization. Webex Connect, a complete communications platform as a service (CPaaS), offers a host of channels and workflow automation options through which to engage with customers. Its flexibility and customer focus have also allowed it to win some large opportunities. Webex Contact Center also integrates with Salesforce Service Cloud, Microsoft Dynamics, and Zendesk.

Webex Contact Center serves a wide range of industries, including financial services, healthcare, retail, and technology. Its flexibility and robust feature set cater to businesses of all sizes and complexities.

Strengths

- Strong Cisco brand
- AI integrated throughout platform
- Generative AI
- Universal Harness
- Flexible deployment options
- Full ICC, UC&C, and CPaaS suite of products

Challenges

- Balancing multiple CC offerings
- Fully integrating all AI acquisitions

Five9

Five9, headquartered in San Ramon and led by Chairman and CEO Mike Burkland, has demonstrated consistent growth due to its early focus on its Intelligent Contact Center offering. Five9 offers a comprehensive suite of contact center solutions, including Intelligent Virtual Agent (IVA), Agent Assist, Global Voice, Agent Desktop Plus, Supervisor Plus, and Engagement Workflow, along with a robust ecosystem of integrations, APIs, and SDKs. Five9 supports both inbound and outbound use cases, offering global call support, intelligent routing, and omnichannel engagement. While maintaining partnerships with leading WEM providers, Five9 now provides a complete ICC solution, including WEM capabilities.

In 2024, Five9 launched Five9 Studio AI, a significant advancement in its AI capabilities. Studio AI provides a low-code environment for businesses to customize and manage their generative AI models and prompts. This empowers organizations to tailor AI-driven interactions, ensuring they align with specific business needs and objectives. Beyond Studio AI, Five9 continues to enhance its core AI offerings. Agent Assist 2.0, with AI Summaries powered by OpenAI, provides agents with valuable insights and support during customer interactions.

Further solidifying its commitment to AI, Five9 recently announced an end-to-end AI suite, Five9 Genius AI, and a new four-step process (Listen, Analyze, Tailor, Apply) to help enterprises transform their customer experience (CX). This comprehensive approach enables businesses to leverage AI effectively across the entire customer journey. A key component of this suite is the upcoming Five9 AI Knowledge, which harnesses the power of generative AI to provide quick and accurate answers to customer questions by utilizing an organization's vast knowledge sources.

In August 2024, Five9 acquired Acqueon, a real-time revenue execution platform. This acquisition enhances Five9's outbound capabilities and enables proactive, AI-driven customer engagement across marketing, sales, and service. The integration of Acqueon allows Five9 to orchestrate personalized interactions across channels, improving connection rates and business outcomes for enterprises.

In 2023, Five9 strategically acquired Aceyus to accelerate cloud migration for enterprise customers transitioning from on-premises contact centers. Aceyus brings pre-built integrations and tools that streamline the migration process and ensure a smooth transition to the Five9 cloud platform. Five9 continues to offer Five9 IVA Studio. This edition provides developers with an additional set of Conversational AI tools, enhancing their portfolio of Speech-to-Text, Text-to-Speech, Sentiment Analysis, and Voice Biometrics engines.

Strengths

- Omnichannel IVA
- Generative AI
- Agent Assist
- AI Insights
- Voice library including custom voices
- Seamless handoff between bots and live agents
- No-code IVA Development Platform
- LLM Code Crafter

Challenges

- Growing awareness outside of North America

Google

Google, led by CEO Sundar Pichai and based in Mountain View, California, continues to invest heavily in AI and its applications across Google Cloud and Google Workspace. In the realm of Conversational AI, Google Cloud Conversational Agents (formerly known as Dialogflow CX) is the flagship offering for building no-code chat and voice bots and hybrid virtual agents with both deterministic and generative AI functionality.

In September 2024, Google rebranded and significantly enhanced its Contact Center AI (CCAI) and Contact Center AI Platform (CCAI-P) solutions, introducing the Customer Engagement Suite with Google AI. This end-to-end application combines advanced conversational AI, omnichannel CCaaS functionality, and the speed of the Gemini 1.5 Flash model to deliver exceptional customer experiences at every touchpoint.

Over the last year, Google has also introduced Vertex AI Agent Builder, a collection of tools for enterprise developers to build, test, deploy, and monitor generative AI agents and applications at scale. Vertex AI Agent Builder leverages Google's foundation models, search expertise, and conversational AI technologies. It includes Conversational Agents and Vertex AI Search, a fully managed platform for building AI-powered search and recommendation experiences, and other tools and primitives, such as reasoning engine and function calling for builders to build AI Agents.

In 2024, Google significantly advanced its Gemini family of AI models. Initially launched with Ultra, Pro, and Nano versions, Gemini expanded to include 1.5 Flash and 1.5 Pro, offering enhanced performance and capabilities. Notably, Gemini 1.5 Pro introduced a breakthrough long context window of up to 2 million tokens, enabling analysis of extensive amounts of information. The lightweight 1.5 Flash was also introduced, optimized for speed and efficiency at scale.

With its ongoing investments in AI, LLMs, and Conversational AI, Google is well-positioned to help enterprises with their virtual agent needs.

Strengths

- GCP ecosystem
- Deep AI commitment
- Omnichannel
- Vertex AI Search and Conversational Agents
- Generative AI
- Prebuilt agents

Challenges

- Bringing AI innovations to the market at a rapid pace, while supporting legacy contact center solutions

Intermedia

Intermedia, headquartered in Sunnyvale, California, and led by CEO Michael Gold, continues to expand its portfolio of communication and collaboration solutions. Its flagship UCaaS platform, Intermedia Unite, is complemented by Intermedia Contact Center, email and content management offerings, and archiving solutions.

Intermedia has made significant strides in AI. In 2023, the company launched SPARK AI technology that leverages Generative AI, Large Language Models, and NLP to power features like AI Meeting Notes & Action Items, AI Evaluator, AI Interaction Summary, AI Call Transcription, AI Sentiment Analysis and AI Transaction Redaction, which automatically removes sensitive information like credit card numbers and personal health data from call transcriptions. Intermedia has made SPARK AI the core focus of its product roadmap, with the goal to help businesses, both large and small, enhance employee collaboration and customer care, protect their IP, and realize greater mobility, efficiency, productivity, and cost savings.

In 2024, Intermedia announced a new SPARK AI feature called "AI Agent Assist," which uses dedicated knowledge bases using unstructured data (PDFs, text, doc) to provide real-time suggestions and guidance to contact center agents during customer interactions. Agents engage AI Agent Assist using natural language in a collaborative chat format, and AI Agent Assist uses Generative AI to access information approved for specific queues to provide an answer (e.g., return policies, troubleshooting instructions, account access protocols, etc.) Intermedia also introduced AI-driven "Evolving Sentiment Analysis" to provide insights into customer emotions during calls. In July 2024, they announced an update to AI Agent Evaluator. This tool is designed to help supervisors deliver more efficient and impactful feedback to contact center agents with detailed insights and workflow automation for recorded calls. Key features include evolving sentiment analysis with granular insights, automated call tagging and topic identification, and detailed agent behavior metrics.

Intermedia primarily serves small and medium-sized businesses (SMBs) across various industries. Its channel-focused strategy relies heavily on resellers, including white-label partnerships. In September 2024, Intermedia entered into a definitive agreement with NEC to assume NEC's UNIVERGE BLUE UCaaS and CCaaS operations in North America and Other Regions.

Intermedia Unite offers a comprehensive suite of cloud-based communication tools, including telephony, messaging, video conferencing, and webinars. Its integrations with popular platforms like Google Workspace, Microsoft Teams, and Slack enhance its value proposition.

With its robust UCaaS and CCaaS offerings, commitment to AI innovation with SPARK AI, and global partner network, Intermedia is well-positioned to serve the evolving needs of the SMB market.

Strengths

- Cloud PBX
- Growing AI Capabilities
- Call center
- Mobile app
- Native CRM integrations
- Channel focus

Challenges

- Market awareness

NICE CXone

NICE, a leader in AI-powered customer experience solutions, has launched the next generation of its CXone platform, CXone Mpower. This enhanced platform introduces advanced architectural services designed to deliver full-scale customer service automation. CXone Mpower enables seamless integration of workflows across front, mid, and back-office operations, orchestrates AI and human agents, and consolidates customer service knowledge, AI models, and integrations.

This launch reflects a growing trend towards automation in customer service, with 60% of businesses planning to adopt labor-replacing automation in the coming year. CXone Mpower empowers organizations to design, build, and operate every element of the customer journey, achieving end-to-end CX automation.

CXone Mpower expands on the existing CXone architecture, enabling the orchestration of human and AI agents on a single platform. It equips employees with an adaptive, proactive copilot to enhance workflows and boost productivity. Furthermore, it allows for the rapid development of sophisticated AI agents using domain-specific AI capabilities.

The platform consolidates data, knowledge, and AI models into a single intelligent hub, providing robust access control and guardrail management. By leveraging NICE's domain-specific AI models, businesses can unlock the full potential of large language models (LLMs) and inject real-time, contextual insights into every interaction.

With its focus on automation, AI orchestration, and a consolidated knowledge hub, CXone Mpower aims to transform contact centers from cost centers into profit centers, achieving operational efficiency at scale. NICE's continued investment in AI innovation reinforces its commitment to delivering exceptional customer experiences and solidifies its position as a leader in the contact center industry.

Strengths

- Enlighten CX platform
- End-to-end journey orchestration
- Generative AI
- Proactive and personalized conversations
- No-code conversational designer
- Industry specific solutions OOTB
- Global partner ecosystem

Challenges

- Balancing between direct and third-party implementation partners

RingCentral

RingCentral, headquartered in Belmont, CA, and led by founder and CEO Vlad Shmunis, has maintained a strong presence in the contact center market. Following the 2023 launch of its native contact center solution, RingCX, the company has continued to innovate and expand its offerings. RingCX is an AI-first, easily deployable platform that provides a comprehensive omnichannel experience. It seamlessly integrates with RingCentral MVP, leveraging existing functionalities such as Voice Calling, Team Messaging, and RingCentral Intelligent Video.

Beyond RingCX, RingCentral offers a growing suite of AI-powered products and services, including Intelligent Phone Solutions, Intelligent Meetings and Messaging, Webinars/Events, and its robust Contact Center offering. The RingCentral Intelligent UCC platform, with high-quality, reliable voice and video conferencing, mobile messaging, and a cloud contact center, is now available in 46 countries.

In 2024, RingCentral significantly enhanced the AI capabilities within RingCX by introducing a native, real-time AI-powered assistant for agents and supervisors. RingCX AI Agent Assist actively listens to customer interactions and offers contextual suggestions, improving accuracy, timeliness, and personalization. RingCX AI Supervisor Assist monitors interactions and alerts supervisors to potential issues, providing them with transcripts and summaries for efficient intervention. Additionally, RingCentral introduced AI Coaching Insights, which automatically analyzes interactions and generates personalized coaching suggestions for agents, streamlining quality management workflows.

RingCentral focuses on a diverse range of industries, including healthcare, financial services, education, retail, and government. The company's focus on providing reliable and secure communication and collaboration tools makes it a suitable choice for businesses of all sizes and across various sectors. With the growth of its new Contact Center offering and its focus on AI, RingCentral is well-positioned with its Intelligent Contact Center offering.

Strengths

- Overall portfolio
- RingCentral brand
- Growing AI capabilities
- Team messaging and collaboration functionality
- Unified client
- Ease of configuration and deployment
- Open platform
- IUC&C marketplace

Challenges

- Managing its growing set of partner and OEM channels

Vonage

Vonage, a wholly-owned subsidiary of Ericsson, is based in Holmdel, NJ, and led by CEO Niklas Heuveldop. In October 2024, Vonage announced industry veteran Anthony Bartolo as its new COO. Vonage offers a suite of solutions covering Unified Communications, Conversational Commerce, Contact Center, and Communications APIs, through the cloud-based Vonage Communication Platform.

Vonage provides conversational AI solutions across its platform, offering both a no-code drag-and-drop interface with its AI Studio and a rich Communication API library to design and deploy conversational solutions. The Vonage AI Studio leverages underlying APIs, allowing direct programming and integration with other systems and alternative AI engines with its drag-and-drop interface.

Vonage's AI Virtual Assistant supports omnichannel conversations across both digital and voice channels. It offers self-service experiences for customers and employees and provides seamless handoff to live agents, if needed, with a full call transcript. Vonage enhanced its platform in 2024 with new AI-powered features and integrations. A major focus has been the launch of the Vonage Contact Center (VCC) Intelligent Workspace, designed to enhance the agent experience with a simple, intuitive interface.

Vonage also joined Salesforce's Bring Your Own Channel for Contact Center as a Service (BYOC for CCaaS) pilot program. This allows Vonage Premier for Salesforce Service Cloud Voice customers to integrate Vonage's omnichannel and AI-powered capabilities into their existing contact center solutions. This includes voice, SMS, chat, social messaging apps like WhatsApp, and more.

A key differentiator for VCC is its multi-mode agent model, allowing different agent experiences within the same VCC backend. This is powered by out-of-the-box integrations with leading CRMs and business productivity tools. VCC also integrates easily with Vonage Business Communications (VBC), a unified communications solution. This combined offering, Vonage Fusion, provides a seamless user experience, enabling organizations to incorporate back-office employees into the customer experience.

Vonage offers its own proprietary conversational AI solutions and provides the ability to integrate large language models (LLMs) from various providers into Generative AI. It also provides flexibility in deployment choices, ranging from fully self-service solutions using AI Studio to fully managed solutions where Vonage designs, develops, and manages the entire solution stack.

Strengths

- Omnichannel
- Extensive API library
- Sentiment analysis
- Pre-built virtual agent templates
- No-code conversation flow builder
- Proprietary NLP technology
- Vonage Marketplace
- Strong partner network

Challenges

- Balancing focus on UC&C and contact center

Contenders

8x8

8x8, led by CEO Samuel Wilson, provides an integrated approach to Unified Communications and Contact Center (XCaaS) through its 8x8 experience Communications platform. This platform includes cloud-based voice, contact center, video, mobile, and unified communications solutions for businesses.

8x8's solutions are designed to deliver smart self-service by automatically handling customer requests through natural, conversational experiences. Its Intelligent Customer Assistant enables businesses to create self-service experiences across multiple channels. This solution offers graphical orchestration capabilities, allowing enterprises to build scalable, consistent experiences across multiple regions and languages.

8x8 has expanded the capabilities of its Intelligent Customer Assistant in 2024, with a focus on enhanced voice and digital customer engagement. This includes AI-powered voice support for a wider range of use cases, such as managing healthcare appointments, sales support, and order management. These enhancements have led to a significant increase in customer adoption, with over one million interactions conducted on the platform to date.

The updated Intelligent Customer Assistant offers features such as streamlined workflows, complete customer context for agents, rapid deployment across multiple channels, rich conversation insights, and turnkey integration options. These enhancements enable organizations to improve operational efficiency, increase first-contact resolution rates, and enhance customer satisfaction.

8x8 also offers Conversation IQ, which provides AI-infused quality management and speech analytics solutions. This functionality captures and analyzes 100% of conversations across all channels, providing agents with targeted feedback and guidance to improve the customer experience. 8x8 provides solutions tailored to various industries, including education, government, manufacturing, retail, financial services, healthcare, and transportation.

Strengths

- XCaaS platform
- Generative AI
- Omnichannel
- Intelligent IVR
- Conversation IQ
- Cloud-native UCaaS, CCaaS and CPaaS

Challenges

- Continuing to expand AI across its platform

AWS (Amazon Connect)

Amazon Web Services (AWS), headquartered in Seattle, WA, is a leading cloud provider of infrastructure platforms and a broad set of services. Under the leadership of CEO Matt Garman (since June 2024), AWS continues to empower enterprises and system integrators across various industries to build and deploy digital applications.

AWS offers a comprehensive suite of services, including core offerings like Amazon Elastic Compute Cloud (EC2), Amazon Simple Storage Service (S3), Amazon Relational Database Service (RDS), and AWS Lambda.

While AWS initially focused on services like Amazon Lex for conversational AI, the landscape shifted significantly in late 2023 with the introduction of Amazon Bedrock. This service provides access to multiple foundation models (FMs) from leading AI providers like AI21 Labs, Anthropic, Cohere, and Meta, including Amazon's own Titan FM, all through a single API.

Bedrock Agents, launched in November 2023, has become the primary environment for building and deploying generative AI agents on AWS. These agents can orchestrate complex tasks, access knowledge bases, and interact with APIs, significantly streamlining the development of sophisticated AI applications.

Further enhancing its AI capabilities, AWS launched Amazon Q, a generative AI-powered chatbot, and in 2024, introduced Amazon Q Apps. This feature allows users to not only utilize pre-built Q Apps but also to create custom applications driven by Amazon Q, further expanding the potential of this AI service.

AWS serves a diverse range of industries, from healthcare and finance to retail and the public sector. Its services support a wide array of use cases, including data storage and analytics, application development, and machine learning, and now, with a strong emphasis on generative AI, AWS continues to lead the way in cloud innovation.

Strengths

- Omnichannel
- Generative AI
- AWS application stack
- AWS Marketplace
- Deep Partner Network

Challenges

- Choosing from a multitude of application options available within AWS

Content Guru

Content Guru, led by co-founder and Global CEO Sean Taylor, provides cloud contact center solutions through its storm® platform, catering to both enterprises and SMBs. storm® focuses on enhancing customer experience through AI-powered solutions and integrations. Their conversational AI solution, storm Machine Agent™, delivers intelligent automation and customer service across all channels, while their brain® solution incorporates conversational and generative AI technologies, providing access to services like Speechmatics, Google Dialogflow, Azure AI, and IBM Watson.

Machine Agent autonomously resolves user requests, assesses customer needs for effective call routing, and provides agent assistance with next-best-action guidance. It offers out-of-the-box solutions for various industries, with a particular focus on healthcare, government, education, financial services, insurance, and manufacturing. In 2023, Content Guru expanded its brain® AI portfolio with generative AI services and support for OpenAI's GPT-4, Anthropic, Meta, and Mistral AI, simplifying generative AI technology for storm users.

Content Guru leverages generative AI to provide accurate call transcripts and summaries, including sentiment and call assessment analytics, reducing agent after-call work. The storm FLOW feature enables users to create complex omnichannel customer journeys through a drag-and-drop interface. FLOW integrates with a wide range of business systems, including CRM platforms like Salesforce and Microsoft Dynamics, as well as various communication channels, such as WhatsApp, SMS, video, and social media platforms, for accessing and managing customer data. It also provides a revisioning system for easy deployment and rollback of changes.

Content Guru has experienced significant growth in 2024, with headcount surpassing 500 employees. They continue to focus on generative AI, particularly human-assist capabilities, to improve CX performance. Content Guru has also updated its agent desktop interface for enhanced accessibility, complying with WCAG v2.2 AA standards.

Strengths

- Omnichannel
- No-code journey orchestration
- Vendor independent Conversational AI models
- Vendor independent Generative AI models
- Sentiment analytics
- Image analytics

Challenges

- Replicate success in EMEA and APAC across other regions

Genesys

Genesys, headquartered in Menlo Park, California, and led by Chairman and CEO Tony Bates, is a leading provider of cloud-based customer experience orchestration solutions. The company offers a comprehensive suite of products, including Genesys Cloud, an AI-powered platform for contact centers, workforce engagement management, and journey orchestration. In October 2024, Genesys confidentially filed for an initial public offering (IPO) in the United States, aiming to capitalize on the growing demand for AI solutions in the customer experience market.

Genesys has been actively enhancing its AI capabilities across its product portfolio. In May 2024, at Xperience 2024, the company announced several new AI-powered features for its Genesys Cloud platform, including Agent Copilot, Virtual Agent, Empathy Detection, and Modern Agent Workspace. These innovations are designed to improve both customer and employee experiences by enabling more efficient and personalized interactions.

Throughout 2024, Genesys has focused on expanding its AI capabilities within the Genesys Cloud platform. The introduction of Agent Copilot, Virtual Agent, Empathy Detection, and Modern Agent Workspace signifies the company's commitment to delivering innovative solutions that leverage AI to enhance customer service and support.

Genesys caters to a wide range of industries, including financial services, healthcare, retail, telecommunications, and technology. Its solutions are designed to meet the diverse needs of businesses across various sectors, enabling them to deliver exceptional customer experiences. Genesys offers a robust ecosystem of integrations through its AppFoundry Marketplace, which features over 500 applications and integrations. The company continues to expand its partnerships and integrations to provide customers with a seamless and comprehensive solution for their customer experience needs.

With its strong focus on AI innovation and its comprehensive suite of customer experience solutions, Genesys is well-positioned for continued growth in the evolving market. The company's strategic investments in AI, coupled with its expanding partner ecosystem, are expected to further strengthen its position as a leader in the customer experience orchestration space.

Strengths

- Omnichannel
- Generative AI
- No-code conversation builder
- Genesys AppFoundry marketplace
- Large Install base
- Deep partnership network

Challenges

- Supporting both on-prem and cloud-based offerings
- Integrating acquired technologies into its platform

Salesforce

Salesforce, based in San Francisco, California, is led by co-founder, chairman, and CEO, Marc Benioff. Salesforce introduced the concept of SaaS and cloud-based CRM in 2000 and over the course of the last two plus decades has expanded its product portfolio into a multitude of industry-specific cloud offerings designed to meet the needs of different sectors. Salesforce Service Cloud is a service designed to support customer service.

Salesforce Service Cloud offers a suite of conversational, predictive, and generative AI solutions as part of its customer service offering. These solutions aim to deliver personalized service and save time by integrating AI directly into the workflow, creating seamless experiences for agents and customers.

In March 2023, Salesforce introduced Einstein generative AI to deliver AI-generated content across its app-specific clouds, grounding in data and knowledge contained in its CRM platform to improve customer experience.

In September 2024, Salesforce announced Agentforce, its AI-based agent platform. Note that Agentforce is an update to Einstein CoPilot that was announced in 2023. The offerings include:

- **Agent Sales:** An AI-powered sales development representative (SDR) agent that can qualify leads, schedule meetings, and update Salesforce records.
- **Agent Coach:** An AI-powered coaching tool that provides real-time feedback and guidance to agents during customer interactions.
- **Agentforce Development:** A low-code platform that allows developers to build and customize their own AI agents.

With the introduction of Agentforce, Salesforce is further expanding its AI capabilities and providing businesses with more ways to automate tasks, improve customer service, and enhance agent productivity.

Strengths

- Omnichannel
- Generative AI
- Leverage data across entire Salesforce platform
- Global public cloud
- Strong partner and industry marketplace

Challenges

- Difficulty selecting from a multitude of product offerings

ServiceNow

ServiceNow, based in Santa Clara, California, is led by CEO Bill McDermott. The company offers a comprehensive suite of digital workflow solutions, including the Now Platform, which is designed to streamline and automate enterprise operations. In the past year, ServiceNow has raised its subscription revenue guidance, reflecting strong financial performance and growth.

In terms of new offerings, ServiceNow has introduced several AI-driven innovations. The Now Platform Xanadu release features hundreds of new AI capabilities aimed at enhancing customer agility, productivity, and employee experiences. The company has also expanded its generative AI (GenAI) capabilities within Now Assist, which are designed to boost productivity, accelerate cost savings, and empower customers and employees to innovate at scale.

ServiceNow has made significant product announcements in September 2024. The company launched the Now Assist generative AI portfolio, including Now Assist in Virtual Agent, flow generation, and Now Assist for Field Service Management. Additionally, ServiceNow introduced Workflow Data Fabric, an enhanced integrated data layer that unifies business and technology data across the enterprise. Human oversight and governance are built-in to ensure responsible AI usage. Initially, these features will focus on Customer Service Management (CSM) and IT Service Management (ITSM), with plans to expand to other departments.

The major industries targeted by ServiceNow include manufacturing, banking, finance, insurance, education, healthcare, and energy and utilities. These sectors benefit from the customized ServiceNow platform, which accelerates automation across IT workflows.

ServiceNow offers a wide range of integrations, including new partnerships and collaborations announced in 2024. Notable integrations include the Zero Copy partnership with Snowflake, which connects enterprise-wide data to solve mission-critical problems at scale, and the expanded strategic alliance with Microsoft, combining generative AI capabilities to enhance employee choice and flexibility.

ServiceNow is well-positioned for the future, leveraging its AI-driven innovations and strategic partnerships to drive business transformation and deliver value to its customers.

Strengths

- Omnichannel
- Generative AI
- Pre-built conversation templates
- No-code conversation flow builder
- Integration with ServiceNow and external systems

Challenges

- Awareness in the Contact Center market

Innovators

Balto

Balto, based in St. Louis, Missouri, is led by co-founder and CEO Marc Bernstein. The company provides AI-powered Real-Time Guidance, Real-Time Coaching, and Balto QA Copilot for contact centers aimed at improving agent performance and enhancing customer experience. In the past year, Balto has introduced several new offerings and innovations.

In early 2024, Balto unveiled Balto QA Copilot, a generative AI-driven solution that revolutionizes QA call scoring. This new tool allows users to auto-score calls based on natural language criteria, eliminating the need for constraining limitations or templates. Balto QA Copilot is part of the same platform trained on 40 million customer calls, helping QA teams focus on improving agents' conversations rather than just scoring them.

In 2023, Balto introduced two other generative AI solutions: Real-Time Notetaker and BaltoGPT. Real-Time Notetaker uses Natural Language Processing to synthesize conversations into accurate call summaries, significantly reducing after-call work for agents. BaltoGPT is a prompt-based generative AI solution trained on specific contact center content, enabling agents and supervisors to gain insights about best practices and coaching suggestions.

Balto targets major industries such as telecommunications, finance, healthcare, and retail. These sectors benefit from Balto's AI-driven platform, which offers features like smart checklists, voice-triggered dynamic prompts, and notifications that reinforce best practices and discourage bad habits. The platform also employs gamification techniques to make the experience more enjoyable and competitive for agents.

Balto offers a wide range of integrations, including new partnerships and collaborations announced in 2024. These integrations enhance the platform's capabilities and provide seamless connectivity with other enterprise systems.

Balto is well-positioned for the future, leveraging its generative AI innovations and strategic partnerships to drive business transformation and deliver value to its customers.

Strengths

- Easy integration to leading ICC vendors
- BaltoGPT
- Easy click & type playbook designer
- Real-time coaching and guidance
- Real-time notifications
- Gamification

Challenges

- Awareness outside North America

ConvergeOne

C1 (formerly ConvergeOne), led by CEO Jeffrey Russell, is a global technology solutions provider with 35 years of experience in delivering AI-powered communications, infrastructure and security solutions. In June 2024, C1 announced C1 Elly™, a fully managed generative AI platform. That platform includes a series of intelligent agents, such as C1 Elly Assist and C1 Elly Automate.

C1 Elly Automate is a fully managed IVA that integrates with a customer's enterprise data, offering authentic, human-like interactions. It enables various departments to have always-on, omnichannel support tailored to their needs, enhance customer and employee interactions, and empower teams with AI-powered self-service.

C1 Elly Assist is an AI copilot that facilitates transitions between automated and agent-assisted interactions. It provides real-time summaries, transcripts, and action items, improving agent productivity and the customer experience.

C1 Elly integrates with all data sources across the enterprise via C1CX Fabric, ensuring accessibility across the tech stack. C1 AI Center of Excellence experts manage data and response quality through a continuous monitoring process that quickly updates Elly with accurate and relevant information. C1 Elly prioritizes safety with security measures like Role-Based Access Control, dedicated Google Cloud instances, and its proprietary Human Experience Quality Index (HXQi) technology that provides guardrails to prevent hallucinations and encrypted communications.

C1 has established key partnerships and integrations to enhance its platform's capabilities. These include collaborations with Google Cloud for secure and scalable infrastructure and integrations with enterprise data sources and contact center solutions providers to ensure seamless data flow and interoperability. Through its AI Center of Excellence, C1 actively participates in various industry consortia and initiatives to stay at the forefront of AI technology, governance, and customer and employee experience innovation.

C1 Elly simplifies AI implementation and maximizes value for businesses. It addresses challenges such as integration complexity, data quality issues, and safety through guardrails that reduce hallucinations and limited skills through its managed platform and expert support. C1's experience as a managed services provider, expertise in AI technology, and track record of delivering enterprise solutions position them as a partner for businesses looking to leverage AI, not just in the contact center but also across the enterprise.

Strengths

- Easy integration to leading ICC vendors
- Contact Center Expertise
- Real-time coaching and guidance
- Real-time notifications

Challenges

- Awareness outside North America

Cresta

Cresta, based in Palo Alto, California, is led by CEO Ping Wu, a former Google AI executive. The company offers four conversational AI product offerings focused on the intelligent contact center (ICC): Cresta Agent Assist, Cresta Director, Cresta Insights, and Cresta Virtual Agent.

Cresta was an early adopter of generative AI and has been using large language models (LLMs) throughout its suite of products since 2019. In 2023, Cresta introduced Ocean-1, its own proprietary foundation model specific to contact centers. The Ocean-1 LLM is trained with anonymized domain-specific conversation data covering the industry verticals Cresta serves, including telecommunications, travel & hospitality, financial services, healthcare, and more.

In 2024, Cresta announced the launch of its new Voice Virtual Agent. This innovative solution combines the power of generative AI with a human-centric platform approach to provide 24/7 personalized and empathetic customer experiences. The Voice Virtual Agent is designed to handle complex, multi-step workflows and works seamlessly with and learns from human agents. This new offering sets Cresta apart by troubleshooting even the most complex challenges and proactively identifying upsell opportunities.

Cresta Opera is a no-code conversation rule builder powered by generative AI with pre-built components that can be invoked based on behaviors, intents, and triggers observed during a conversation.

Cresta targets major industries such as telecommunications, travel & hospitality, financial services, and healthcare. These sectors benefit from Cresta's AI-driven platform, which offers features like real-time coaching, guidance, and insights to enhance agent performance and customer experiences.

In 2024, Cresta expanded its voice platform integrations to include headphone functionality, enabling legacy, on-premise contact centers to access the benefits of the cloud without fully committing to a cloud transformation. Cresta is well-positioned for the future, leveraging its generative AI innovations and strategic partnerships to drive business transformation and deliver value to its customers.

Strengths

- Omni-channel
- Generative AI
- Ocean-1 LLM
- Real-time coaching and agent-assist
- Automatic real-time call summary
- Post-call analytics and business insights

Challenges

- Awareness outside North America

Dialpad

Dialpad, headquartered in San Ramon, California, and led by Founder and CEO Craig Walker, continues its strong focus on AI innovation across its product suite. With the recent appointment of Jen Grant as CMO in early 2024, the company is well-positioned for continued growth and market penetration. Dialpad's AI-powered customer Intelligence Platform provides a unified solution with an AI Contact Center, AI sales Center, AI messaging, AI meetings, and AI voice, catering to both sales and customer experience professionals.

Dialpad continues to advance its AI capabilities across its platform. In July 2024, the company announced the general availability of Ai Sales, powered by their proprietary large language model, DialpadGPT. This offering leverages over six billion minutes of business conversations to deliver real-time coaching, automated note-taking, and customized sales playbooks. Ai Sales is designed to reduce reliance on multiple applications, allowing sales professionals to focus on building relationships and closing deals.

In addition to Ai sales, Dialpad introduced real-time agent assistance in 2024 for its AI Contact Center. This feature provides agents with instant knowledge base access and recommended responses during live interactions. Dialpad provides a no-code workflow builder, enabling business users to design multi-step and complicated pathways that are personalized based on a customer's status, history, open tickets, and more. It's AI and machine learning automatically determine customer intent based on natural conversations.

Dialpad focuses on contact centers for sales organizations and HR/Talent Acquisition teams. Dialpad continues to expand its API offerings and maintains its strategic partnership with Google, leveraging Google Cloud Platform's global data centers for scalability and reliability. They have also expanded their integrations with Salesforce for seamless data synchronization. With its ongoing commitment to AI innovation, expanding integrations, and a new CMO-driving marketing strategy, Dialpad is poised for continued success in the evolving communications landscape.

Strengths

- Natively integrated AI capabilities
- Generative AI
- Dialpad AI Labs
- DialpadGPT
- Real-time transcription
- Real-time analytics
- Visual bot builder
- App Marketplace

Challenges

- Maintain focus across a wide range of product offerings

Replicant

Replicant, founded by Gadi Shamia (CEO) and Benjamin Gleitzman (CTO), focuses on automating common customer service calls, allowing human agents to address more complex issues. The firm has raised \$78 million in Series B funding led by Stripes, with participation from Salesforce Ventures and others.

At the heart of Replicant's platform is its AI agents, a conversational AI engine that engages customers in natural conversations across voice, text, and digital channels. This technology enables businesses to resolve tier-1 support issues autonomously, freeing up human agents for more demanding tasks.

Replicant's platform is designed for rapid implementation and offers numerous pre-built components, including open-ended intents, FAQs, and integrations with existing contact center technologies like IVR, CCaaS, and CRM. The platform also provides pre-trained packages for various industries, including transportation, travel & hospitality, consumer services, insurance, and healthcare.

Replicant's fully configurable dashboard provides visibility into conversation transcripts for easier monitoring alongside advanced analytics for real-time insights into the performance of conversation flows, what issues are leading to escalations, and why customers are contacting support. Replicant also enables conversation flows to be updated in real-time with self-service script editing to enhance the customer experience based on insights from analytics.

Replicant provides pre-trained packages for various industry verticals, including transportation, travel & hospitality, consumer services, insurance, and healthcare. It can read, transform, and store data from a variety of knowledge sources and use generative AI models to provide a summarized contextual response.

Replicant scales up or down instantly and integrates with leading contact centers, CRM, and telephony providers. It can be implemented in weeks, handling millions of customer support interactions a month for leading brands across various industries.

Strengths

- Omni-channel
- Autonomous resolution of Tier-1 issues
- Pre-built conversation components for faster deployment
- Out-of-the-box integrations to 3rd party applications
- Advanced conversation analytics
- Generative AI

Challenges

- Awareness outside of North America

Talkdesk

Talkdesk, headquartered in San Francisco and led by CEO Tiago Paiva, continues to expand its leadership team and enhance its platform. In 2024, Talkdesk remains focused on delivering a comprehensive and innovative Intelligent Contact Center (ICC) solution. Its offerings include the core ICC platform, Talkdesk AI, Talkdesk Builder, Talkdesk Knowledge Management, Talkdesk Workforce Management, and Talkdesk Workspace.

Talkdesk is deeply invested in AI. In 2023, they announced the integration of generative AI across their platform, introducing features like automated summaries, topic discovery, and bias detection. Talkdesk AI Trainer empowers agents to improve AI models, while Talkdesk Agent Assist provides next-best-action recommendations during live interactions. These generative AI capabilities enhance existing features like Talkdesk QM Assist, which originally focused on transcription. In September 2024, Talkdesk introduced Talkdesk AI Rewriter and Talkdesk AI Translator. AI Rewriter allows agents to instantly rewrite text in a professional, friendly, or empathetic tone to match a customer's sentiment, while AI Translator automates text translation for digital interactions, enabling agents to engage with customers in any language.

Talkdesk Workspace allows for personalization of the user interface and unifies all CX applications and data. It leverages Talkdesk Builder, a low-code/no-code tool that enables the customization of workspaces, routing, reporting, automation, and integrations. Talkdesk continues to expand its platform's reach, achieving the US Government FedRAMP In-Process designation in 2023, paving the way for broader adoption within federal agencies.

Talkdesk caters to specific industry needs with tailored solutions like Talkdesk Financial Services Experience Cloud, Talkdesk Healthcare Experience Cloud, and Talkdesk Retail Experience Cloud. The Talkdesk AppConnect marketplace offers 1-click access to over 80 contact center applications, extending the platform's capabilities and providing flexibility for businesses.

With its ongoing focus on industry-specific solutions, commitment to platform development, and continued investment in AI, Talkdesk is offering a differentiated go-to-market for its products and services.

Strengths

- Omnichannel
- Native AI
- Generative AI
- Voice biometrics
- Enterprise App Store
- No-code conversation flow builder
- Pre-configured industry specific solutions

Challenges

- Growing Brand awareness in APAC

Specialists

Convoso

Convoso, based in Woodland Hills, California, is led by co-founder and CEO Nima Hakimi. The company offers a robust suite of solutions for outbound call centers, including a Conversational AI solution to automate conversations. The Convoso platform provides a preview dialer, progressive dialer, power dialer, and predictive dialer, offering high flexibility, efficiency, and high contact rates. The platform is highly scalable, with its customers placing over one billion calls per month.

In 2024, Convoso will continue to innovate with its AI-driven solutions. The company has enhanced its Voso.ai conversational AI solution, which automates engagements, accelerates the sales pipeline, and improves lead generation performance. Voso.ai employs advanced conversational AI technology, including generative AI through large language models (LLMs), to automate routine interactions at scale, improving lead response rates. It engages prospects in natural conversation over both digital and voice channels, making them feel as though they are interacting with a live person and transferring high-intent prospects to live agents.

Convoso targets major industries such as marketing, insurance, solar, financial services, and home services. These sectors benefit from Convoso's AI-driven platform, which offers features like caller ID reputation management, answer machine detection, and compliance tools to help with TCPA and state regulations. Administrators benefit from a flexible administration experience, advanced workflow automation tools, and real-time analytics reporting.

Convoso offers a wide range of integrations, including new partnerships and collaborations announced in 2024. The platform's open API makes it easy to integrate with third-party applications such as Balto, Microsoft Dynamics, Salesforce, Zapier, and many more. This seamless connectivity enhances the platform's capabilities and provides a comprehensive solution for outbound call centers. Convoso is well-positioned for the future, leveraging its AI-driven innovations and strategic partnerships to drive business transformation and deliver value to its customers.

Strengths

- Omnichannel AI
- Automates Inbound / Outbound Engagements
- Enables leads to use conversational language
- Conversational tone matched to business brand
- Conversational AI trained on sales domain
- Goal-oriented dialog management
- Seamless integration with dialing platform
- Tier 1 carrier relations
- Rich analytics and reporting

Challenges

- Market awareness outside North America

Khoros

Khoros, based in Austin, Texas, is led by CEO Chris Tranquill. In addition to its social media management software and online community management software, Khoros provides a digital-first contact center platform with conversational AI capabilities. The company offers a comprehensive suite of solutions designed to enhance customer engagement and operational efficiency.

In 2024, Khoros introduced a generative AI-powered platform that enhances self-service customer care. Khoros enables brands to automate conversations, providing self-service responses that allow human agents to focus on more complex, higher-value tasks. Khoros chatbots can also be used in an agent assist mode where the chatbot provides the next best action options to human agents, offloading time-consuming research.

The Khoros platform integrates with a wide array of messaging channels, including chat, social media, mobile messaging, and voice assistants. This integration allows brands to create a single omnichannel chatbot and resolves incompatible UI elements, enabling the bot to leverage the best features available on each channel. Khoros offers three tiers of service to satisfy brands with a wide variety of conversation design expertise and available resources. This ranges from an entire self-service approach where brands design and deploy chatbots on their own to a supported service model where Khoros provides the support necessary for a successful design and launch to a fully managed service where Khoros performs all the work.

By coupling generative AI with real-world conversation data, a robust orchestration framework, and omnichannel engagement tools, Khoros enables self-service, automated care that scales and requires less time and people to build.

Khoros targets major industries such as telecommunications, financial services, healthcare, and retail. These sectors benefit from Khoros' AI-driven platform, which offers features like natural language understanding (NLU) to identify customer intents and respond to common inquiries, allowing agents to focus on more complex tasks. Khoros offers a wide range of integrations, including new partnerships and collaborations announced in 2024.

Strengths

- Omnichannel
- No-code chatbot builder
- Flexible deployment and support model
- Integration with social channels and online communities

Challenges

- Balancing focus between contact center and other business segments

Final Considerations for AI Agent Platforms in the Intelligent Contact Center

Agent Assist should be considered essential and foundational by all ICC Providers. There are many providers offering out-of-the-box knowledge of industry verticals using either fine-tuning or RAG technology to greatly simplify the implementation and shorten the training time needed by these models. However, these still need to be configured and tuned to an enterprise's specific offerings.

Whether an enterprise chooses an ICC provider's native Agent Platform solution or integrates another solution will be highly dependent on the use cases and unique requirements. Aragon recommends performing a detailed feature evaluation and conducting a pilot program when evaluating conversational AI providers. Enterprises that are successful in deploying conversational AI solutions in the ICC will have a significant advantage, both economically and from an overall user experience, over those that are not.

Aragon Advisory

- Enterprises need to embrace AI-based virtual agents to improve human agent productivity and overall customer experience.
- AI Agent Platforms are evolving rapidly, and as such, product roadmaps from vendors need to be evaluated carefully.
- AI Agent use cases will grow rapidly, but enterprises need to have solid deployments of basic Agent Assist before venturing into custom agent building.

Bottom Line

With virtual agents here to stay, the Contact Center market is changing. Enterprises need to embrace this change, and it starts with learning more about the capabilities of their current and future providers. The selection and implementation of Agent Platform offerings should always be focused on the desired business outcome, not on the technology itself.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategies and performance to be compared regardless of their size and market share. It will improve the recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

The strategy reflects the degree to which a vendor has the market understanding and strategic intent that is at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time on the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer experience:** Feedback on the product, installs, upgrades, and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international*, or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Sections of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

Conversational AI is defined by Aragon as the platforms used to create chatbots and virtual agents. These offerings interact with humans and/or other chatbots/agents via text or voice, or both.

- A minimum of \$5 million in primary revenue for conversational AI solutions or a minimum of \$10 million in revenue in a related market (team collaboration / messaging, RPA, or other related software market).
- Shipping product. Product must be announced and available.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process.