



OVUM DECISION MATRIX

Selecting a Home-Based Outsourcing Vendor, 2014–15

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Making Ovum's Enterprise Shortlist

Home-based outsourcing is the future—here and now for companies to complete and on-demand talent to perform.

The benefits are undeniable. They've validated by clients, their customers, work-at-home agents, market experts and analysts alike. For business, the question is: Who to choose?

Industry analyst Ovum presents an insightful case in its new report, "Ovum Decision Matrix: Selecting a Home-Based Outsourcing Vendor, 2014-15."

Ovum ranks Working Solutions among the market leaders: "...worthy of a place on most enterprise selection shortlists. The vendor has established a commanding market position with a service and record that are widely accepted as best-of-breed."

Principal analyst Peter Ryan examines the market dynamic and positions of service providers assessed. These excerpts are taken from his report, worthwhile reading for companies wanting to invest in home-based services.

OVUM DECISION MATRIX: SELECTING A HOME-BASED OUTSOURCING VENDOR, 2014-2015

VENDOR ANALYSIS

Working Solutions – Ovum recommendation: leader

Dallas-based home agent outsourcer Working Solutions has been classified as a leader in this year's Decision Matrix.

It has been in the business for nearly 20 years and has proven itself to be capable of adapting its offering to suit evolving business environments. This is reflected in Working Solutions' revenue, which was among the top three of the firms examined in this report, coming in behind only Sykes and Arise (The other two leaders identified by Ovum).

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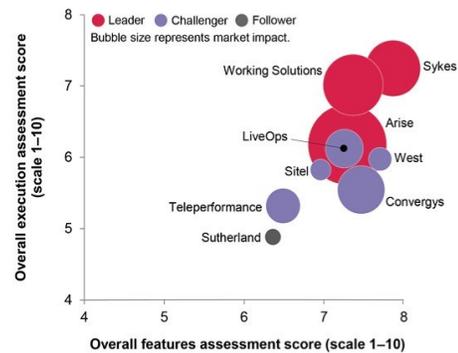


Chart by Ovum depicts market positions of service providers.

In terms of vertical breadth, Working Solutions was the second-most vertically diverse vendor in this study, and was notable in that, from an industry standpoint, its revenues were not heavily weighted toward one particular sector, something that was unique vendors.

Ovum recommendation

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This diversity was also reflected in the fact that Working Solutions manages interactions for firms that are relatively evenly distributed across size bands, proving the company's ability to successfully manage interactions for the SME market—long a target segment for the work-at-home market.

The features of Working Solutions' home agent offering are very solid relative to the competition. In fact, Working Solutions was ahead of the industry average in every category (with the exception of certifications), speaking to the expertise and experience of this firm.

Ovum anticipates that Working Solutions will remain a top-line vendor in the home agent space for the foreseeable future. Its leadership has remained stable and the company has made the right moves to draw in new talent when opportunities have presented themselves. The key initiative to watch will be the company's attempts to increase its geographic footprint beyond North America.

MARKET LEADERS

Market leaders: features

In terms of overall market leaders, Ovum has identified Sykes, Working Solutions, and Arise as the vendors that are setting the standard for home-based contact center outsourcing services. However, all nine companies examined for this Decision Matrix performed strongly in the features category, with very limited difference between players in some cases, speaking to the highly commoditized nature of this industry.

Sykes clearly benefitted from its 2012 acquisition of Alpine Access, which boosted its home-based offering

tremendously (see Ovum's opinion "Sykes buys Alpine Access: consolidation of home agent outsourcing space begins").

The results of this year's Decision Matrix are proof of this, given that Sykes was listed among the top three vendors in a number of features categories, most notably in agent monitoring/security, hiring, and certifications.

Working Solutions was also a leader in the features category, which is unsurprising given the Dallas-based firm's longevity in this delivery model. Similar to Sykes, Working Solutions was included among the top three vendors in six categories, faring especially strongly in agent monitoring/security and workforce optimization.

Arise's performance in the features category was solid, featuring strongly in three categories: pricing models, workforce optimization, and agent equipment supported. Interestingly, West Corporation (a long-time vendor in this space) emerged in the features section as a very strong competitor, featuring among the top three in five separate categories. LiveOps also performed well in terms of features offered, placing among the top three vendors in a number of categories, including workforce optimization and workforce management/scheduling, which is not surprising given the length of time this firm has been providing home-based agent solutions.

Market leaders: execution

There was some degree of consistency between vendors that ranked as the leaders in the execution and features categories. Specifically, Sykes once again emerged as one of the top players examined in this report by counting among the top three vendors in four categories: maturity of offering, functional expertise, channel expertise, and agent profile.

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Market leaders: execution

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This should come as no surprise considering the synergies that Sykes was able to achieve through the merging of its home-agent offering with that of Alpine Access in 2012.

Working Solutions also performed strongly in the execution category, again playing to its strength as a long-time vendor of home-based agent services. Specifically, Working Solutions was very solid in vertical, function, and channel capabilities, coupled with a strong showing in virtual delivery and the tenure of its leadership.

LiveOps was strong in the execution category, which is logical considering the amount of time that it has been providing home-based contact center services. The firm was included among the top three in five categories, including maturity of offering, vertical expertise, virtualized delivery, agent profile, and management tenure. Arise rounded out the top players in this category, ranking in the top three for maturity of

offering, vertical expertise, agent profile, and virtual delivery.

Market leaders: market impact

Market impact analyses the extent to which a particular vendor is influencing the home-based agent space, based on its overall presence. The virtual agent space is still relatively immature compared to the bricks-and-mortar business model, so competitors in this study were quite varied across the various components of this category. Arise was the clear leader in the market impact section, counting itself among the top three vendors in several components, which speaks to the volume of business that the firm currently turns over, coupled with its reach in different locations, functions, channels, and languages. Working Solutions and Sykes also fared quite well in the market impact category, placing among the top three vendors in six of the seven categories. Working Solutions' only shortfall was in regional revenue diversity, while Sykes narrowly missed being in the top three in the horizontal section.

In its report, Ovum cites Working Solutions' strong points, including:

- **Financial strength—revenues dispersed across different sectors**
- **Stable leadership—executives with broad, well-established industry expertise**
- **Diversity of clients—track record of serving various-sized firms across industries**
- **Ability to attract talent—well positioned to respond to new opportunities**
- **Adaptive offering—flexibility to change with business needs of clients and their customers**

“It’s always good to make the shortlist, reaffirming our reputation as a long-time market leader,” said Working Solutions CEO Tim Houline. “And while longevity is no guarantee of success, it does show staying power in serving our clients and their customers well.”

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