ISG Provider Lens®

Contact Center – Customer Experience Services

Guide for enterprises assessing providers to enhance CX in evolving digital landscapes

Customized report courtesy of:

probegroup

QUADRANT REPORT | OCTOBER 2025 | AUSTRALIA

Table of Contents

Report Author: Hemangi Patel

The market is shifting to AI-powered, secure and hybrid delivery models, where success hinges on combining local expertise with global innovation to meet rising customer expectations

The Australian BPO contact centre market in 2025 reflects a dynamic convergence of regional specialisation, global innovation, regulatory intensity and evolving enterprise demands. It remains a mature yet evolving landscape where cost optimisation and CX excellence continue to be key imperatives. However, the expectations around how these outcomes are achieved have significantly shifted. Enterprises are now increasingly prioritising digital transformation, data privacy and agent empowerment, while also seeking scalability and innovation through partnerships. The market is being shaped by an intricate balance between local players that offer deep cultural understanding and scale and global service providers that bring technological maturity and transformation-centric models. As technology matures, enterprises are increasingly embracing AI to unlock productivity gains, operational efficiencies and scalable innovation across their service ecosystems. Enterprises are also keenly partnering with service providers to accelerate implementations. However, they are encountering several challenges in their AI journey within contact centres. These challenges include seamlessly integrating AI into legacy systems, managing data quality and availability, and ensuring responsible deployment. Additionally, enterprises must navigate change management, reskill their workforce and clearly define the value AI brings to both customer and agent experiences to ensure successful adoption.

A defining characteristic of the Australian contact centre ecosystem is the dominance of local service providers, particularly in the public sector and highly regulated industries such as banking, utilities, telecommunications and healthcare. Their local presence, understanding of regional regulations and longstanding client relationships make them

Market dynamics are shifting to **AI-driven CX, compliance focus and hybrid delivery** at scale.

well positioned for government and citizen-facing services. However, the landscape is marked by contrasting dynamics, as mature domestic players with deep local roots are on a journey of technology adoption, while global service providers are expanding their footprint and capabilities. Additionally, enterprises are reassessing contact centre strategies to prioritise security, experience and intelligent automation. Global service providers with next-generation CX platforms and global delivery frameworks are expanding their influence in the Australian market, seeking relevant engagement opportunities.

Continued focus on data privacy and sovereignty

A major theme shaping the Australian contact centre emphasis is not just a regulatory requirement but a fundamental business concern. With stringent regulations under the Australian Privacy Act and heightened expectations around compliance, enterprises are now demanding airtight security practices from their BPO partners. These requirements have driven a surge in demand for onshore delivery models, particularly for clients in the government and healthcare sectors. Additionally, nearshore models in New Zealand and the Philippines have gained momentum as enterprises seek proximity, English proficiency, cultural alignment and cost advantages without compromising security or compliance.

GenAI technology adoption moving beyond PoC

One of the most transformative developments in the market has been the growing maturity of GenAI use cases. While interest in GenAI began with exploratory pilots and small-scale deployments in 2023-2024, the current year has seen more enterprises moving beyond PoC to real production use cases. GenAI is now embedded in many facets of customer service, from real-time chat summarisation and proactive resolution suggestions to intelligent coaching for agents and automated knowledge generation. These capabilities deliver both CX and agent experience (AX) benefits. However, the implementation of GenAI is limited by concerns around model transparency, hallucinations and explainability, especially in sensitive sectors. As a result, service providers are emphasising compliance-aware GenAI frameworks, offering localised deployment options and collaborating with hyperscalers to develop safe, enterprise-grade AI systems.

Maintaining a hybrid delivery model for cost efficiency and compliance

Another critical shift in the delivery model is the growing adoption of hybrid sourcing. While cost optimisation remains important, Australian enterprises are recognising the need for a nuanced delivery mix that combines offshore efficiency with onshore quality. This shift has resulted in an increased reliance on dual-shore or blended models. The Philippines continues to serve as the primary nearshore destination for transactional and technology-enabled support services. However, New Zealand is now emerging as a trusted nearshore option for voice-based and high-touch interactions, particularly in situations where regulatory scrutiny is high. In parallel, many providers are also exploring Tier 2 cities within Australia for onshore operations to optimise costs, while maintaining compliance and service proximity.

Driving efficiency at scale with automation tools, AI and analytics

From a technology standpoint, Australian enterprises have adopted cloud strategies in the contact centre services market, whereby cloud-based contact centre platforms are enabling improved agility, scalability and integration across digital channels. Solutions such as Genesys Cloud, Amazon Connect and Microsoft Dynamics have become foundational to enterprise CX strategies. In 2025, the focus has shifted from simply migrating to a cloud to consolidating platforms and enabling more intelligent orchestration across the technology stack. Enterprises are seeking platform convergence between unified communication as a service (UCaaS) and contact centre as a service (CCaaS), as well as deeper integrations between CRMs, workforce optimisation tools and AI engines. The goal is to create a seamless and personalised customer journey, supported by a connected agent and process layer.

Automation and self-service capabilities have also advanced significantly. Conversational bots, IVR systems and AI-based ticketing solutions are widely deployed, enabling faster response times and reducing the burden on live agents. In addition, tools that enable proactive engagement, such as predictive analytics and real-time journey analytics, are gaining traction. These technologies improve CSAT, drive cost efficiencies and improve KPIs such as average handling time and first call resolution.

Evolving role of agents

The role of contact centre agents has undergone a significant transformation. As bots and automation take over routine tasks, human agents are now expected to handle more complex, emotional and high-value interactions. This shift demands better tools, training, upskilling and support. In response, service providers and enterprises are investing in EX tools that enhance agent well-being, performance and retention. Real-time coaching, adaptive training modules and AI-enabled knowledge bases help reduce agent cognitive load and onboarding time. Sentiment analytics and performance dashboards are enabling supervisors to identify training needs and tailor interventions more precisely.

Changing buyer expectations and commercial models

In terms of competition, the Australian BPO contact centre space is becoming fragmented. Global service providers, technology startups and boutique consultancies are all vying for a share of enterprise CX budgets. As a result, pricing models are also evolving. Clients are moving away from traditional FTE-based pricing towards outcome- and usage-based commercial models. Service providers that can demonstrate value through tangible business outcomes such as customer retention, upsell conversion or reduced churn are more likely to win long-term engagements.

In conclusion, the Australian BPO contact centre services market in 2025 is at a pivotal juncture. To thrive in this environment, service providers must combine local expertise with global innovation, balance regulatory compliance with agility and align technology investments with evolving customer expectations. The successful players will be those that can deliver personalised, secure and scalable CX powered by AI, enriched by human empathy and supported by a resilient, future-ready workforce.

> The Australian BPO market is undergoing a major transformation, driven by the rise of AI-enabled CX, growing regulatory scrutiny and the need for hybrid delivery models that combine local talent with global scale. Providers that balance innovation with compliance and cultural alignment are best positioned to lead in this evolving landscape.

Provider Positioning

Page 1 of 3

	Digital Operations	Intelligent Operations
[24]7.ai	Contender	Contender
Acquire Intelligence	Leader	Leader
ASTIA	Contender	Contender
Cognizant	Product Challenger	Product Challenger
Concentrix	Leader	Leader
CPM	Contender	Contender
Datacom	Leader	Leader
EXL	Product Challenger	Product Challenger
Firstsource	Product Challenger	Product Challenger
Foundever®	Leader	Leader

Provider Positioning

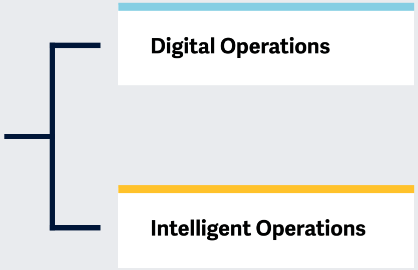
Page 2 of 3

	Digital Operations	Intelligent Operations
Genpact	Rising Star ★	Leader
HCLTech	Product Challenger	Rising Star ★
HGS	Product Challenger	Product Challenger
Infosys	Product Challenger	Product Challenger
Merchants	Contender	Contender
Mindpearl	Contender	Contender
Mphasis	Contender	Market Challenger
Probe Group	Leader	Leader
Serco	Product Challenger	Contender
Startek®	Product Challenger	Product Challenger

Provider Positioning

	Digital Operations	Intelligent Operations
TCS	Product Challenger	Product Challenger
Tech Mahindra	Leader	Leader
TP	Leader	Leader
TSA	Leader	Leader
TTEC	Leader	Product Challenger
Wipro	Market Challenger	Product Challenger
WNS	Product Challenger	Leader

The study focusses on **people, process, data and technology** as the key catalysts to CX transformation.



Simplified Illustration Source: ISG 2025

Definition

In an era defined by constant disruption, delivering exceptional CX needs a comprehensive and flexible transformation strategy. Rapid technological advancements, evolving workforce dynamics and heightened customer expectations compel enterprises to reevaluate their operational models, enhance agility and address emerging security and compliance challenges. This shift is driving significant transformation in the contact centre sector, leading organisations to pursue strategic partnerships to navigate these complexities and achieve sustainable growth.

Providers are increasingly investing in expanding their solution offerings to stay competitive, transitioning beyond conventional models to deliver holistic end-to-end CX capabilities. This evolution necessitates extensive technological expertise, skilled personnel and the ability to leverage AI-driven innovations. Generative AI (GenAI) and agentic AI are revolutionising the landscape, propelling advanced automation, hyperpersonalisation and intelligent decision-making. With its autonomous decision-making and adaptive learning capabilities, agentic AI is setting new benchmarks in agent support, self-service and predictive analytics, enabling proactive and context-aware customer interactions.

To remain relevant in this evolving environment, providers must adopt agility, drive innovation and build domain expertise while integrating AI-driven solutions effectively. This strategic focus is crucial for helping enterprises redefine their operational frameworks, optimise KPIs and achieve impactful business outcomes. As the contact centre industry evolves, empowering people, processes, data and technology will be vital to this transformation journey.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following two quadrants for services: Digital Operations and Intelligent Operations.

The ISG Provider Lens® Contact Center – Customer Experience Services 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Digital Operations

This report is valuable for service providers offering **digital operations** for contact centres in **Australia** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report guides Australian enterprises in selecting suitable contact centre digital operations providers by highlighting personalised solutions and relative AI, analytics and RPA capabilities for enhanced CX, efficiency and innovation.

Digital professionals

Should read this report to gain insights and evaluate various contact centre service providers. These services are integral to optimising digital operations and enhancing the CX across industries. The report compares the providers' capabilities in detail, helping stakeholders make informed provider selection for technological transformations and improved service delivery.

Technology professionals

Should read this report to comprehend how contact centre service providers use various technologies. It compares their technical competencies comprehensively and offers insights into how multiple solutions can be integrated for better service delivery. This analysis serves as a guide for assessing the relative strengths and market positions of different providers.

Strategy professionals

Should read this report to learn about the capabilities and solutions of Australian providers. The report highlights their modernisation endeavours aimed at improving customer satisfaction scores and loyalty. It furnishes a nuanced understanding of how providers implement strategic initiatives to enhance these metrics. Such insights will equip professionals to make informed choices on building partnerships that meet evolving enterprise needs.

Contact centre professionals

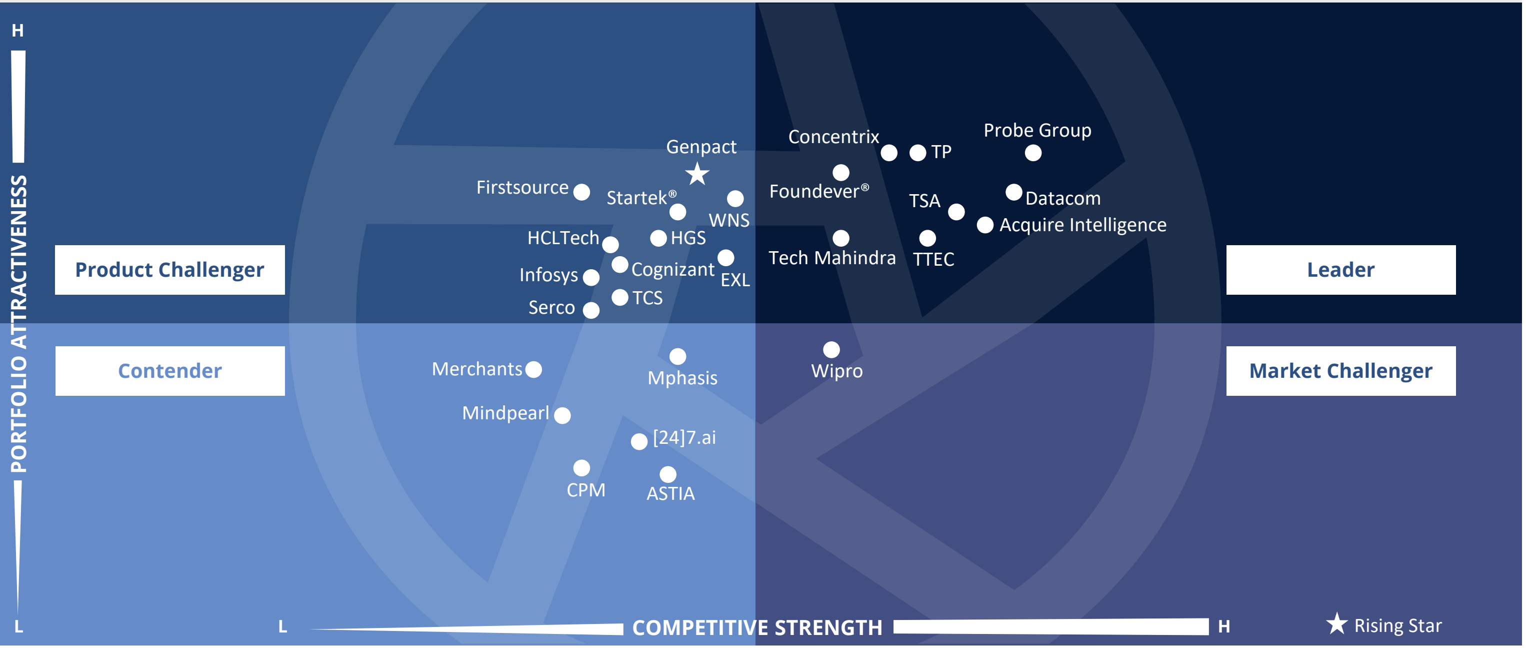
Should read this report to deepen their understanding of contact centre operations, aiming to refine service delivery, foster an enhanced workplace environment and elevate industry standards. This learning will enable professionals to implement best practices, innovate effectively and remain abreast of industry trends that are pivotal for progress and achieving operational excellence.

isG Provider Lens®

Source: ISG RESEARCH

Contact Center – Customer Experience Services
Digital Operations

Australia 2025



The Digital Operations quadrant assesses providers' ability to deliver **end-to-end contact centre services**, combining **consulting, domain expertise** and **digital capabilities** such as **AI, cloud** and **analytics**, while driving **ESG goals, talent management** and **innovation**.

Hemangi Patel

Definition

This quadrant assesses providers' capabilities to address the end-to-end value chain of contact center services. It evaluates their consulting services, domain and industry knowledge and technological expertise. Providers must demonstrate their ability to assess clients' maturity through their maturity assessment framework. They must have expertise in designing tailored solutions with optimal operating models, technology capabilities, scalable infrastructure and flexible delivery models. Digital infrastructure, including cloud and AI, and analytical capabilities are crucial. Digital technology proficiency also serves as a key measure to help clients achieve their ESG goals. Companies also focus on onboarding, training, employee engagement and retention programs. They use AI, GenAI and analytics to manage the talent landscape within organizations. Providers' growth depends on strategic initiatives such as proprietary solutions, partnerships, M&As, innovation centers, CoEs and thought leadership.

Eligibility Criteria

1. Demonstrate strategic **vision and investments** to build capabilities and solutions portfolios
2. Offer **consultation** backed by domain expertise, industry leadership and maturity assessment frameworks
3. Provide essential **contact center infrastructure** to offer agents and customers multichannel/omnichannel capabilities and industry solutions
4. Develop various **digital capabilities** such as AI, analytics, GenAI, cloud and security
5. Highlight capabilities around **contact center infrastructure (software and hardware), omnichannel strategy and proprietary solutions or accelerators** that enhance scalability, efficiency and innovation
6. Showcase capabilities around **governance frameworks for data security, regulatory compliance and responsible AI** adoption
7. Demonstrate commitment to **ESG** through sustainable contact center operations, energy-efficient infrastructure, ethical AI practices and inclusive workforce strategies
8. Adopt **talent onboarding and training** approaches, employee well-being programs and talent retention strategies
9. Focus on delivery centers, **right shoring models**, innovation, pricing models, **employee engagement models** (GigCX or contracting models) and hybrid working strategies

Observations

Australia's contact centre service providers are accelerating their digital maturity to keep pace with evolving customer expectations. In 2025, there is a clear shift towards the adoption of intelligent automation, AI-driven agent assistance and deeper analytics to enable faster, more personalised CX. Service providers are deploying conversational AI, sentiment analysis and predictive routing to improve engagement quality and reduce resolution times.

Omnichannel capabilities are maturing, with integrated platforms supporting consistent customer interactions across voice, chat, social media and messaging channels. Cloud-native infrastructure remains critical for scalability and agility, enabling providers to rapidly adapt to client-specific needs and support remote operations. Many firms are also incorporating GenAI and large language models (LLMs) to enhance self-service, improve knowledge management and assist agents in real time.

Providers are pairing these technologies with strong change management and training programmes to upskill agents and optimise human-machine collaboration. With multiple ongoing digital transformation initiatives across the banking, telecommunications and public sectors, Australia's contact centre ecosystem is becoming an innovation hub. These advancements underscore a strategic focus on delivering high-quality, responsive and cost-efficient customer service in an increasingly digital and competitive environment.

From the 34 companies assessed for this study, 27 qualified for the Digital Operations quadrant, with 9 being Leaders and one Rising Star.

Acquire Intelligence

Acquire Intelligence's end-to-end consulting approach, strong focus on training and governance, and adaptable delivery models tailored to client needs make it a Leader in this quadrant.

CONCENTRIX

Concentrix combines human-centred strategy, advanced technologies such as GenAI and IoT, and robust partnerships with technology vendors to deliver personalised, scalable and technology-enabled CX solutions in Australia.

DATACOM

Datacom delivers end-to-end CX transformation through a robust service portfolio, strategic technology alliances and its Thinksmash® consulting framework, making it a Leader in this quadrant.

foundever®

Foundever's digital-first approach, powered by proprietary assets and robust partnerships, drives transformation to deliver high-impact, scalable CX services in Australia.

probegroup

Probe Group, with a strong portfolio, focussed growth strategy and end-to-end CX transformation powered by automation, analytics and platform expertise, is positioned to deliver scalable, AI-led CX outcomes across industries.

TECH mahindra

Tech Mahindra combines gig workforce flexibility, strategic geographic expansion and full-spectrum CX capabilities to deliver intelligent and scalable contact centre services in Australia.

TP is accelerating its CCCX transformation through the TP.ai FAB platform, strategic AI partnerships and a focussed growth strategy built on AI-led core expansion, vertical solutions and innovation across the AI value chain.

tsa

TSA combines a CX-led consulting approach, smartshoring delivery between Australia and the Philippines and a strong AWS partnership to deliver tailored, scalable and cloud-enabled contact centre solutions across Australia.

TTEC

TTEC combines cloud-native platforms such as Amazon Connect and Google's Customer Engagement Suite with advanced AI tools and ecosystem partnerships to transform contact centre operations, with a key focus on scalability, automation and seamless integration.

Genpact (Rising Star) is driving AI-led CCCX transformation through a strategic combination of consulting, scalable platforms and robust ecosystem partnerships. Its AI Gigafactory accelerates enterprise adoption of agentic AI with agile delivery, prebuilt models and responsible AI practices.

Probe Group

Leader

> "Probe Group is recognised for its integrated approach to CX transformation, blending intelligent automation, advanced analytics and platform expertise to drive measurable outcomes through its contact centre services."
>
> *Hemangi Patel*

Overview

Probe Group, headquartered in Melbourne, Australia, is a leading CX specialist and BPO provider with over 45 years of experience and more than 900 clients globally. It has 19,000 employees across 28 delivery locations in Australia, the Philippines, New Zealand and India. With around one quarter of the employees based in ANZ locations, the company delivers high-quality CX through its strong onshore delivery capabilities in outsourcing, strategy and advanced AI technology. The company specialises in CX and BPO services, combining digital innovation with a people-first approach to deliver managed services, intelligent automation, workforce transformation and CX strategy.

Strengths

Comprehensive portfolio: Probe Group delivers a comprehensive CX portfolio covering customer management, omnichannel solutions, conversational AI and IT support. It is supported by enterprise services in finance, collections and healthcare, along with capabilities in data engineering, GenAI and voice-of-customer analytics. The company's transformation services span process redesign, automation and CX platforms, while flexible workforce models support end-to-end CX delivery.

Focussed growth strategy: Probe Group's growth strategy focusses on expanding across both the enterprise and government sectors. In the enterprise space, it scales AI insights to improve B2B CSAT and retention, while its government initiative aims to enhance citizen engagement. Both areas are supported by investments in analytics, upskilling and security to strengthen CX and digital transformation.

CX digital transformation capabilities: Probe Group's digital transformation team works closely with clients to improve CX delivery and satisfaction. Innovior (digital consulting and managed services business) brings intelligent automation, AI and data analytics to modernise BPO operations. With expertise in platforms such as Salesforce, ServiceNow and PowerPlatform, Innovior delivers workflow automation and digital transformation, supporting end-to-end operations.

Caution

Probe Group has rapidly expanded its CX portfolio across sectors. However, success will depend on maintaining skilled talent, strong governance and effective integration, especially as AI adoption grows and regulatory, ethical and data privacy challenges intensify.

Intelligent Operations

This report is valuable for service providers offering **Intelligent Operations** in **Australia** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the key technological and non-technological capabilities for AX and CX. The report emphasises the importance of unified communications, AI-driven assistance tools and performance monitoring to boost agent productivity. A supportive environment, training and feedback are also critical for agent satisfaction, while GenAI and analytics tools enhance contextual conversations and operational efficiency.

Digital professionals

Should read this report to learn about how AI and analytics improve internal operations and customer interactions through enhanced personalisation and efficiency. Deploying AI technologies allows businesses to fine-tune UX, automate complex tasks and deliver personalised services that align with evolving consumer preferences, driving operational excellence and customer satisfaction.

Procurement professionals

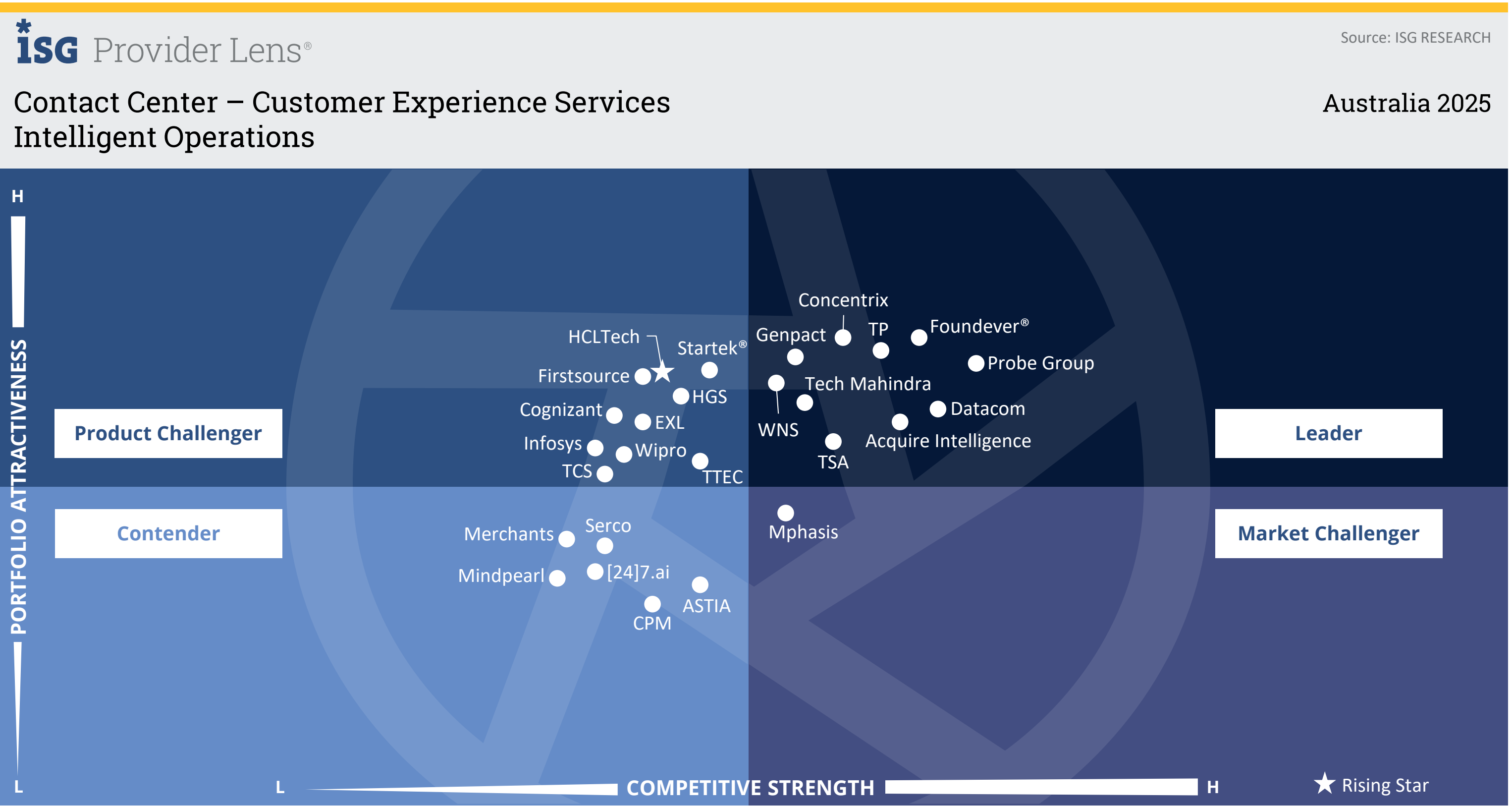
Should read this report to gain insights into fostering positive agent experience by focusing on agent training, continuous feedback and career development initiatives. These efforts help mitigate high turnover rates and bolster agent engagement. Upskilling through structured programs and implementing AI-driven analytics are vital in empowering agents for better performance and productivity.

Technology professionals

Should read this report to understand how contact centre providers leverage AI and unified communications to enhance agent performance and customer interactions. Integrating multiple channels and AI-driven communications empowers agents with real-time data and analytics, improving efficiency, productivity and customer satisfaction while ensuring superior CX.

Contact centre professionals

Should read this report to gain insights on market trends, best practices and technologies that enhance agent performance and digital operations, thereby boosting CX. The report explores AI implementation, unified communications, training, feedback mechanisms and career development to reduce turnover and increase engagement.



The Intelligent Operations quadrant assesses providers' capabilities in **AI tools, analytics** and **agent assist** technologies, alongside **training, career growth** and a **supportive work culture**, all critical to boosting **AX, CX excellence** and **operational success**.

Hemangi Patel

Definition

Emerging technologies are transforming contact centres, enhancing both agent and customer experiences. AI and analytics drive efficiency and satisfaction by leveraging tools and technologies, including conversational AI, sentiment analysis, voice recognition and behaviour insights. These tools help identify cross-sell and upsell opportunities, boost personalization and support strategic shifts to meet evolving customer needs. AI and ML algorithms analyse vast CX data to simplify service delivery.

Agent experience (AX), closely tied to CX, depends on both tech and non-tech enablers. Technological aspects include unified communication, AI-powered assistance, real-time monitoring and automated summaries. Non-tech elements involve training, continuous feedback, work-life balance and career development. As AX grows vital for success, analytics, collaboration tools and best practices help improve loyalty, performance and satisfaction, ultimately leading to superior CX.

Eligibility Criteria

1. Offer **advisory services** with automation maturity and benchmarking assessments supported by a skilled consulting team
2. Provide AI and analytics technology applications, partnerships, homegrown solutions and **investments in GenAI**
3. Implement data strategies, frameworks and analytical solutions such as **sentiment analytics, VoC and speech/ text analytics**
4. Showcase **case studies that are focused on enhancing CX and agent capabilities** with business outcomes such as revenue generation, customer retention, improved productivity, quality, satisfaction and engagement
5. Provide **career development programs**, training curriculums and tools such as gamification and security training
6. Utilise tools for real-time quality monitoring, workforce management, **remote work management and knowledge management**
7. Demonstrate capabilities and use **cases around integrating AI, GenAI, agentic AI and analytics tools** to enhance AX and CX

Observations

Contact centre service providers in Australia are enhancing their intelligent operational capabilities to deliver more responsive and adaptive CX. To enhance CX, conversational AI and intelligent chatbots play a critical role in first-line support, enabling 24/7 self-service, understanding complex queries and escalating issues intelligently when needed, freeing up human agents for higher-value interactions. GenAI tools are being deployed across customer touchpoints to enable dynamic FAQs, real-time content creation and automated summarisation, driving faster, more personalised resolutions. Service providers are also embedding predictive analytics and sentiment analysis into daily operations, enabling proactive issue resolution and continuous experience improvement.

On the agent experience side, agent assist solutions are now more intelligent, leveraging real-time analytics and natural language understanding to offer contextual prompts, knowledge suggestions and next-best-action support. These solutions are combined with agentic AI capabilities that can autonomously execute certain tasks, streamlining complex processes, reducing escalations and improving consistency in service delivery. AI-led training programmes are using analytics to personalise training, reinforce skill development and monitor agent readiness.

Across industries such as banking, government and retail, these intelligent solutions are transforming both customer and agent experiences. By integrating GenAI, agentic AI, analytics and automation, providers are positioning themselves as innovation-led CX partners delivering smarter, faster and more human-centric support at scale.

From the 34 companies assessed for this study, 27 qualified for the Intelligent Operations quadrant, with 10 being Leaders and one Rising Star.

Acquire Intelligence

Acquire Intelligence combines AI-driven automation, secure tool integration and an omnichannel CX approach to deliver end-to-end transformation for clients, ensuring a consistent, high-quality CX.

CONCENTRIX

Concentrix enhances contact centre performance through AI-powered tools such as iX Hero and iX Hello, improving agent productivity and CX, making it a Leader in this quadrant.

DATACOM

Datacom leads in the Australian market by driving CX excellence through AI-powered agent assist, end-to-end workforce management and a structured employee development road map.

foundever®

Foundever® combines agentic AI, end-to-end digital CX and a robust GenAI suite (EverSuite) to deliver scalable, intelligent solutions that enhance agent productivity and CX, establishing itself as a strong player in this quadrant.

Genpact is redefining CX with a powerful combination of agentic AI, proprietary platforms such as Cora and CX.AI Hub, and a strong focus on automation and analytics.

probegroup

Probe Group integrates AI across its CX ecosystem, from strategic consulting to intelligent platforms like Oration, enabling predictive insights, automation and tailored service delivery across industries.

TECH mahindra

Tech Mahindra combines AI integration, domain-specific platforms and comprehensive employee training to strengthen its BPO offerings, making it a Leader in this quadrant.

TP is evolving into a holistic CX transformation partner offering integrated, scalable and intelligence-led services across the customer lifecycle with the launch of TP Infinity, enhanced agentic AI solutions and a growing portfolio of CX IP.

TSA combines a robust cloud-based CX platform with omnichannel capabilities and custom solution delivery, enabling businesses to drive efficient, AI-enabled and tailored CX across every touchpoint.

WNS enhances both customer and agent experiences through intelligent, real-time support and personalisation by integrating agentic AI and GenAI into solutions such as ConverseEX and AssistEX.

HCLTech (Rising Star) combines GenAI-powered analytics, personalised training (iKnow) and real-time performance management (iEvolve) to enhance contact centre efficiency, agent effectiveness and CSAT.

Probe Group

Leader

> "Probe Group's AI-led approach reflects a mature CX strategy. It combines GenAI-driven tools, deep consulting expertise and industry-specific innovation to deliver intelligent, scalable customer engagement solutions."
>
> *Hemangi Patel*

Overview

Probe Group is headquartered in Melbourne, Australia. It employs over 19,000 people across delivery centres and offices in four countries: Australia, the Philippines, New Zealand and India. Probe Group delivers intelligent CX solutions powered by AI, ML and advanced analytics to enhance customer and agent experiences. It uses AI-driven tools such as conversational AI, real-time speech analytics, predictive modelling and intelligent automation to personalise interactions, optimise workforce management and improve operational efficiency.

Strengths

AI-led investment strategy: Probe Group's AI-led strategy focusses on four key cohorts: Assisted Customers, Assisted Agents, Enhanced Managers and Digital Executives. Its solutions leverage GenAI for self-service, interaction summarisation, automated QA and insight development to meet industry-specific needs. The firm is investing in GenAI and data analytics to deliver predictive insights, with a key focus on power and utilities to enhance service delivery.

Integrating AI capabilities: Oration by Convai, a subsidiary of Probe Group, is a GenAI conversational platform that enhances contact centre performance through intelligent call routing, speech recognition and automated interaction summarisation. Its GenAI assistant simplifies setup by autogenerating caller intents and utterances, while built-in analytics and supervised learning deliver real-time insights, QA automation and CX optimisation.

Strong CX consulting approach: Probe Group utilises the Probe OS framework to assess and transform CX services, supported by tools such as the Transformation Digital Twin for scenario planning and ROI-driven road maps. Rapid insight tools such as Oration accelerate diagnostics and solution design. Probe CX codevelops and pilots next-gen solutions, such as Salesforce Einstein for Service and Agentforce, driving CX outcomes.

Caution

Probe Group's success hinges on maintaining seamless integration across tools such as Oration, GenAI solutions and core CX platforms. As adoption scales, the need to align AI with industry-specific needs, ensure responsible AI use and manage data quality and security will intensify.

Appendix

The ISG Provider Lens® 2025 – Contact Center – Customer Experience Services study analyses the relevant service providers in the Australia market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Namratha Dharshan

Lead Author:
Hemangi Patel

Research Analysts:
Sandya Kattimani and Priyanka A

Data Analyst:
Sibasis Panigrahy

Consultant Advisors:
Jarrod Magill and Himanshu Chawla

Project Manager:
Abhilash M V

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of September 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars ($US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Contact Center – Customer Experience Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Lead Analyst

Hemangi Patel

Senior Manager and Principal Analyst

Hemangi has more than 10 years of experience in the field of strategy research and consulting space especially within ICT sector. She has proven her excellence in delivering projects, that include quality analysis, extensive primary and secondary research, market entry and go-to-market strategy, competitive benchmarking and company analysis, and opportunity assessment.

Here at ISG, Hemangi leads research activities for service provider intelligence report in the areas of BPO focused on customer experience and contact center services. Hemangi holds her bachelor's degree in commerce from Mumbai University and MSc in economics from Symbiosis International University, Pune.

Research Analyst

Sandya Kattimani

Senior Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens® studies on Contact Center, Life Sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation.

She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other Ad hoc business research assignments.

Research Analyst

Priyanka A
Research Analyst

Priyanka is a Research Analyst at ISG and supports ISG Provider Lens® studies on Contact Center and Procurement Services. She works closely with Lead Analysts across regions, contributing to quadrant reports, global summaries and focal points. Her responsibilities include analyzing primary and secondary data, supporting provider evaluations and identifying key market trends. She also assists in conducting primary research and preparing detailed reports that support enterprise decision-making.

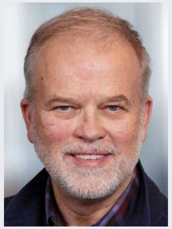
Prior to joining ISG, Priyanka was a data-driven Procurement Analyst with five years of experience analyzing market trends and managing end-to-end purchase cycles. She is proficient in supplier identification, spend analysis and stakeholder engagement, with a strong focus on streamlining operations and adding value through strategic sourcing solutions.

Study Sponsor

Namratha Darshan
Chief Business Leader

As a Chief Business Leader at ISG, Namratha Dharshan spearheads the BPO, AI and Analytics arm of the ISG Provider Lens® program, contributing to more than 20 reports. Under the aegis of this program, where she heads a team of analysts, Namratha manages the delivery of research findings on service provider intelligence. As a part of her role in the Senior Leadership Council, Namratha is the designated representative of the ISG India Research team, comprising more than 100 dynamic research professionals. In addition, Namratha is a speaker in ISG's flagship quarterly call, ISG Index™.

As a principal industry analyst and thought leader, Namratha is well recognized for her contributions to service provider intelligence and her understanding of the customer experience landscape, particularly the area of contact center services. She has also authored reports on other horizontal service lines such as finance and accounting and penned vertical focused reports for insurance.



IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens®

OCTOBER, 2025

REPORT: CONTACT CENTER – CUSTOMER EXPERIENCE SERVICES