ISG Provider Lens™

Intelligent Automation – Solutions and Services

Conversational AI

A research report comparing provider strengths, challenges and competitive differentiators

U.K. 2020
Quadrant
Report

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creativevirtual

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About this Report

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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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2020, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

COVID-19 PANDEMIC FAST-TRACKS ENTERPRISE ROADMAP TO INTELLIGENT AUTOMATION

With the COVID-19 pandemic, enterprises across industries worldwide are embracing digital transformation to future-proof their businesses. Intelligent automation, at the heart of this transformation, combines robotic process automation (RPA) with artificial intelligence (AI), cognitive optical character recognition (OCR), machine learning (ML), natural language processing (NLP), advanced analytics and other digital technologies for improved productivity, data accuracy and customer experience, alongside reduced costs.

The need to remain competitive, agile and effective in delivering value to customers, partners and stakeholders is the trigger for adopting intelligent automation. However, inadequate knowledge and skills often derail this digital transformation journey, driving enterprises to seek transformational sourcing options to revamp business and IT operations.

The economic impact of COVID-19 will be long-lasting for enterprises, and the ones that implement intelligent automation now will be able to optimize costs, productivity and capacity and reduce risks in the short term to stay prepared for the future.

ISG has observed the following trends in the global intelligent business automation space:

Large enterprises are rapidly embracing intelligent automation: Intelligent automation finds more acceptance among large enterprises as they have the resources to implement such solutions. Midsize companies, too, are gradually making headway in this direction.

Extending automation to front and middle office: Although automation is common in IT infrastructure operations and traditional back-office tasks such as finance and accounting, enterprises now are automating beyond these support functions, in sales and marketing, supply chain and customer service.

Benefits beyond headcount reduction: The goal of automation is increasingly shifting from cost savings to improved productivity, indicating an understanding that technology automates routine work, and not jobs. Enterprises with advanced automation capabilities expect automation to provide improved employee productivity, data accuracy and customer experience.

Focus on change management: Organizational change management (OCM) plays a vital role in helping employees adapt to the introduction of advanced technologies into business processes and allay fears about job loss. Companies are increasingly motivating employees to embrace automation and fostering a culture of collaboration between them and digital workers for transactional tasks.

Outcome- and transaction-based pricing attaining traction: Subscription-based pricing has overtaken perpetual licensing as the preferred commercial model, with enterprises increasingly opting for transaction- and outcome-based pricing models. Concurrently, providers are confident about promising higher productivity and business outcomes while negotiating on sourcing engagements. Outcome-based pricing is particularly gaining favor among enterprises in the mature stage of automation.

Reskilling and upskilling workforce for jobs of the future: With increasing automation of back-office functions, talent management is a challenge, carrying the risk of existing employee skills soon becoming obsolete. Therefore, training and upskilling is critical. Several organizations are collaborating with providers to upskill their workforces on digital skills such as AI, ML and advanced analytics to empower them to focus instead on high-value tasks.

Vertical-specific business process expertise: The changing business environment is pushing enterprises to try to find a competitive edge in their respective industries. Hence, companies are on the lookout for providers with vertical-specific automation expertise such as claims bill payment in iinsurance and inventory monitoring in retail. Providers that bring in extensive domain/industry knowledge alongside intelligent automation technologies are head and shoulders above the others.

Process mining is key to proving automation opportunities and benefits: A key factor preventing companies from realizing return on investment (ROI) from automation is the poor identification of use cases and inclination to automate processes as-is. To gain the benefits of automation, business processes must be assessed through multiple lenses with the help of process-mining and task-mining technologies. Process-mining solutions will see high demand in the near future, particularly among large organizations looking to optimize legacy business processes.

Growing importance of ethical AI: As companies scale their automation programs, providers of AI solutions will have access to critical enterprise data. In this context, providers that have invested significantly in R&D for the ethical, transparent and accountable use of AI technologies will find favor among enterprises.

AI- and ML-led automation has been gaining traction in the past few years: With the global IT environment undergoing digital transformation, independent software vendors (ISVs) and system integrators worldwide need to create the right setting for data and systems to be managed from a centralized location. IT assets and workloads would need to be orchestrated across edge, cloud and on-premises resources, making the use of analytics for actionable deep insights critical. AIOps blends AI, ML and big data to analyze the large volume of data generated in the wake of digital transformation. Most verticals are adopting AIOps to improve business processes in terms of increasing revenue and reducing IT operational costs.

Diverse automation offering: The global IBA and AIOps services market primarily comprises of two sets of offerings from ITO BPO providers — a homegrown proprietary platform and services around tools offered by ISVs. Many enterprise clients are seeking providers that offer a proprietary IBA and/or AIOps platform. However, a large percentage of clients are working with automation service providers that are platform/vendor agnostic and are thus able to support custom business requirements.

The ISG Provider Lens report for Intelligent Automation this year compares service providers and software solution vendors on their proprietary solutions and services and positions them based on their portfolios and outlook. This comparison has been made across three quadrants — Intelligent Business Automation, AIOps and Conversational AI, which represent the services and products that typical enterprise clients are acquiring in the intelligent automation space.

Disclaimer: ISG Automation is a sister division to ISG Research, and we have purposely selected quadrants and the eligibility criteria that would exclude ISG Automation from being evaluated in order to avoid any conflict of interest.

U.K. MARKET OVERVIEW

Intelligent Business Automation

The U.K. market is making steady progress in the adoption of intelligent business process automation solutions, with an increasing number of enterprises inclined to fast-track their digital transformations. According to ISG Research, 63 percent of enterprises in the U.K. have automated at least five business processes. It has also been observed that the adoption of automation and AI technologies with NLP, ML and OCR in business processes has helped U.K. enterprises meet or exceed their expectations in cost savings, staff productivity, data accuracy and customer experience.

The uncertainty regarding Brexit continues to loom over the industry and is impacting large deals; many enterprises are delaying such deals. However, outsourcing has not seen a major impact. According to the Q3 2020 ISG Index™ report, the annual contract value (ACV) for deals of £4 million or more, shows that ACV for traditional managed services in EMEA increased by 10 percent year-on-year to £2.0 billion, with IT outsourcing (ITO) up by 36 percent to £1.6 billion. The U.K. alone contributed £794 million to managed services ACV in the quarter, up 60 percent from the previous year, with business process outsourcing (BPO) up by double digits and ITO doubling.

Given the uncertainties of Brexit and the market's dependence on a skilled workforce from EU countries, the U.K. may experience an acute skills shortage, especially in the areas of science, technology, engineering and mathematics (STEM). Additionally, with COVID-19, U.K. enterprises that so far have not undergone significant digital transformation have to accelerate their digital investments by including intelligent business process automation. All these factors will lead to further traction for outsourcing deals in intelligent business process automation.

Business leaders in the U.K., like their counterparts in the U.S., should look at automation more holistically rather than take a piecemeal approach. They should find trusted partners that can support their business process automation journey to realize their vision. Some providers are differentiating themselves by offering end-to-end intelligent automation solutions and services with an outcome-driven approach. These are combined with deep domain and vertical expertise, use of process-mining technologies to identify automation opportunities, superior advisory services, support for change management, maintenance support services and use of reusable assets and accelerators across business processes to speed up deployment. Providers are leveraging a strong and expanding partner ecosystem, expertise in automation and AI centers of excellence (CoEs) and collaboration with academia and startups to develop innovative solutions tailored to client-specific requirements.

AIOps

COVID-19 pandemic and Brexit impact: The adoption of automation and AIOps does not follow a straight line. As the U.K. economy has slowed down due to the impact of Brexit and COVID-19, most enterprise clients and the midmarket in the region are increasingly leaning toward automation. With the decline in revenues, companies must do more with less and are offsetting the natural deleverage that comes with expensive human labor. The economic shock has emerged as the catalyst driving the maximization of productivity through automation platforms and services. After the pandemic, the outlook should become clearer and the early signs of recovery should drive the need for investments; hence, automation technology providers are the first receivers of capital spending.

Conversational AI

Clients in the U.K. were already adopting AI technologies to assist in a smooth transition after the Brexit period and rebalance the economy after the crisis. This includes changes in supply chains to deal with an increase in tariffs and border checks as well as to address the growing paperwork of legal complications faced by residents. Conversational AI applications in these scenarios could help smooth out the processes, and the pandemic has only increased the urgency of this approach. There are many technology startups and leading firms in the region, and this will be an opportunity for them to scale up their conversational AI projects.

The following are some of the global trends in conversational AI that also applicable to the U.K. market:

- **Low-code/no-code development:** As the focus shifts toward enabling citizen developers, and a young, smart and tech-savvy workforce finds employment, users would seek solutions to rapidly implement business context to an existing framework and build customized conversational AI bots or virtual assistants.
- **Integration with business applications:** Solutions that can integrate with more leading enterprise technology stack solutions and offer application programming interface (API) integration would lead the market. A conversational AI solution should be able to integrate with all such technologies to decide on the response and fetch the required data.
- **Reusable prepackaged business process and industry-focused virtual agents:** Clients would seek solutions that offer prepackaged modules or virtual agents for common business processes such as HR, operations and IT. Many are interested in or are expected to adopt solutions with prebuilt modules for industry-specific operations. They would prefer solutions with more of these prepackaged modules as they require less customization.
- **Bots talking to bots:** Many vendors are investing in solutions that enable virtual agents to converse with each other, allowing them to automate many processes and making a significant change in the way business processes work.

Introduction

Simplified Illustration

Intelligent Automation Solutions & Services 2020	
Intelligent Business Automation	Artificial Intelligence for IT Operations (AIOps) - Large Accounts
Artificial Intelligence for IT Operations (AIOps) - Mid Market	Conversational AI

Source: ISG 2020

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Definition

According to the ISG Research **December 2019 RPA Deployment & Capability study**, organizations are improving their automation capabilities, but many are still in the early stages of the automation journey. Only 7 percent have progressed into enriching their RPA with intelligent automation. While RPA can automate simple, rules-based tasks previously performed by humans, it needs structured data as input and can perform only standardized processes. Therefore, inability to handle unstructured data, lack of AI capabilities and in-house skills limitations are driving enterprise clients to look for transformational sourcing options, which include intelligent automation.

Intelligent automation enables software bots to interact with unstructured data and generally includes the following capabilities: image recognition, NLP, cognitive reasoning and conversational AI. Enterprise clients worldwide are focusing on building intelligent automation capabilities into their RPA

Definition (cont.)

initiatives in keeping with the growing need to stay apace of competition with next-generation technologies. Well-orchestrated intelligent automation technologies are enabling enterprises to automate processes once considered as beyond the purview of automation and to deliver higher productivity, reduced costs, improved data accuracy and enhanced customer experience.

This study on Intelligent Automation Solutions and Services is aimed at understanding enterprise requirements and provider capabilities in meeting these demands.

Scope of the Report

The ISG Provider Lens™ study offers business and IT-decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness
- A perspective on different markets, including the U.S., U.K., Nordics and Germany

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate current vendor relationships and potential new engagements.

For this reason, ISG's report on Intelligent Automation is composed of multiple quadrants covering the spectrum of solutions and services that an enterprise client requires.

Definition (cont.)

The quadrants descriptions are as follows:

Intelligent Business Automation: This quadrant analyzes information technology outsourcing/business process outsourcing (ITO/BPO) service providers that offer proprietary automation and AI platforms, solutions and frameworks, along with associated services to enable enterprises to automate business processes and augment the capabilities of their workforces.

Artificial Intelligence for IT Operations (AIOps) - Large Accounts: This quadrant assesses the ability of a service provider's automation-as-a-service solution and framework to determine the state of a company's multi-cloud IT workload and analyze the data it senses to facilitate automated operation. Enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and revenues of more than US$1 billion.

Artificial Intelligence for IT Operations (AIOps) - Mid Market: This quadrant assesses the ability of a service provider's automation-as-a-service solution and framework to determine the state of a company's multi-cloud IT workload and analyze the data it senses to facilitate automated operation. Enterprises are subject to strict regulations that can complicate engagements. The enterprise client typically has fewer than 5,000 employees or generates less than US$1 billion in revenue.

Conversational AI: This quadrant includes providers that offer conversational AI solutions to facilitate a development environment and an application programming interface (API) for automated conversational agents. These solutions integrate with chat interfaces such as messaging and social media platforms, allowing third-party extensions and customization. Conversational AI solutions interact with users through text or voice, similar to what a human would do. These applications run on programmable commands and AI technologies and are commonly classified as chatbots and virtual assistants.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Mid Market**: Companies with 100 to 4,999 employees or revenues between US$20 million and US$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 US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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.

Leader

The Leaders among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average cover¬age of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly fall behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

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).

Rising Star

Companies that receive the Rising Star award have a promising portfolio 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. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: 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 qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

Intelligent Business Automation - Quadrant Provider Listing 1 of 4

	Intelligent Business Automation	Artificial Intelligence for IT Operations (AIOps) - Mid Market	Artificial Intelligence for IT Operations (AIOps) - Large Accounts	Conversational AI
[24]7.ai	Not in	Not in	Not in	Product Challenger
Accenture	Leader	Not in	Leader	Not in
Artificial Solutions	Not in	Not in	Not in	Product Challenger
Atos	Leader	Not in	Leader	Not in
AWS	Not in	Not in	Not in	Product Challenger
Birlasoft	Contender	Contender	Not in	Not in
BitBot Studios	Not in	Not in	Not in	Contender
CANCOM	Not in	Market Challenger	Not in	Not in
Capgemini	Leader	Not in	Leader	Not in
Capita	Market Challenger	Not in	Not in	Not in
Coforge	Product Challenger	Product Challenger	Product Challenger	Not in
Cognigy	Not in	Not in	Not in	Contender
Cognizant	Rising Star	Not in	Rising Star	Not in

Intelligent Business Automation - Quadrant Provider Listing 2 of 4

	Intelligent Business Automation	Artificial Intelligence for IT Operations (AIOps) - Mid Market	Artificial Intelligence for IT Operations (AIOps) - Large Accounts	Conversational AI
Computacenter	Not in	Leader	Not in	Not in
Creative Virtual	Not in	Not in	Not in	Leader
CSS Corp	Contender	Contender	Contender	Not in
Datamatics	Product Challenger	Not in	Not in	Not in
DXC	Product Challenger	Not in	Product Challenger	Not in
eGain	Not in	Not in	Not in	Contender
Eudata	Not in	Not in	Not in	Product Challenger
EXL	Product Challenger	Not in	Not in	Not in
Fujitsu	Market Challenger	Not in	Market Challenger	Not in
GAVS	Not in	Contender	Contender	Not in
Genpact	Leader	Not in	Not in	Not in
Google	Not in	Not in	Not in	Product Challenger
HCL	Leader	Not in	Leader	Not in

Intelligent Business Automation - Quadrant Provider Listing 3 of 4

	Intelligent Business Automation	Artificial Intelligence for IT Operations (AIOps) - Mid Market	Artificial Intelligence for IT Operations (AIOps) - Large Accounts	Conversational AI
Hexaware	Rising Star	Rising Star	Product Challenger	Not in
IBM	Leader	Not in	Leader	Leader
Inbenta	Not in	Not in	Not in	Contender
Infosys	Leader	Not in	Leader	Not in
IPsoft	Not in	Not in	Not in	Leader
Kore	Not in	Not in	Not in	Product Challenger
LivePerson	Not in	Not in	Not in	Product Challenger
LTI	Not in	Not in	Product Challenger	Not in
Microland	Not in	Product Challenger	Contender	Not in
Microsoft	Not in	Not in	Not in	Product Challenger
Mindtree	Not in	Leader	Rising Star	Not in
Mphasis	Product Challenger	Leader	Contender	Not in
NTT DATA	Product Challenger	Not in	Market Challenger	Not in

Intelligent Business Automation - Quadrant Provider Listing 4 of 4

	Intelligent Business Automation	Artificial Intelligence for IT Operations (AIOps) - Mid Market	Artificial Intelligence for IT Operations (AIOps) - Large Accounts	Conversational AI
Nuance	Not in	Not in	Not in	Product Challenger
OneReach	Not in	Not in	Not in	Product Challenger
Persistent	Contender	Not in	Not in	Not in
Softtek	Product Challenger	Not in	Not in	Not in
Sonata Software	Contender	Contender	Not in	Not in
Sutherland	Product Challenger	Not in	Not in	Not in
TCS	Leader	Not in	Leader	Not in
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger	Not in
The Bot Forge	Not in	Not in	Not in	Contender
UST	Product Challenger	Product Challenger	Contender	Not in
Virtusa	Not in	Market Challenger	Not in	Not in
Wipro	Leader	Not in	Leader	Not in
Zensar	Not in	Contender	Contender	Not in

Intelligent Automation – Solutions and Services Quadrants

ENTERPRISE CONTEXT

Conversational AI

This report is relevant to enterprises across industries in the U.K. for evaluating vendors that offer conversational artificial intelligence (AI) platforms.

In this quadrant report, ISG highlights the current market positioning of vendors of conversational AI in the U.K., based on the depth of their service offerings and market presence.

Despite the dual impact of COVID-19 and Brexit, the market for conversational AI in the U.K. has shown a steady growth. The enterprise clients in the U.K. have already started adopting bots and conversational agents in their business processes to ensure smoother transition and reduce complexity in various other processes.

Who should read the report:

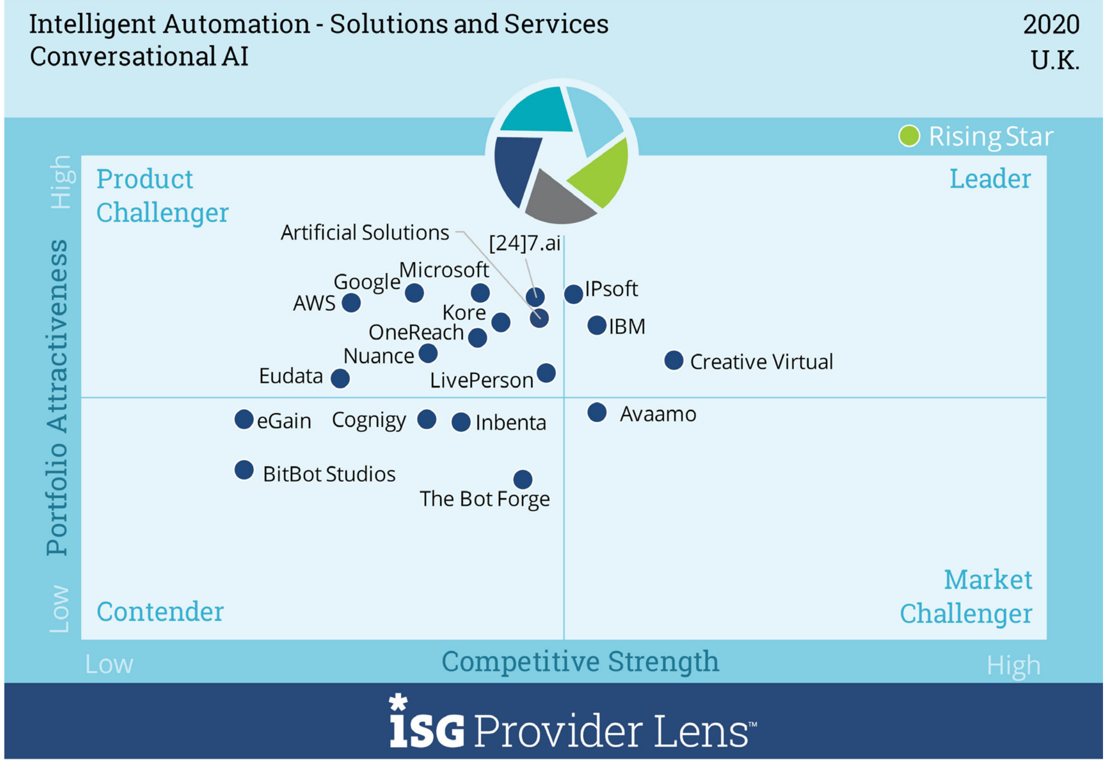
Line of business leaders (LOBs) should read this report to understand the relative positioning and capabilities of conversational agent vendors that can help them effectively improve their business processes. The report also details about technical and integration capabilities of the vendors, as well as their strategic partnerships.

Chief information officers (CIOs) and chief strategy officers (CSOs), through this report, will gain knowledge on providers' product capabilities, which, in turn, will help them understand the solutions and how they can help achieve strategic objectives.

CONVERSATIONAL AI

Definition

This quadrant covers providers that offer conversational AI solutions to facilitate a development environment and an API for automated conversational agents. These solutions integrate with chat interfaces such as messaging platforms and social media platforms, allowing for third-party extensions and customization. Conversational AI solutions interact with users through text or voice, similarly to what a human would do. These applications run on programmable commands and AI technologies and are commonly classified as chatbots and virtual assistants. They are an efficient way to handle communication with users through programmable technologies; for example, automating a standard response and a keyword search from a database. Conversational AI solutions use natural-language processing (NLP) and other technologies for sentiment analysis to understand a user's context and mood. These solutions can process increasing volumes of data, including unstructured data, based on search algorithms and data classification approaches. Inside an enterprise, conversational AI solutions using virtual assistants help employees interact with



Source: ISG Research 2020

CONVERSATIONAL AI

Definition (cont.)

their digital workplaces. In an external customer-facing environment, conversational AI provides chatbots and voice assistants for customer support and marketing initiatives.

Eligibility Criteria

- The provider must own a solution that is designed and deployed on-premises or on cloud.
- The provider must offer solutions in the following formats: allowing user self-service to create chatbots or virtual assistants with the requisite coding skills; as a solution where the vendor or its partner offers consulting services to an enterprise and customizes the final product; as a complete managed service where the vendor (with or without a partner) provides consulting, customization and maintenance for the chatbot or virtual assistant.
- The provider should offer solutions that can create chatbots and virtual agents for customer-facing services and/or internal IT.
- The provider must offer solutions that have proprietary NLP capabilities or support third-party NLP.
- The provider should offer solutions that include virtual assistants for both text and audio mode.
- The provider should offer solutions that allow chatbot and virtual assistant development with little or no reliance on data science skills.
- The provider must have a minimum of 25 active deployments with large enterprises.

CONVERSATIONAL AI

Observations

- **Creative Virtual** has a strong local presence and case examples for its V-Person™ solution.
- **IBM Watson Assistant** leads the market because of its strong accuracy capabilities in discerning user intent based on conversations.
- **IPsoft** has many successful client examples in the U.K. for its Amelia solution.

CREATIVE VIRTUAL

Overview

Headquartered in London, Creative Virtual is an established brand in conversational self-service solutions. It provides virtual agent, chatbot and live chat solutions powered by its knowledge management, workflow automation and business intelligence platform. Creative Virtual is a recipient of the prestigious Queens Award in the U.K. for enterprise innovation.

Strengths

Comprehensive solution portfolio: Creative Virtual offers its V-Person™ solution as its core intelligent assistant product and associated services. It offers V-Person™ virtual agent and chatbot technology that can work on multiple channels such as web, mobile, social media, messaging, voice, interactive voice response (IVR), smart speakers and kiosks, as well as solutions for contact centers and service desks. It offers flexible integration options and customization by channel, product, business unit, user profile and device. It supports about 35 languages globally. Creative Virtual's V-Person Live Chat™ has deep integration with V-Person virtual agents, providing a human-AI blend with a feedback loop for live chat agents.

Knowledgebase: Creative Virtual's V-Portal™ is its knowledge management, workflow management and business intelligence platform. This orchestration platform underpins V-Person virtual agent, chatbot and live chat implementations and brings together content sources and AI systems. It manages intents and blends them together with NLP, human curation of content, AI and machine comprehension. Creative Virtual has developed great knowledgebase starter packs and sector-specific intent libraries from diverse industries to help with building and training virtual agent solutions.

Case examples in the U.K.: Creative Virtual has multiple examples of helping local clients in the U.K. with its conversational AI solutions. It has helped many clients, particularly in the U.K. public sector and non-profit organizations, with its V-Portal and V-Person™ solutions integrated for IT and enterprise apps support. It has helped the largest telecom provider in the U.K. with a virtual agent solution, while also integrating with back-end Oracle solutions. Creative Virtual also provides multiple customer- and employee-facing self-service tools for multiple financial services groups in the U.K.

Caution

Creative Virtual is a well-known and established brand for AI-enabled client support in the U.K. However, the competition in the conversational AI market is intensifying due to the entry of many new and globally established players.

2020 ISG Provider Lens™ Leader

Creative Virtual is an established vendor with a focus on developing omnichannel virtual agent solutions and building and leveraging knowledge bases; it is a leader in this space.

Methodology

METHODOLOGY

The research study “ISG Provider Lens™ – Intelligent Automation – Solutions and Services” analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Intelligent Automation – Solutions and 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 & use cases
4. Leverage ISG’s internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

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Amar Changulani is the senior lead analyst at ISG and responsible for authoring Provider Lens™ studies on Intelligent Automation and Utilities. He covers key areas around business process automation, intelligent document processing, process mining and RPA. Additionally, Amar works with ISG advisors and clients on research engagements related to hyper automation. He has also authored various provider briefing notes as well as a research report - Enterprise Automation Capability Improves but RPA Wall Still Looms, which explores the typical automation adoption profile, the most common obstacles and best practices for accelerating adoption, helping enterprises understand where they are relative to others and how they can scale automation initiatives across the business.

Mrinal Rai, Author

Manager and Principal Analyst

Mrinal Rai is the principal analyst for Digital Workplace and Conversational AI. His area of expertise is digital workplace services, enterprise social collaboration and conversational AI both from a technology and business point of view. He covers key areas around the Workplace, End User computing domain and conversational AI viz., modernizing workplace, Enterprise mobility, BYOD, VDI, managed workplace services, service desk, enterprise social software, content/ team collaboration, chatbots and intelligent virtual agent platforms. He has been with ISG for last 8+ years and has more than 13 years of industry experience. Mrinal works with ISG advisors and clients in engagements related to chatbots, virtual assistants, workplace modernization, social intranet, collaborative workplace, cloud-based VDI, end user computing and service desk.

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At ISG, Manoj is primarily responsible for research projects and working on the ISG Provider Lens™ (IPL) program. He actively contributes in gathering service provider intelligence through both primary and secondary research. He is responsible for writing thought leadership reports and papers on briefings provided by the service providers. In addition to these, Manoj also writes blogs on trending topics, specifically in the Cutting-Edge IT technology. Manoj has executed several client requests for research and consulting assignments across industries, predominantly in the IT, manufacturing and insurance.

He has handled client communication for the team, managing the client right from on-boarding to understanding their custom research requests to scheduling briefing calls. Along with this, he has been closely involved with the quadrant studies around cloud services and data centre outsourcing market.

ArulManoj M, Enterprise Context and Global Overview Analyst

Senior Research Analyst

Arul has been working with ISG for more than two years and his area of expertise is on Application Development & Maintenance (ADM). During his tenure, he has developed content for ISG Provider Lens™ in the areas of Next-gen Application Development & Maintenance (ADM), SAP HANA and Leonardo Ecosystem and Intelligent Automation - Solutions and Services 2020. As part of ISG Provider Lens™, Arul is responsible for supporting research authors and authoring blogs about niche technologies, market trends and insights.

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