

ISG Star of Excellence™ – 2nd Quarter 2023 CX Insights

A quarterly report on enterprise
CX trends across technologies



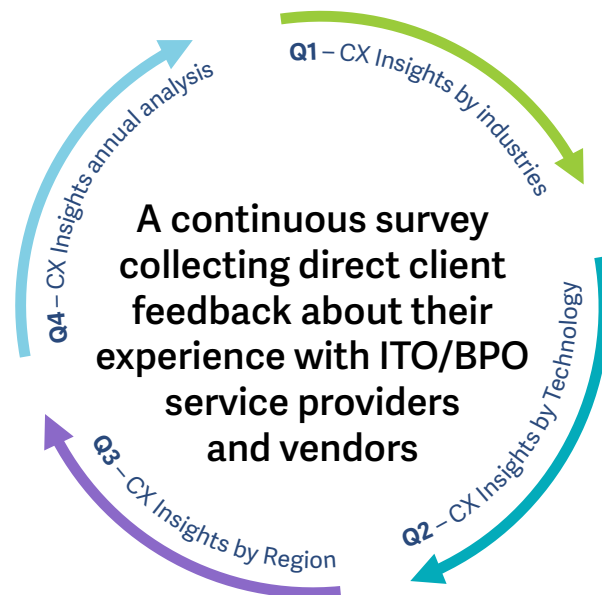
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ISG Star of Excellence™ CX Insights

The ISG Star of Excellence CX Insights reports provide a periodic analysis of trends defining the enterprise customer experience with their technology and managed service providers. These reports quantify enterprise customer satisfaction for key pillars defining the experience with technology and managed service providers. The CX Insights reports highlight the variations in this experience from different regions and industries' perspectives. The quarterly reports also provide a year-over-year change analysis in enterprise CX along with the factors influencing it.

This report focuses on trends in enterprise CX for different services provided by information technology outsourcing (ITO) and business process outsourcing (BPO) providers.

We hope you find the observations in this report interesting and valuable. We welcome your feedback.



[Q1 2023 CX Insights by Industries](#)

[Q3 2022 CX Insights by Region](#)

[Q4 2022 CX Insights Annual Analysis](#)

[Q2 2022 CX Insights by Technology](#)



What defines Enterprise CX?

ISG has identified six pillars that define enterprise CX in the ITO/BPO services and technology industry.

Six categories of customer experience:

1. Business Continuity and Flexibility

- Ensuring limited downtime in systems or services provided
- Avoiding friction while transitioning
- Adapting to changes in demand due to macroeconomic and global factors

2. Execution and Delivery

- Executing plans and projects on time
- Providing the agreed resources to deliver services
- Maintaining high-quality work consistently

3. Governance and Compliance

- Ensuring compliance with policies and regulations
- Engaging proactively in issue resolution
- Taking effective measures for cybersecurity

- Clients are asked to rate the importance of each of the six categories and then rate their service provider/vendor on each, on a scale of 1-100
- CX scores are generated across industries, regions and technology domains and for each service provider/vendor

4. Collaboration and Transparency

- Defining the handoffs/milestones between provider and client staff
- Communicating information around projects, workload and timelines
- Accepting constructive criticism or suggestions for improvement

5. People and Cultural Fit

- Adapting to a client's working culture
- Understanding a client's business and industry
- Adapting delivery to meet a client's business objectives

6. Innovation and Thought Leadership

- Supporting end-to-end processes, supplier monitoring and ESG reporting
- Demonstrating new methods of work, techniques and tools
- Adopting emerging technologies and fostering their widespread use



Key Enterprise CX highlights

- There was an improvement in the satisfaction scores for all six pillars in Q2 2023 compared to Q2 2022. The importance scores for these six pillars increased further in the same period.
- While Execution and Delivery and Innovation and Thought Leadership saw the highest growth in terms of importance, the change in the satisfaction score in the two pillars saw marginal improvement. This highlights the rate at which customers expect innovation and associated transformation in service execution to increase; service providers improve their performance for these CX pillars, although at a slower pace. Service providers can enhance their customer satisfaction in these areas by continuing to execute projects on time while also demonstrating new methods of work, techniques, and tools.

- Providers received their highest satisfaction scores for Governance & Compliance. Customers were most impressed with the provider's ability to maintain effective cybersecurity measures. The satisfaction scores that providers received from their customers this year were substantially higher than in 2022.
- Providers were also successful in significantly improving the satisfaction score they received from their customers for their ability to collaborate efficiently and transparently. Efficiently defining milestones and handoffs between teams was a key focus for providers, which was also responsible for substantially improving their collaborative approach with their customers.

Average enterprise CX score

74

Highest enterprise CX: 82

Lowest enterprise CX: 63

Enterprise CX score =

Weighted average of satisfaction scores and importance scores for six CX pillars

The arrows indicate the Y/Y change from Q2 2022

Six Pillars	Q2 2023 Satisfaction Score	Q2 2023 Importance Score
Business Continuity and Flexibility	73 ↑ 3%	77 ↑ 6%
Collaboration and Transparency	74 ↑ 7%	75 ↑ 5%
Execution and Delivery	74 ↑ 2%	81 ↑ 10%
Governance and Compliance	77 ↑ 7%	77 ↑ 9%
Innovation and Thought Leadership	73 ↑ 4%	75 ↑ 11%
People and Cultural Fit	74 ↑ 5%	73 ↑ 7%

Source: ISG user research in Q2 2023; n=981





Major Findings & Customer Insights

Key Technology CX Highlights

When a limited number of service providers offer a technology service, they usually specialize in those services and achieve a high CX score. Enterprise service management and contact center services best illustrate this point. A small percentage of providers offer digital engineering services; however, they specialize in new product development and help drive business growth. Hence these providers achieve high CX scores.

At the same time, there are exceptions to this correlation. For example, enterprise clients are highly satisfied with the cybersecurity solutions that they receive from a large pool of service providers. This points to industry's inherent price sensitivity and the preference for security solutions that can address immediate security concerns than long-term threats. ADM service providers are developing and managing applications that positively influence different business lines and business functions

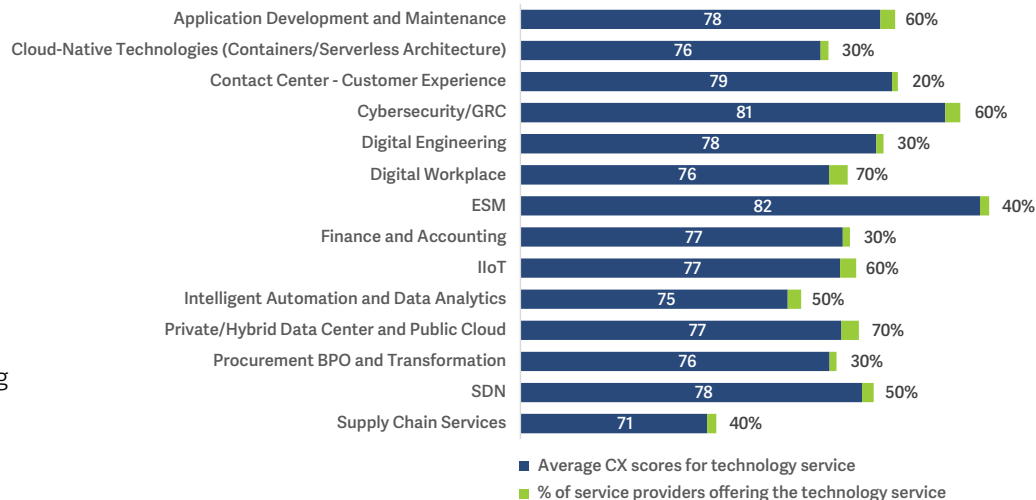
and are achieving high CX scores.

While the number of providers offering cloud, digital workplace and IIoT services is relatively large, their customers are not that content. This is because these services are mostly offered by providers that are traditionally strong in the IT infrastructure practice, and customers expect more industry vertical integration with cloud and edge technologies, which providers often fail to deliver.

Enterprises focus on digitally transforming their traditional IT services to ramp up their technological innovations. Per ISG Provider Lens™, prominent service providers have been successful in providing services that cover consulting, managed services and support services that can ensure seamless end-to-end operations for their customers, while significantly reducing operational costs.

Intelligent automation and data analytics, supply chain services, and cloud-native

Average CX score for technology services and provider specialization



Source: ISG user research in Q2 2023; n=981

technology services (including containers and serverless architecture) received low satisfaction scores from customers. Considering this, providers of these services should focus on improving their GTM strategies, resource allocation and

the cost efficiency of their services, while also co-innovating with their customers. Providers of cloud-native technology services should also engage better with the open-source developers' community.



CX scores from cybersecurity and/or GRC take the lead in ITO technology, with an increase from last year.

Customers from cybersecurity/governance risk compliance expressed the highest level of satisfaction with their service providers. Customers appreciated service providers' cybersecurity measures and GRC policies and provided a positive rating for their cyber resilience capabilities. Overall, cybersecurity/GRC customers rated providers highly for their zero-trust security model and comprehensive cybersecurity strategy.

ESM customers also expressed high satisfaction with the providers of managed services. These customers gave high scores to providers for their streamlined communication and improved service delivery.

Customers from Networking - Software Defined (SDN) gave high CX scores

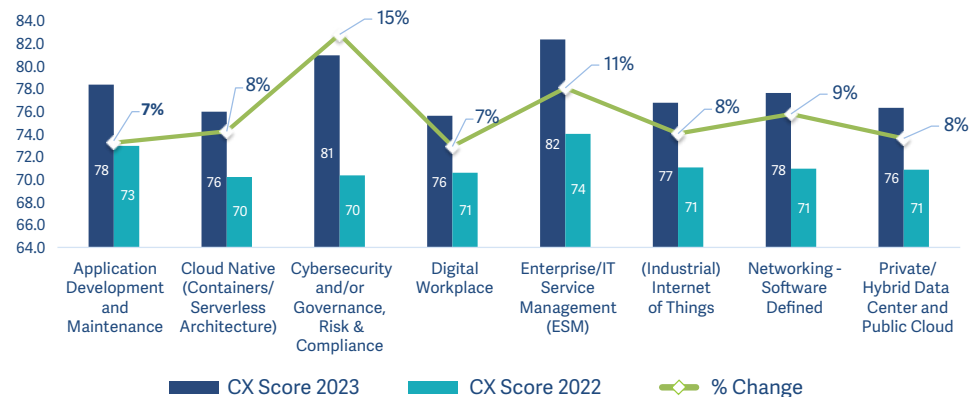
to providers for their platform-based managed services' ability to adopt a greater number of connected devices or a broader range of technologies implemented in a network.

Customers from cloud-native technologies (containers/serverless architecture) also gave high CX scores to providers for their cloud-native architecture and increased focus on automation.

Industrial Internet of Things (IIoT) customers gave high CX scores to providers for their AI-powered IoT, edge computing and tailor-made innovative solutions to deliver intelligent connectivity, drive energy cost savings, and control and secure their supply chains.

Customers from application development and maintenance, private/hybrid data center and public cloud, and digital workplace gave high CX scores to providers, but their average CX score falls

Average CX Scores by Technology (ITO)



Source: ISG user research in Q2 2023; n=981

below ITO's average CX score. Application development and maintenance service providers must deliver and modernize core applications with greater speed and agility. Private/hybrid data center and public cloud service providers need to focus on data processing, data governance, analytics and automation.

Digital workplace service providers need to enhance personalized experiences, tools and frameworks for their customers.



Enterprise CX Scores by Technology

CX scores for contact center services and finance and accounting took the lead in BPO technology, with an increase from last year, while the scores for intelligent automation and data analytics increased but remained below the BPO Average CX Score of 3.87%.

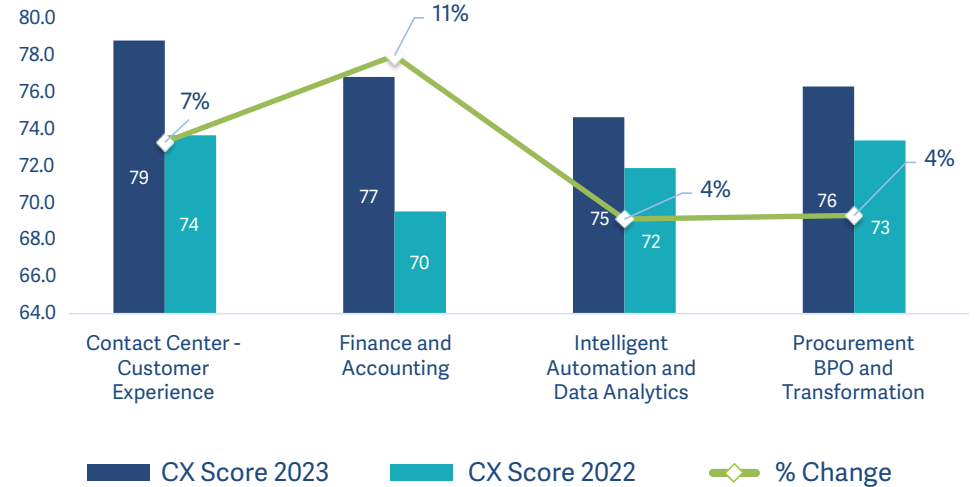
Service providers experienced the highest jump in satisfaction from customers in finance and accounting, increasing 10.5% over 2022. Customers appreciated service providers' round-the-clock support, expertise, timely delivery of services, valuable insights, compliance assurance and personalized attention.

Service providers continue to experience high satisfaction scores from customers for their contact center - customer experience solutions. These customers also gave high scores to providers for their enhanced agent experience, improved automation capabilities, and workforce management.

Customers in procurement BPO and transformation gave favorable CX score to providers; this indicates only a marginal increase from BPO's average CX score. Customers gave high scores for providers' improved operational efficiency, analytics capabilities, sustainability parameters and high-quality services.

Satisfaction scores for intelligent automation and data analytics also rose marginally in comparison to those in 2022. Customers gave high scores to providers for delivering pre-built industrialized solutions and establishing CoEs to reap long-term automation benefits.

Average CX Scores by Technology (BPO)



Source: ISG user research in Q2 2023; n=981



Technology CX Insights Across Regions – ITO

As enterprise customers across the globe understand the value of integrating technology with businesses, technology services that address this requirement are generating high CX. However, a closer analysis of the customer experience data highlights that geographic markets, such as North America, that have matured in services outsourcing are highly satisfied with technologies that form the digital backbone of enterprises. On the other hand, customers in geographies such as Europe have given high CX scores to providers for services that cater to the requirements of lines of business and business-technology integration.

As customers accelerate their digital transformation initiatives, application development and maintenance service providers, have received high CX scores in Europe. Similarly, ESM service providers have received high CX scores from the region as these

services focus on business aspects of technology clients are exploring.

Digital workplace received the lowest, but marginal, CX score for the Americas region because of the finite development of industry-specific accelerators and solutions. Software Defined Networking (SDN) customers expressed dissatisfaction with providers in EMEA for their limited adoption of platform-based managed services and slow shifting toward network as a service (NaaS) or network as a subscription. Customers from cloud-native (containers/serverless architecture) gave the lowest CX score in APAC due to the slow espousal of serverless/edge computing with hybrid cloud platforms. Customers appreciated and gave high CX scores to ESM providers in ITO technology across all three regions, Americas, EMEA and APAC. Customers appreciated the service provider's ability to provide

a skilled workforce with expertise in integrating software into existing systems and applications, cloud, API interfaces,

big data platforms, AI automation and core programming languages.

ITO Technologies	Americas	EMEA	APAC
Application Development and Maintenance	77	78	79
Cloud Native (Containers/Serverless Architecture)	78	78	72
Cybersecurity/GRC	82	80	78
Digital Workplace	74	75	76
Enterprise/IT Service Management	83	87	83
(Industrial) Internet of Things	80	76	76
Networking-Software Defined	78	75	79
Private/Hybrid Data Center and Public Cloud	75	76	77

High Performing Service Lines



Technology CX Insights Across Regions – BPO

For the Americas region, finance and accounting customers appreciated providers' ability to leverage core technologies, such as AI and ML, analytics and automation, to drive transformation in the financial planning and analysis (FP&A) function. At the same time, for the region, customers from intelligent automation and data analytics gave the lowest CX score. According to ISG research, this was of because of the absence of a centralized platform, the lack of standardized data, and the inability to gather relevant insights from data.

For EMEA, customers from digital engineering gave high CX scores to providers. According to ISG research, this was because of their providers ability to provide personalized experiences backed by advanced AI and augmented/ virtual reality and digital transformation tools that accelerate their enterprise-wide digital technology adoption. At the same time, for the region, customers from supply chain

services expressed dissatisfaction with providers' inability to meet expectations, provide services and support, and be equipped to handle sustainability requirements.

For APAC, customers from contact center - customer experience appreciated providers for evolving rapidly to adapt to the changing requirements of customers and industries by integrating AI and ML technologies. At the same time, for the region, customers gave the lowest CX score to providers for their inability to match customers' expectations in terms of speed, quality, consistency and customer support.

BPO Technologies	Americas	EMEA	APAC
Contact Center - Customer Experience	77	75	79
Digital Engineering	77	81	76
Finance and Accounting	79	75	78
Intelligent Automation and Data Analytics	72	74	74
Procurement BPO and Transformation	74	76	78
Supply Chain Services	74	71	73

High Performing Service Lines



Average Technology Services CX Scores by Industries

Enterprise customers from majority of industry verticals expressed a higher level of satisfaction with their ITO service providers compared to their BPO service providers.

ITO enterprise CX by industries

Customers from majority of industry verticals gave higher enterprise CX scores to the service providers that manage their core IT infrastructure services than those that provide application development and maintenance (ADM) services.

As customers accelerate the transition to cloud, transform their legacy technologies, such as mainframes, and modernize their workplace or network technologies, IT service providers are excellently ensuring high CX. Customers from the energy industry gave the highest CX scores for core infrastructure service providers as they are increasing their infrastructure modernization efforts.

Industries	ITO	BPO	Emerging Technologies	Cloud Ecosystem
Business services	76	72	77	75
BFSI	78	75	77	74
Energy (Oil and gas, power and utilities)	78	76	82	73
Healthcare and pharmaceuticals	77	77	75	73
Manufacturing	79	78	77	75
Retail CPG	77	75	74	73
Telecom and media	78	73	75	73
Travel, transport and leisure	74	72	72	71
Highest-CX-scoring technology	IT infrastructure services (cloud, data center, workplace, network, mainframes)	Contact center services	Immersive reality and augmented reality/virtual reality	AWS ecosystem

Top CX across all categories



Customers from certain industries where service providers develop and maintain custom applications gave high CX scores to their ADM service providers. BFSI customers are the most satisfied with their ADM service providers. At the same time, customers from the travel, transportation and leisure industry gave the lowest CX scores for ADM service providers, as applications are core to their business and expectation for services is higher than that in other verticals.

Emerging technologies CX by industries

Customers from business services and energy gave higher CX scores for providers of emerging technologies services. For business services, providers offer latest cutting-edge technologies and help customers get a competitive edge in the market. Customers from the energy industry are increasingly depending upon immersive reality and augmented reality/virtual reality, and service providers

are successfully managing these technologies, securing high enterprise CX.

BPO enterprise CX by industries

Among BPO customers, those from healthcare and pharmaceuticals and telecom and media gave higher enterprise CX scores to their providers compared to those from other industry verticals. Service providers are doing a great job in managing business process services for industry verticals where processes are mostly well-defined. For example, finance and accounting operations in the telecom industry follow a defined procedure and approach, and customers from this industry gave high enterprise CX scores for FAO service providers. Similarly, in industries where business processes are consistently changing, enterprise customers' expectations are also increasing, and providers cannot meet them. For example, customers in the retail and CPG industry use new

channels for customer support, such as social media, and the enterprise CX scores for contact center services are the lowest for this industry.

Customers from the manufacturing industry are rapidly transforming to adapt to more digital processes and adopt a better transformation outlook. These customers gave high enterprise CX scores to providers for their successful implementation and managed services for some specific business process services, such as digital engineering, organization change management and intelligent automation.

Cloud ecosystem services enterprise CX by industries

Within cloud ecosystem services, as AWS develops more industry specialization, service providers are able to manage the AWS product and service offerings more efficiently. Thus, this ecosystem

gained a higher CX score compared to other cloud ecosystems.



Technology CX Insights by Business Roles

Enterprise CX scores analysis by business functions and roles highlights two key insights.

Although ITO technologies generate high satisfaction among IT leaders, service providers can also get high satisfaction scores from other horizontal business functions. For example, ADM providers are increasingly serving the needs of horizontal business functions but falling short of satisfying the exceeded expectation of the line of business roles. The non-IT business functions have also given high CX scores to the digital workplace service providers highlighting that these providers are able to bring changes beyond technology enablement. These business functions have also given the highest CX scores for private hybrid cloud service providers, followed by the enterprise IT function that works closely with these service providers. The importance and impact of cybersecurity services are now appreciated by

business functions other than IT organizations as well. Hence the non-IT business functions have given the highest CX scores for this service.

BPO technologies generate higher enterprise CX from specific industry vertical lines of business roles compared to other business functions. For example, contact center service providers have showcased their value addition to the line of business leaders. Similarly, intelligent automation services are positively impacting the line of business as global enterprises are adopting automation-focused strategies. Service providers have received the highest CX scores from the business leaders for this service. The procurement BPO service providers are meeting expectations of the procurement business function and have received high CX scores from these business leaders.

Technology*	Key Tech Roles			
	Non-IT horizontal business function	IT, shared services	Vendor management, Procurement	Line of business (industry vertical business function)
Application Development and Maintenance	★★★★	★★	★★★	★
Contact Center CX	★★	★★★	★	★★★★
Cybersecurity	★★★★	★★	★★★	★
Digital Workplace	★★★	★★★★	★★	★
Intelligent automation and data analytics	★★★	★★	★	★★★★
Private/ hybrid cloud	★★	★★★	★★★★	★
Procurement BPO	★★★★	★★	★	★★★

★★★★ Highest CX ★★★ High CX ★★ Low CX ★ Lowest CX

*- only selected technologies



2022 Enterprise CX Award Winners by Industry

In 2022, ISG awarded the service providers that achieved the highest enterprise CX score for each industry and universally across multiple industries.

Award Criteria: Eligibility criteria for ISG Star of Excellence Awards: Providers need to have a minimum of 30 percent of responses via independent sources (public survey link). In addition, each category has the following eligibility criteria.

ISG Star of Excellence™ 2022 Universal Industry Awards

Criteria:

- Minimum 10 client responses
- Client responses in 75 percent of industries covered
- Above-average overall CX score across industries

Universal Industry Award winners

DXC Technology

Hexaware

Infosys



ISG Star of Excellence™ 2022 Industry Awards

Criteria:

- Client responses from respective industries
- Above-average overall CX score for the respective industry

Industry Award winners	Highest enterprise CX Industry award winner
Business Services	Microland
Consumer Packaged Goods	Lumen
Energy	Hexaware
Financial Services	TCS
Healthcare	TCS
Insurance	Infosys
Manufacturing	Infosys
Pharmaceuticals and Life Sciences	Tech Mahindra
Public Sector	Capgemini
Retail	HCLTech
Telecom and Media	Infosys
Travel, transportation and leisure	Tech Mahindra



ISG Industry classification

- Business services (includes business services and supplies, software and services)
- Energy (chemicals, oil and gas operations and utilities)
- Financial services (banking, diversified financials)
- Insurance
- Healthcare (healthcare equipment and services)
- Pharmaceuticals and life sciences
- Retail (food markets)
- Telecom and media
- Consumer packaged goods (food and beverage and tobacco, household and personal products)
- Travel, transportation, and leisure (hotels and restaurants)
- Public sector
- Manufacturing (aerospace and defense, consumer durables, which includes automotive, capital goods, conglomerates, construction, materials, semiconductors, hardware, and trading companies)

Technology coverage in ISG Star of Excellence™

ITO Services

- Application Development and Maintenance Services
- Digital Workplace
- Cybersecurity and Governance, Risk & Compliance
- Enterprise/IT Service Management
- Industrial IoT (IIoT)
- Mainframes
- Networking - Software Defined
- Private Cloud - Data Center
- Public Cloud services

BPO Services

- Contact Center - Customer Experience
- Digital Engineering
- Finance and Accounting
- Procurement BPO and Transformation
- Supply Chain Services
- HR Outsourcing
- Payroll/ Benefits Administration
- Organizational Change Management
- Analytics Services
- Intelligent Automation

Emerging Technology Services

- Blockchain and/or Non-Fungible Token
- Cloud Native (Containers/ Serverless Architecture)
- Environmental Social Governance (ESG)
- Immersive media and/or Extended Reality (Metaverse)

Technology Provider Ecosystem Services:

- AWS
- Microsoft
- Salesforce
- ServiceNow
- Workday
- Google
- Oracle
- SAP



Author & Editor Biographies

Author



Rohan Thomas
Senior Lead Analyst

Rohan Thomas has nearly a decade's worth of knowledge expertise in the realms of ICT, which include telecommunications, data centers, and networks and application performance management. At ISG, Rohan is the lead analyst for ISG Provider Lens™, leading research activities and benchmarking exercises pertaining to the regional adoption of digital infrastructure such as private/hybrid cloud.

He has a Bachelor's degree in Mechanical Engineering from Visveswaraya Technological University and a Master's degree in Computer Aided Design and Manufacturing from Vellore Institute of Technology.

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Mrinal Rai
Assistant Director and Principal Analyst

Mrinal Rai is Assistant Director and Principal Analyst at ISG and leads research for the future of work and enterprise customer experience. His expertise is in the digital workplace, emerging technologies and the global IT outsourcing industry. He covers key areas around the Workplace and End User computing domain, viz., modernizing workplace, Enterprise mobility, BYOD, DEX, VDI, managed workplace services, service desk and modernizing IT architecture. He also focuses on unified communications collaboration as a service, enterprise social software, content collaboration, team collaboration, employee experience and productivity services and solutions.

He has been with ISG for 10+ years and has around 16 years of industry experience. Mrinal works with ISG advisors and clients in engagements related to the digital workplace, unified communications and service desk. He also leads the ISG Star of Excellence™ program that tracks and analyzes enterprise customer experience in the technology industry and authors quarterly ISG CX Insights reports. He is also the ISG's official media spokesperson in India.



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Puranjeet Kumar is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Next-Gen ADM Solutions & Services and Salesforce Ecosystem. He supports the lead analysts in the research process and authors the global summary report. Puranjeet also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Prior to this role, he worked across several syndicated market research firms and has more than eight years of experience in research and consulting, with major areas of focus in collecting,

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Kiran B
Senior Data Analyst

Kiran works as a Data Analyst and has a professional experience of 7+ years. He has pursued master's in Computer Vision and has worked in multiple fields such as IT and Hospitality. He has worked on market segmentation, customer segmentation and derived insights from customer data and had used it to generate additional revenue. He is passionate about research and interested in advanced exploratory data analysis using ML algorithms. He has also worked on data science projects such as 'Time Series Forecasting' and 'Natural Language Processing' using Neural Networks.

He is currently responsible for data insights derivation and task automation using Python.





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Heiko Henkes
Director & Principal Analyst,
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Heiko Henkes is a Director and Principal Analyst at ISG; in his role as Global ISG Provider Lens™ (IPL) Content Lead and Program Manager, he is responsible for strategic business management and acts as thought leader for IPL Lead Analysts. In his role as ISG Star of Excellence™ Product Owner, he leads the program design and IPL integration. His core competencies are in the areas of defining derivations for all types of companies within their IT-based business model transformation.

Within this context, Mr. Henkes supports companies to undergo continuous transformation, combining IT competencies with sustainable business strategies and change management. He acts as Keynote speaker in the context of digital innovation.



*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, while 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™

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*ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit isg-one.com.





AUGUST, 2023

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