

NEAT EVALUATION FOR WEBHELP:

Social Media Customer Experience Services

Market Segment: Customer Care & Sales Capability

Introduction

This is a custom report for Webhelp presenting the findings of the NelsonHall NEAT vendor evaluation for *Social Media Customer Experience (CX) Services* in the *Customer Care & Sales Capability* market segment. It contains the NEAT graph of vendor performance, a summary vendor analysis of Webhelp for social media CX services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering social media CX services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors with capability in content moderation, trust & safety; customer care & sales; and online reputation management.

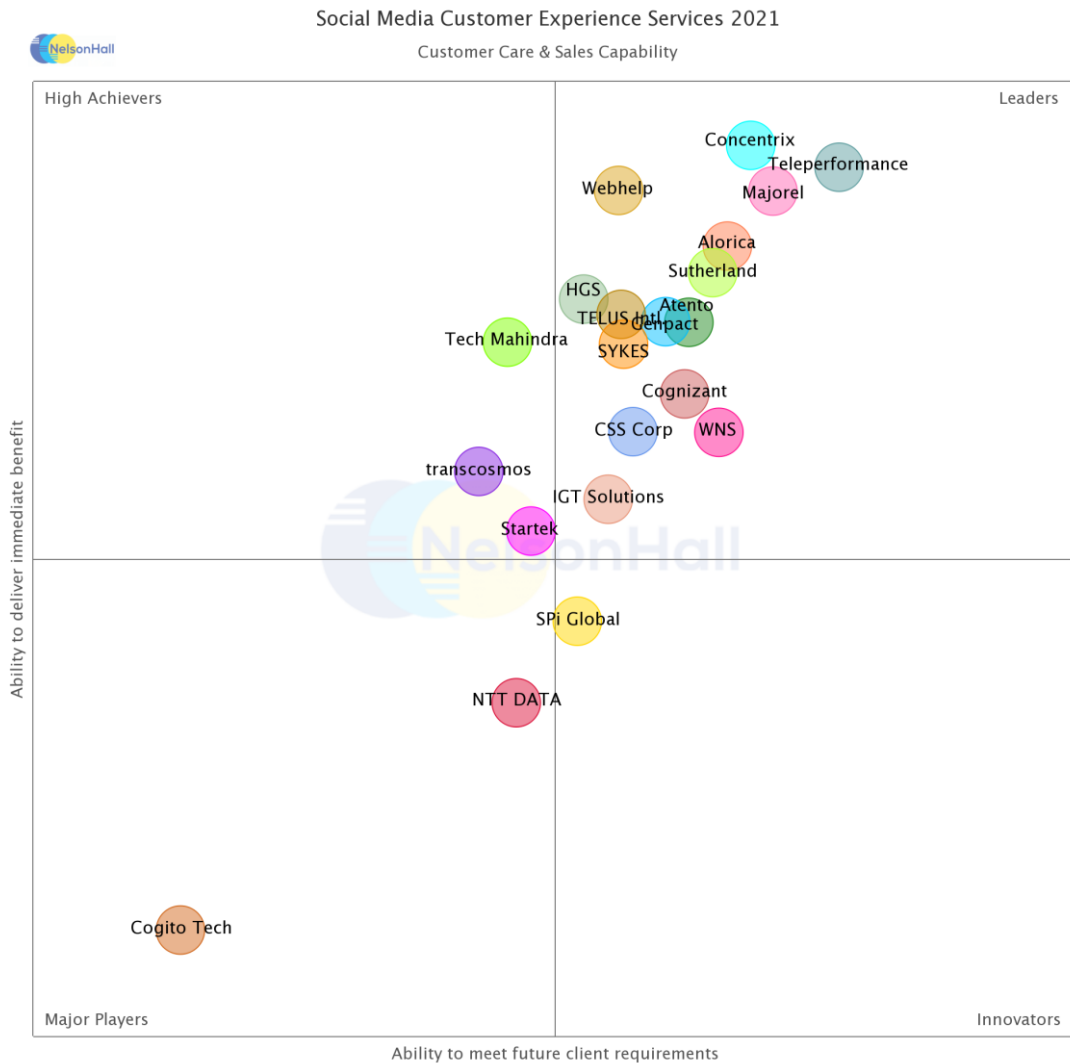
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Alorica, Atento, Cogito, Cognizant, Concentrix, CSS Corp, Genpact, HGS, IGT Solutions, Majorel, NTT DATA, SPi Global, Startek, Sutherland, SYKES Enterprises, Tech Mahindra, Teleperformance, TELUS International, transcosmos, Webhelp, and WNS.

Further explanation of the NEAT methodology is included at the end of the report.



NEAT Evaluation: Social Media Customer Experience Services (Customer Care & Sales Capability)



NelsonHall has identified Webhelp as a Leader in the *Customer Care & Sales Capability* market segment, as shown in the NEAT graph. This market segment reflects Webhelp’s ability to meet future client requirements as well as delivering immediate benefits to its social media CX services clients with specific capability around customer care and sales.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *Social Media Customer Experience Services* NEAT tool (*Customer Care & Sales Capability*) [here](#).



Vendor Analysis Summary for Webhelp

Overview

Webhelp Group (Webhelp) is a private BPS provider headquartered in Paris, France, providing CX services across the customer journey. It provides payment processing, regulated and legal services, KYC, application development and implementation, analytics, strategic advisory and consulting, and healthcare and logistics-specific services. It has ~€1.8bn revenues for CY 2020 (NelsonHall estimate) with ~65k employees in 170 sites in 50 countries, supporting ~1.3k clients. Webhelp provides social media CX services and specialized digital content services such as content moderation, data annotation, and digital activation.

In social media CX services, Webhelp provides customer care, technical support, lead generation, new customer acquisition, upsell and cross-sell, marketing campaigns on social channels, community and forum management, engagement with owned and earned content, listening, monitoring, reputation management, sentiment analysis, content moderation, trust and safety, program design, and CX consulting. It also offers content moderation technology, data collation, annotation, and NLP and computer vision training.

It has ~2.8k content moderation experts supporting ~30 languages, ~1k social media customer care specialists, and ~3k B2B sales employees. It has a separate team of ~80 digital activation consultants, business analysts, and data analysts providing display and programmatic, SEO/SEM, social campaign optimization, and CRM integration.

Webhelp has ~250 social media clients, including traditional and digital media such as newspapers, news portals, radio and TV channels, telecoms, consumer electronics and high tech, insurance, retail and CPG brands, healthcare, automotive OEMs, public and government entities, and transport companies. It also supports marketing and advertising agencies.

Webhelp has a dedicated practice offering community management, social media listening, and manual and automated content moderation. It has a proprietary content analysis platform and moderation automation platform, and is a Facebook certified marketing partner.

Gobeyond Partners is Webhelp's consulting business, delivering service design, CX consulting, organizational strategy, UX/UI services, RPA and AI technology, web and app development, digital channel enablement, and omnichannel integration.

Financials

NelsonHall estimates Webhelp's CX services revenues for 2020 at ~\$1.8bn, of which social media services are ~\$140m.

Strengths

- Strong social media CX consulting and design practice with frameworks, dedicated resources, and automation enablement expertise
- Mature content moderation and trust & safety experience with proprietary platforms, strategic partnerships, functional know-how, employee lifecycle approach, and industry-specific deployments, particularly in media
- Scale and market momentum of the content moderation business



- Strong B2B social selling practice with proprietary methodology, delivery scale, and implementations across sectors
- Investments in language and conversational design resources and technology.

Challenges

- Can expand services for micro-influencer identification and management to address market demand
- Can invest more actively in additional ecommerce trust and safety services such as trademark protection and counterfeit goods detection.

Strategic Direction

Gobeyond Partners is actively incorporating social media analytics into sentiment analysis and VOC services to create a combined view of the CX and generate actionable insights for clients. Webhelp is looking to address marketing departments' operational and administrative requirements for digital back-office services covering content production, publication, and digital assets management. Its one-to-one customer care and account management are focused on messengers, expecting the support volumes to shift. A major driver is that messengers offer convenience and ubiquity as part of the smartphone ecosystem.

With CX impacted by increasing demand fluctuations and clients looking to scale up support without a large headcount, Webhelp aims to address the challenges through CX program designs with automation at the center. It relies on its self-service and bot implementation experience across industries and clients to deliver ROI faster and more efficiently than clients' in-house capabilities. It currently has chatbot developments in progress for retail, ecommerce, and travel clients. It plans to build sector views with reusable components such as intent libraries and language models to speed up delivery.

Webhelp continues to expand its content moderation and trust and safety practice from both technology and delivery perspectives. It is adding functionalities to augment moderators' work, such as pre-moderation, audio muting, and shutdown buttons. It is developing Proteus to automatically detect non-compliant content, such as an AI model to identify text instructions for building explosives and monitoring dark web activity. Another investment area for 2021 is compliance with online marketplaces and enrichment of ecommerce content.

For delivery in 2021, Webhelp is adding a new site in Daugavpils, Latvia, for content moderation. It expects the growth to continue with media brands aiming to nurture their comment sections and community for added value and for brands to prioritize their online reputation protection. It looks to address this demand with its mixture of moderation technology and specialized resources.

During the COVID-19 pandemic, the company activated WAH for content moderation and adjusted employee wellbeing and resilience training with team and peer-to-peer chats and higher team leader to agent ratios. It is adding new criteria to the employee happiness index; for example, content rejection reason to create a more precise proactive issue detection. Next, it plans to certify the operational model with third-party organizations.

On the back of its B2B sales experience with IT and technology sectors, the company is adding new localized campaigns with enterprise demand to enter markets without a field sales force and expanding social selling. It also targets retail, ecommerce, travel, and transport clients which increasing focus on direct sales over social channels. It continues to investigate suitable



social platforms for B2B sales activities outside markets where LinkedIn adoption is low. It already has a technology partnership for web listening to identify direct purchase intent.

Outlook

Webhelp has a mature consulting and design practice able to analyze clients' CX demand and identify social channels' suitability within an overall CX approach. Its frameworks, dedicated resources, and focus on automation are well suited to meet the digital experience's market transformation under cost pressures. Its language and brand persona design capability are a differentiator. Expect the company to benefit here in the high-growth ecommerce sectors.

Webhelp's established content moderation practice serves the specialized but growing need of brands to handle UGC in their own communities and social platforms. The company's comprehensive offerings in the space can be further integrated with the specialized trust and safety services existing within other parts of the organization, such as KYC and payment services. Look for Webhelp to expand its content moderation operations with additional nearshore and offshore locations.

The B2B social selling expertise is a significant asset for Webhelp, outperforming competitors and creating opportunities in an underserved market. Look for additional expansion in North American and APAC markets. In addition, look for Webhelp to develop its marketing back-office services such as content production, localization, and publishing to support social campaigns and advertising.



Social Media Customer Experience Services

Market Summary

Overview

The current market for social media CX services has a significant growth potential fueled by increased user activity, a need for volume deflection and mass communication, and the shift to ecommerce.

The future social media CX services market will have wider adoption of conversational commerce and social bots and will support both the CXO and CMO with a broader range of ORM, content services, and analytics.

Buy-Side Dynamics

The key buy-side drivers for the adoption of social media CX services include requirements for:

- Improved customer satisfaction delivered through process redesign
- Improved cost optimization through offshoring, self-service, and automation
- Additional flexibility and scalability
- Increased brand engagement and reach
- Additional business insights
- Greater regulatory compliance
- Decreased processing time
- Improved online asset usage
- Additional sales.

Additional buy-side factors in the adoption of social media CX services include:

- Access to automation, BI, talent recruitment, training, wellbeing, and CX transformation
- The creation of centralized social media command centers and CoEs to unify social media monitoring and support, achieve cost savings, reach scale, and adopt best operational practices
- Deploying RPA and automation in social media operations for agent augmentation
- Access to technology and design and implementation experience for social bots
- Remote selection, recruitment, training, and onboarding of social media skilled talent
- Quality audits and training technology use for the client's in-house teams
- Use of best practices and models in moderator resilience building and wellbeing and employee mental health development
- Multilingual capabilities for new market entry



- Customer, market, and competitor insights with data services, visualization, and predictive models
- Trust and safety services in the shared economy industries between third-party suppliers and end users
- Niche trust and safety services such as copyright protection, counterfeit goods prevention, fraud detection, and social account integrity maintenance
- Serving as a broader intermediary with micro-influencers, covering identification, interactions, and performance management.

Market Size & Growth

The global social media CX services market is ~\$5bn in 2020, approximately 6.5% of the overall industry, and is growing above the average market rate at 6.9% CAAGR; the market is expected to reach \$6.5bn in 2024.

The U.S. represents ~31% of the global market today, with the German market expanding the fastest of the large markets at 8.4% CAAGR.

Challenges & Success Factors

The main challenges for social media clients in effectively adopting outsourced social media services are the limited view and siloed ownership of the channel.

Major success factors for CXS vendors are the ability to design the CX and brand experience on social channels, together with deep expertise in social media sub-processes, and integrated multichannel delivery moving to conversational commerce over asynchronous messengers.

Analytics offerings are evolving from real-time insights to predictive and prescriptive ML-based models. Vendors also require the capability to improve customer satisfaction, optimize costs, generate insights, and pilot sales and retention activities over social channels, with social media-specific talent management practices evolving to brand advocacy experts with independent decision-making.

Outlook

Over the next four years:

- Key focus areas for clients and vendors are the adoption of cloud, omnichannel, and intelligent automation in contact center operations to speed up digitalization of interactions and social media channel use
- Move to nearshore markets to lower cost and increase capacity for social media care
- Move to multilingual hubs for centralized content moderation services across regions
- Wider adoption of conversational commerce for direct sales and retention over asynchronous messengers supported by conversational AI
- Expanded scope of ORM to encompass employee, supplier, and third-party social media sentiment analysis with clear crisis management function
- Deeper integration of social media data in R&D, product development, and new market entry



- B2B social media, especially for sales, will become standard
- Customer-facing social bots will become commonplace, and the work of social media agents will be augmented by a high degree of automation and prescriptive analytics
- Vendors will support the CMO with domain-specific services such as content production and creative, influencer selection and management, and social media brand persona development.



NEAT Methodology for Social Media Customer Experience Services

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet client future requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet client future requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

‘Ability to deliver immediate benefit’: Assessment criteria

Assessment Category	Assessment Criteria
Offerings	<ul style="list-style-type: none"> Range of social media customer experience services Customer experience improvement capability Online reputation management capability Content moderation and trust & safety capability Digital transformation
Delivery	<ul style="list-style-type: none"> Scale of delivery capability for social media CX Services Suitability of delivery North America Suitability of delivery EMEA Suitability of delivery APAC Suitability of delivery Latin America Application of social media engagement models and platforms Application of customer, market, competitor insights Application of semantic analysis Application of advanced ORM services Application of specialized trust and safety services Application advanced content management services Application of agent-facing automation and RPA Application of customer facing automation and self-service Application of technology and models to enhance staff recruitment, training, management Application of frameworks and practices for employee resilience and wellbeing Function-specific process re-engineering capability CX design and consulting capability
Market Presence	<ul style="list-style-type: none"> Scale and momentum in social media CXS market Scale and momentum in ORM market Scale and momentum in content moderation market
Benefits Achieved	<ul style="list-style-type: none"> Level of customer experience improvement achieved Level of social media engagement increase achieved Level of cost savings achieved



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Investment in Social Media CX Services	<ul style="list-style-type: none"> Investment in development of social media customer care Investment in development of social media sales Investment in development of ORM Investment in development of content moderation Investment in development of analytics Investment in development of automation Investment in development of end-to-end digital transformation
Perceived Suitability by CX Services Clients	<ul style="list-style-type: none"> Perceived effectiveness in the application of customer experience improvement Perceived effectiveness in the application of online reputation management Perceived effectiveness in the application of content moderation Mechanisms in place to deliver client innovation through analytics Mechanisms in place to deliver client innovation through automation & RPA Extent to which client perceives that innovation has been delivered Suitability of vendor to meet future needs of client Perceived suitability as key partner

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.



research.nelson-hall.com

Sales Enquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:
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