

The Forrester New Wave™: Digital-First Customer Service Solutions, Q2 2020

The 13 Providers That Matter Most And How They Stack Up

by Kate Leggett

April 13, 2020

Why Read This Report

In Forrester's evaluation of the emerging market for digital-first customer service, we identified the 13 most significant providers — [24]7.ai, Astute, Comm100, Conversocial, eGain, Glia, Helpshift, Khoros, Kustomer, LivePerson, LogMeIn, Nuance Communications, and Quiq — and evaluated them. This report details our findings about how well each vendor scored against 10 criteria and where they stand in relation to each other. Customer service operations pros can use this review to select the right partner for their pre- and postpurchase customer engagement needs.

Key Takeaways

LivePerson, Nuance Communications, And [24]7.ai Lead The Pack

Forrester's research uncovered a market in which LivePerson, Nuance Communications, and [24]7.ai are Leaders; eGain, Helpshift, LogMeIn, and Glia are Strong Performers; Astute, Khoros, and Kustomer are Contenders; and Quiq, Comm100, and Conversocial are Challengers.

Beyond Channel Depth, AI And Automation Are Key Differentiators

Beyond channel breadth and depth, vendors vary in their automation and AI strategies to assist agents and deliver highly personal engagement. The best solutions pervasively embed automation and AI: automated conversations, agent-facing productivity aids, insights to deliver high quality of service, journey usage, and behavioral data for highly personal engagement.

Watch This Space As It Disappears

This market is ripe for acquisition activity. CRM vendors have already started picking up these companies to enhance and extend their often lackluster digital offerings. We predict that this category will quickly disappear.

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The 13 Providers That Matter Most And How They Stack Up



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April 13, 2020

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Digital-First Customer Service Is An Emerging, Yet Fleeting, Category

Digital-first customer service experiences: 1) take place on digital properties like desktop and mobile websites and mobile applications; 2) are initiated and resolved over synchronous and asynchronous digital channels; 3) enable customers and agents to seamlessly move between digital channels without losing context; and 4) are delivered based on customer, temporal, and behavioral data and optimized via AI.

Digital-first customer service solutions deliver automated and assisted engagement via chat, messaging, cobrowsing, one- and two-way video, SMS, social interactions, click-to-call, and click-to-callback. They use customer- and agent-facing chatbots to automate engagement and tap into knowledge bases for curated content. A combination of rules and AI models enables omnichannel routing, and embedded AI understands customer intent, context, and sentiment and predicts when to engage. This is very much a category in the making, where few vendors offer a breadth of digital-first capabilities; however, they all shine in targeted areas, like depth of messaging capabilities or social engagement.

Digital-first solutions have broad appeal to teams that must support authenticated or anonymous customers in the pre- and postpurchase stages. These include digital operations, digital experience, eCommerce, digital marketing, and customer service teams. This is because digital-first solutions can help understand customer behavior and intent and deliver highly contextual experiences — reactively and proactively — based on friction points they detect in customer journeys. They offer automated and live-agent engagement and do not encompass chatbot-only customer service solutions. Many teams use these solutions in conjunction with CRM, and CRM vendors eye this category to beef up their omnichannel offerings.¹ We predict that this will be a short-lived category.

Digital-First Customer Service Solutions Evaluation Overview

The Forrester New Wave™ differs from our traditional Forrester Wave™. In the New Wave evaluation, we assess only emerging technologies, and we base our analysis on a 10-criterion survey and a 2-hour briefing with each evaluated vendor. We group the 10 criteria into current offering and strategy (see Figure 1). We also review market presence.

We included 13 vendors in this assessment: [24]7.ai, Astute, Comm100, Conversocial, eGain, Glia, Helpshift, Khoros, Kustomer, LivePerson, LogMeIn, Nuance Communications, and Quiq (see Figure 2 and see Figure 3). Each of these vendors has:

- › **Broad digital-first functionality.** All vendors in this evaluation offer a wide range of native self-service and agent-assisted capabilities to support customer interactions that: 1) are initiated and resolved over digital channels; 2) occur before, during, and after the purchase phase; and 3) use customer, behavioral, and temporal data to optimize experiences.

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- › **Proven customer adoption and Forrester client mindshare.** We focused on vendors that are most relevant to Forrester clients, as indicated by frequency of client requests or because, in Forrester’s judgment, their market presence or technical capabilities warranted inclusion.
- › **General availability of product in multiple geographies.** The evaluated vendors’ products were generally available as of January 21, 2020, and sold in at least two of three major geographic regions: North America, Europe, and Asia Pacific. We did not evaluate any alpha, beta, preview, limited-availability, or prerelease features or services.

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FIGURE 1 Assessment Criteria

Criteria	Platform evaluation details
Agent and supervisor experience	How well does the agent desktop support digital engagement, including channel switching, transfer to other agents, agent collaboration, and chatbot-agent and agent-chatbot handoff? How effectively does it make agents productive? How does it enable managers to optimize agent workload and quality of service?
Personalized customer experience	How well does the solution deliver a personalized customer experience, including channel choice, transfers between channels, and multimodal support based on the customer's need or intent? What customer interaction and journey data does it use for proactive engagement?
Routing, queuing, and CRM integration	How well does the solution natively support unified routing and queuing to agents and to chatbots for all digital interactions? How deep are routing and queuing capabilities? Is routing optimized via machine learning? What inputs does the solution use, for example, from CRM, to influence routing and queuing?
Breadth of supported channels; channel orchestration	How well does the solution natively support digital channels (for example, chat, messaging, cobrowse, one- and two-way video, SMS, social interactions, click-to-call, and click-to-callback)? How well does it support multimodal interactions? How does it carry context across channels and along the customer journey?
Knowledge and content	Does the solution include a native agent- and customer-facing knowledge management solution? How does it support packaged integrations to third-party knowledge bases? How does it support the creation and optimization of curated content? How well does it surface knowledge for each interaction?
Chatbots	How well does the solution support customer- and agent-facing chatbots? Does it include native or third-party conversational AI? Does it include business-friendly tooling to create chatbots, topic automation analysis, and learning and performance optimization? How does it improve AI and natural language processing?
Business insights	How well does the solution provide insights on the quality of service delivered using: 1) direct structured feedback via surveys; 2) quality-of-service reporting; and 3) indirect feedback from analysis of digital interactions? How does it present recommendations for quality improvement?
Vision	To what degree does the company have a differentiated vision for the product, incorporating current and emerging market trends? Does this vision appeal to a broad range of verticals, geographies, and target buyers? To what degree can the company execute on its vision in the next three to five years?

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FIGURE 1 Assessment Criteria (Cont.)

Criteria	Platform evaluation details
Roadmap	To what degree will the company deliver superior business outcomes to its customers, relative to competitors, based on the product enhancements, commercial model, or partner ecosystem expansion in its near-term (approximately one year) roadmap?
Market approach	What tangible evidence exists with customers today (current revenue, number of customers, and year-over-year growth)? What is the breakdown of customers in different regions (North America, Latin America, EMEA, and Asia Pacific)?

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FIGURE 2 Forrester New Wave™: Digital-First Customer Service Solutions, Q2 2020

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FIGURE 3 Vendor QuickCard Overview

Company	Agent experience	Customer experience	Routing and queuing	Breadth of channels	Knowledge and content	Chatbots	Business insights	Vision	Roadmap	Market approach
LivePerson	⊖	⊕	⊕	⊖	⊖	⊕	⊕	⊕	⊖	⊕
Nuance Communications	⊖	⊖	⊕	⊖	⊖	⊕	⊖	⊕	⊖	⊕
[24]7.ai	⊕	⊕	⊕	⊖	⊖	⊕	⊖	⊖	⊕	⊖
eGain	⊖	⊕	⊖	⊕	⊕	⊖	⊕	⊖	⊖	⊖
Helpshift	⊕	⊖	⊖	⊖	⊖	⊖	⊖	⊕	⊖	⊖
LogMeIn	⊖	⊖	⊖	⊕	⊕	⊖	⊕	⊖	⊖	⊖
Glia	⊖	⊕	⊖	⊕	⊖	⊖	⊖	⊖	⊕	⊖
Astute	⊖	⊖	⊕	⊖	⊕	⊖	⊖	⊖	⊖	⊖
Khoros	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Kustomer	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Quiq	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Comm100	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Conversocial	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖

⊕ Differentiated ⊖ On par ⊖ Needs improvement ⊖ No capability

Vendor QuickCards

Forrester evaluated 13 vendors and ranked them against 10 criteria. Here’s our take on each.

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LivePerson: Forrester’s Take

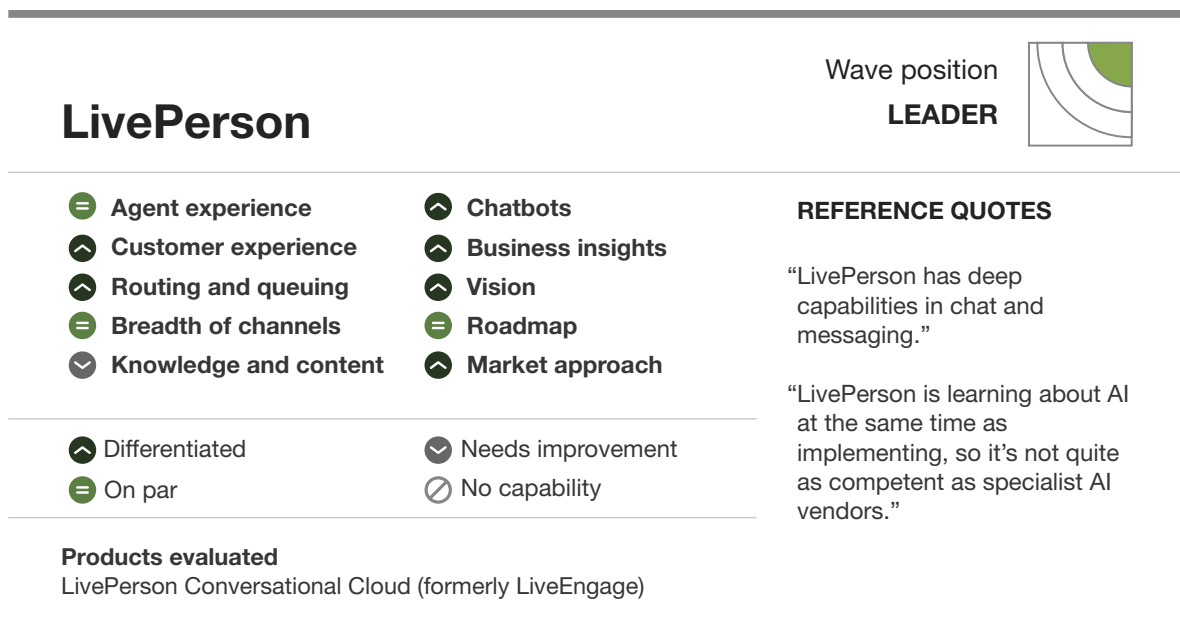
Our evaluation found that LivePerson (see Figure 4):

- › **Leads with enterprise-grade messaging.** The vendor successfully supports the interplay of chatbots and agents — a capability backed by customer references. Its comprehensive chatbot tooling is built for business users and supports industry-specific flows, intents, and packaged integrations. It offers sophisticated routing, capacity queue management, and business insights to optimize operations.
- › **Has product and positioning gaps to fill.** LivePerson over-rotates on its messaging position to the detriment of other capabilities. It lacks robust knowledge management (KM) and language support, and its conversational AI is less mature than that of other Leaders.
- › **Best suits companies that look to adopt messaging at enterprise scale.** LivePerson offers technology, adoption, and optimization services — and thought leadership — that allow enterprises to deflect calls and modernize engagement modalities.

LivePerson Customer Reference Summary

References universally praised the vendor’s chat, messaging, and chatbots. Yet, they had difficulties scaling the solution to meet customers’ global needs and language requirements.

FIGURE 4 LivePerson QuickCard



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Nuance Communications: Forrester’s Take

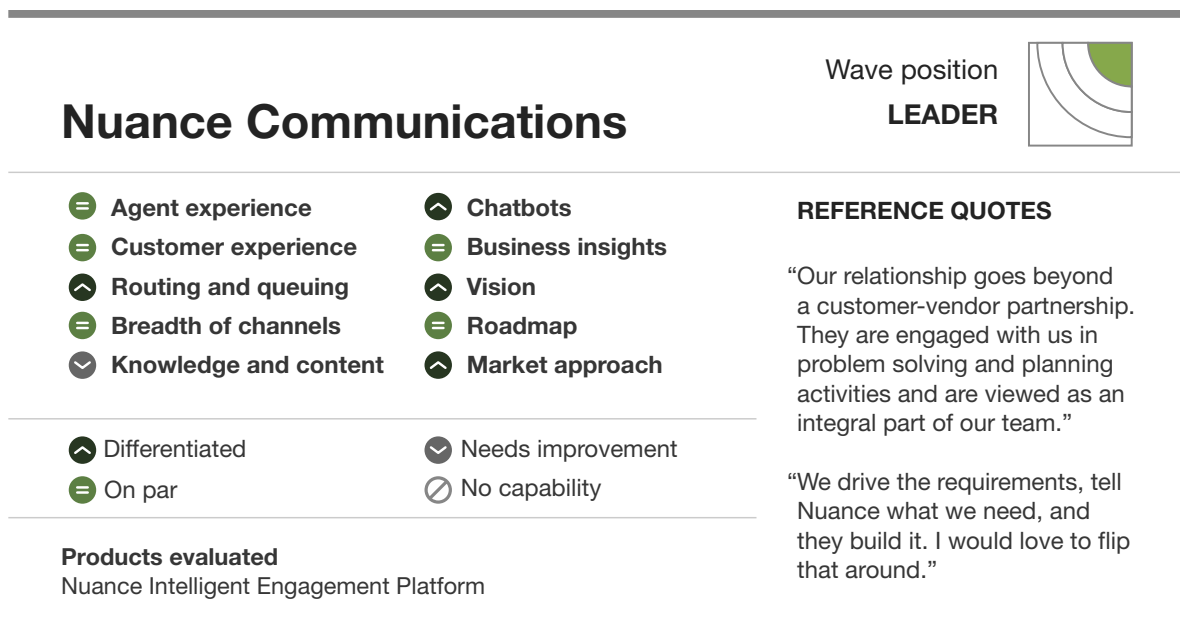
Our evaluation found that Nuance Communications (see Figure 5):

- › **Leads with conversational AI embedded in its digital suite.** Nuance outstrips its rivals with leading conversational AI for chatbots, including tooling that uncovers conversations to automate. It also offers a mature agent desktop and supervisor tooling to facilitate agent coaching and real-time adjustments to the agent workforce.
- › **Lacks breadth in messaging channels.** Nuance doesn’t support as many of the newer messaging channels that leading vendors in this specific category natively support.
- › **Best suits enterprises with large global footprints and high interaction volumes.** Nuance’s global presence, mature professional services, partner relationships, and industry focus best suit large enterprises in financial services, telecom, healthcare, travel, and retail.

Nuance Communications Customer Reference Summary

Customers valued their strategic relationships with Nuance and its ability to execute, but they complained about the vendor taking a back seat, not leading, in terms of a compelling customer engagement roadmap.

FIGURE 5 Nuance Communications QuickCard



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[24]7.ai: Forrester’s Take

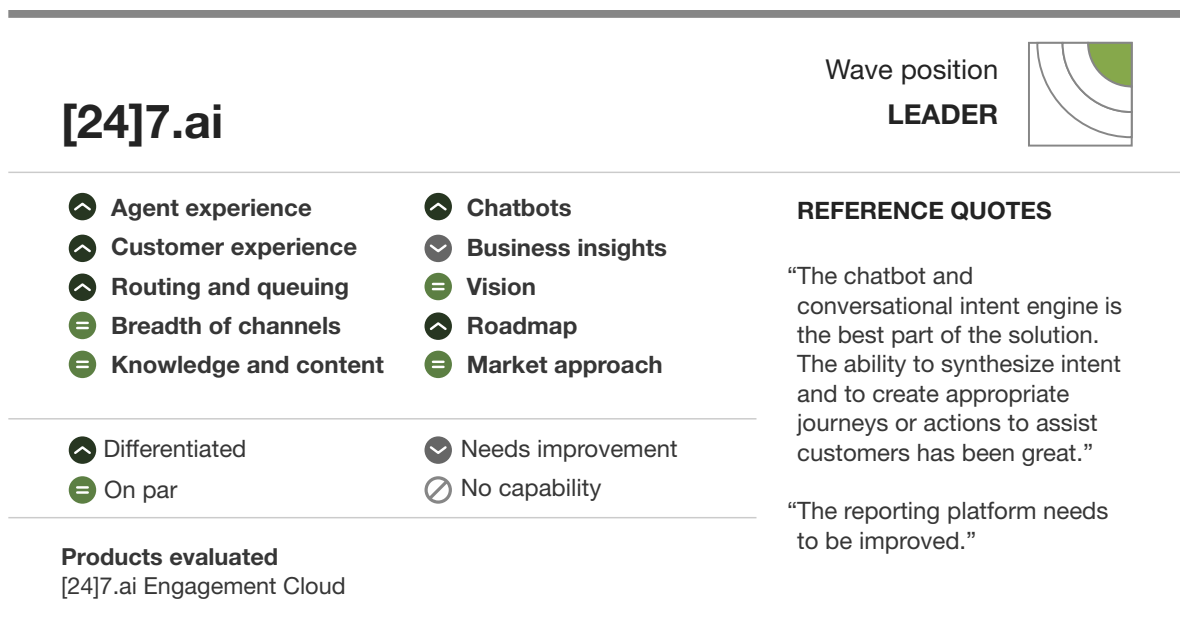
Our evaluation found that [24]7.ai (see Figure 6):

- › **Leads with industry-specific predictive engagement.** [24]7.ai’s solution strengths include sophisticated AI backed by domain-specific intent libraries, a real-time decisioning engine, and a well-designed agent workspace. It integrates with Apple Business Chat, Facebook Messenger, and Google Business Messaging.
- › **Has deployments that require significant customization.** Solutions require a heavy lift from the vendor’s implementation team, although that cost is often baked into pricing. It also has a small partner ecosystem, which it must grow in order to scale.
- › **Best suits select verticals that require chatbots to tame engagement volumes.** [24]7.ai uniquely combines AI, omnichannel engagement, and digital workforce management for the retail, telecom, travel and hospitality, and financial services and insurance markets.

[24]7.ai Customer Reference Summary

Customers praised [24]7.ai’s solution, which predictively supports customers throughout their journeys, but they complained about the lack of enterprise-grade reporting.

FIGURE 6 [24]7.ai QuickCard



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eGain: Forrester’s Take

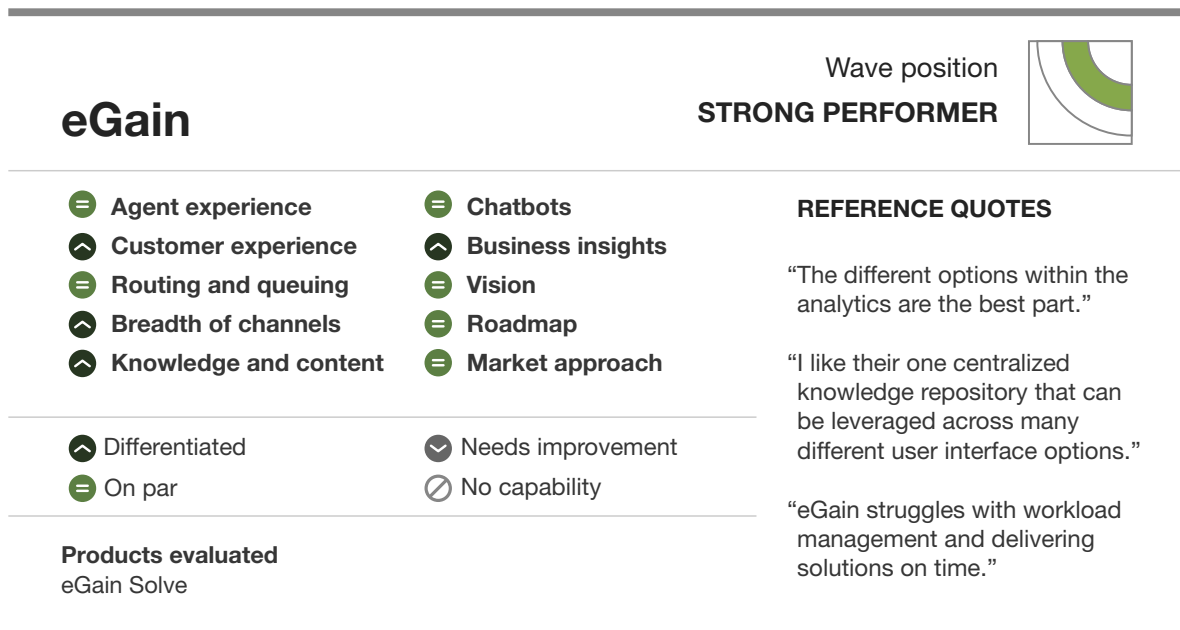
Our evaluation found that eGain (see Figure 7):

- › **Offers a well-rounded digital engagement solution.** eGain has a mature agent desktop powered by robust knowledge management that automates activities and guides agents with next best actions. Supervisors manage agent workloads in real time, and they can tune entire journeys using analytics and surveys, which is another slick capability.
- › **Needs to broaden and deepen its set of digital channels.** eGain natively supports a limited number of messaging channels: Apple Business Chat, SMS, Facebook Messenger, Twitter direct messages, and WhatsApp. It lacks the functional depth that leaders in the messaging space provide.
- › **Best suits companies that value knowledge-powered engagement.** eGain provides world-class knowledge management that fuels self-service and agent-assisted experiences. It also offers quick-start packages that show value within a month.

eGain Customer Reference Summary

Customers highlighted eGain’s knowledge solution, which they can leverage across touchpoints and channels, and its can-do attitude, but they called out product quality as an issue.

FIGURE 7 eGain QuickCard



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Helpshift: Forrester’s Take

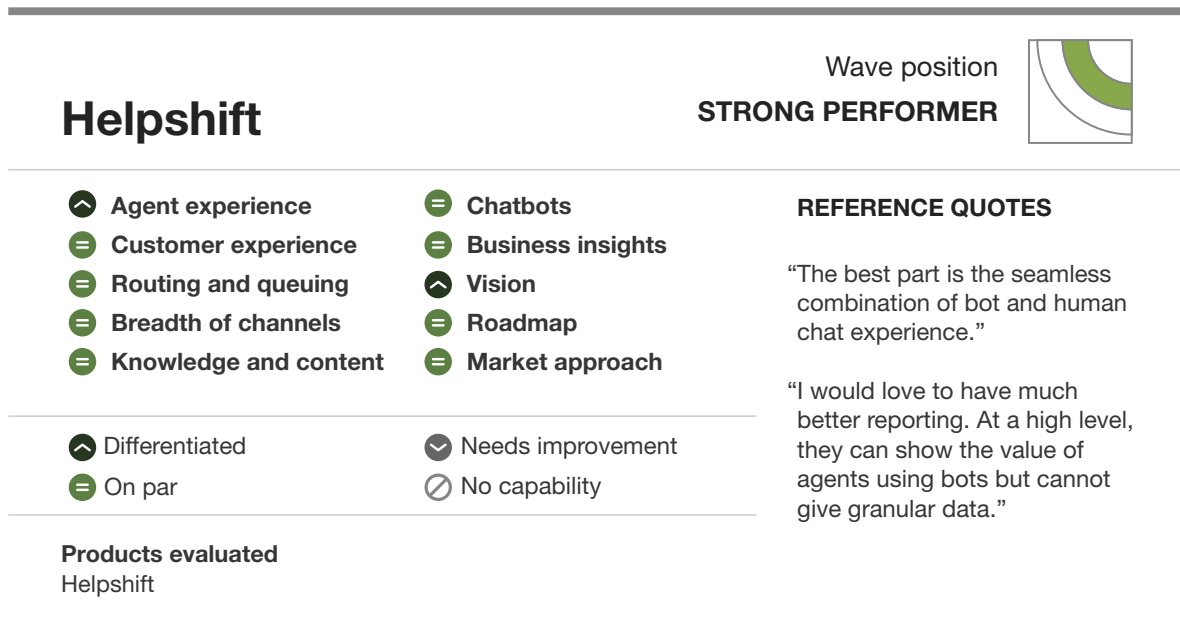
Our evaluation found that Helpshift (see Figure 8):

- › **Has a microbot approach that rapidly automates simple messaging interactions.** Helpshift’s unique low-code visual bot builder, coupled with packaged microbots, allows service organizations to quickly add automation to asynchronous digital channels. Bots and agents seamlessly work together, and bots are tuned with user feedback.
- › **Does not extend to complex customer service.** Helpshift’s approach is less suited to complex service processes that require real-time customer and agent collaboration. In addition, Helpshift misses out on synchronous digital voice and video.
- › **Best suits B2C brands with high volumes of digital interactions.** Helpshift’s mobile-messaging- and AI-first approach resonates strongly with brands in gaming, retail, and fintech.

Helpshift Customer Reference Summary

Customers said that Helpshift’s approach to combining AI and bots for service automation yielded measurable efficiency and satisfaction gains, but they highlighted that their bots were first generation.

FIGURE 8 Helpshift QuickCard



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LogMeln: Forrester’s Take

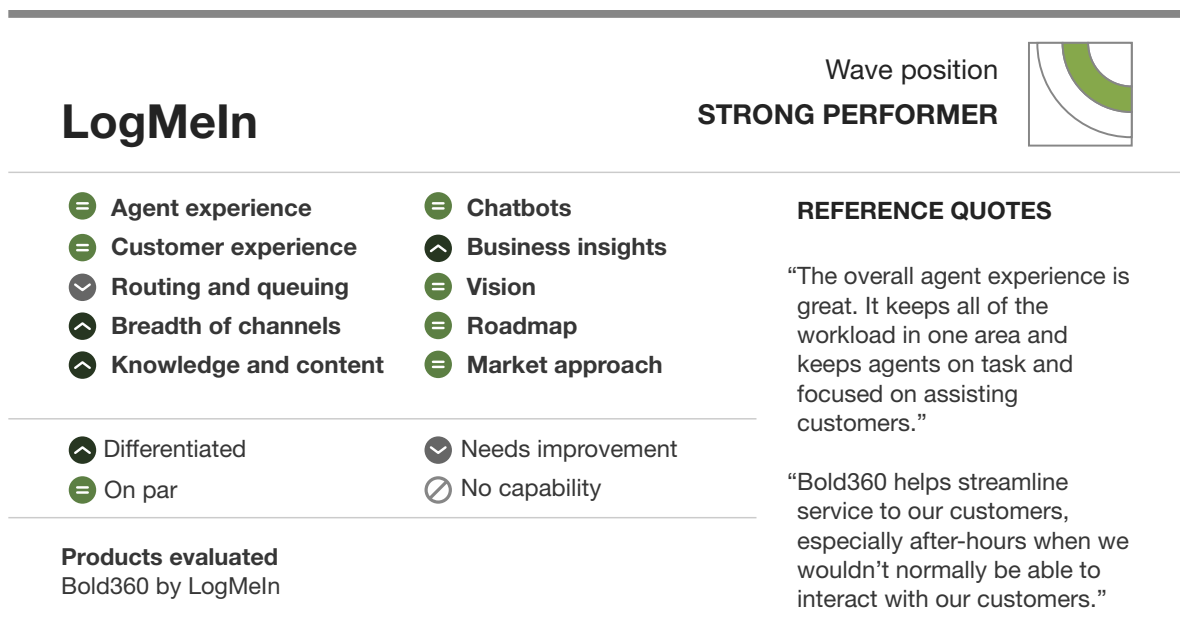
Our evaluation found that LogMeln (see Figure 9):

- › **Has a well-designed agent experience that combines all elements for efficient service.** The vendor has best-in-class analytics to track customer intent and evolve self-service. The agent workspace does a great job of organizing work by importance, enabling agents to work across multiple channels, automating actions, proactively displaying knowledge, and facilitating bot-to-agent handoffs.
- › **Must evolve its routing and queuing capabilities.** LogMeln supports only rules-based routing, unlike some of its peers, and it must use greater swaths of data for personalization.
- › **Best suits midsize companies invested in digital engagement.** LogMeln has competitive pricing, streamlined deployment, business-friendly tooling, and a maturity model that helps cost-sensitive companies realize value at every step.

LogMeln Customer Reference Summary

Customers found that the Bold360 team is very willing to help and that it’s extremely knowledgeable about its product and best practices to maximize return on investment.

FIGURE 9 LogMeln QuickCard



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Glia: Forrester's Take

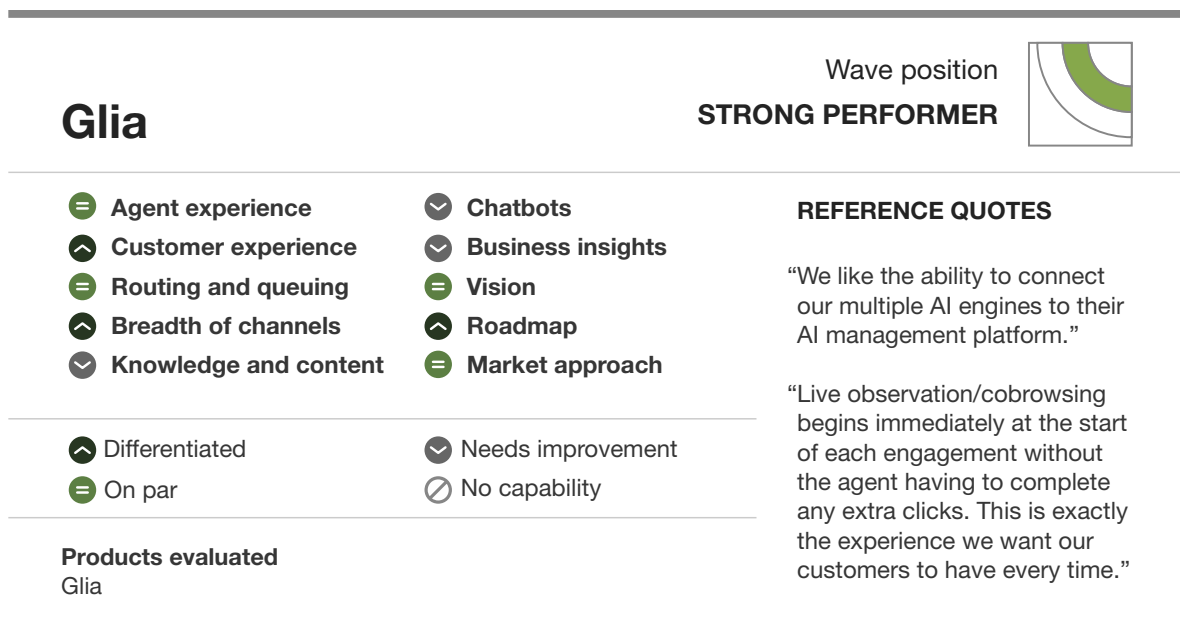
Our evaluation found that Glia (see Figure 10):

- › **Empowers customers with channel choice in a sophisticated and slick way.** Glia uses journey context and interaction data to decide when and where to offer a particular channel to a customer. Customers can move seamlessly between channels and add channels for multimodal interactions.
- › **Lacks a native chatbot.** Although Glia's platform has connectors to major AI engines (Amazon Lex, Dialogflow, Microsoft Bot Framework, and IBM Watson), reliance on a third party can be challenging for customer success.
- › **Best suits contact centers looking to modernize.** Glia has an outstanding model, which resonates with telephony stakeholders, for evolving from traditional channels, such as voice and email, to digital. Glia has had notable traction in financial services and insurance.

Glia Customer Reference Summary

Glia's digital-first strategy helped references rapidly and seamlessly connect with customers to deliver a high quality of pre- and postpurchase engagement. Customers found it hard to quickly understand Glia's value proposition; a demo is often necessary.

FIGURE 10 Glia QuickCard



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Astute: Forrester’s Take

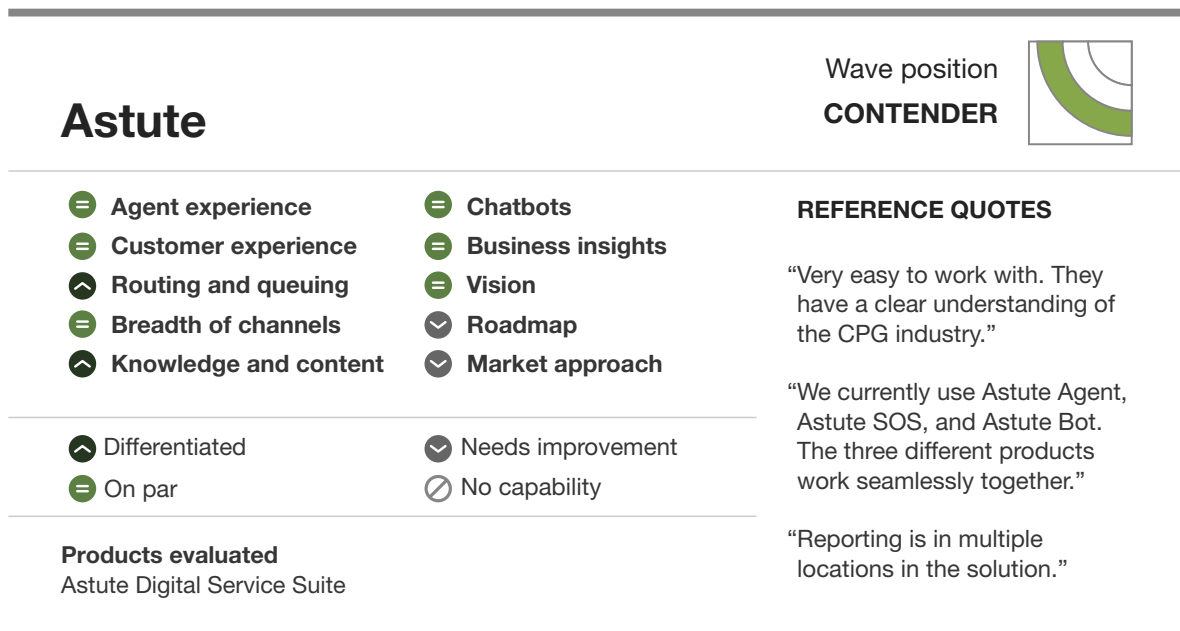
Our evaluation found that Astute (see Figure 11):

- › **Provides a comprehensive digital engagement solution with solid analytics.** Astute supports customers over a broad channel mix: chat, messaging, social interactions, social ad management, ratings, and review sites. Its predictive routing is excellent, as is its knowledge management. Its solid reporting analyzes inquiry trends to help customers make decisions about promotions, distribution, packaging, and communication.
- › **Must rethink its product bundles.** Astute provides digital engagement capabilities via discrete products. It must rethink its product suite approach to better bundle products.
- › **Best suits key verticals.** Astute has a clear market focus but no industry solutions. Its digital reach and industry expertise make it especially attractive in retail and CPG.

Astute Customer Reference Summary

Customers said that Astute continues to improve its value for their consumers. They stated that Astute’s focus has changed over the past couple of years and that new offerings and services have made pricing challenging.

FIGURE 11 Astute QuickCard



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Khoros: Forrester’s Take

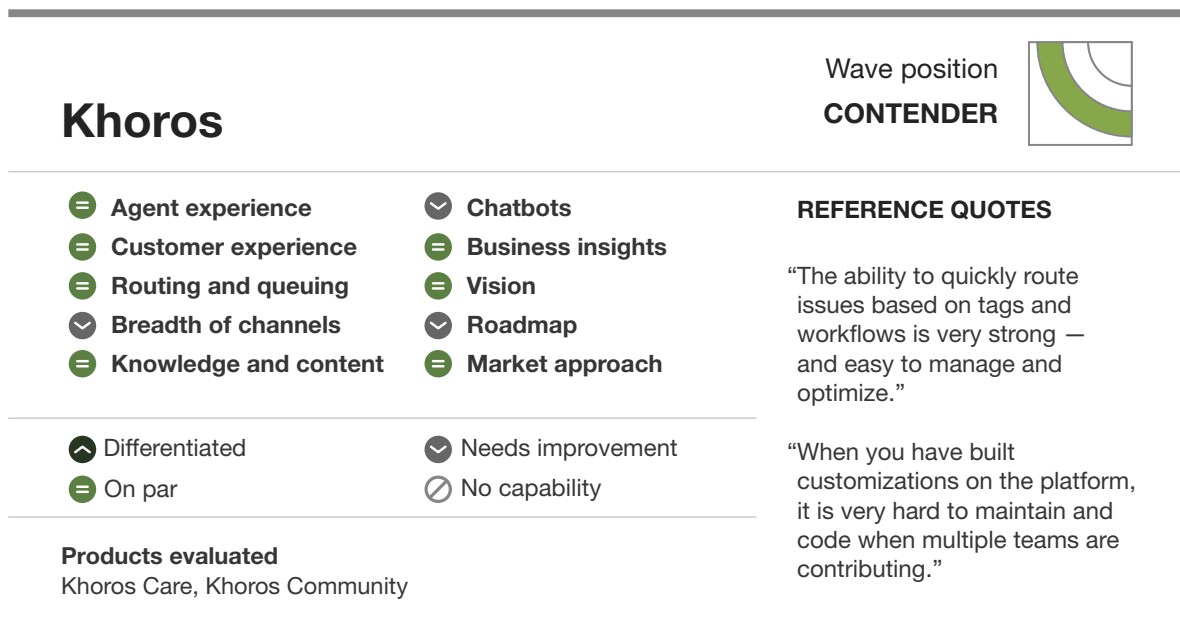
Our evaluation found that Khoros (see Figure 12):

- › **Uniquely couples social engagement with community content.** Khoros supports various digital channels and asynchronous social channels, including review sites. It also supports knowledge creation from community content. Users can measure agent performance to align with traditional contact center metrics, which is a convenient feature.
- › **Must fill product gaps to become a complete solution.** Khoros lacks cobrowsing, video, digital voice, and customer tooling for its own managed service chatbot. It does, however, have a chatbot-agent orchestration framework (that can plug in other chatbots).
- › **Best suits brands with a social and community presence.** The Khoros solution is a melding of two established solutions — Khoros Care for digital engagement and Khoros Community — that suit brands looking to strengthen customer connections and offer self-service via their communities.

Khoros Customer Reference Summary

Customers used Khoros primarily for digital customer service over messaging and social channels. They said that the Khoros Care and Khoros Community solutions should be better unified.

FIGURE 12 Khoros QuickCard



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Customer: Forrester's Take

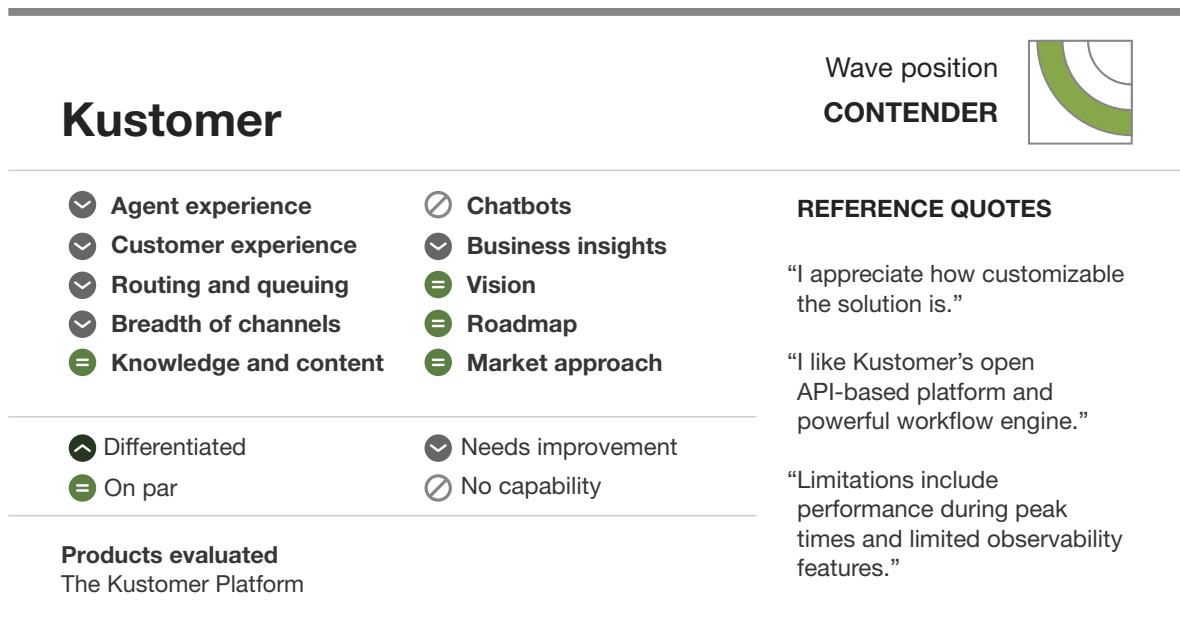
Our evaluation found that Kustomer (see Figure 13):

- › **Facilitates conversations around the customer.** Kustomer does a great job of organizing all interactions, including multimodal interactions, around a customer — not a ticket. Its open APIs allow it to bring in data from other systems, which it uses to determine the right business process to follow.
- › **Must evolve its AI.** Kustomer is new to AI. It currently uses AI for sentiment detection, to surface the right knowledge-base content, and to categorize conversations. Chatbots are currently provided by partners.
- › **Best suits process-centric customer service.** Kustomer couples omnichannel interaction with process management to support long-running or complex service scenarios.

Kustomer Customer Reference Summary

Customers found Kustomer to be very responsive and eager to get feedback and iterate on its features. However, they said that features tend to be minimally viable and take a while to mature.

FIGURE 13 Kustomer QuickCard



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Quiq: Forrester’s Take

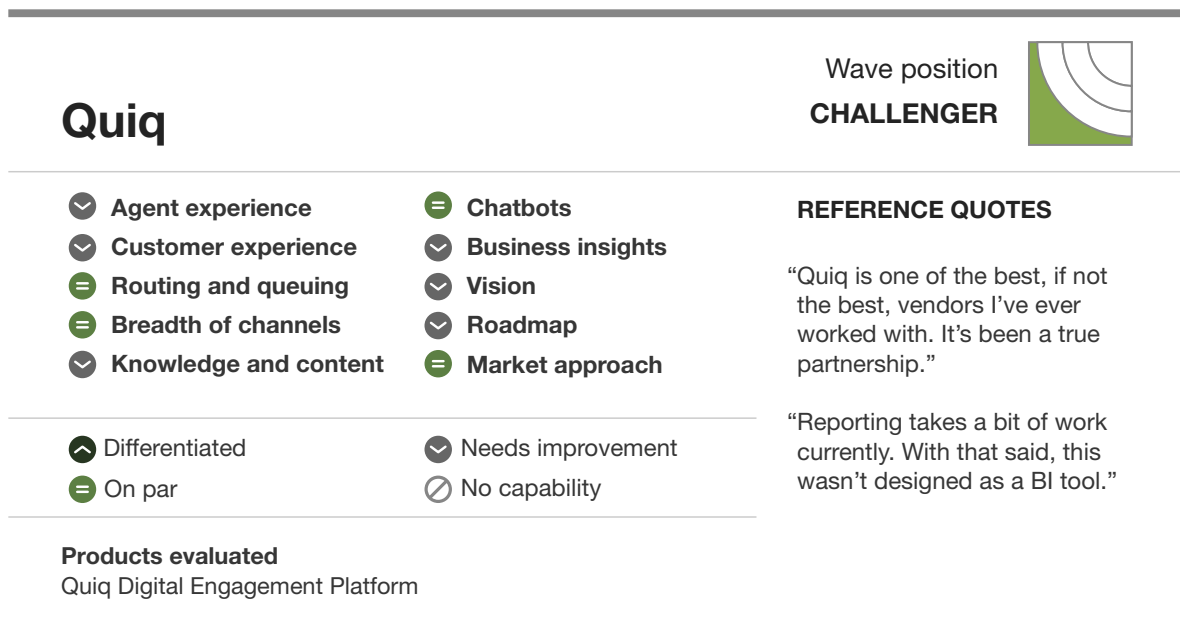
Our evaluation found that Quiq (see Figure 14):

- › **Has excellent chatbot-powered, enterprise-grade asynchronous messaging.** Quiq is very flexible. It blends native Quiq bots, third-party bots, and live-agent messaging interactions well. It offers operational manager controls for collaboration, real-time observation, and agent performance management. It can stand alone or snap into CRM solutions such as Oracle, Salesforce, and Zendesk without disrupting the agent experience.
- › **Needs synchronous communication and KM capabilities for broader appeal.** Reporting can improve, but major gaps include synchronous channels and knowledge management. These are roadmap items.
- › **Best suits companies looking to jump into messaging.** Quiq offers a conversation-based pricing model that makes it easy for midmarket and enterprise firms to try messaging, as it aligns the value of serving customers with the cost of the service.

Quiq Customer Reference Summary

Customers praised Quiq for its ability to snap into CRM systems, bot designer experience, and rapid response to service issues. They complained about the lack of depth in reporting.

FIGURE 14 Quiq QuickCard



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Comm100: Forrester’s Take

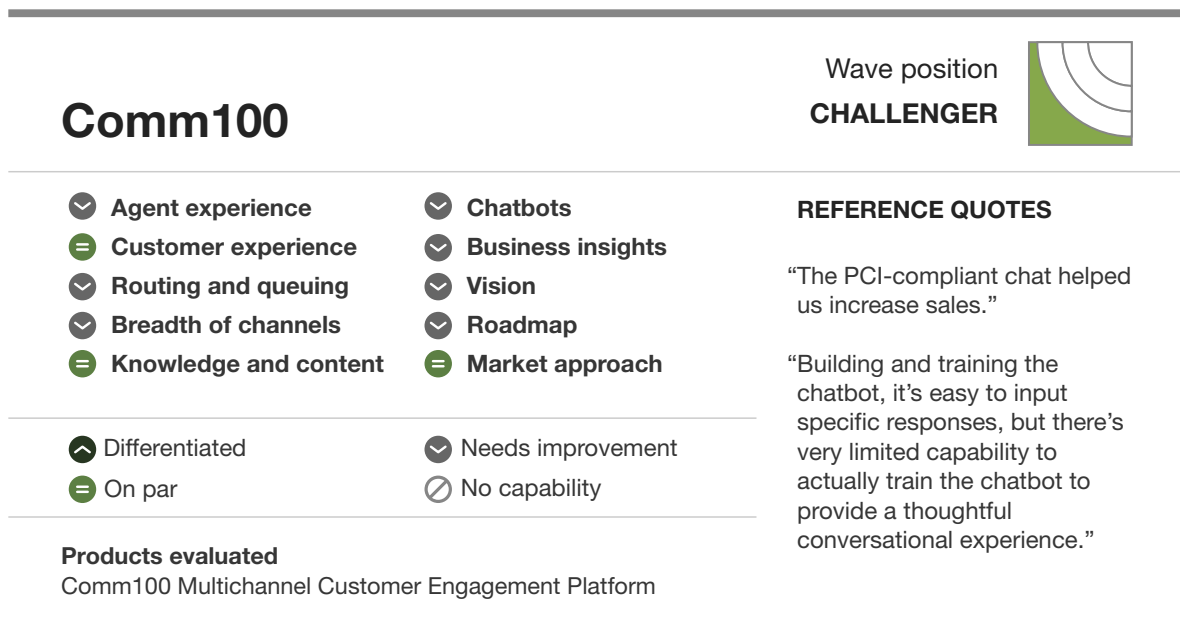
Our evaluation found that Comm100 (see Figure 15):

- › **Takes compliance seriously.** Comm100 has an installed customer base of more than 4,000, which uses it primarily for chat. The vendor does much more than chat, supporting customers via digital audio, video chat, cobrowsing, asynchronous messaging, and social channels. Comm100 is one of the few vendors that is compliant with SOC 2 Type 2, ISO 27001, GDPR, CCPA, PCI-DSS, and HIPAA.
- › **Needs to offer more than just basic capabilities.** Agent tooling comprises canned messages, KCS-certified knowledge, simple chatbots, supervisor controls, and lightweight reporting that lacks the more advanced automation features that Leaders provide.
- › **Best suits small deployments that value simplicity.** With an average deployment of fewer than 20 agents, Comm100 provides streamlined customer and agent experiences.

Comm100 Customer Reference Summary

Customers praised Comm100’s team and its availability. They felt fully supported and that the company was genuinely interested in improving its clients’ operations and engagement experience with the solution. They complained about the lack of robustness in the vendor’s chatbot offering.

FIGURE 15 Comm100 QuickCard



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Conversocial: Forrester’s Take

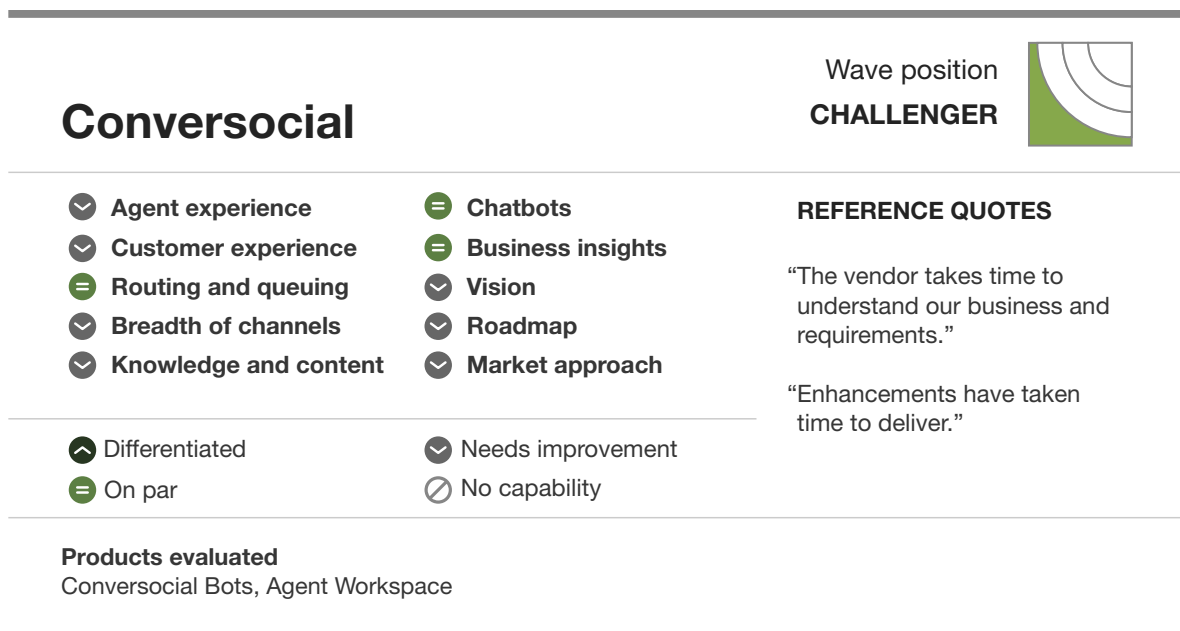
Our evaluation found that Conversocial (see Figure 16):

- › **Supports the highest number of private messaging and social channels.** Conversocial is an omnichannel vendor in the making. It has a well-designed workspace, native bot development capabilities with optional support for third-party chatbots, packaged integrations with payment processors and CRM systems, and a wealth of APIs.
- › **Must look beyond messaging to become a true omnichannel player.** Conversocial has just a few plans to move beyond chatbots and messaging, which limits its appeal to companies that want a better-rounded digital-first solution.
- › **Best suits companies supporting customers throughout their engagement journeys.** Conversocial supports consumers through their prepurchase, onboarding, and postpurchase digital journeys. It is especially attractive to B2C retail, media and entertainment, and utilities and telcos.

Conversocial Customer Reference Summary

Customers praised the efficient workspace but said that recent changes to the product offering have made pricing tough to work through.

FIGURE 16 Conversocial QuickCard



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Supplemental Material

The Forrester New Wave Methodology

We conducted primary research to develop a list of vendors that met our criteria for the evaluation and definition of this emerging market. We evaluated vendors against 10 criteria, seven of which we based on product functionality and three of which we based on strategy. We also reviewed market presence. We invited the top emerging vendors in this space to participate in an RFP-style demonstration and interviewed customer references. We then ranked the vendors along each of the criteria. We used a summation of the strategy scores to determine placement on the x-axis, a summation of the current offering scores to determine placement on the y-axis, and the market presence score to determine marker size. We designated the top-scoring vendors as Leaders.

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The 13 Providers That Matter Most And How They Stack Up

Integrity Policy

We conduct all our research, including Forrester New Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ NICE, Pegasystems, and Zendesk have already made acquisitions in this space. NICE purchased Brand Embassy, Pegasystems purchased In The Chat, and Zendesk purchased Smooch.

We work with business and technology leaders to drive customer-obsessed vision, strategy, and execution that accelerate growth.

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