

NEAT EVALUATION FOR FOUNDEVER:

Conversational Commerce

Market Segment: Retention Capability

Introduction

This is a custom report for Foundever presenting the findings of the NelsonHall NEAT vendor evaluation for *Conversational Commerce* in the *Retention Capability* market segment. It contains the NEAT graph of vendor performance, a summary vendor analysis of Foundever, and the latest market analysis summary.

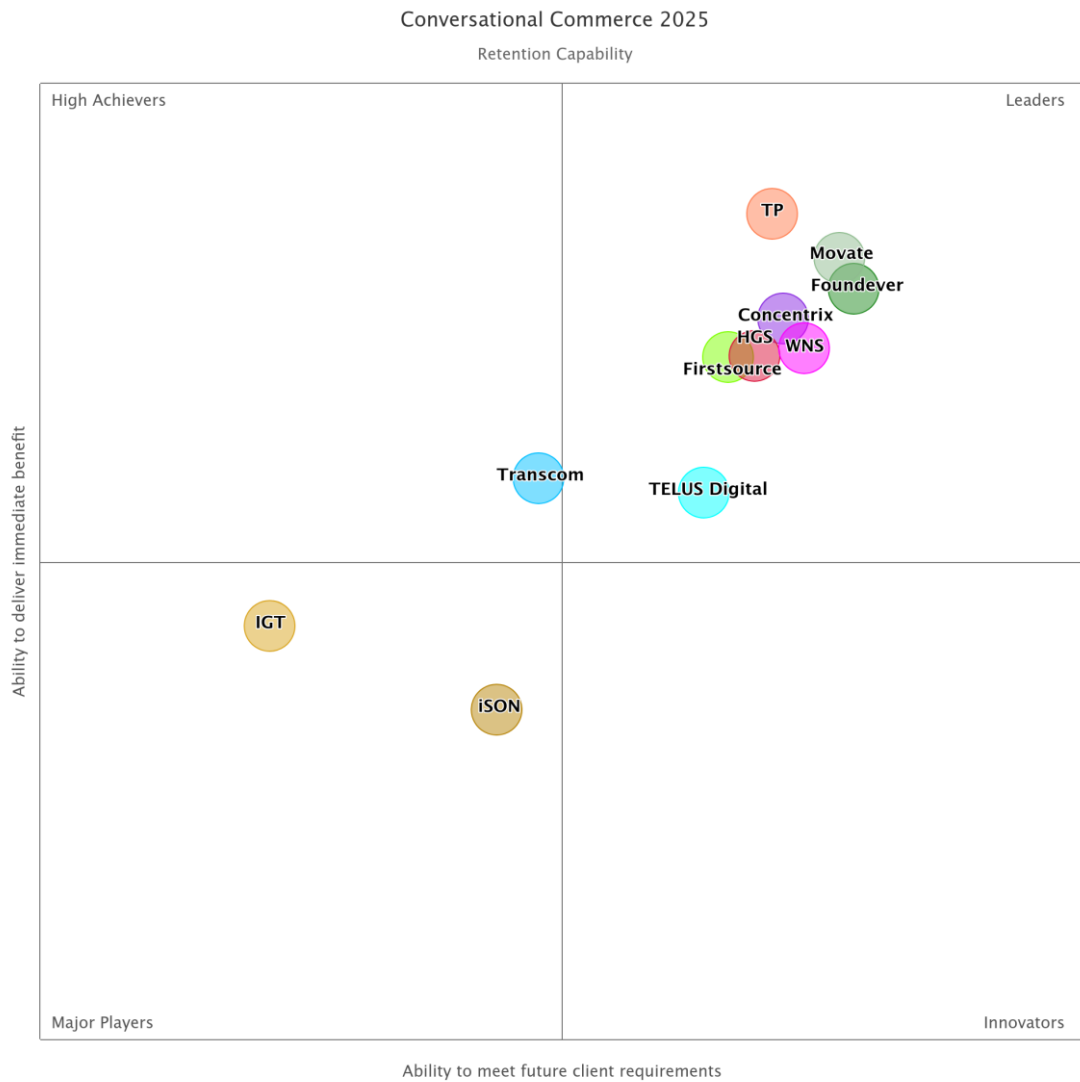
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering conversational commerce services, which cover outsourced revenue generation activities in B2C, B2B, and B2B2C environments over IB/OB voice and text channels, asynchronous messaging, video chat, and social media. 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 overall, and with specific capability in sales and retention.

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: Concentrix, Firstsource, Foundever, HGS, IGT Solutions, iSON Xperiences, Movate, TELUS Digital, TP, Transcom, and WNS.

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

NEAT Evaluation: Conversational Commerce (Retention Capability)



NelsonHall has identified Foundever as a Leader in the *Retention Capability* market segment, as shown in the NEAT graph. This market segment reflects Foundever's ability to meet future client requirements as well as delivering immediate benefits to its conversational commerce clients, with specific capability in customer retention.

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 *Conversational Commerce* NEAT tool (*Retention Capability*) [here](#).



Vendor Analysis Summary for Foundever

Overview

Foundever is a private CX services provider headquartered in Luxembourg. It offers CX consulting; experience design; customer care; technical support; sales and retention services; contact center back-office and BPS; CX strategy & design, learning & development, AI, CX Analytics, omnichannel CX, self-service, and social media care; online reputation management; trust and safety and content moderation; and credit management and collections. It also offers software development, application services, and products. Foundever has ~150k employees in ~143 locations in 45 countries, supporting ~800 clients in ~60 languages.

Its conversational commerce services include B2C and B2B lead generation, prioritization, and qualification, inbound and outbound sales, including over asynchronous messaging and social platforms, proactive outreach, sales through service, order taking, account management, cross-selling and upselling, customer retention and renewal, loyalty management, and sales back-office activities such as product information maintenance and database management. It also offers specialized B2B services such as customer recertification and customer details audit. It delivers sales process optimization and sales analytics, data intelligence, and predictive insights. Separately, it offers credit management and collections and has a dedicated fulfilment service.

Foundever develops omnichannel sales strategies, builds and implements conversational AI and sales bots, and integrates GenAI-powered sales and retention agent assist tools such as recommendation engines and next-best offers. It recruits, trains, and cross-trains revenue generation talent with proprietary methodology and learning and development platforms.

The company has a subsidiary (Clearlink) for sales centers, performance marketing, social selling, and online advertising. It creates sales and advertising content using video, paid media, email, websites, display, and social media. Clearlink specializes in ISP, cable, satellite, insurance, personal finance, house moving services, and Medicare plans in the U.S.

Foundever has ~37k employees providing revenue generation services in North America, LATAM, Europe, Middle East, Africa, and APAC.

It has ~80 conversational commerce clients, both B2C and B2B, in banking and financial services; credit cards; fintech; life and P&C insurance; healthcare payer and provider; medical equipment; pharmaceuticals; telecom, ISP, and media; entertainment; high tech; manufacturing; automotive parts; consumer electronics and appliances; brick and mortar retail, ecommerce; advertising platforms; food and beverage; fashion and luxury goods; cosmetics and beauty products; travel, hospitality, and transportation; public sector; and energy and utilities.

Foundever has a stack of proprietary instruments for automation, analytics, GenAI agent assist and copilots, CRM, unified agent desktop, internal communication, employee training, engagement, and innovation ideation.



Financials

NelsonHall estimates Foundever's CY 2024 revenues at ~\$4,450m, of which conversational commerce revenues are ~\$455m, growing at 11% y/y.

Strengths

- Strategic consulting capability for revenue generation services with expertise in creating sales through service enablement
- Comprehensive sales talent management practice with a stack of AI tools for employee recruitment, training, coaching, collaboration, and engagement
- AI-powered knowledge management with in-house and external assisting agents for sales and retention personalization
- Portfolio of sales analytics and campaign analytics programs with optimized results beyond revenue generation
- Established fulfilment operations and logistics services to support D2C brands.

Challenges

- Could consider providing social selling over emerging channels, including video chat
- Could expand more actively in B2B sales and account management for the SMB segment in selected high-growth verticals
- Could incorporate additional external data for lead enrichment and real-time buyer persona identification.

Strategic Direction

Foundever has simplified its GTM and combined its product offerings to integrate value-add capabilities in its standard operating model. These integrated offerings now include smart hiring and training, agile delivery, technology ecosystem such as EverDesk for CRM or the entry level of Genesys for cloud CCaaS, and CX insights under the PeakOS standard, plus enterprise know-how, and GenAI employee augmentation. The capabilities provided are integrated and without separate payments.

Foundever is advancing several internal initiatives to strengthen conversational commerce delivery and sales agent performance. It is enhancing its internal tools EverConnect and EverTeam, with additional GenAI-powered features to ultimately develop a fully automated CX solution based on GenAI and agentic AI. The company is also enabling omnichannel experience from a conversational case, integrating voice through CTI with external platforms such as Odigo, Vonage, Twilio, and Genesys, and adding chatbot integration with Cognigy. Additional functionality includes allowing cross-search and saving of search criteria, automating parts of conversations to assist agents, and introducing dashboards to visualize top performers by quartile. It is implementing a 360-degree view of agent data to support regular coaching, alongside a gamification engine to track individual and team performance. To assist managers, Foundever is also automating the analysis and summarization of agent feedback. For its EverCoach tool, Foundever employed GenAI for automated trend analysis to target opportunities, create call transcripts and summarize data, and generate coaching plans to drive CX.



Other platform enhancements include changes to catalog page navigation through the addition of pagination, a redesign of filters and search functionality, and updates to default course display settings. It is integrating APIs to connect EverGrade with EverLearn to improve the employee learning experience. The company is enhancing cohort functionality to support courses in multiple languages and adding trackers and tags, along with API endpoints, to improve data use in product development. Foundever is also implementing a unified design system across its Triboo platform and reorganizing roles and permissions for greater control and visibility. Improvements to the Studio interface aim to reduce the time required for course creation and setup.

In the area of lead qualification and generation, Foundever is improving the identification of target audiences, collecting relevant data, and applying the BANT framework (budget, authority, need, timeline) to evaluate lead quality. It is focusing on tracking and analyzing engagement metrics to refine strategies using performance feedback.

In new customer acquisition, Foundever is prioritizing identifying target markets, generating leads, developing clear value propositions, and using digital marketing tools to create communication aligned with customer needs. This communication extends to follow-up processes to help drive conversions, while maintaining brand consistency and trust throughout the acquisition journey.

For upselling and cross-selling, Foundever is training sales teams to execute sales strategies effectively by assessing customer needs, recommending relevant complementary products, and personalizing offers using GenAI agent assist tools. Another track is marketing automation to support the process.

Foundever is also investing in data analytics to predict churn and inform proactive measures in retention. It is adopting customer benefit reminders to simplify and support renewals and rolling out targeted campaigns that include personalized offers and the resolution of past issues for win-back efforts.

The company is increasingly taking sales and retention work to offshore destinations such as the Philippines, South Africa, and Egypt.

Outlook

Foundever is actively working to embed AI into sales and retention environments to drive results. The company has already achieved progress in end-to-end sales talent recruitment, management, and engagement. Most notable are the investments in AI-simulated training and coaching, and knowledge management. Foundever combines this AI-powered talent management IP with robust frameworks and methodologies for the selection, upskilling, and attrition prevention of highly sought-after conversational commerce resources. The company is effectively positioning itself within clients as an expert in sales talent learning and development, with customized microlearnings tied to operational processes and performance management systems.

One opportunity to consider is developing custom vertically-aligned or domain-specific sales agent augmentation tools to address specific sales challenges; for example, AI-powered assistants for overcoming objections by sector. Such assets will assist further with the effective transformation of Foundever's existing customer care programs into sales through service hubs. Target verticals could include telecom, where the company can rely on a portfolio of revenue generation transformation examples, and other promising verticals such as utilities and retail.



Foundever has extensive capability in sales talent incentivization and gamification, including in B2B sales, and could utilize it more actively for additional verticals such as the high-tech SMB market, where the demand for scaled sales operations is growing.

With its existing fulfilment and logistics services, Foundever could provide a one-stop shop for small and medium-sized D2C brands in Europe who might look for alternatives to the established ecommerce players.

Conversational Commerce Market Summary

Overview

Conversational commerce covers outsourced revenue generation activities in B2C, B2B, and B2B2C environments over IB/OB voice and text channels, asynchronous messaging, video chat, and social media. This includes lead generation and qualification, product and services discovery, new customer acquisition and onboarding, customer success management, consultative selling, upsell and cross-sell, retention, renewals, loyalty management, health checks, and win-backs, revenue leakage prevention, sales back-office tasks, and field sales staff support.

The demand for conversational commerce is driven by the shift from product-centric marketing to customer preferences-based sales. Client organizations are looking to adapt to the dominance of digital-first sales journeys, the ubiquity of omnichannel interactions, and the appeal of immersive environments. Brands are growing their D2C sales, adopting subscription services and product models, and increasing their presence in online marketplaces. Many enterprises are expanding B2B and B2B2C sales (e.g., to partner ecosystems) and offering onboarding and account management to the SMB segment to increase ROI from enterprise platforms and services (e.g., in advertising). The support function is gradually evolving to sales-through-service and consultative selling in a LOB convergence.

At the same time, organizations are dealing with exacerbated budget limitations and significant risk factors from external threats such as the rising economic nationalism with resulting trade barriers, supply chain disruptions, and changing customer perceptions and behaviors. Clients' outsourcing needs are for flexible outsourcing models with adaptive commercial structures and changing their CX operations performance metrics to ones focused on growth.

In the medium term, GenAI and AI-based sales agent assist tools and real-time sentiment analytics during live interactions will bring the next level of personalization and contextualization of sales and retention. The rise of social selling and video chat, including in B2B use cases, allows for the delivery of one-to-one conversational commerce at scale.

In the longer term, digital-first buying journeys and the new generation of consumers will force the integration of experiences in pre-sales, sales, and after-sales support. This paradigm shift will drive revenue generation outsourcing providers and clients to: upskill CX talent for sales roles; utilize a gig workforce of peer experts; integrate advanced analytics for effective customer segmentation and campaign targeting; use predictive analytics and analytics automation for continuous market, customer, and competitor insights; implement customer and agent-facing agentic AI for sales and retention processes; build presence across social platforms and online marketplaces; implement conversational AI on emerging channels such as asynchronous chat and video channels; and develop personal shopper experiences.



Buy-Side Dynamics

Increased sales and enhanced customer lifetime value are the top priorities for conversational commerce clients, while the vendor capabilities clients rank the highest are delivering improved customer retention and reducing customer churn.

The key vendor capabilities clients seek are:

- Revenue acceleration consulting capability with maturity modeling across people, process, and tech, and AI-empowered revenue acceleration strategy redesign know-how
- Specialized B2B sales, onboarding, and account management with vertical expertise
- Revenue generation analytics such as predictive lead scoring models and customer intent analysis
- Access to lead factories for lead generation, qualification, and lead enrichment with third-party data and IP for automated campaign management
- Use of AI and analytics automation to understand customer behavior in a dynamic fashion
- Integration of internal and external data sources for effective customer segmentation and targeting to feed marketing and sales campaign optimization
- Sales and retention hyperpersonalization based on customer personas and granular customer segmentation for intent-based routing
- Sales and retention contextualization based on dynamic intent recognition and real-time sentiment analysis
- Access to knowledge management IP with cognitive search features and GenAI-enabled sales agent assist for recommendation, next-best offers, summarization, and transfer
- Deployment of Conversational AI across voice and text channels to detect and route revenue generation interactions
- Delivery flexibility, including onshore, nearshore, offshore, and gig work capabilities to enable cultural alignment and cost management
- Strong sales talent selection, recruitment, and onboarding practice for identification of domain-specific sales skills and employing AI to measure these skills
- Expertise in sales agent training and coaching using learning tools such as microlearning, personalization training curricula, gamification, AI-based simulations, and immersive environments for experiential learning
- Frameworks and best practices for retaining and career development of specialized sales talent
- Frameworks and best practice for upskilling front-line support staff in sales skills such as revenue generation opportunities identification and capture during live interactions
- Expertise in the selection, integration, customization, and implementation of sales-enablement technology and curation and nurturing of a partner ecosystem
- Experience in enabling omnichannel sales, including activation of social selling, asynchronous chat, and video chat
- Deployment of accent softening and machine translation technology to enable higher-quality offshore sales and retention programs



- Dedicated marketing back-office practice and agency services to answer CMO office requirements
- Offerings for two- and three-way supplier, seller, and merchant support, including specialized services in store-front services such as catalog and pricing management, counterfeit goods protection, and creative work
- Assistance with cloud-based dialer customization and integration.

The target benefits for conversational commerce are increase in new sales, retention, growth of upsell and cross-sell, and overall revenue uplift along with NPS and CSAT improvement.

Additional buy-side factors in the adoption of conversational commerce are:

- Freeing up support resources to deliver upsell/cross-sell
- Enabling one-on-one account management and customer education
- Enhancement of digital buying experiences
- Automation and self-service sales reporting and BI
- Localized marketing and sales campaigns
- Experience with new market entry and expansion.

Market Size & Growth

The conversational commerce market is worth \$21.4bn in 2025 and is expected to reach \$26.8bn by 2028.

Lead qualification and generation is expected to grow by 7.9% CAAGR through 2028, followed by upsell and cross-sell services at 7.8% CAAGR and new customer acquisition and onboarding at 7.7% CAAGR for the same period.

The U.S. domestic market is the largest, equivalent to ~30% of the global market in 2025. India is the fastest-growing sizable domestic market, growing at 9.8% CAAGR through 2028.

Challenges & Success Factors

Major challenges for the adoption of conversational commerce are achieving a balance between: the transformation of support centers into revenue generation centers; implementation of GenAI-powered platforms for customers; agent assistance in sales, upsell & cross-sell, and retention; and adoption of business outcome-based pricing structures to engage both vendor and client.

Other challenges include:

- Client industries suffering from macroeconomic headwinds such as rising economic nationalism (e.g., U.S. tariffs' fallout), supply chain disruptions related to trade barriers, security risks, environmental risks, and drop in consumer confidence
- Clients forced to cut operational costs further and turn to outsourcing of revenue generation LOBs while limiting operational and technology investments
- Shifting revenue generation programs to lower-cost locations while maintaining quality



- Significant demand for flexibility in sales and retention operations, including via flex staffing and gig work
- Prioritization of the cost of acquisition and as brands face significant cost pressures
- Evolving to more complex success metrics such as CLV in a highly unpredictable economic environment
- Decrease in customer brand loyalty and changing buyer behaviors
- Restriction of data access on ecommerce platforms
- Desire to enable dynamic pricing across more product and service categories
- Need to boost social media reputation management, including monitoring, intervention, and marketing localization support.

Key success factors for vendors addressing the needs of conversational commerce clients are:

- Specialized lead generation, B2C, B2B, and B2B2C sales, retention, win-back offerings
- Operational transformation expertise to shift support to customer success and sales
- Offerings in consulting, advisory, and effectiveness measurement of GenAI interventions in sales and retention operations offered as-a-service
- Dedicated domain-aligned B2B practices focused on consultative selling and sector expertise (e.g., high tech ecosystems) with custom frameworks covering from intelligent territory and account planning to B2B post-call analysis and insights
- Expertise in integrating asynchronous messaging platforms to optimize contact rates (e.g., IVR deflection to WhatsApp) with the creation of a 360-degree view of the customer with historical data and channel preferences
- Use of visualization tools during voice interactions to help customers visualize products
- Expertise in the integration of sales agent GenAI-based assist tools covering auto-call summary, cognitive search, knowledge bots, conversation guides, and recommendation engines
- Experience with the customization of SLMs and deployment of pre-built RAG architecture to optimize use costs and model effectiveness, and move it closer to the data source
- Using predictive analytics for contextualized and proactive sales, both customer- and agent-facing and highly industry-specific
- Strong B2B expertise for merchant/seller onboarding and white-glove support on ecommerce platforms
- Consulting know-how for retention strategy formulation and (re)design, program health-checks and headroom analysis, points modeling, and strategy enablement and transformation with customer MDM and data quality, customer 360-degree view creation, digital loyalty personalization, and data engineering & architecture
- Experience in implementing automation in retention campaigns with capabilities for omnichannel cadences, automated email campaigns (with GenAI offer customization), daily/weekly tasks and engagement lists, and next-best offers
- Expertise in end-to-end sales and retention talent management with the infusion of AI into employee lifecycle management.



Outlook

Over the next four years, the role of AI-powered sales assist tools will drive personalization and contextual interaction at user level, while being enabled at scale. This will cover:

- Lead generation: AI for scoring leads, lead qualification automation, and persona categorization; capture and analysis of social media data
- Hyperpersonalized campaign messaging
- Real time speech analytics to enable contextual sales adapted to the current use case
- Sales and marketing insights via virtual assistants
- Upskilling CX talent for sales roles using AI-based simulations training and dynamic practice, use of immersive environments for product testing and exploration, and targeted sales training need identification will be standard.



NEAT Methodology for Conversational Commerce

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 future client 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 future client 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 conversational commerce offerings Lead generation & qualification improvement capability New customer acquisition, sales, upsell, & cross-sell capability Retention, renewal, & win back capability Revenue generation transformation capability
Delivery	<ul style="list-style-type: none"> Scale of conversational commerce resources Application of delivery models for staff scalability & flexibility Application of digital channels for sales & retention Application of social selling & retention Application of customer, market, competitor insights Application of predictive and prescriptive analytics Application of Conversational AI and GenAI Application of end-to-end rev gen talent management models Application of AI to enhance rev gen talent management Application of agentic AI for rev gen agent augmentation Application of rev gen-specific operations transformation models Application of rev gen-specific IP & third-party tools Application of flexible commercial terms & models Cultural compatibility Implementation of conversational commerce adjacent services
Market Presence	<ul style="list-style-type: none"> Scale of client presence in B2C rev gen Scale of client presence in B2B rev gen Market momentum for conversational commerce
Benefits Achieved	<ul style="list-style-type: none"> Level of lead generation achieved Level of new sales, upsell, & cross-sell achieved Level of retention, renewal, & win back achieved Level of sales operations enhancement achieved

*Exhibit 2***‘Ability to meet client future requirements’: Assessment criteria**

Assessment Category	Assessment Criteria
Conversational Commerce Investments	<ul style="list-style-type: none"> Investment in development of lead generation & qualification Investment in development of sales, upsell, & cross-sell Investment in development of retention, renewal, & win back Investment in development of advanced analytics Investment in development of AI & GenAI Investment in development of digital channels Investment in revenue generation end-to-end transformation
Perceived Suitability by CXS Clients	<ul style="list-style-type: none"> Perceived effectiveness in overall conversational commerce delivery Perceived effectiveness in the application of sales Perceived effectiveness in the application of retention Mechanisms for client innovation through talent development Mechanisms for client innovation through digital channel enablement Mechanisms for client innovation through analytics Mechanisms for client innovation through cloud, automation, & AI/GenAI Mechanisms in place to deliver client innovation through consulting & redesign Mechanisms in place to deliver client innovation through flexible pricing 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.

Sales Inquiries

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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