

FROST & SULLIVAN

SITEL GROUP

2022
COMPETITIVE
STRATEGY
LEADER

LATIN AMERICAN CX
OUTSOURCING SERVICES INDUSTRY

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Sitel Group excels in many of the criteria in the CX outsourcing services space.

AWARD CRITERIA	
Strategy Innovation	Customer Impact
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

Strategy Effectiveness

The highly competitive and mature customer experience (CX) marketplace is changing rapidly. Frost & Sullivan’s independent research finds the pandemic has impacted the CX outsourcing services landscape on more than one level, resulting in more organizations outsourcing a considerable portion of their

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Research Director**

customer interactions and CX practices. This trend opens up significant opportunities for business process outsourcing and drives double-digit growth in the sector.

Since Groupe Acticall acquired Sitel Worldwide Corporation in 2016, the newly created Sitel Group has been actively working to reimagine the role of contact centers, investing in technology to connect teams and secure client data while expanding into new countries.

At the forefront of creating meaningful customer connections is the Sitel Group Enterprise Experience Platform (EXP+), a flexible cloud-based solution designed to simplify the delivery of CX services. It creates a robust ecosystem through four product families: EXP+ Empower (Learning and Talent Services), EXP+ Explore (Insight and Analytics), EXP+ Engage (CX Digital Operations), and EXP+ Evolve (Artificial Intelligence [AI] and Automation).

Sitel Group built the EXP+ leveraging proprietary intellectual property (IP), combined with key technological partners, to deliver a best-of-breed, end-to-end solution to clients. Sitel Group's Software R&D entity encompasses more than 400 engineers globally and manages proprietary and partner integration practices.

Sitel Group bases all core operating processes on its Global Operating Standards (GOS), which is modeled after Customer Operations Performance Centre (COPC) standards. The GOS comprises six major process groups: hiring, training, on-the-job training, measurement, feedback and improvement, and succession planning. Each process group ensures every Sitel Group associate performs well and receives continuous individual progress and development. The company also conducts semi-annual audits to certify its associates' adherence to the GOS to provide consistent service delivery.

The GOS includes a closed-loop quality and performance maximization process comprising continuous measurement, root cause analysis, feedback, and action planning for improvement. Sitel Group's managers understand and define their responsibilities in performance management based on the GOS model, meeting and exceeding clients' expectations. Managers conduct weekly business reviews to discuss performance gaps and subsequent action plans.

Using Six Sigma and Lean Six Sigma methodologies, Sitel Group quickly identifies areas for improvement within the GOS to avoid escalating issues and impacting CX. The GOS platform also has an operational toolbox that enables active client engagement. The GOS toolbox and Six Sigma approach are analytics tools that offer a proactive approach to add value to clients' business. Frost & Sullivan commends Sitel Group for its innovative use of technology and adherence to best practices to solidify its position as a leading global contact center provider.

Competitive Differentiation

Sitel Group's integrated end-to-end services, technological capabilities, and expertise in delivering tailored solutions with added value create competitive differentiation in the regional marketplace. In Latin America, the company primarily supports North American clients (except for Brazil, where it provides services to domestic and global client brands). Its distinct combination of talent, scalability, and passion for CX continues to drive demand for service delivery in Latin America.

By bringing people, data, and technology together, Sitel Group creates compelling experiences for customers in the moments that matter. Its breadth of capabilities includes:

- Omnichannel contact center services
- Insights and analytics – Automated quality and deep analytics capabilities to interpret data for meaningful business improvements
- Social and community support – Strategic design and delivery of social media intelligence, direct social media support, and social community moderation
- Technology, CX consulting, and transformation – Customer journey mapping, digital roadmap design, channel strategy development, and business transformation
- Software, self-care, and automation – Contact deflection, chatbots and voicebots, visual interactive voice response, knowledge platforms, and self-care portals
- Learning and talent services – Learning analysis, instructional design, training facilitation, mobile

learning, and full learning management system and data curation platforms

- CX Innovation Lab – Design thinking workshops with aligned demonstrations of chatbots, AI, augmented agent, and conversational commerce to enable business transformation

Another primary distinction of Sitel Group is its culture. Realizing how deeply intertwined the employee experience is with CX, Sitel Group has created Sitel MAX, an associate engagement platform to transform and enhance the agent experience. Members of the community, known as MAX Insiders, drive innovation and co-design the future of the associate experience within Sitel Group.

Sitel Group prioritizes developing a philosophy of transformation in Latin America and globally through Sitel MAX, ensuring its employees everywhere have the necessary digital tools, training, and skills to deliver exceptional CX. For example, in Nicaragua, the company fills more than 60% of non-agent roles through talent development programs, with many local leaders achieving management jobs from entry-level positions. In Brazil, the company uses a human resource digital agent (Sarah) as a new engagement channel to support employees with key information, communication, and self-care tips. It also adopts a three-dimensional learning solution (HUB 360°) to bring the best experience during virtual onboarding. In Colombia, the company has unveiled the Growthpoint program, a blended learning approach that focuses on mentorship and developing local talent into operational leadership positions. Sitel Group managed to fill 98% of all new positions with internal talent.

Many forward-looking CX service providers invest in digital divisions or innovation departments to reinforce their digital value propositions, but none do it like Sitel Group. The company has distinguished itself with a unique value proposition, moving differently from its close competitors. By emphasizing the human component in every interaction, Sitel Group capitalizes on digital tools and human resources initiatives to boost efficiency, effectiveness, and customer satisfaction in CX services delivery.

Strategy Execution

Sitel Group has built its global delivery model on onshore, nearshore, and offshore CX delivery centers, adopting the flexibility and benefits of the work-from-home approach to ensure right-fit solutions for clients and associates. As part of its ongoing evaluation of its footprint, the company has launched the

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first Latin American MAXhub (a small location providing on-site capacity for training, operations, and socialization among local team members) in Barranquilla, Colombia. The MAXhub concept presents a novel level of engagement, providing new opportunities to connect for remote employees and reshaping the work environment by accommodating a flexible space that drives the brand message and ensures associates align with company values.

Sitel Group is increasingly transitioning new and existing clients to Latin America following the rise of talented workforces in the region and local hiring challenges in the United States. While Sitel Group also operates in Mexico and Panama, its key nearshore hubs are Nicaragua and Colombia. Sitel Colombia has grown continuously since 1997, starting with fewer than 1,000 employees and expecting 8,000

employees by the end of 2021 (a 33% growth from 2020).

In Nicaragua, Sitel Group demonstrated a solid performance in 2021, reaching double-digit growth rates through organic growth, new logos evolution, expansion in the financial services industry, and entry into the back-office services space. The company observed a similar positive performance in Brazil in 2021, where the company has a center of excellence supporting industries and clients globally and creating highly complex and highly customized solutions.

Customer Purchase and Ownership Experience

Sitel Group supports its detailed implementation methodology with a global project management office (PMO) called Launch Green. The Launch Green initiative organizes teams, tasks, and planning to meet desired outcomes. With a detailed statement of work (SOW), the company aligns efforts to meet client requirements on time and within SOW parameters. Its PMO comprises a team of experienced project management professionals who follow proven, best practices implementation processes developed over decades of global experience launching new programs and transitioning operations from one site to another. Recognizing the importance of getting things right the first time, the PMO's project manager ensures the project plan has all the tasks identified with owners and due dates followed for successful project launches. The project manager's involvement continues until the account management team is confident the process has effectively matured from implementation to steady-state operations.

Sitel Group strives to minimize the client's effort in any business implementation. As a best practice, the company recommends clients engage in a face-to-face discovery session to facilitate an efficient and thorough understanding of all aspects of the business, establish relationships, and set mutually agreeable milestones with detailed plans. Frost & Sullivan lauds Sitel Group for providing robust, end-to-end support to clients.

Customer Service Experience

Sitel Group conducts an annual customer feedback survey to gain a balanced and fully representative assessment of the ongoing partnership, mapping daily and long-term goals. Its Voice of the Client (VOC) survey is a digital review comprising five questions (including scored and verbatim responses) that allow respondents to share feedback on the business-relationship level and each location where Sitel Group delivers services.

The VOC survey continually improves Sitel Group's service offering in price, performance results, and efficiency with a consistent, global approach to measuring and responding to client satisfaction. It is a standardized measure of the company's performance and relationship leveraging the Net Promoter Score. The VOC survey complements the ongoing and regular cadence of account-level interactions and planning between Sitel Group and clients, a key component in the account governance model.

Brand Equity

Sitel Group proudly recognizes its associates and agents as its greatest asset and the heart of the organization. It creates a distinct workplace environment that rewards initiative, ingenuity, and passion by operating under a set of values that guide employees on how to treat each other, clients, customers, and business partners.

Committed to attracting, developing, motivating, and retaining a high-quality team, Sitel Group aims to foster a dynamic and spirited atmosphere that offers employees the opportunity to make a positive difference and reach their maximum potential.

Sitel Group's brand message reflects its innovative, entrepreneurial, and people-centric spirit. Balancing people and innovative technology, it focuses on empowering conversations with clients through its four fundamental values:

- Create – Produce results through new ideas and imaginative skills to reduce effort and develop solutions for end-user needs
- Connection – Integrate technologies and expertise to bring consumers and brands closer and deliver meaningful experiences
- Value – Deliver a tangible difference to clients by offering solutions ready to meet existing and emerging individual needs
- Conversation – Recognize the human, emotional exchange at the heart of each interaction

Conclusion

Sitel Group disrupts the market with its solid value proposition, the flexible cloud-based EXP+ designed to simplify CX services delivery. The company's combined end-to-end services, technological capabilities, and expertise in delivering tailored solutions with added value create competitive differentiation in the regional marketplace. Its commitment to innovation is distinctive, and its investment in people is noteworthy. Sitel Group does not shy away from putting its employees first, implementing best practices and digital tools to support them. The company empowers employees to deliver exceptional CX services by rewarding initiative, ingenuity, and passion in the workplace. Its strategy of building human capital and effectively offering robust customer support distinguishes Sitel Group from other CX services providers.

With its strong overall performance, Sitel Group earns Frost & Sullivan's 2022 Latin American Competitive Strategy Leadership Award in the CX outsourcing services industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Award recognizes the company with a stand-out approach to achieving top-line growth and a superior customer experience.

Best Practices Award Analysis

For the Competitive Strategy Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes Best Practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

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Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

