

# Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021

September 2021

AMELIA

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# 01

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## Introduction and overview

- Research methodology
- Key information on the report
- Background of the research

# Everest Group’s SOT research is based on multiple sources of proprietary information

## Proprietary database of conversational AI technology vendors in scope of work (updated annually)

- The database tracks technology vendors’ offerings/capabilities for:
  - Design, development, and integration
  - Control and monitoring
  - IT governance and security
  - Agent-assist capabilities
  - Conversational intelligence capabilities
  - Product-related training and support services
  - Availability and adoption of commercial model(s)

## Proprietary operational information database of technology vendors (updated annually)

- The database tracks the following operational information for each technology vendor:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by scope of services
  - Portfolio coverage in terms of industry, geography, process areas, and buyer size

## Demonstrations and interactions with technology vendors and other industry stakeholders

- Detailed briefing and demos for a comprehensive product view and executive-level discussions with conversational AI technology vendors that cover:
  - Current state of the market
  - Vision and strategy
  - Annual performance and outlook
  - Opportunities and challenges
  - Emerging areas of investment

## Buyer reference interviews, ongoing buyer surveys, and interactions

- Interviews with technology vendors’ reference clients and enterprise buyers to get the buyer perspective around:
  - Drivers and objectives for adopting Intelligent Automation
  - Apprehensions and challenges
  - Assessment of technology vendors’ performance
  - Emerging priorities / buying criteria
  - Outcomes achieved
  - Lessons learnt and best practices

**Note:** The source of all content is Everest Group unless otherwise specified

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion

## Technology vendors assessed

## Background and scope of the research

Conversational AI is one of the key enablers of front-office automation. Businesses across the globe are realizing the importance of conversational AI solutions to serve customers across different channels and meet enterprise expectations, especially during peak demand, as well as support internal processes such as HR support, IT helpdesk, sales, F&A, and marketing. As we are slowly emerging into a post-pandemic world, the demand for self-service solutions such as conversational AI is expected to gather greater momentum. Increasing sophistication of technology, along with successful pilots in the past, are driving popularity of these solutions in the market. Therein lies a huge market opportunity for leading conversational AI vendors to cater to this surging market demand, while continuously improving their product capabilities to make them more powerful, holistic, and amenable for wide-scale adoption. As the impact of conversational AI platforms keeps increasing, it becomes crucial to pick the solution that can meet the current objectives for enterprises while having the capability to accommodate any potential future demands.

Conversational AI is an ecosystem of advanced technologies and solutions that work in an integrated fashion by interacting with each other and sharing information across systems in a contact center environment. Conversational AI improves overall contact center efficiency, customer experience, and agent experience by leveraging technologies such as Intelligent Virtual Agents (IVA), agent-assist solutions, analytics & insights, and other automation solutions such as RPA. At the heart of any conversation AI offering is powerful artificial intelligence and machine learning capabilities. For the scope of this study, we are covering global leading technology vendors that offer these solutions on independent licensing.

### In this study, we analyze the conversational AI technology vendor landscape across various dimensions:

- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 20 leading conversational AI technology vendors
- Competitive landscape in the conversational AI technology vendor market
- Remarks on key strengths and limitations for each conversational AI technology vendor

### Scope of this report:



**Geography**  
Global



**Products**  
Conversational AI



**Technology vendors**  
20 leading conversational  
AI vendors

# 02

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## Executive summary

- Summary of key messages
-

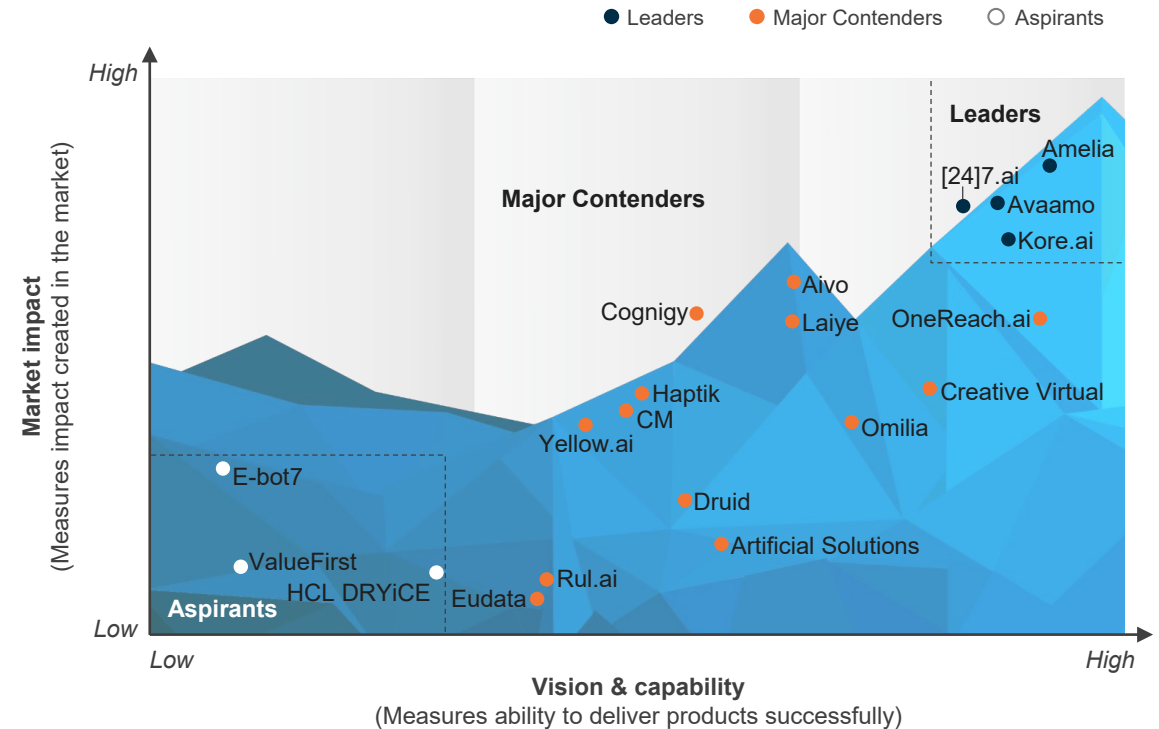
# Summary of key messages

- The Products PEAK Matrix® is a proprietary framework used to assess the market impact and overall vision & capability of technology vendors
- Everest Group classifies conversational AI technology vendors on the Everest Group Products PEAK Matrix® into three categories:
  - **Leaders:** [24]7.ai, Amelia, Avaamo, and Kore.ai
  - **Major Contenders:** Aivo, Artificial Solutions, CM, Cognigy, Creative Virtual, Druid, Eudata, Haptik, Laiye, Omilia, OneReach.ai, Rul.ai, and Yellow.ai
  - **Aspirants:** E-bot7, HCL DRYiCE, and ValueFirst
- [24]7.ai, Amelia, Kore.ai, and Omilia are the top technology vendors in terms of conversational AI license revenue
- Cognigy, Haptik, Yellow.ai, and Druid have reported the highest Year-over-Year (YoY) percentage revenue growth in the conversational AI market

## Conversational AI competitive landscape

- [24]7.ai and Amelia are amongst the largest players across most of the leading industries
- Amelia and Laiye are the leading players across major processes including customer support and IT helpdesk, which account for most of the market revenue
- Amelia and Kore.ai are among the leading players across all geographies, while Avaamo is among the leading players in three geographies

Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021



Source: Everest Group (2021)



# 03

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## Everest Group PEAK Matrix® for Conversational AI

- PEAK Matrix framework

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- Everest Group PEAK Matrix

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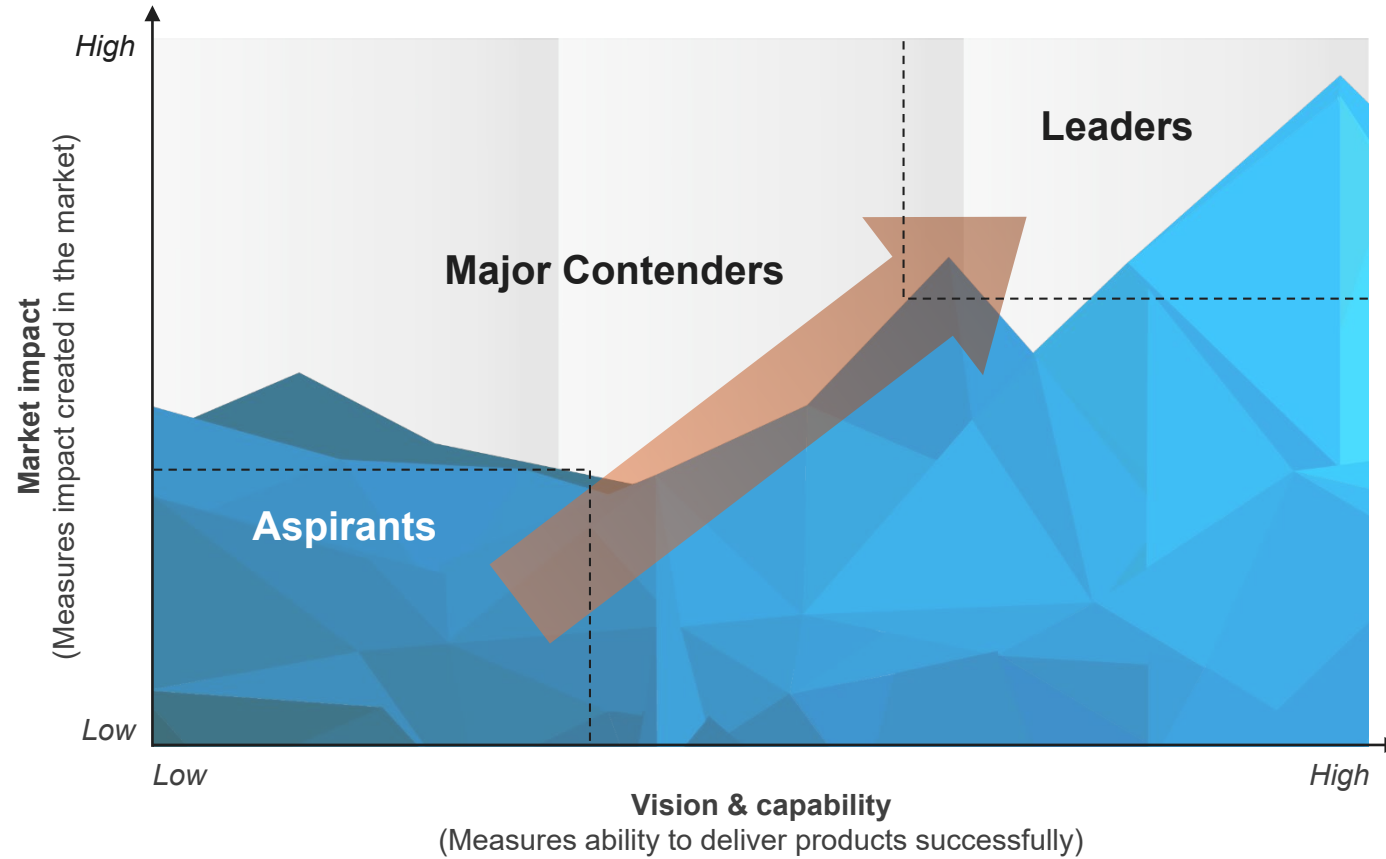
- Characteristics of Leaders, Major Contenders, and Aspirants

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- Technology vendor capability summary dashboard

# Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

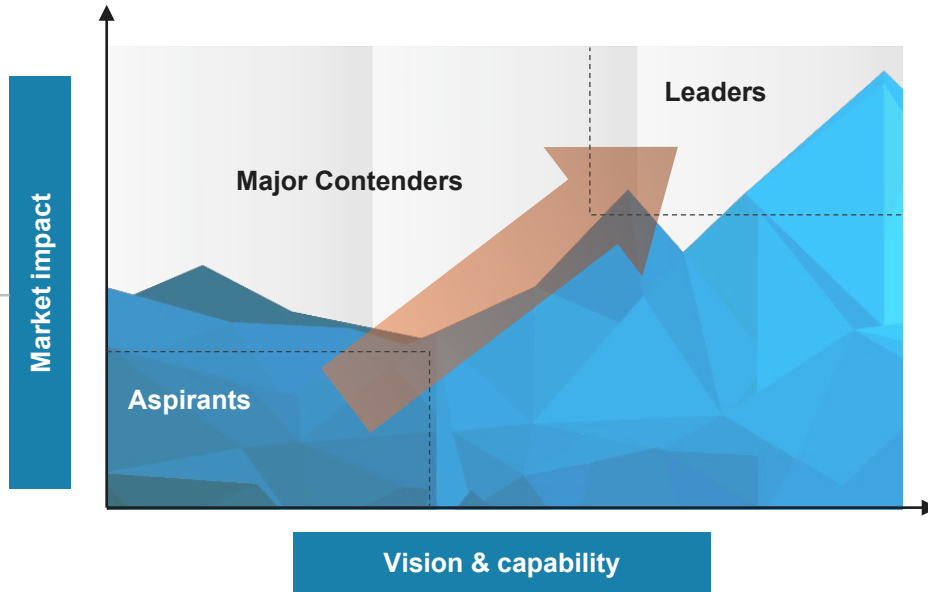
Everest Group PEAK Matrix®



# Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**  
Number of clients, revenue base, and YoY growth
- Portfolio mix**  
Diversity of client base across industries, geographies, environments, and enterprise size class
- Value delivered**  
Value delivered to the client based on customer feedback and other measures



Measures ability to deliver products successfully. This is captured through five subdimensions

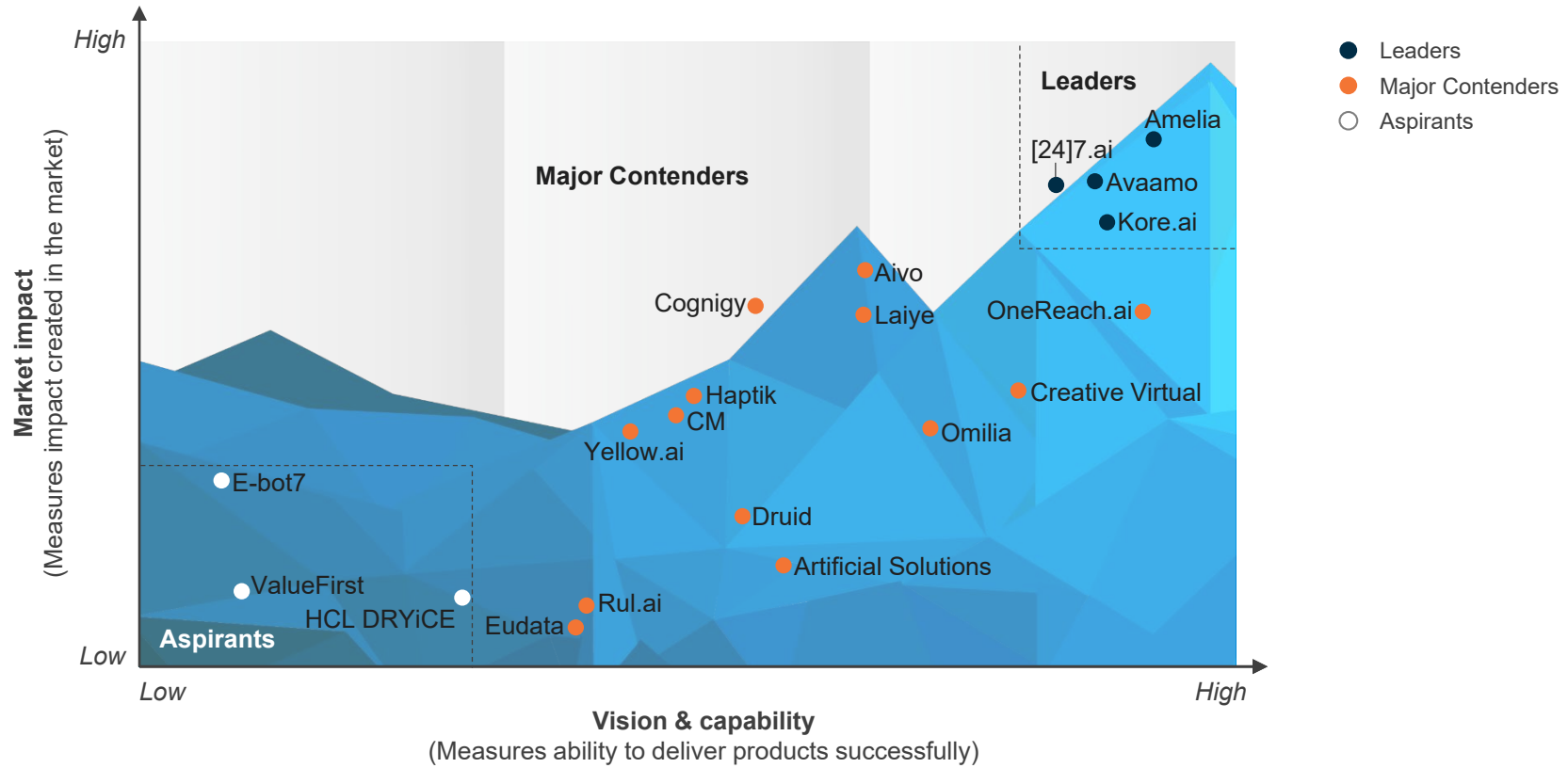
- Vision and strategy**  
Vision for the client and itself; future roadmap and strategy, and progressiveness and flexibility of commercial models
- Implementation and support**  
Hosting type, pre-built intents, visual workflow designer, interoperability, deployment type, and security and compliance
- Technology capabilities**  
Technical sophistication and breadth/depth across Natural Language Processing (NLP), conversational intelligence, intent extraction, agent-assist, training, and sentiment analysis
- Execution and monitoring**  
Analytics capabilities and client training & support
- Breadth of services**  
Channels supported, language coverage, and process coverage

# Everest Group PEAK Matrix®

## Conversational AI Products PEAK Matrix® Assessment 2021



### Everest Group Conversational AI Products PEAK Matrix® Assessment 2021



Source: Everest Group (2021)

## Conversational AI products PEAK Matrix® characteristics

### Leaders:

[24]7.ai, Amelia, Avaamo, and Kore.ai

- Leaders are driving investments in building a conversational intelligence ecosystem for front-office, led by a conversational AI platform. For this, they have made significant investments in areas such as Artificial Intelligence (AI), Machine Learning (ML), enhanced channel support, analytics dashboards, agent-assist, and security solutions
- These players are also partnering with leading technology vendors to offer an automation solution suite for enterprises that can cater to end-to-end automation needs in front-office
- Leaders offer their conversational AI solutions across all leading channels such as voice, chat, email, and in-app. They also serve most of the leading industries globally in multiple languages

### Major Contenders:

Aivo, Artificial Solutions, CM, Cognigy, Creative Virtual, Druid, Eudata, Haptik, Laiye, Omilia, OneReach.ai, Rul.ai, and Yellow.ai

- Major Contenders have approached the market by building capabilities to target pockets of opportunities across regions, industries, or geographies, and plan to expand on these capabilities to other areas over time to meet their global aspirations
- They are following Leaders by investing in cutting-edge technologies and extending technology partnership with RPA vendors to drive digital transformation for their clients in contact centers

### Aspirants:









































E-bot7, HCL DRYiCE, and ValueFirst

- Aspirants are relatively new entrants in the conversational AI market and are investing in conversational capabilities to build differentiation in the market
- These players have approached the market by offering rule-based or less complex chatbots initially, and enhancing them by adding advanced capabilities leveraging AI and ML over time through internal investments

# Summary dashboard | market impact and vision & capability assessment of technology vendors for conversational AI products 2021

## Leaders







































































Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
[24]7.ai										
Amelia										
Avaamo										
Kore.ai										

# Summary dashboard | market impact and vision & capability assessment of technology vendors for conversational AI products 2021

Major Contenders (page 1 of 2)





























































Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
Aivo										
Artificial Solutions										
CM										
Cognigy										
Creative Virtual										
Druid										
Eudata										

# Summary dashboard | market impact and vision & capability assessment of technology vendors for conversational AI products 2021

## Major Contenders (page 2 of 2)

Measure of capability:  Low  High































Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
Haptik										
Laiye										
Omilia										
OneReach.ai										
Rul.ai										
Yellow.ai										



# Summary dashboard | market impact and vision & capability assessment of technology vendors for conversational AI products 2021

## Aspirants

Measure of capability:  Low  High

Service provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
E-bot7										
HCL DRYiCE										
ValueFirst										

# 04

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## Competitive landscape

- Diversity across industries
- Diversity across business functions
- Diversity across geographies

## Industry diversity

Amelia and [24]7.ai are amongst the largest players across most of the leading industries; Avaamo and Kore.ai are the other leading players across many industries

**Top vendors across major industries by revenue**  
Top five vendors (arranged alphabetically)

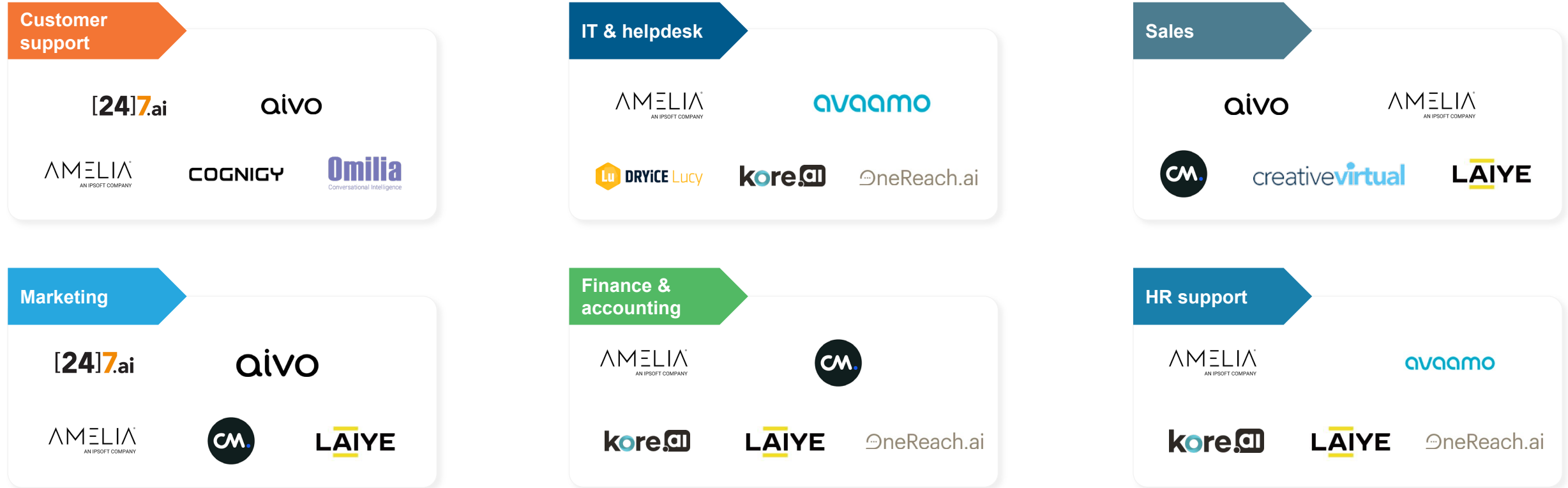


Note: Some assessments may exclude technology vendor inputs, and are therefore based on Everest Group estimates, which leverage our proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage, public disclosures, and interaction with buyers  
Source: Everest Group (2021)

## Diversity across business functions

Amelia and Laiye are the leading players across major processes including customer support and IT helpdesk, which account for most of the market revenue

Top vendors across major processes by revenue  
Top five vendors (arranged alphabetically)

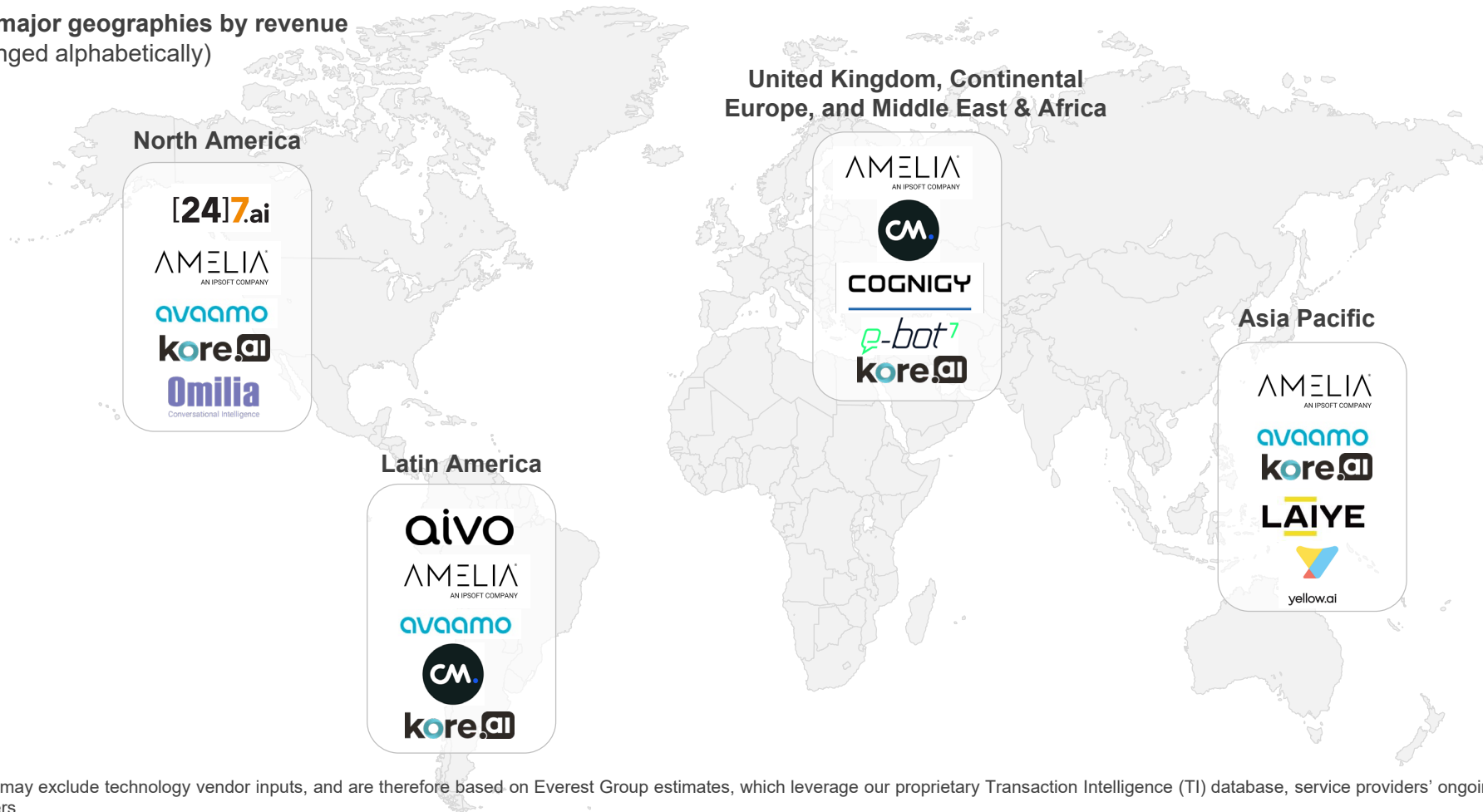


Note: Some assessments may exclude technology vendor inputs, and are therefore based on Everest Group estimates, which leverage our proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage, public disclosures, and interaction with buyers  
Source: Everest Group (2021)

## Diversity across geographies

Amelia and Kore.ai are among the leading players across all geographies, while Avaamo is among the leading players in three geographies

Top vendors across major geographies by revenue  
Top five vendors (arranged alphabetically)



Note: Some assessments may exclude technology vendor inputs, and are therefore based on Everest Group estimates, which leverage our proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage, public disclosures, and interaction with buyers

Source: Everest Group (2021)

# 05

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## Enterprise sourcing considerations

- Leaders
- [24]7.ai
- Amelia
- Avaamo
- Kore.ai

## [24]7.ai (page 1 of 2)

### Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- [24]7.ai offers conversational AI platform through its ‘Engagement Cloud’ offering across industries such as retail & CPG, BFSI, telecom, and travel & logistics. It consists of a visual workflow designer for developing digital and voice conversation flows. Clients have indicated high level of satisfaction with the platform’s ease of use
- It leverages its proprietary NLP engine, with in-built NLG capabilities and libraries of pre-built ontologies and intents for multiple industries. It also offers flexibility in the platform to integrate with other NLP engines such as IBM Watson and Google Dialogflow. Its buyers indicate NLP and intent recognition as its major strengths
- The platform has native voice capabilities along with voice biometrics for caller authentication. A significant share of its interactions are voice-based
- The platform has the ability to switch context during a conversation and remember contexts when switching between different channels. It is also capable of assessing the emotional state of the conversation

#### Limitations

- [24]7.ai has rich experience serving clients in North America. However, it has limited presence in other geographies such as the UK, Continental Europe, APAC, and LATAM
- Its deployments mostly consist of customer support and marketing use cases. Its experience in catering to use cases in other process areas such as IT helpdesk, HR support, F&A, and sales is relatively untested
- A vast majority of its customers are large enterprises with revenue more than US\$ 10 billion, leaving the platform relatively untested with small and medium-sized customers that are rapidly entering the conversational AI market
- Currently, the platform lacks the ability to extract multiple intents from a sentence and the ability to identify sarcasm
- The platform does not have advanced data ingestion capabilities such as understanding free-flowing text and automatically generating FAQs

## [24]7.ai (page 2 of 2)

### Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- The platform has advanced agent-assist capabilities, through which agents get real-time assistance for the next-best action. Capability to make recommendations for cross-sell and upsell can also be configured in it, which works on the principle of text mining
- It has pre-built connectors available with multiple enterprise applications such as Cisco, Genesys, Avaya, Salesforce, Microsoft Dynamics, and Oracle
- Its centralized analytics dashboard is embedded in the engagement cloud offering and allows clients to track operational metrics as well as customer and human workforce analytics. It has advanced capabilities such as speech analytics, custom report building, and tracking of compliance-related issues
- Along with usage-based commercial model, it also offers progressive outcome-based pricing option to its clients
- Buyers appreciate its time-to-market, customer support, and feedback implementation

#### Limitations

- [24]7.ai has a limited number of technology partners, resellers, and implementation partners. While it has an alliance with Blue Prism, partnering with other leading RPA vendors will allow it to offer pre-built integrations with these automation solutions and attract new clients
- Buyer feedback suggests that [24]7.ai can further enhance analytics capabilities and offer suggestions to clients on how to improve the process as well



# Amelia (page 1 of 2)

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Amelia is a low code end-to-end platform capable of enabling RPA bots, interacting with APIs, and building custom UI interactions as part of the dialog. It also offers an online marketplace for accessing Amelia-powered digital employees. Its buyers appreciate ease of use of the platform
- It has extensive experience of working with clients from diverse industries and has a vast geographical footprint. It has experience of handling a wide variety of use cases in multiple process areas such IT helpdesk, customer support, HR support, F&A, sales, and marketing
- Through its proprietary NLP engine, Amelia supports context switching, remembering context across different channels, sentiment analysis, and processing long sentences with multiple intents. It also has NLG capabilities and pre-built ontology. Its clients have lauded ML capabilities of the platform
- Amelia has capabilities to offer omnichannel experience, including voice, and supports over 100 languages through these channels

### Limitations

- A majority of Amelia’s clients are large and mid-sized enterprises with revenue more than US\$1 billion. Its experience in serving small enterprises, which are rapidly entering the conversational AI market, is very limited
- While it has proprietary voice capabilities, it lacks advanced capabilities such as speech analytics and voice biometrics for caller authentication. It depends on third-party integrations for voice biometrics
- The platform does not offer flexibility to leverage third-party NLP engines such as IBM Watson, Microsoft Luis, Amazon Lex, or Google Dialogflow
- Although its NLU technology uses synonyms, it does not allow enterprise users to add them on their own
- Buyers feel Amelia can further strengthen on-premise implementation of the product and improve channels integration and custom analytics and reporting capability

# Amelia (page 2 of 2)

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Agent-assist capabilities are present in the platform where Amelia observes the conversations and makes recommendations on next-best action to the agent. It is also capable of skill-based agent routing
- In addition to its proprietary RPA solution, 1RPA, it has pre-built integrations with leading RPA vendors such as Automation Anywhere, UiPath, Blue Prism, and NICE
- It also includes monitoring and analytics capabilities as part of its offerings that helps track operational, customer, and human workforce parameters. Other capabilities of the platform include custom report creation and tracking of compliance-related issues
- It offers customers flexibility in pricing models depending on their requirements and volume expectations. It also offers the option of outcome-based pricing model to customers
- Buyers consider Amelia’s subject matter expertise, responsiveness, and customer support as its key strengths

### Limitations

- Buyer feedback also suggests that Amelia can improve customer onboarding by helping customers understand the capabilities better and setting expectations accordingly

# Avaamo (page 1 of 2)

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Avaamo offers conversational AI platform to enterprises across industries such as BFSI, healthcare, retail & CPG, and telecom. It has vast experience of catering to requirements in the US and Asia Pacific. Avaamo has a skill store that contains over 100 plug-and-play skills for quick implementation and scaling the bots
- It leverages its proprietary NLP engine and supports capabilities such as NLG and pre-built ontology. The platform comes with large libraries of pre-built intents for various industries as such as BFSI, healthcare, retail, and telecom, as well as process areas such as IT helpdesk, HR support, and customer support
- The platform has native voice capabilities and handles a sizable amount of its conversations through the voice channel. It also has advanced capabilities such as speech analytics and voice biometrics for caller authentication
- The platform can remember context from previous conversations, switch context within a conversation, and remember context across all its channels

### Limitations

- Avaamo’s geographical presence is limited in the mature EMEA market. It lacks the presence of a local GTM team in EMEA to cater to this market or an extensive partnership network to take its offering via these partners to the market
- Its platform is primarily leveraged for customer support, IT helpdesk, and HR support use cases. Its ability to cater to requirements in other business processes such as F&A, marketing, and sales is relatively untested
- Most of its current clients are mid-sized or large enterprises. It is yet to tap into the growing demand from small enterprises, who have so far been behind in the conversational AI adoption journey due to prohibitive costs. It does not offer outcome-based pricing model, which could be an attractive option for this buyer segment
- Avaamo’s platform currently lacks agent-assist capabilities such as the next-best action suggestion to agents for solving queries and for cross-sell/upsell

# Avaamo (page 2 of 2)

## Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- It can recognize multiple intents and get back to the user with multiple responses one after the other in an appropriate sequence
- The platform also has the ability to ingest unstructured data such as company policies and free flowing texts to automatically generate FAQs from them
- Avaamo has pre-built connectors with various business applications, ranging from CRM platforms such as Salesforce, SAP, and Oracle, to ITSM tools such as ServiceNow and BMC
- Avaamo’s NLP engine can verify instances of sarcasm and the emotional state of the user based on the responses, and allow bot designers to trigger sentiment-based agent routing fallbacks
- It offers flexible commercial models to customers, including both perpetual and subscription pricing based on usage or fixed capacity. Buyers appreciate the cost-effectiveness of the platform

### Limitations

- It does not offer out-of-the-box image recognition capabilities, and customers may need to integrate with other third-party products for this capability
- Avaamo does not offer its training modules in languages other than English such as Spanish, French, or German
- While buyers appreciate Avaamo’s approachability, customer support, and responsiveness, they cited that the company could do a more thorough analysis of user queries for potential training data additions and can provide a better interface for user feedback

## Kore.ai (page 1 of 2)

### Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Kore.ai leverages its proprietary NLP engine and offers flexibility to integrate with third-party NLP engines as well. It also has voice conversation capabilities, sentiment recognition, deep learning capabilities, and the ability to create FAQs from free-flowing texts such as policies and T&C documents
- Kore.ai has a well-distributed client base across different industries and process areas in the markets of North America, Europe, the UK, and parts of Asia Pacific. It has pre-built domain-specific virtual assistants and supports 26 languages natively
- The platform can remember context from previous conversations, allows users to switch contexts mid-conversation, and remember context across different channels
- The solution can automatically detect degradation in its performance and has a centralized dashboard for insights around operational metrics, workforce analytics, and customer analytics
- The platform has agent-assist capabilities and leverages AI-based next-best action capability to support the agents during live conversations

#### Limitations

- While Kore.ai has considerably grown its presence in mature markets, it has limited experience in working in emerging markets such as Latin America
- Despite having a voice channel, the solution lacks speech analytics capabilities to transcribe, log, and evaluate speech real-time. It also does not support voice biometrics for caller authentication
- The platform does not have out-of-the-box NLG capabilities which can enable the platform to generate new utterances automatically
- While the platform supports 25+ languages natively, its experience in handling interactions in languages other than English is relatively limited
- It can look to explore outcome-based pricing options such as gainshare/revenue-share models, as this can help it penetrate accounts that have so far been hesitant to adopt conversational AI technology due to high upfront costs or lack of confidence in the technology

## Kore.ai (page 2 of 2)

### Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- The platform supports all modes of deployment, including on-premise, private, and public cloud. Customers can also leverage a mixed environment in which the platform runs in the cloud, but still connects to on-premise applications
- Kore.ai has built partnerships with various implementation partners across the globe to deploy its solutions. It has also tied up with several technology partners in areas of RPA, automatic speech recognition, and text-to-speech such as Google, Amazon, and Nuance to augment its capabilities
- It offers session-based pricing where one session is defined as a 15-minutes duration with unlimited messages from both sides. Large enterprises prefer session-based pricing over usage-based pricing as they do not need to keep tabs on the number of messages
- Buyers applaud the integration that Kore.ai provides with their back-end enterprise systems, the robust development features of the platform, and the pre-built small talk and intent segregation features of the platform

#### Limitations

- Buyers pointed out that Kore.ai’s platform is price prohibitive; especially, its post-implementation support is quite expensive compared with other vendors. They also pointed out instances of platform instability where features did not work as expected, and upgrades resulted in outages

# 05

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## Enterprise sourcing considerations

- Major Contenders

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- Aivo
- Artificial Solutions
- CM
- Cognigy
- Creative Virtual
- Druid
- Eudata
- Haptik
- Laiye
- Omilia
- OneReach.ai
- Rul.ai
- Yellow.ai

## Aivo (page 1 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Aivo is focused on the Latin American market and provides support in Spanish, English, and Portuguese. It has shown considerable growth in the last two years by adding a significant number of new logos to its customer base
- The platform offers pre-built intents not only for various industries & process areas, but also for specific commercial dates and occasions (such as Black Friday and Christmas), which helps in quicker implementation and less effort for its customers
- The platform has an effective disambiguation layer, which helps it to handle multiple intents, switch contexts, and identify intents from long paragraphs
- The product team is driven by a clear roadmap and has expanded its offering to new channels such as Slack and Instagram in the last 12 months. Aivo has also added capabilities such as voice authentication (via partner) and integration with Salesforce chat
- Aivo's proprietary NLP engine can identify regional differences in Spanish dialect and informal language, allowing it to differentiate its product in the local market from its peers

#### Limitations

- Aivo lacks expertise to cater to clients in mature markets such as North America and Europe, which may be a deterrent to clients looking for a global partner
- While the platform supports multiple languages natively, its experience in supporting major European languages (apart from Spanish & Portuguese) as well as Asian languages has been fairly limited. Additionally, the solution lacks the capability to switch languages mid-conversation
- Most of the platform's use cases are built around customer support, its is relatively untested in employee support use cases such as IT helpdesk and HR support, which are seeing higher demand from clients
- While the platform has developed voice capabilities, it is still relatively untested as most of the conversations are driven through the chat channel
- The platform does not have the capability to perform sentiment analysis to enable quick agent handoff in case a negative sentiment from the end-user is detected



## Aivo (page 2 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- It has also built a robust team across different roles such as product development, sales, support, and marketing. This enables it to not only focus on adding more capabilities to the solution, but also facilitates higher visibility and client traction
- The platform provides a centralized analytics dashboard that allows clients to track operational metrics as well as workforce analytics. Clients can also track metrics such as average handle time, intent recognition rate, and accuracy rate for each intent
- Aivo has been successful in dealing with large as well as small enterprises through its strong reseller network, which includes companies such as Genesys, Zendesk, and Ettico
- Aivo has its own adoption department, with staff specialized in training, creation of study materials, and support. Buyers have appreciated the customer onboarding experience and agility of the company’s support team
- Buyers have also appreciated the agility of Aivo’s support team, the product team’s market view, and the smooth integration of its platform with their technology environment

#### Limitations

- The platform does not have NLG capabilities to enable it to generate new utterances automatically
- The training of the solution can be further enhanced by adding the ability to learn automatically from the live chat solution as well as adding human-in-the-loop training method
- Aivo does not offer outcome-based pricing models, which could be more lucrative for first-time adopters of conversational AI solutions
- Buyers suggested that Aivo can improve the business insights and analytics capabilities of the platform

# Artificial Solutions (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Artificial Solutions’ conversational AI platform consists of three components, i.e., Teneo Studio – the workflow building interface, Teneo Engine – the runtime engine that enriches its ML models, and Teneo Data – its analytics platform
- Artificial Solutions has built a network of reusable NLU blocks called lexical resources, which include intents, phrases, synonyms, and pre-defined entities, and uses this combined approach of ML and linguistic learning to drive higher accuracy of intent recognition and sentiment analysis
- The Teneo platform supports more than 86 languages natively including rare languages such as Nordic languages. It can also detect regional language variations. The breadth and depth of its language capability is highly appreciated by its buyers
- It has a master-local hierarchy approach where the user can build a master solution in his/her preferred language and then branch it to other languages, thus, shortening the implementation time for multi-lingual deployments

### Limitations

- While Artificial Solutions has presence in mature geographies such as EMEA and North America, it is yet to penetrate the emerging markets of Asia Pacific and Latin America
- Artificial Solutions’ go-to-market strategy does not include selling the product via reseller partnerships, which is inhibiting its growth
- Its client base is dominated by the telecom sector, followed by a small percentage of retail and banking clients. Its experience with other major industries such as healthcare, technology, and public sector is limited
- While Artificial Solutions does have voice capabilities and works with STT/TTS providers such as Microsoft Azure STT, Nuance, and Google STT, it has limited experience in deploying voice bots for its clients
- It also lacks sophisticated voice capabilities such as voice biometrics for caller authentication and speech analytics

# Artificial Solutions (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- The platform has the ability to recognize multiple intents, remember context from previous conversations, and carry on conversations seamlessly across channels
- Artificial Solutions leverages pre-built and custom entities present in Microsoft Luis, and extends other out-of-the-box cognitive capabilities offered by the Azure platform
- Artificial Solutions has a strong focus on product development, to which it dedicates more than 50% of its workforce; this enables it to come up with frequent upgrades to the platform and roll out emergency patches quickly (if needed)
- It has a strong partner network of large system integrators such as Cognizant, Deloitte, and Tech Mahindra, which help it in product implementation. It also has a strong network of technical partners such as UiPath, Vonage, Blueprism, and Sabre
- Buyers appreciated the availability of packaged chat client widgets/connectors, easy-to-use conversation builder, and the mature architecture of the platform

### Limitations

- It does not provide accreditations for individuals/organizations that complete the platform's training modules
- It does not offer outcome-based pricing models, which may be a deterrent for clients that have low willingness to pay upfront charges or low confidence in this technology
- Buyers cited that Artificial Solutions can improve on its out-of-the-box analytics/visualization capabilities and its scalability to grow along with its customers

# CM (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall

### Strengths

- CM offers its conversational AI platform primarily to clients in Europe and the UK market across multiple industries such as BFSI, telecom, travel, and retail
- While the platform specializes in customer support, CM also caters to other process areas such as sales, F&A, and marketing
- CM uses its proprietary NLP libraries and offers capabilities such as native voice conversational capabilities and pre-built ontologies per vertical. The platform also allows the customer to modify these ontologies
- The platform has some advanced conversational capabilities such as being able to create generated responses using deep learning and the ability to customize content/flow of the conversation based on variable information about the customer
- The platform also has features such as context recall, context switching, and the ability to remember context across different channels


### Limitations

- While CM specializes in catering to the European market and has some presence in LATAM, it has very limited presence in other major markets such as North America and Asia Pacific. This can be a deterrent for clients looking for global partners
- While it specializes in serving BFSI clients, it misses out on other fast-growing verticals, such as healthcare, technology, education, and public sector
- Despite growing demand for conversational AI solutions for employee experience, CM’s platform has limited experience in catering to these process areas such as IT helpdesk, HR support, and procurement / supply chain
- Currently, the platform lacks features such as sentiment recognition & analysis and the ability to extract multiple intents from a paragraph
- The solution lacks sophisticated capabilities such as speech analytics for training the bot and voice biometrics for caller authentication on the voice channel

## CM (page 2 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Training of the platform is provided both by CM as well as its partners/resellers. These trainings are provided in multiple languages, both online as well as classroom-led, in multiple geographies. It also provides accreditation on completion of the training.
- The platform uses its long question API engine to be able to summarize long tail inputs such as emails or long paragraphs into two to five words and respond appropriately
- CM offers outcome-based pricing to some clients based on the preset KPIs such as reduction in average handling time, increase in customer satisfaction, and increase in lead generation
- Buyers appreciated the collaborative nature of the team and the product team’s focus on continuous improvement and meeting end-customers’ needs

#### Limitations

- CM’s platform can be hosted on Azure. It misses out on client premises and private cloud hosting options, which could be prohibitive for some clients
- CM’s platform does not have the ability to integrate with third-party NLP engines alongside its own NLP engine
- The platform does not have APIs to pull customer analytics to analyze customer behavior and insights, which can unlock additional value for clients. Buyers have also pointed out that it can make its analytics dashboard more data-rich by going beyond tracking operational metrics.
- Additionally, buyers have also suggested that CM can improve the sentiment recognition capability of the platform

# Cognigy (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Cognigy has developed a proprietary low code conversational AI platform and caters to clients in mature markets such as EMEA and North America
- The platform comes with pre-built intents for industries such as banking and insurance and process areas such as HR support, customer support, and IT helpdesk
- The platform can recall context from previous conversations, switch context mid-conversation, and seamlessly switch across different channels
- Cognigy has pre-built integrations with most voice platforms such as Genesys, Avaya, and Cisco. More than half of its current pipeline is voice-related, highlighting the market demand for voice-based bots built on the Cognigy.ai platform
- The platform has agent-assist capabilities across both voice and chat channels and can suggest next-best action to agents during a live session

### Limitations

- While Cognigy has a strong presence in mature markets, it has limited footprint in emerging markets such as APAC and Latin America
- Cognigy’s platform does not provide native support to sophisticated voice features such as speech analytics and voice biometrics for caller authentication
- It does not have pre-built intents for industries beyond BFSI to shorten implementation time for such clients
- The platform does not have the ability to natively handle skill-based routing to live agents during a conversation
- The platform can look to enhance its knowledge management capabilities by adding the ability to read free-flowing documents such as policies to automatically generate FAQs
- The platform does not provide analytics around end-customer for cross-sell/upsell and on workforce analytics. It also does not provide the ability to build custom reports

# Cognigy (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- It offers customers the flexibility of choosing between on-premise, private cloud, or public hosting options, thereby aligning the solution to their specific needs
- Cognigy has a strong partnership network of resellers and implementation partners to take the product to market. These include Deloitte, Accenture, and KPMG
- Cognigy natively supports NLP connections with most third-party NLP providers such as Dialogflow, LUIS, Watson Assistant, and Alexa, which enables agents to easily switch NLP providers without having to modify the flows
- Buyers appreciated the usability of the platform and continuous improvements/developments done on the platform

### Limitations

- Cognigy does not offer commercial models such as outcome-based pricing, which is increasingly being sought by buyers. Its portfolio is skewed toward large organizations and does not include many small and mid-sized buyers
- While Cognigy’s sales presence is primarily concentrated in Europe, it does not have local teams and offices in new geographies to understand region-specific customer needs and serve them better
- Buyers pointed out that the admin panel for user management and reporting/analytics capabilities can be improved upon, while pre-trainings in the platform could be more industry-specific to help them leverage greater value out of the platform

## Creative Virtual (page 1 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Creative Virtual’s conversational AI technology platform is a highly versatile platform offering use cases around customer, agent, and employee support. It also has a geographically well-spread client base across the UK, North America, EMEA, and APAC
- It has the capability and experience of serving multiple processes such as customer service, IT helpdesk, sales, marketing, and HR support, thus covering all major areas where virtual agents are currently deployed
- Creative Virtual has been able to build a diverse team across different functions and spread across the globe in locations including the US, the UK, India, and Asia Pacific, giving it access to local talent which can help understand client requirements better
- It has built a vast library of pre-built intents for leading industries such as banking, telecom, and technology, which shortens the deployment time for its clients
- The platform has the ability to switch context mid-conversation and remember context when switching between different channels

#### Limitations

- While Creative Virtual has built some voice capabilities by integrating into third-party systems such as Alexa, it has not expanded this capability to offer native voice support across other channels such as phone
- Currently the solution does not support NLG capabilities natively. NLG allows creating content variations for different personas, leading to a more personalized digital experiences and better customer engagement
- While it focuses on serving large organizations, Creative Virtual does not currently target the growing demand for this technology from small and medium-sized businesses
- Creative Virtual does not provide online courses for client training to expand the coverage of its support to geographies that it or its partners do not have a presence in
- Although it offers native support to a large set of languages, the platform’s experience in dealing with languages other than English is relatively limited



# Creative Virtual (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- The solution also offers agent-assist capabilities, which include embedded bots: Autosuggest (bot suggests response to agent on every request from end-user) and Research Widget (agent can have its own conversation with the bot)
- It offers two tools for reporting – Operational Reports (V-Portal) and Management Reports (Dashboard). These tools allow clients to track various parameters related to operational efficiency, workforce management, and customer insights
- Creative Virtual offers outcome-based pricing option to experimental customers looking to switch from usage-based pricing. This can also be a good option for first-time buyers of this technology
- Buyers appreciate the technical knowhow of the team, the IP (intent libraries), and speed of implementation

### Limitations

- The platform does not have the capability to ingest unstructured documents such as PDFs and policy documents to automatically generate FAQs
- Buyers have suggested improving the GUI for bot developers and admins, cognitive features of the product, and training

## Druid (page 1 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Druid’s conversational AI platform caters primarily to EMEA and North America. It has a rapidly growing client base across a multiple industries, including retail, healthcare, banking, technology, and travel
- The platform is highly versatile as it covers process areas such as IT helpdesk, HR support, and legal, as well as customer support and agent support
- The platform has the ability to remember context from previous conversations, switch contexts, and remember contexts across different channels
- Druid has developed production-ready chatbots with pre-built workflows and intents for most internal process areas such as IT helpdesk and HR support. This provides a much shorter implementation time and a quicker RoI as validated by its customers
- The platform’s NLP engine supports over 40 languages natively. It has experience of supporting uncommon languages such as Romanian and Arabic

#### Limitations

- Druid has limited presence in the fast-growing Asia Pacific market. It also lacks local presence in North America, which can be a deterrent to understanding regional customer nuances better
- While Druid has voice capabilities via text-to-speech and speech-to-text service providers such as Microsoft and Vonage, it has limited experience in implementing voice-based chatbots
- The platform does not have the capability of reading unstructured data formats, such as free-flowing texts or long PDF documents, and automatically generating FAQs from it. Currently, it only allows Excel files to be imported by the flow designer for the knowledge management of chatbots
- Druid cannot automatically generate new utterances for intents and dialog or group certain utterances pertaining to an intent without human supervision in the platform

## Druid (page 2 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Druid has native integration with major UiPath products such as Orchestrator, Action Center, Ai Center, UiPath Apps, and Automation hub
- Druid’s flow diagram functionality allows chatbot authors to configure all the elements that are part of the specific flows, not only the steps, but also the integrations, tasks, and even entities related to that flow, in the same interface
- The platform has advanced agent-assist capabilities through which an agent can chat with multiple customers at the same time and get assisted real-time responses for the next-best action. The platform can also display a holistic profile of the customer from CRM systems to the agent in real-time. These capabilities have been acknowledged by buyers and have been called out as a key strength











#### Limitations

- The platform does not have speech analytics capabilities or voice biometrics for caller authentication
- The platform does not have out-of-the-box integration with other NLP engines such as Dialogflow, Rasa, IBM Watson, and Luis. However, Druid plans to add this functionality in the future
- Currently, Druid does not provide accreditations for individuals/organizations on completing its training modules
- Buyers felt that Druid can enhance flow designer’s ease to use, provide a configurable KPI dashboard, and improve the auto-translation of scripts from different languages

## Eudata (page 1 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Eudata offers its conversational AI platform to enterprises in EMEA and APAC region and has added several new logos in the last 12-18 months. It specializes in serving telecom, banking, and insurance industries for customer support use cases
- It offers a visual workflow designer with an in-built library of pre-built intents and ontologies for banking and telecom industries
- It has its proprietary NLP engine and offers flexibility to integrate with third-party NLP engines such as IBM, Microsoft, and AWS
- It also has substantiated voice capabilities and handles a decent volume of conversations through its voice bots. Through partners and third-party APIs, it is able to provide speech analytics and voice biometrics for caller authentication
- Eudata has in-built agent-assist capabilities including next-best action suggestion for agents as well as skill-based agent routing






#### Limitations

- Eudata’s presence is restricted largely to the EMEA market, with some presence in APAC, and does not cater to the mature markets of North America and the UK. It also lacks a widespread partner network to amplify the reach of its platform
- The majority of its clients are enterprises with revenue less than US\$1 billion, and its ability to cater to requirements of large enterprises is relatively untested
- The platform’s experience in process areas beyond customer support such as IT helpdesk, HR support, and marketing is fairly limited
- While Eudata specializes in telecom and BFSI, its experience in other sectors is relatively untested. It also does not have pre-built intents for other industries
- While the platform specializes in Italian and English languages, its experience in other major European languages and Asian languages is relatively limited

## Eudata (page 2 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Through its partnership with Expert.ai, the platform can also handle sentiment analysis of a conversation and detect sarcasm
- It leverages its proprietary RPA, which is a part of its process builder. It also allows integration with third-party tools such as CRM and IVR systems with a no code approach
- Eudata also provides a centralized dashboard for viewing operational as well as customer analytics. It also includes the functionality to build custom reports
- Buyers appreciated the simplicity with which the platform can integrate with external APIs and web services and Eudata’s vision and roadmap

#### Limitations

- It currently lags behind some of its peers in advanced capabilities such as multiple intent detection and the ability to form FAQs from free-flowing text such as policy documents
- Eudata’s sales team has a relatively small geographical footprint centered around Italy. It lacks presence of an on-ground GTM team in new geographies to be able to better understand region-specific customer needs and tailor its platform accordingly
- Eudata does not offer progressive commercial models such as outcome-based models, which could be an attractive proposition for first-time buyers of conversational AI technology
- Buyers suggested that Eudata can improve its machine learning capabilities to increase the accuracy of intent detection and do better in using spatial elements such as maps within chats

# Haptik (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Haptik’s conversational AI platform comes with more than 100+ pre-defined conversational workflows for various industries such as financial services, telecom & media, and e-commerce, which accelerates time to value for its clients. Apart from its focus on customer support, it also has a significant number of deployments for sales and marketing processes
- The platform has an easy-to-use no-code conversation builder interface, and provides an out-of-the-box coding environment to configure technical details
- It also offers managed services to design, build, configure, and deploy conversational bots and work on continuous optimizations
- The platform has some advanced features such as sentiment analysis, the ability to remember context from past conversations, and multiple intent detection
- The platform also has agent-assist capabilities through its smart agent chat feature, which helps in suggesting the next-best action to the agent during a live chat

### Limitations

- While Haptik’s conversational AI platform has shown decent traction in Asia Pacific, it remains largely untested in most other markets such as EMEA and North America
- Telecom, technology, and public sector companies form the majority of its clients. It has limited experience in serving other high-growth industries such as BFSI and retail
- While it has a fair amount of experience in serving small buyers, Haptik is relatively inexperienced in dealing with large buyers with global deployments
- The platform does not have the capability to hand over the conversation seamlessly from one channel to another and remember context across channels
- From a channel perspective, the platform is largely chat-driven. It misses out on native voice capabilities and has limited implementations across voice channels

## Haptik (page 2 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- Haptik has built a strong partner network of both resellers such as Jio Enterprise Sales, as well as software/technology vendors such as Zendesk, Freshworks, and Google
- The platform supports 20+ languages, including most Indic languages, by combining the native language model with a correction layer built on top of it
- The platform has an integrated AI model into its analytics dashboard, which makes recommendations on improving the bot by augmenting training data for existing intents and suggest new intents
- Buyers appreciated the ease of development on the platform and the quick troubleshooting provided by the support team

#### Limitations

- The platform currently does not support on-premise and private cloud hosting. This could be a deterrent for some buyers, especially in BFSI and healthcare verticals
- The platform does not have advanced document ingestion capability such as the ability to create FAQs from free-flowing text for company policies and T&C documents
- The platform currently lacks pre-built integrations with other third-party NLP engines such as Dialogflow, Watson, and Luis
- Haptik does not provide online training courses, or provide accreditations for clients and partners
- Buyers felt that the platform can add more features to its analytics dashboard and improve its agent-assist capabilities

# Laiye (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Laiye’s conversational AI platform comes with pre-trained off-the-shelf solutions such as HR bot, e-commerce bot, insurance knowledge bot, mothercare bot, healthcare bot, and car service bot
- It also has pre-built ontologies and intents for several industries such as retail, healthcare, and insurance. It has many clients in these industries along with public sector and real estate
- The platform has the ability to display customized content as per the customer persona. It stores user attributes through CRM integration or through conversational flows, which can be used to provide a personalized experience
- It can remember context from previous conversations and while switching between channels. It can also handle context switching within a conversation
- Laiye has developed an OCR system (via partnership) to recognize general tickets, cards, and certificates in China. It also leverages its proprietary RPA to automate back-end tasks

### Limitations

- The bulk of Laiye’s client base is situated in China. While it has built deep and comprehensive solutions for its local market, it lacks an established presence in mature markets such as North America and EMEA
- Its multiple intent detection capability lags behind some of its peers. This feature is crucial to ensure a more intuitive and conversational experience
- While it provides support in Chinese and English, it lacks expertise in dealing with European languages, which could be a major barrier to enter the EMEA market
- Although the platform has the ability to track operational metrics, it lacks the ability to automatically detect degradation in its performance. It also does not have the ability to find gaps in agent performance and recommend suitable training
- It also lacks speech analytics capability to analyze voice-based interactions on the platform and improve future interactions



# Laiye (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Laiye has recently invested in machine reading comprehension technologies, which allows the platform to ingest unstructured documents such as company policies, and T&C documents, and automatically create question answer pairs from them
- The platform has built voice capabilities via integrations with automatic speech recognition and text-to-speech providers. It also provides voice biometrics for caller authentication
- Laiye has built a strong network of resellers such as Microsoft, Deloitte, and Accenture, which helps in amplifying the product’s reach as well as provide consulting and project implementation. The majority of its customers are won via this route
- The platform has a centralized analytics dashboard, which displays operational metrics to track the performance of its NLP engine as well as customer analytics to unlock cross-sell/upsell opportunities and workforce analytics for work optimization
- Buyers appreciated the technical knowledge of Laiye’s product team and their domain expertise in the healthcare industry

### Limitations

- The platform does not have the ability to perform skill-based agent routing based on customer attributes.
- While the platform can identify the emotional state of a conversation, it does not have the ability to detect sarcasm
- Laiye does not offer progressive commercial models such as outcome-based pricing models that can remove the burden of upfront investment and quick RoI realization from enterprises. Its buyers also expressed the desire for more affordable pricing options

# Omilia (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Omilia provides omnichannel experience through its conversational AI platform across industries such as banking, insurance, telecom & media, and travel & logistics. Its miniApps are packaged dialog elements that deliver off-the-shelf AI functionalities
- It leverages its proprietary NLP engine, with in-built NLG capabilities and libraries of pre-built ontologies and intents for multiple industries. The platform can also recognize emotional state of the customer based on interaction
- The solution has voice conversation capabilities along with voice biometrics for caller authentication for security purposes. The majority of Omilia’s interactions are voice-based
- It supports over 20 languages and has rich experience serving clients in languages beyond English such as Russian, Greek, and French. It can support interactions across both voice and non-voice channels for these languages. Users can also switch languages mid-conversation as well

### Limitations

- While Omilia has rich experience serving clients in North America and Europe, its ability to cater to client requirements in markets across Asia Pacific and LATAM is relatively untested
- A majority of its clients are large organizations with greater than US\$1 billion revenue and it has limited experience of working with small enterprises
- Most of its deployments are for customer support, and it lacks experience in other process areas such as IT helpdesk, HR support, and F&A. Pre-built intents are available only for customer support and not for other process areas
- The solution lacks agent-assist capabilities, wherein it can suggest the next best action to agents during a live conversation
- Advanced document ingestion capability to ingest unstructured documents and create FAQs from free-flowing text is currently not available

## Omilia (page 2 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- The solution is capable of identifying multiple intents in a sentence and get back to the user with multiple responses one after the other in an appropriate sequence
- The conversational AI platform has the ability to switch context in the conversation, remember context from previous conversations, and across different digital channels
- Its robust centralized analytics dashboard allows tracking the performance of the conversational AI solution across leading parameters, as well as tracking customer analytics for cross-sell/upsell. It also has advanced capabilities such as speech analytics and the ability to create custom reports
- The solution is also capable of automatically detecting degradation in performance, and tracking and reporting compliance-related issues
- Its conversational AI platform is backed by a large team across diversified roles such as product development, support services, QA, and sales

#### Limitations

- The platform does not offer flexibility to integrate with third-party NLP engines
- Its centralized analytics dashboard does not provide analytics around workforce management that is useful to enterprises for optimizing workforce and operations
- It offers only usage-based commercial models and does not offer progressive outcome-based pricing models

# OneReach.ai (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- OneReach.ai has proprietary omnichannel conversational AI platform consisting of a visual workflow designer and a library of pre-built workflows for common conversations. It has a sizable team for product development that ensures regular updates and new features
- Its clientele is spread across multiple geographies such as North America, the UK, Continental Europe, and LATAM. Additionally, it has tapped clients from multiple industries from these regions and has diverse process coverage
- The platform consists of an ecosystem of intelligent digital workers which consist of multiple domain-specific skills for common use cases such as changing password, onboarding employees, and managing appointment. Its buyers appreciate the platform’s ease of use and speed of implementation
- It leverages its own NLP engine and offers flexibility to integrate with third-party NLP engines such as IBM Watson, Amazon Lex, and Google Dialogflow. It is capable of context switching, sentiment analysis, remembering context across different channels, and processing long sentences with multiple intents. It also has NLG capabilities

### Limitations

- Although OneReach.ai has experienced decent traction in North America, the UK, and Continental Europe, its platform remains largely untested in Asia Pacific
- Insurance, healthcare, and travel & logistics companies form the majority of its clientele. It has limited experience in serving needs of enterprises in other major industries such as banking and telecom
- Most of its clients are small and mid-sized enterprises. Its experience is limited in catering to requirements of large enterprises with revenue more than US\$10 billion
- OneReach.ai offers customizable pre-trained digital workers and pre-built workflows, but it lacks off-the-shelf point solutions
- While it has out-of-the-box integrations with UiPath and Automation Anywhere, having partnerships with other leading RPA vendors will help in adding clients that are already leveraging solutions from these vendors

# OneReach.ai (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- It has developed its own voice technology stack for voice conversational capabilities and supports voice biometrics for caller authentication. A large amount of its conversations are voice-based
- The platform has agent-assist capabilities and leverages AI-based next-best action capability to support agents. It is also capable of real-time skill-based agent routing based on customer attributes
- In addition to operational, customer, and human workforce analytics, the platform also has advanced capabilities such as speech analytics and the ability to create custom reports. This has also been highlighted by buyers as one of its key strengths
- It offers both fixed capacity and usage-based commercial model. In usage-based pricing, the client pays for the duration while the digital worker is working
- Buyers appreciate OneReach.ai’s flexibility and long-term vision of its offerings

### Limitations

- The platform supports over 65 languages natively, but its experience in handling interactions in languages other than English is limited
- While OneReach.ai provides self-paced online training courses, buyer feedback suggests that there is scope to improve the training and provide certification for employees
- Buyer feedback indicates the need for OneReach.ai to improve marketing of its platform and introduce security standards that are relevant for the federal market

# Rul.ai (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Rul.ai primarily has presence in the North American and Asia Pacific markets with clients across verticals such as retail, BFSI, technology, and telecom
- The platform offers “accelerators” to be able to train the platform by automatically identifying new intents from human-to-human conversational transcripts as well as aid the conversation designer in enhancing existing intents. It can also crawl through websites to increase its knowledge base
- The platform also has the capability to remember context from previous conversations and switch context dynamically in the same channel as well as across channels
- It also has the ability to automatically create FAQs from semi-structured data such as PDF documents, web sites, and databases
- The platform has agent-assist capabilities. It can suggest next-best action to agents and allows conversational designers to incorporate skill-based agent routing at any point in a conversation

### Limitations

- Its geographical presence is limited in the EMEA market. It lacks a robust partnership network of resellers that can deploy its solutions for buyers in other geographies
- The platform is focused primarily to cater to customer support use cases, leaving it relatively untested in dealing with employee support use cases such as IT helpdesk and HR support
- The platform does not provide out-of-the-box support for capabilities such as speech analytics and voice biometrics for caller authentication
- Rul.ai does not have pre-built intent libraries for industries such as healthcare, technology, and media and publishing
- The platform does not have the ability to display customer profile or customer-specific content to agents for a personalized experience or to unlock cross-sell/upsell opportunities

# Rul.ai (page 2 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Rul.ai-powered bots have pre-built integrations with voice and text-based apps, contact centers, agent desktops, back-end fulfillment systems, and even other bots
- The platform has native support for major languages such as English, Chinese, German, Spanish, and Korean. Going forward, more languages are planned to be natively supported as per customer demand
- Rul.ai offers client as well as partner training. These self-paced trainings are available both online as well as offline in English and Chinese languages. It also provides accreditations on completion of training modules
- Buyers appreciated the flexible integration capabilities of the platform, the easy-to-use conversation designer, and the overall product roadmap

### Limitations

- The platform does not have out-of-the-box capability to generate workforce analytics as well as customer analytics for cross-sell/upsell. It also lacks the ability to generate custom reports
- Rul.ai’s platform currently does not have out-of-the-box image recognition capability, which is often demanded by BFSI and healthcare clients, among others
- Rul.ai does not have any offices in the mature European market, which may inhibit its ability to cater to region-specific client needs and help serve them better
- Buyers cited that Rul.ai can look to provide WhatsApp integration, improve its analytics offering, and expand its native language capabilities beyond its current set of languages

# Yellow.ai (page 1 of 2)

## Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- Yellow.ai has experienced strong growth in its year-on-year revenue and has recently introduced natively developed and AI-powered voice bots. It has also opened a new office in the US, signaling its intention to penetrate deeper into the US market
- It has an easy-to-use no-code conversation studio with visual drag-and-drop features to aid citizen developers in building conversations with minimal help from the product team
- Yellow.ai has developed a proprietary AI marketplace, which is an open platform for developers to build components such as pre-defined validators, integration layers, and pre-built intents, which can then be reused by other users of the platform
- Its proprietary NLP engine uses word embeddings and few-shots learning technique to provide higher accuracy with lesser training data as compared with third-party NLP engines
- Through its document cognition feature, the platform can read free-flowing policies, long documents, and automatically create FAQs from them

### Limitations

- While Yellow.ai has presence across almost all major geographies, it has a strong focus on its home base, i.e., the Asia Pacific market and is yet to establish a strong portfolio in the more mature EMEA, UK, and North America markets
- The platform is concentrated on customer experience use cases. Its experience to cater to employee assist use cases is relatively limited
- While it offers pre-built intents for retail & BFSI, it lacks pre-built intents for other fast-growing industries such as technology and healthcare, which would help in reducing the implementation time for such clients
- Yellow.ai's experience in the voice channel is relatively low, and the newly launched voice capabilities of the platform are untested. It also does not have speech analytics capabilities in the platform. Buyers also highlighted voice capabilities as one of its limitations



## Yellow.ai (page 2 of 2)

### Everest Group assessment – Major Contender

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- The platform can remember context from previous conversations, switch context within and across channels, and identify multiple intents. It then considers previous conversational turns such as intents and entities detected as input to drive a more personalized conversation during response generation and dialog management
- The platform also offers off-the-shelf conversational AI solutions such as Flax for ITSM support, Bumblebee for HR automation, and Canary for retail and e-commerce
- The platform has a translation-independent multi-lingual model that uses language-agnostic embeddings through which it covers more than 100 languages natively. About 20% of conversations on its platform are in non-English languages.
- Buyers have appreciated the flexibility, agility, and technical skills of the product development team

#### Limitations

- The platform has limited analytics capabilities. The analytics dashboard does not include customer analytics and lacks the ability to create customer profiles to generate personalized content and upselling/cross-selling opportunities. Buyers have also pointed out this as a limitation of the platform
- The platform currently lacks sophisticated features such as the ability to understand an intent from a long paragraph or the ability to automatically detect degradation in the performance of the bot

# 05

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## Enterprise sourcing considerations

- Aspirants
  - E-bot7
  - HCL DRYiCE
  - ValueFirst

## E-bot7 (page 1 of 2)

### Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- E-bot7, a Germany-based conversational AI player, serves clients primarily in Continental Europe and the UK across multiple industries such as BFSI, telecom, travel & logistics, and retail. The majority of its deployments are around customer support use cases
- Its diversified portfolio across buyers of different sizes shows its ability to meet demands from different segments of the market
- Its conversational AI platform has a visual drag-and-drop interface to create conversational flows. It also allows enterprise users to code or configure technical details. Buyers appreciate the ease of use of the platform
- The platform has the ability to switch context mid-conversation and remember context across different channels
- It has rich experience of serving clients in German, English, French, Spanish, and Dutch languages. These languages are supported natively by the platform







#### Limitations

- Beyond the European market, E-bot’s presence is fairly limited in the mature North America market or the fast-growing APAC market. It lacks a robust partnership network of resellers to take its product to a wider market
- While the platform allows users to create new intents, it does not have a library of industry- and process-specific pre-built intents and ontology to shorten customer onboarding time
- E-bot7 currently lags behind some of its peers in implementation of multiple intents detection capability. It also does not have the ability to create customized content as per the customer
- The platform does not currently have the ability to build voice bots. Buyers expect this capability, and it is in the pipeline for this year
- It lacks advanced conversational capabilities such as assessing the emotional state from a conversation and the ability to detect sarcasm

## E-bot7 (page 2 of 2)

### Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- The platform has a centralized analytics dashboard for reporting and analytics that can provide information to clients around operational metrics, agent metrics, and customer metrics for understanding customer satisfaction
- E-bot7 provides training to its clients via both online and offline modes. The training is available in German, Spanish, and English
- Buyers appreciate E-bot7’s customer support and cost-competitiveness of the platform as compared with bigger players

#### Limitations

- The platform currently does not offer flexibility to integrate with third-party NLP engines such as Dialogflow and IBM Watson; however, this feature is in its pipeline. It also does not have NLG capabilities which enable the platform to generate new utterances automatically
- The platform does not have the capability of ingesting unstructured and free flowing documents such as policies, and T&C documents to be able to automatically generate FAQs. Currently, it only supports document ingestion for Excel files
- It does not provide pre-built integrations with third-party RPA providers. The platform also does not support skill-based agent routing
- Buyers cited not having enough API integrations with enterprise products as a challenge while working with E-bot7’s platform

# HCL DRYiCE (page 1 of 2)

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- HCL’s DRYiCE Lucy is a conversational AI platform for IT helpdesk that can leverage multiple NLP engines such as IBM’s Watson, Microsoft Luis, and Google Dialogflow
- It has presence across most of the major geographies and serves a wide range of industries such as manufacturing, automotive, healthcare, banking, and telecom
- A key differentiating factor of Lucy is its library of pre-built workflows across business functions and domains, which provides a fast customer onboarding experience
- Lucy’s Cognitive Console allows admin users to manage, curate, and train the platform through its multiple subconsoles such as integration module, channel configuration, spellchecker, and reporting dashboard
- Lucy also offers capabilities such as context switching, sentiment analysis, image recognition, and pre-built intents for different industries and process areas

### Limitations

- Most of the current conversations driven on the Lucy platform are through the chat channel. Its experience in supporting other channels, such as voice, is relatively limited
- A majority of its deployments are for IT helpdesk, and it lacks significant experience in other process areas such as sales, marketing, or finance and accounting
- While it supports deployments on public cloud, it does not support private cloud and on-premise deployments, which can act as a deterrent for industries/clients who do not yet leverage public cloud for managing their enterprise applications
- A vast majority of Lucy’s customers are large enterprises, leaving the platform relatively untested with small and medium-sized customers, which are rapidly entering the conversational AI market
- Although the platform can retain past conversations to restart them in the same channel, it lacks the ability to remember context when switching between channels

# HCL DRYICE (page 2 of 2)

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- The solution supports multi-bot environment, which is becoming increasingly common, through its bot connect API that helps in extending all the intents, and entities developed on the Lucy platform to the rest of the bots
- Lucy has built a strong network of software partners such as ITSM vendors such as Ivanti and Cherwell, as well as RPA vendors such as Workfusion, UiPath, and Blueprism. It has also built a strong reseller partner ecosystem to amplify its reach
- Buyers appreciate HCL’s work ethic to implement new use cases, redoing certain use cases, and meticulous planning/following-up by the product support team during the implementation phase

### Limitations

- The solution lacks agent-assist capabilities, wherein it can make suggestion to agents by retrieving relevant knowledge articles, searching internal knowledge base, or identifying the next best action during a live conversation
- While it offers voice capabilities through IBM Watson, it does not offer voice biometrics to authenticate the callers
- It has limited analytics capabilities. Tracking of customer analytics and human workforce analytics is not present within the solution. Its also does not have the ability to track and report compliance-related issues
- Buyers pointed out that HCL can improve on its platform’s maintenance roadmap, and cited its lack of internal communications and lack of client training as a challenge while working with the platform

## ValueFirst (page 1 of 2)

### Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

#### Strengths

- ValueFirst’s enterprise conversational AI platform offers customized solutions in marketing, customer support, and commerce. Its market focus is mostly on the Middle East, parts of Southeast Asia, and India
- ValueFirst has experience of catering to large, mid-sized, and small enterprises, which shows its ability to meet demands from different market segments
- The platform offers visual workflow designer and a library of pre-built workflows for common conversations. It also has sentiment analysis capability, using which conversation flow designers can initiate an agent handoff functionality
- The solution can be deployed across different hosting environments such as server/on-premise, private cloud, as well as public cloud, depending on customer preference
- ValueFirst has its own NLP engine and supports capabilities such as NLG. The platform also has the ability to enable context switching mid-conversation and across different digital channels

#### Limitations

- ValueFirst’s presence in major geographies such as North America and Continental Europe is limited. It also lacks a robust partner network to deploy its solution outside regions where it has a physical presence
- ValueFirst has limited voice capabilities. It does not have voice channel integrations and lacks experience in deploying voice-based chatbots
- ValueFirst primarily supports sales, marketing, and customer support processes. It has limited experience in handling other process areas such as IT and HR support
- While the platform does support agent handover, it does not provide advanced agent-assist features such as suggesting the next-best action to an agent during a live chat
- The platform also does not support pre-built intents for various industries and process areas. It can consider building intent libraries, which help in reducing implementation time

# ValueFirst (page 2 of 2)

## Everest Group assessment – Aspirant

Measure of capability:  Low  High

Market impact				Vision & capability					
Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Implementation & support	Technology capabilities	Execution and monitoring	Breadth of services	Overall
									

### Strengths

- The platform offers an analytics dashboard showing operational analytics such as intent analytics, sentiment analytics, as well as agent analytics. It also has the ability to provide custom reports on various KPIs
- Buyers appreciated ValueFirst’s responsiveness, ability to bring new ideas to the table, and working according to the client’s budget
- Buyers also appreciated the platform’s performance and the continuous development undertaken by the product team

### Limitations

- The platform does not have advanced intent extraction capabilities such as the ability to extract multiple intents from a sentence and the ability to extract intent from long paragraphs
- ValueFirst has limited experience in handling major European languages, which could be a prohibitor for EMEA as well as LATAM clients
- The accuracy of the NLP model for languages other than English is about 70%. This can be a deterrent for clients looking for multi-lingual bot deployments
- The platform lacks pre-built integrations with third-party NLP engines and RPA tools
- Buyers feel that ValueFirst can improve on its resource retention, improve its data analytics capabilities, and bring expertise gained from experiences with other clients



# 06

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## Appendix

- Glossary
  - Research calendar
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## Glossary of key terms used in this report

<b>ACV</b>	Annualized Contract Value is calculated by dividing the Total Contract Value (TCV) by the term of the contract
<b>BPO</b>	Business Process Outsourcing refers to the purchase of one or more processes or functions from a company in the business of providing such services at large or as a third-party provider
<b>Buyer</b>	The company/entity that purchases outsourcing services from a provider of such services
<b>Buyer size</b>	Buyer size is defined as large (>US\$5 billion in revenue), mid-size (US\$1-US\$5 billion in revenue), and small (<US\$1 billion in revenue)
<b>FTEs</b>	Full-Time Employees on the rolls of a company
<b>Horizontal business processes</b>	Horizontal business processes refer to processes that are common across the various departments in an organization and are often not directly related to the key revenue-earning business. Examples include procurement, finance & accounting, and human resource management
<b>IoT</b>	The Internet of things (IoT) is the network of physical devices, vehicles, home appliances, and other items embedded with electronics, software, sensors, actuators, and connectivity, which enables these things to connect, collect, and exchange data.
<b>Image recognition</b>	Image recognition, in the context of machine vision, is the ability of software to identify objects, places, people, writing, and actions in images
<b>Machine learning</b>	A type of artificial intelligence that provides computers with learning capabilities without explicit programming
<b>NLP</b>	Natural Language Processing is a cognitive intelligence-based methodology to interpret human languages
<b>Optical Character Recognition (OCR)</b>	A technology within computer vision that involves the recognition of printed characters using computer software
<b>PoC</b>	Proof of concept is a realization of a certain method or idea in order to demonstrate its feasibility, or a demonstration in principle with the aim of verifying that some concept or theory has practical potential
<b>RPA</b>	A type of automation that interacts with a computer-centric process through the User Interface (UI) / user objects of the software application supporting that process; typically deployed on virtual machines and can enable end-to-end process automation without the need for human triggers
<b>Sentiment analysis</b>	Understanding the mood and emotions of the user by deploying NLP, text analysis, and computational linguistics
<b>Speech-to-text</b>	A type of assistive technology program that converts words that are spoken aloud to electronic written text
<b>Text-to-speech</b>	A type of assistive technology program that reads digital text aloud
<b>Vertical-specific business processes</b>	Vertical-specific business processes refer to processes that are specific to a department within an organization and are often directly related to the key revenue-earning business. Examples include lending process in case of the banking industry, and claims processing in case of the insurance industry



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