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UPSTREAM WORKS RECEIVES THE 2023 CUSTOMER VALUE LEADERSHIP AWARD

Identified as best in class in the North American contact center omnichannel agent engagement industry

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Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Upstream Works excels in many of the criteria in the contact center omnichannel agent engagement space.

AWARD CRITERIA

Business Impact	Customer Impact
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

Customer Purchase Experience

For more than 50 years, all types of companies have used customer service agents as the front door to their businesses to provide customer service and technical support, perform accounts receivables management (ARM), take orders, upsell and cross-sell goods and services, and perform proactive outreach, among other business functions. As customer contact has skyrocketed in complexity, including the addition of multiple new customer interaction channels, the agent desktop has also evolved. Today's modern desktop has changed from a simplistic interface with limited information to an omnichannel desktop populated with myriad productivity tools and information to assist agents in providing stellar support.

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>
> *- Nancy Jamison,*
> *Senior Industry Director*

Millions of first- and second-generation desktops are still in use today, and they are yet to be updated, negatively impacting productivity and employee experience (EX). A poorly designed agent desktop can hamper even the best agents, ultimately making for a negative customer experience (CX). It would be difficult to find a person who has not experienced an agent apologizing for a slow response by saying, "I'm sorry, my computer is a little slow today," when, in reality, the issue is probably an older-generation desktop that forces the agent to have to open multiple windows

into other systems or applications to get the answer the customer needs.

For more than 20 years, Upstream Works has been changing this paradigm, and it is at the forefront of desktop design to enhance EX and CX. The company has not wavered from its original mission statement ("We provide contact center technology to simplify and improve agent and customer experiences."), which was ahead of its time 20 years ago.

The Upstream Works desktop provides the utmost flexibility for clients and agents. A modern desktop must blend a multitude of functions and data sources for agents to quickly and effectively provide services without escalating to a supervisor, and here Upstream Works shines. Upstream Works' desktops allow agents to drive interactions and blend interaction history, including customer journey information, product and service detail germane to the inquiry, and industry-specific third-party information. Upstream Works delivers all context-sensitive data to the agent in a single desktop that is functional, visually appealing, and easy to use.

Upstream Works Agent Desktop with Virtual Agent Portal
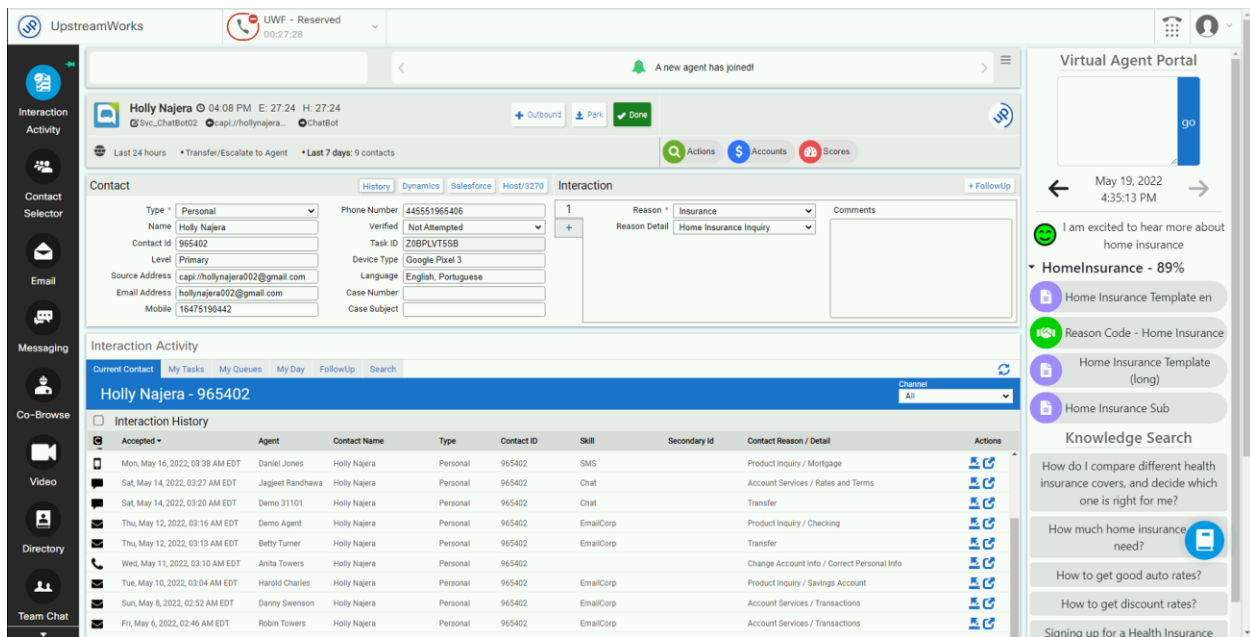
Source: Upstream Works

Some of the important features of the Upstream Works desktop are omnichannel customer interaction history, including when and on which channel the customer has engaged with the business, with full contextual information; omnichannel engagement across voice, video, chat, email, messaging, and social media; customer journey analytics; omnichannel reporting and management; seamless integration with CRM, AI, business applications, and third-party applications; integrated team chat and collaboration tools for team collaboration and chat conferences with the option of bringing team members or subject matter experts into the customer conversation; marquee messaging and statistics for real-time communication between supervisors and employees; AI assistance with knowledge management across channels; an AI virtual assistant portal; and email automation through an email bot handler service to support agents in the background.

The Upstream Works desktop provides agents with everything they need to assist clients, including in-process tasks from other interactions a customer has had. For example, if a healthcare patient calls her insurance company during open enrollment, the agent can also see that she had sent an email asking when to apply for Medicare coverage as she turns 65 in the upcoming year. This allows the agent to proactively address these questions during the same call. Shifting channels during the interaction is also a seamless process, and agents can move to video or show the caller information and screen share, for example, with a single click.

"For 22 years, Upstream Works has steadfastly stuck to its mission of improving CX and EX by providing agents with feature- and information-rich tools to seamlessly engage with customers. Long before 'omnichannel' took root in customer contact in 2013, Upstream Works laid the groundwork for multi-channel engagement, enabling agents to excel in service delivery across channels."

- Nancy Jamison,
Senior Industry Director

Customer Ownership Experience

Frost & Sullivan lauds Upstream Works for flexibly catering to the needs of clients in terms of improving the agent experience. The company's research and development (R&D) team has been a strength in this regard, with 65% of new features developed based on customer feedback.

A core design principle and strength for Upstream Works is platform flexibility, that is, its platform should offer optimum performance in the customer's choice of environment. While most contact center solution providers develop their own agent desktops, many have only now started adding the ability to integrate contact center feed into others' desktops, such as leading CRM suppliers, including ServiceNow or Salesforce, to allow agents to work in environments they are familiar with or in environments that suit them. Upstream Works was one of the first companies in the industry to provide customers with a choice: customers can handle interactions natively in the Upstream Works desktop and have information populated within it, or have the information contextually populated to the multiple other business applications used in the contact center.

Therefore, Upstream Works ensures that all its agents have the same experience, regardless of the interface they use. Through this approach, the company has also solved some issues other companies face with the use of third-party desktops. For example, traditionally, agents working on one desktop might have to update data in another application, but Upstream Works can push and pull data into multiple systems, such as from Upstream Works to Salesforce and back, automating the process for agents, saving time and ensuring data consistency, and allowing agents to work on one desktop.

Moreover, the company caters to areas outside customer contact by extending desktop capabilities to other business areas and customizing and deploying desktops for workers across sales and marketing as well as back-office personnel. With the Upstream Works desktop, back-office workers get the same capabilities as their contact center counterparts; they can track customer interactions, perform management reporting, and undertake work item allocation. This ensures greater business optimization and return on investment (RoI) across the organization.

Price/Performance Value

The feature-rich functionality of the Upstream Works desktop and the ability to deploy it across platforms provides a highly competitive price performance. For example, giving agents a complete view of the customer journey and surfacing context-sensitive information when it is needed without the agent having to search satisfies the growing requirements of improved CX and EX. The desktop also accelerates service delivery, improves first-contact resolution, decreases average handle time, and increases customer and agent satisfaction.

Providing choice extends to other areas of the platform as well. For instance, one of the most innovative functions in this regard is integrating any third-party AI into the product. The infusion of AI across customer contact is a popular trend in the industry, and for good reason. AI allows process automation, significantly reducing the amount of agent time required to service clients. AI is used to infuse intelligence into self-service applications in the form of bots and intelligent virtual assistants. It is also used for agent-assist applications where a bot acts in tandem with an agent to perform tasks and give guidance.

Similar to other top-tier contact center solution providers, Upstream Works has invested heavily in incorporating AI into the agent workspace. Upstream Works provides a virtual agent (VA) portal embedded into the desktop that provides VA assistance for the agent and robotic process automation to automate tasks and reduce employee workload. With integrated knowledge management, the VA sits alongside the agent, gathering information and making suggestions to assist agents with client queries. However, unlike many suppliers in the market, Upstream Works' VA portal was also built to be AI agnostic, enabling multiple AI engines to be used, depending on the requirement, and creating seamlessly blended output for agents. For instance, if a company runs speech and text analytics to derive customer information and intent and decides that one AI engine is better for text processing and another for voice, both can be used. The output for customer intent is the same, and the agent never knows the difference. The workspace also seamlessly integrates customer and agent-facing bots, which, typically, have been siloed applications, often from disparate vendors. However, to the agent using an Upstream Works desktop, this is not an issue. The company integrates AI from a multitude of top-tier providers, including Amazon, Amelia, IBM, Google, Microsoft, and Uniphore.

These factors contribute to cost reduction, increased business efficiency, and quick ROI. Upstream Works also provides investment protection to clients as its platform flexibly allows the addition and simultaneous use of non-Upstream Works components. If a company chooses to add new channels, AI engines, or applications, these are seamlessly integrated into the workspace, as required.

Customer Acquisition

Upstream Works provides workspaces for tens of thousands of agents around the world. It has developed its sizeable installed base of desktops by selling through key partnerships, some of which were established decades ago. The company's initial product, Upstart, powered thousands of Avaya and Nortel agents in the early 2000s and, since then, the company has never looked back, embellishing and evolving the agent experience and expanding routes to market.

Today, Upstream Works' channel partners have increased and, with it, brand recognition. For instance, the company is an Amazon Technology Partner and a Cisco Preferred Solution Partner; Cisco uses

Upstream Works' desktops in its installations and also as an engine underneath thousands of Cisco Finesse desktops. Such key partnerships continue to drive growth. Other partnerships include those with Bell, CDW, NTT, Presidio, Telus, and TTEC.

The early design decision to fit in anywhere has also paved the way for continuous growth and enabled the company to establish solid beachheads for its products at a time when others were locking customers into their own desktops. Other development decisions show additional promise as Upstream Works has attuned R&D to the important trends driving the industry. For example, the company was hyper-focused on improving EX long before most of the industry saw the potential.

Customer Service Experience

Upstream Works ensures that customers also have choice in terms of the deployment and consumption of employee desktops. Customers can deploy on-premises or in the cloud, and they can pay through perpetual licenses through a subscription or as Software-as-a-Service. The company also future-proofs its desktop environments, enabling companies to stay on-premises, work in a hybrid environment, or easily migrate to the cloud, while providing the same desktop experience to all its users.

Upstream Works offers a comprehensive customer service experience, with 24/7 technical support and continuous software upgrades. The company also includes test system licenses with maintenance agreements so customers can make changes and test them and train employees before going live.

Upstream Works delivers additional value to customers and partners by offering the Upstream Works learning program. The program includes the Upstream Works online academy, training modules, and online courses taught by experienced system architects, including role-based learning on the tools and skills needed to deploy the Upstream Works system.

Brand Equity

For 22 years, Upstream Works has steadfastly stuck to its mission of improving CX and EX by providing agents with feature- and information-rich tools to seamlessly engage with customers. Long before 'omnichannel' took root in customer contact in 2013, Upstream Works laid the groundwork for multi-channel engagement, enabling agents to excel in service delivery across channels. This includes embedding customer journey data into the desktop so that agents see all interaction history, including information from digital self-service channels; as a result, agents will have a complete picture of what has gone on with the customer without having to ask. While full-suite contact center providers built desktops as part of their platforms, being laser-focused on just the agent/supervisor desktop experience has enabled Upstream Works to build a solid reputation in this area of the market.

Over time, Upstream Works' brand recognition has grown and, to further this, the company shows a strong presence at industry trade shows and events. A smattering of 2022 events includes a combined Innovate Tour 2022, along with partner Cisco, on A Practical Guide to AI, Automation, and Innovation and the National Credit Union Call Center Conference. This not only boosted Upstream Works' brand awareness but also showcased a broader perspective than just desktops. Other go-to-market activities include Webinars, videos, blogs, and case studies to further showcase its capabilities.

Conclusion

For almost 2 decades, Upstream Works has been a market leader in an important segment of the contact center, that of improving the employee experience, and it has consistently stuck to its mission to improve CX and EX, while expanding its capabilities into core contact center adjacencies, such as AI. This focus has helped the company transform employee engagement and performance and overall business optimization. With its consistent vision and strong R&D focus, Upstream Works earns Frost & Sullivan's 2023 North American Customer Value Leadership Award for contact center omnichannel agent engagement.

What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership Award recognizes the company that offers products or services customers find superior for the overall price, performance, and quality.

Best Practices Award Analysis

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Business Impact

Financial Performance: Strong overall financial performance is achieved in terms of revenues, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

Customer Impact

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

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

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

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

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

About Frost & Sullivan

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The Growth Pipeline Engine™

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

Key Impacts:

■ **Growth Pipeline**: *Continuous Flow of Growth Opportunities*

■ **Growth Strategies**: *Proven Best Practices*

■ **Innovation Culture**: *Optimized Customer Experience*

■ **ROI & Margin**: *Implementation Excellence*

■ **Transformational Growth**: *Industry Leadership*

The Innovation Generator™

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

Analytical Perspectives:

■ **Mega Trend (MT)**

■ **Business Model (BM)**

■ **Technology (TE)**

■ **Industries (IN)**

■ **Customer (CU)**

■ **Geographies (GE)**