



metrigy

About Metrigy 2025

Introducing Metrigy, its Services, and Research Agenda

metrigy

OUR SERVICES

Research + Advisory Service

Metrigy's Research + Advisory Service provides great value and benefits. You get:

- One-on-one access to Metrigy's analysts
- Marketing content
- Access to Metrigy's library of research
- Strategy sessions to bolster your marketing initiatives or product development
- Customized inquiry reports
- Reprint rights to our data
- Advanced input into our studies
- Licensing for existing reports and infographics... and more!

We have many different customizable tiers to make the relationship work with your budget.

Speaking Events

Have a Metrigy analyst join your upcoming event, whether it be virtual or in-person, to discuss success trends in the industry with research-backed metrics to help strengthen your messaging.

MetriCast Service

Metrigy's MetriCast Service includes two buy-side market studies covering the CX and collaboration markets. It also includes market forecasts and market shares across select technologies, along with vendor rankings published in our annual MetriRank reports and our MetriStar Awards for providers that rank highest for business success and customer sentiment, based on the most successful companies in the MetriCast studies.

(For more details on the MetriCast Service, see page 6.)

Custom Research

Metrigy provides customized research projects specific to your campaign or product development needs. We can customize number of participants, geographies, job titles, questions, and more.

Marketing Content

Metrigy works with clients by developing research-backed marketing content to strengthen marketing campaigns and spread the word about your products. Some of Metrigy's marketing offerings include:

- White Papers
- Webinars
- Full-Service Webinars
- Infographics
- Blogs
- Ebooks
- Business Value Analysis
- Podcasts/Videos

Bi-weekly Newsletter

Metrigy sends out bi-weekly newsletters covering the new research, latest technology news, data-backed analyst blogs, promotions and more!

Subscribe to our newsletter at

<http://www.metrigy.com/newsletters/>

2025 RESEARCH AGENDA

Focus on customer experience (CX), employee engagement, and workplace collaboration (WC)
Studies/reports listed below are available with our Research + Advisory Service; for MetriCast Service deliverables, see page 6

CX Optimization: 2024-25 – Consumer Views

In this study, we ask consumers for their perspectives on what the companies they interact with are doing right, and what not. More importantly, we'll see how this has changed over the past year. With all the technology investments, do consumers see customer service improving and or not, and why?

Workforce Engagement Management: 2025-26

Workforce engagement management (WEM) has become critical in meeting workforce challenges that, left unchecked, could inhibit agent/supervisor engagement and, ultimately, hurt customer experience. But with the addition of AI features and other advanced functionalities, these suites are changing rapidly. How are AI-enabled WEM tools helping businesses increase operational efficiency and employee engagement while simultaneously improving CX? What's still missing—with AI and elsewhere?

In this study, we'll look at topics such as:

- Predictive/advanced analytics to assess workload variability, attrition risks, and training needs
- Intelligent scheduling based on agent skills and fluctuating business needs
- Real-time performance feedback and customer sentiment analysis
- Quality management
- AI-powered virtual assistants, for agents and supervisors
- Challenges of using AI for WEM
- Impact on agent spending
- Characteristics of successful WEM initiatives

Q1 2025

Q1 2025

AI for Business Success: 2025-26

As AI continues its rapid acceptance and adoption in companies, here is our annual update on how companies are using AI, and where they are seeing value. Among other topics, we will cover:

- Which AI technologies are working best to drive business metrics
- How AI is helping with customer insights, including AI-powered surveys and inferred sentiment
- How much money companies are actually saving—or generating—with AI, or not
- Real-world use cases generating success
- AI's affect on different employee groups, including contact center (supervisors and agents), sales, marketing
- Which applications of AI truly work today, and what's on the roadmap for tomorrow
- How AI affects staffing decisions, and overall employee productivity
- Who makes buying decisions and how companies are changing their organizational structure to leverage AI
- To what extent companies have an enterprise-wide AI strategy, and who's running it

Q2 2025

AI for Business Success: 2025-26 – Consumer Views

This annual study evaluates how consumers view AI, both in their own workplaces or education, as well as when they interact with companies. We will uncover gaps and alignments in what companies deliver and what consumers want or don't want.

2025 RESEARCH AGENDA

Data Storage & Knowledge Management for CX: 2025–26

Q2 2025

For many organizations, generative AI has been a much-needed wake-up call for improving their data posture and approach to knowledge management. Messy, hard-to-find data; limited, rigid storage capacity; siloed and fragmented knowledge bases—such are but a few problems that limit, if not prohibit, the effective use of AI for customer experience improvement. This research study will explore how CX, IT, and other business leaders are rethinking data and knowledge management for the new age of AI. Topics will include, but not be limited to:

- Data architecture for CX, including sources, repositories, integration, and more
- Where companies are today with their knowledge management systems, where they need to be, and how they'll get there
- How LLMs, RAG retrieval systems, and other advancements are changing knowledge management for CX
- Technologies and strategies driving success

WC and Contact Center Security and Compliance Management: 2025–26

Q2 2025

As apps and features grow, and as AI becomes an integral part of the mix, companies must ensure security and compliance for employee and customer engagement platforms to protect customer data and to ensure brand reputation. In this global study, we'll provide actionable insight for successfully creating and implementing security and compliance strategies to enable maximum ROI for emerging technologies such as generative AI, bots and agents, visual engagement, and more.

Topics will include:

- Organizational strategies and budgets
- Threat identification and mitigation approaches
- Use of specialty security and compliance management tools
- Privacy management
- Mobile security and compliance
- Investment justification in security products and solutions
- AI (including generative AI) compliance and security
- Contact center fraud protection
- Use of branded calling solutions

Q2 2025

Microsoft Teams in the Contact Center: 2025–26

Metrigy's Microsoft Teams in the Contact Center study looks at how organizations are leveraging Teams for their call and contact center needs. It provides actionable guidance for those evaluating using Teams call center use cases versus dedicated contact center solutions. It also provides insights and success strategies for evaluating and implementing integration of contact center platforms into Teams.

The study explores how companies:

- Use Teams in the contact center
- Integrate Teams into the contact center, including evaluating vendor integrations and managing PSTN access
- Handle operations management
- Determine the business value of integrating Teams into the contact center
- Successfully achieve business value from the

Q3 2025

CRM Market Overview

In this market overview report, Metrigy will provide a deep dive on the CRM landscape, highlighting top providers, key product developments, and essential trends shaping the market.

2025 RESEARCH AGENDA

CX Optimization: 2025-26

With a never-ending set of technology options for interacting with customers, companies are continuously evaluating and changing their applications, services, and operational processes. This study evaluates how successful companies are optimizing their customer experience from both their own experience—and that of their end customers. We will conduct research with IT, CX, and business leaders to understand what they like and dislike with the technology used to interact with businesses.

Coverage will include:

- Artificial intelligence: Which types of AI are tablestakes now, and which require more caution
- CX transformation: How many companies have transformed their customer experience, and what projects were considered “transformational?”
- Operational efficiencies: How can technology, particularly forms of AI, help augment or reduce staffing requirements? Which technologies are key to making that happen?
- Customer feedback: How are companies gathering and acting upon customer insights?
- The role of interaction channels: Which channels are crucial, and how are they changing? Where does AI help (or hurt)?
- Architecture decisions: With all the talk of cloud, why isn't every company there? What's driving organizations to stay on-premises—and be happy about it?
- Contact center perspectives: Continuing our trending question over time, is the contact center viewed as a cost center or a value center?
- Security: To what extent is security a part of CX application decision-making and budget?
- Relationship management: How important are partner relationships vs. platform vendor? Are partners keeping up with the latest tech trends, and if so, how?

Q3 2025

Q4 2025

Employee Engagement Optimization: 2025-26

Metrigy's Employee Engagement Optimization: 2025-26 study provides insight into successful strategies for hybrid workplace collaboration in the age of AI. This study provides IT leaders with the insight they need to craft communications and collaboration strategies for 2025 and beyond.

Key technologies and trends covered include:

- Evolution of office space (including meeting rooms, hot desking, and reservation approaches)
- Video conferencing device strategies
- Supporting hybrid and remote workers (including device and stipends)
- Evolution of Microsoft Teams implementation
- Voice and video management strategies
- Fixed-mobile convergence and mobile device management strategies
- NG911 and related technologies
- Extending collaboration apps to frontline workers
- Use of AI copilots and agents, including implementation, funding, and ROI measurement approaches
- AI impact on collaboration application strategies
- Employee experience approaches and platforms

Q4 2025

Connected Workspaces & Collaborative Work Management: 2025-26

A connected workspace for collaborative work management brings together applications such as project and task management with knowledge bases, document repositories, and chat. The goal is to reduce the inefficiencies incurred as employees spend time hopping from one app to the next as they work throughout the day. In this study, we'll explore how companies are implementing connected workspaces for their employees.

Topics will include:

- Applications and capabilities in use
- The role of AI and automation
- Pain points being addressed
- Deployment scope and implementation strategies
- Buying decision maker and budgeting
- Integrations
- Efficiencies gained



METRICAST SERVICE

Metrigy's one-of-a-kind MetriCast Service brings together a detailed buy- and supply-side market forecast and quarterly market shares (**MetriCast**), coveted vendor awards based on customer sentiment and success (**MetriStar**), and extensive top 10 vendor ratings in multiple categories (**MetriRank**). Metrigy gathers the data for these offerings from large global studies of IT, CX, and business leaders. With a MetriCast subscription, everyone at your company gets access to our deep-dive analysis, reports, and workbooks, as well as the opportunity for analyst-led strategy sessions to dig into the topics and categories.

MetriCast Service Overview

In our global MetriCast studies, Metrigy gathers and analyzes data from more than 1,000 decision makers in IT, CX, and business leadership roles to provide insight into what companies are doing now, and what their plans are over the next four years. Annual service covers market sizing for customer and employee engagement technologies.

MetriCast Buy-Side Study

- PowerPoint slide deck of results - contains 100+ charts, tables, and adoption levels for numerous technologies
- Global and regional

MetriCast Market Forecast and Market Shares

- Excel Workbook – Interactive workbook that allows subscribers to evaluate market forecasts by geography and company size; and quarterly market shares by product area
- MetriCast Reports – Detailed forecast and market share reports, plus buying trends, on select technologies

MetriRank Vendor Rankings

MetriRank Reports - Detailed vendor rankings based on six criteria:

1. Market share
2. Financial strength
3. Market momentum
4. Product mix
5. Customer sentiment
6. Customer business success

MetriStar Vendor Awards

MetriStar Reports – Analysis of vendors in multiple technology categories based solely on customer sentiment and business success customers associated with products and services

Also included:

Per-category reports, covering:

- Global market size
- Growth projections with breakdowns for NA, EMEA, Asia-Pac
- "Gain/retain" charts + reasons for leaving, considering vendors; vendor adoption numbers
- Success group comparisons

Quarterly market shares updated in workbook

Workbook with data and pivot tables

Presentation slide deck

- With full, detailed recorded MetriCast client-only session
- Moderated questions during recording
- Optional one-hour 1:1 session

Up to eight customized inquiry call/reports

2025 METRICAST RESEARCH AGENDA

3Q24 CX Metricast Forecast & Market Shares

3Q24 market share updates across CCaaS, on-prem contact center platforms, CPaaS, and CRM

UCaaS MetriRank 2024

Evaluation of top 10 UCaaS providers across a set of fixed criteria: market share, financials, market momentum, product mix, customer sentiment, and customer business success

2024 & 4Q24 WC MetriCast Forecast & Market Shares

Five-year forecasts and quarterly market shares with 4Q24 and 2024 across UCaaS, on-prem PBX, IP desk phones, eSBCs, video equipment

CX MetriStars 2025

MetriStar Award recognition, based on both customer ratings of providers and quantitative metrics correlating the use of products and services with measurable business success, across the following technology categories in the CX MetriCast 2025 study:

- Contact center as a service
- Customer relationship management
- Communications platform as a service
- AI chat agents (for customers)
- AI voice agents (for customers)
- Knowledge management for self-service
- Workforce engagement management
- Agent assist
- Voice of the customer

1Q25 WC MetriCast Forecast & Market Shares

1Q market share updates across UCaaS, on-prem PBX, IP desk phones, eSBCs, and video equipment

Q1 2025

Q1 2025

Q2 2025

Q2 2025

Q2 2025

Q1 2025

3Q24 WC Metricast Forecast & Market Shares

3Q24 market share updates across UCaaS, on-prem PBX, IP desk phones, eSBCs, video equipment

Q2 2025

2024 & 4Q24 CX MetriCast Forecast & Market Shares

Five-year forecasts and quarterly market shares with 4Q24 and 2024 shares across CCaaS, on-prem contact center platforms, CPaaS, and CRM

Q2 2025

CX MetriCast 2025

Based on a large global study with technology decision makers, Metrigy analyzes buy-side market forecasting. We look at technologies in use, providers, spending, ratings of the providers, and relative success using them. We also examine the percentage of companies that are changing or planning/evaluating a change in providers, what's driving them to leave, and which new providers they are considering.

Categories included in the 2025 study are:

- Contact center as a service
- Customer relationship management
- Communications platform as a service
- AI chat agents (for customers)
- AI voice agents (for customers)
- Knowledge management for self-service
- Workforce engagement management
- Agent assist
- Voice of the customer

Q2 2025

1Q25 CX MetriCast Forecast & Market Shares

1Q market share updates across CCaaS, on-prem contact center platforms, CPaaS, and CRM

2025 RESEARCH AGENDA

CCaaS MetriRank 2025

Q3 2025

Evaluation of top 10 CCaaS providers across a set of fixed criteria: market share, financials, market momentum, product mix, customer sentiment, and customer business success

WC MetriCast 2025

Q3 2025

Based on a large global study with global decision makers, Metrigy analyzes buy-side purchasing plans for the upcoming year. We look at technologies in use, vendors, spending, ratings of vendors, and relative success using them. We also examine businesses that are changing, or planning/evaluating whether to change, a vendor, what's driving them to leave, and which new providers they are considering.

Product/service areas include:

- UCaaS
- Premises-based PBX/UC platforms
- Meeting applications
- Team collaboration applications
- Video room systems
- Audio and video endpoints, including phones
- Headsets
- Event platforms
- Enterprise SBCs
- SIP trunking

3Q25 CX MetriCast Forecast & Market Shares

Q4 2025

3Q market share updates across CCaaS, on-prem contact center platforms, CPaaS, and CRM

Q3 2025

CPaaS MetriRank 2025

Evaluation of top 10 CPaaS providers across a set of fixed criteria: market share, financials, market momentum, product mix, customer sentiment, and customer business success

Q3 2025

2Q25 CX MetriCast Forecast & Market Shares

2Q market share updates across CCaaS, on-prem contact center platforms, CPaaS, and CRM

Q3 2025

2Q25 WC MetriCast Forecast & Market Shares

2Q market share updates across UCaaS, on-prem PBX, IP desk phones, eSBCs, and video equipment

Q4 2025

UCaaS MetriRank 2025

Evaluation of top 10 UCaaS providers across a set of fixed criteria: market share, financials, market momentum, product mix, customer sentiment, and customer business success.

Q4 2025

3Q25 WC MetriCast Forecast & Market Shares

3Q market share updates across UCaaS, on-prem PBX, IP desk phones, eSBCs, and video equipment