

F R O S T  S U L L I V A N



Market
Insight

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**Providers Look to Harness AI to Infuse Intelligence
in the Customer Experience**

Bright Pattern Profile

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Bright Pattern

Company Background and Current Performance

Bright Pattern was founded in 2010 as a provider of SaaS-based contact center solutions. The company name came from the idea of “making customer service brighter, easier, and faster than ever before,” with a focus on enterprise scalability and true omnichannel capabilities and with the goal of offering the greatest simplicity and lowest cost in the industry. Its founders came from within the contact center industry and include some of the original engineers who created enterprise contact center software at Genesys, as well as engineers who developed CRM solutions at FrontRange. The company took an early investment from Aspect to develop on a cloud-based platform, the result of which was Zipwire, Aspect’s entrée into cloud contact centers.

Based in San Bruno, CA, the company has additional offices in California, Australia, Russia, and Japan. The company has 2 data centers in the United States and 1 each in Ireland, Australia, Japan, Singapore, and South Africa.

After a few years as primarily an engineering-driven company, Bright Pattern in 2017 began the expansion of its executive team to focus on building the business more aggressively from a sales and marketing standpoint. Bright Pattern refreshed its executive leadership by naming board member Michael McCloskey, a former president of Kana and Genesys, as CEO. In 2018, two other tenured Genesys executives followed: Ted Hunting after 14 years as senior vice president of marketing, and Brian Hays after 18 years as senior vice president of global sales. Since 2018, Bright Pattern has seen its strongest annual revenue growth to date, with the acquisition of key enterprise accounts such as Daimler Group and Kaiser Permanente; innovative unicorn companies such as Klook and Weebly/Square; many large, global BPOs; and reseller partners in North America, APAC, and EMEA. Bright Pattern today has acquired more than 200 new logos in 26 countries including the United States, Canada, Japan, Singapore, Australia, the United Kingdom, Ireland, Germany, Italy, and South Africa.

Portfolio Description and Analysis

Bright Pattern Contact Center

The Bright Pattern Contact Center is a natively built omnichannel, multitenant platform targeted at midsize to very large enterprise customers. Built on microservices architecture, it provides omnichannel customer contact across legacy and emerging interaction channels. The Bright Pattern platform is built on a single unified architecture with all channels native to the platform.

Bright Pattern provides 100% global availability and an active-active topology with 10,000-plus concurrent users in a single instance. It runs its platform in all locations separated in different geographies, and the system chooses which connections to make, providing for solid business continuity and disaster recovery. The system also allows for a company to comply with regional data security regulations by finding a local agent in a specific area to keep data local as well.

The company claims to be the first cloud-agnostic platform allowing customers the option to utilize Amazon, Azure, Oracle, Rackspace, and others, or their own data centers. Bright Pattern runs its own data centers in the United States and mostly uses AWS globally, with other instances being run in partner or customer data centers. The company also boasts measured uptime of 99.998%. Bright Pattern makes upgrades on the fly without any downtime to users.

The platform design combined with best practices has enabled Bright Pattern's customers to be up and running very quickly, with minimal IT support. Typical deployment windows are 1 to 2 weeks for small to medium-sized businesses and 1 to 2 months for large enterprises, including pre-integration with third-party software, such as CRM applications (e.g., SFDC, MS Dynamics, ServiceNow, Zendesk). The administrative interface is designed to let companies change configurations on the fly, such as modifying business rules and journey workflows, without involving excessive time and cost of IT or professional services.

Bright Pattern Contact Center provides a unified omnichannel agent desktop for agents and supervisors, a contact center administrator application for admins, a system management application for service providers, and supporting Web applications for building custom forms, chat widgets, automated scenarios, and wallboards. Features of note:

- **Bright Pattern Journey Engine.** The heart of the platform, it provides business workflows to orchestrate journey flows for inbound, outbound, IVR, video, email, chat, mobile in-app, SMS/text messaging, bots, and messengers. The system does capacity-based routing that works on top of skills-based routing, enabling

customers to define different communication channels and how much capacity an agent can handle to be completely busy. The engine also allows for seamless channel switching and escalation, and a full range of monitoring, reporting, and quality management consistent across channels. Advanced call handling features include callback, conversation continuity for dropped calls, and in-call and standalone SMS messaging between agent and customer.

- **BrightStart Apps.** Preconfigured modules or workflows built in the Bright Pattern Journey Engine using a simple point-and-click workflow. They were designed as instantly deployable solution packs that solve common CX issues for particular use cases, making it easy to quickly address particular customer needs with minimal PS. BrightStart apps include conversational IVR, omnichannel digital starter (getting top 2 channels working as one conversation), proactive priority Web chat, and human and chatbot (seamless escalation from bot to agent with full context). Other BrightStart Apps can be easily configured as part of initial customer setup based on each customer's desired business use case.
- **Bright AI.** Utilizes numerous technologies, including NLU, voice transcription, meaning extraction, and AI and ML, to drive intelligence into applications. The company also has integrations to best-of-breed AI-based products such as IBM, Google, Amazon, and Microsoft. The blending of these technologies enables bots and humans to work as one unit with bots for basic triage and agents added in as needed with context. Bright AI allows a customer to use any commercial bot or build custom bots. The same AI engine helps agents with suggested responses over text, phone, email, chat, and messengers, and supports desktop automation.
- **Conversational IVR.** A natural language, AI-powered IVR solution using best-of-breed AI technology from Google, Microsoft, Amazon, and IBM. By using AI, NLP, and speech analytics on customer calls, it continually learns to improve customer interactions.
- **Omnichannel Quality Management.** A full quality monitoring solution to measure quality across all channels and every interaction. Released in Q2 2019, it provides an intuitive, easy-to-use way of monitoring and coaching agents, and includes call recording, screen recording, transcripts, supervisor coaching, and end-of-interaction surveys. Omnichannel QM can be applied to any channel so that a supervisor can work with the agent in real-time regardless of channel or after the fact by going through scorecards. Call recording is multichannel; it can do speaker separation, and automatic transcription can be turned on and off. It also provides multiscreen recording and full control over where data is going or is stored.

Omnichannel QM is embedded into the desktop; customers can operate in a single desktop interface. Because Bright Pattern has all channels native to the platform,

companies are able to have a view of quality across all channels and are able to see quality management scores such as CSAT and NPS, and sentiment by channel, by journey type (e.g., mortgages vs. credit cards vs. support), or customer segment in simple QM dashboards. Also, using the Journey Manager engine, interactions that fall below given thresholds can be immediately routed to retention specialists or supervisors for real-time follow-up. Bright Pattern claims to be the first in the industry to provide these metrics across all channels and for all interactions.

- **OmniWFM.** An omnichannel WFM solution for all channels and agent skill sets scheduled for release in Q4 2019.
- **Bright Connect APIs.** A set of prebuilt APIs or connectors to all leading CRMs and databases, such as MS Dynamics, SFDC, Zendesk, and ServiceNow.

Sales and Services

Bright Pattern sells both directly and through partners. Its primary revenue channel has been through partners, though a more even direct/partner mix is expected as the sales and marketing buildout continues in 2019/20. Bright Pattern is expanding on the partner side, and starting in October 2018, the company signed 10 of Genesys's large partners in the United States, Canada, Europe, and Asia. As a testament to the strength of its platform, Bright Pattern also signed a deal with TTEC and expects to have 4,000 seats by the end of 2019; in addition, TTEC is reselling the product.

Bright Pattern's partnership program includes resellers, business process outsourcers, CRM vendors, and technology partners. Bright Pattern's partner direction is to remain open to all key technologies (e.g., CRM, WFO/WFM, AI partners) so that customers can choose their own best-of-breed solutions. Bright Pattern also is available on all cloud infrastructure partners (AWS, Azure, Oracle).

Because of simplicity in the platform (automation in deployment, configuration) Bright Pattern can be implemented with minimal PS. Ongoing changes (e.g., operational changes such as updating or modifying journey workflows or business rules) can typically be made by business users with minimal or no PS support. Bright Pattern PS revenue is less than 5% of total revenue as an indicator of ease and speed of deployment.

Strengths	Concerns
<p>All channels are native to the platform, enabling true omnichannel conversations. Omnichannel quality management with omnichannel WFM is planned for Q4 2019 release.</p>	<p>Bright Pattern offers capabilities through integrations with all leading WFM vendors. It recently launched its own QM offer with WFM being released in Q4 2019. As such, they remain untested in the market.</p>
<p>The ability for customers to choose their own network provides an added layer of flexibility that many cloud providers do not offer.</p>	
<p>Bright Pattern is one of the first providers to offer customer service messaging apps, particularly in an omnichannel environment.</p>	
<p>Due to the simplicity of the platform, Bright Pattern offers low license costs and professional service fees at a fraction of the cost of many other cloud-based vendors (less than 5% of revenue comes from PS).</p>	
<p>A customer and partner-led organization, Bright Pattern's R&D is heavily driven by customer/partner feedback. For instance, its recently launched QM product saw 80 top feature requests from partners.</p>	
<p>Per Capterra and other "not for pay" customer review sites, Bright Pattern customers rank the company higher than virtually every other cloud contact center.</p>	

Customer Recommendations

Best Fit

- Omnichannel.** Companies that are looking to easily offer true omnichannel capabilities without significant license or PS expense are Bright Pattern target customers. Companies looking at emerging channels such as messengers, or mobile capabilities such as chat, video chat, or document sharing within their app into their customer care organizations would do well to look at Bright Pattern. The company has adopted a mobile-first strategy, and integrated mobile messaging with apps such as WhatsApp and Facebook Messenger into the platform. This provides customers with in-app messaging and "call me now" buttons that carry

context with the call, as well as multimodal in-app capabilities such as chat, video chat, and document and picture sharing.

- **AI in the Contact Center.** For companies that are looking to infuse AI into customer contact, Bright Pattern's Bright AI provides a plethora of choices as to how to do so—from desktop automation (as well as integration with other RPA vendors) to intelligent bots and messaging applications. In fact, the various technologies can easily be combined (e.g., creating a messaging application that provides instant access to a chatbot for assistance).

Caution

- **Brand Recognition.** Bright Pattern still does not share the same level of brand recognition of many other cloud contact center providers because it was primarily focused on engineering until 2018. But with the recent buildout in sales and marketing and new marketing efforts such as significant investment in SEO, expanded trade show presence, and industry presentations, Bright Pattern saw a strong uptick in prospects and recognition in H2 2018 and H1 2019.

The Frost & Sullivan Story

Frost & Sullivan, the Growth Partnership Company, helps clients accelerate growth and achieve best-in-class positions in growth, innovation, and leadership. The company's Growth Partnership Service provides the CEO and the CEO's growth team with disciplined research and best practices models to drive the implementation of powerful growth strategies.

Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from more than 40 offices on 6 continents to clients accelerate growth by:

- Delivering the broadest industry and market coverage of any research and consulting firm worldwide—10 industries, 35 sectors, and 300 markets—ensuring that clients understand their industry challenges and opportunities, growth opportunities in aligned industries and competitive pressures from previously unknown sources;
- Providing a 360-degree perspective, integrating 7 critical research perspectives to significantly enhance decision-making accuracy and lower the risk of implementing growth strategies with poor return;
- Leveraging extensive contacts in the value chain, including manufacturers, distributors, end users, and other industry experts;
- Offering a global perspective of opportunities and threats built on regional expertise;
- Documenting best practices worldwide that overcome tough business challenges; and
- Partnering with the client's team to ensure success.