

# ISG Star of Excellence™ — Annual 2024 CX Insights

A quarterly report on enterprise  
CX trends across 2024



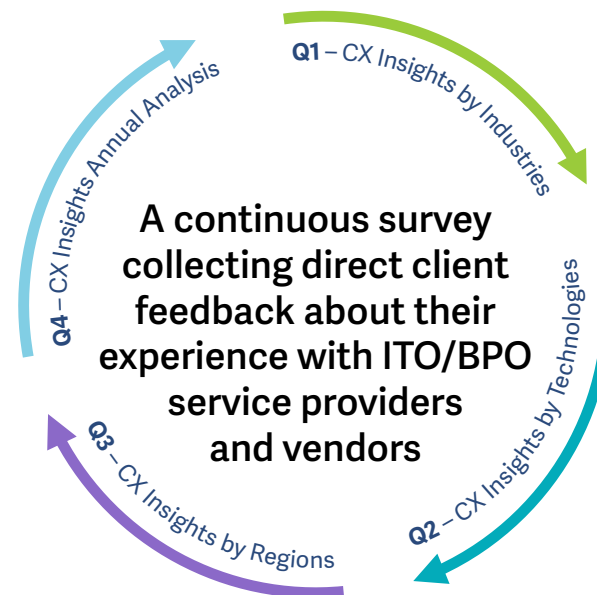
CX Introduction	03	CX Score for AI by Revenue Segment	18
CX Annual Highlights 2024	05	CX Score for AI by ITO/BPO Providers	19
Major Findings and Customer Insights	09	2024 Enterprise CX Award Winners	20
CX Insights by Technologies	10	Appendix and Terminology	21
CX Insights by Industries	14	Author & Editor Biographies	22
CX Insights by Regions	15	About ISG	24
Special Edition – CX Insights for AI	16		
Overall CX Insights for AI	17		

## ISG Star of Excellence™ CX Insights

The ISG Star of Excellence CX Insights reports provide a periodic analysis of trends defining the enterprise customer experience with their technology and managed service providers. These reports quantify enterprise customer satisfaction for key pillars defining the experience with technology and managed service providers. The CX Insights reports highlight the variations in this experience from different regions and industries' perspectives. The quarterly reports also provide a year-over-year change analysis in enterprise CX along with the factors influencing it.

This report focuses on trends in enterprise CX for different services provided by information technology outsourcing (ITO) and business process outsourcing (BPO) providers.

We hope you find the observations in this report interesting and valuable. We welcome your feedback.



[Q3 2024 CX Insights by Regions](#)

[Q2 2024 CX Insights by Technologies](#)

[Q1 2024 CX Insights by Industries](#)

[2023 CX Annual Insights](#)



### What defines Enterprise CX?

ISG has identified six pillars that define enterprise CX in the ITO/BPO services and technology industry.

#### Six categories of customer experience:

##### 1. Business Continuity and Flexibility

- Ensuring limited downtime in systems or services provided
- Avoiding friction while transitioning
- Adapting to changes in demand due to macroeconomic and global factors

##### 2. Execution and Delivery

- Executing plans and projects on time
- Providing the agreed resources to deliver services
- Maintaining high-quality work consistently

##### 3. Governance and Compliance

- Ensuring compliance with policies and regulations
- Engaging proactively in issue resolution
- Taking effective measures for cybersecurity

- Clients are asked to rate the importance of each of the six categories and then rate their service provider/vendor on each, on a scale of 1-100
- CX scores are generated across industries, regions and technology domains and for each service provider/vendor

##### 4. Collaboration and Transparency

- Defining the handoffs/milestones between provider and client staff
- Communicating information around projects, workload and timelines
- Accepting constructive criticism or suggestions for improvement

##### 5. People and Cultural Fit

- Adapting to a client's working culture
- Understanding a client's business and industry
- Adapting delivery to meet a client's business objectives

##### 6. Innovation and Thought Leadership

- Supporting end-to-end processes, supplier monitoring and ESG reporting
- Demonstrating new methods of work, techniques and tools
- Adopting emerging technologies and fostering their widespread use



**Annual Overall CX Insights**

The ISG Star of Excellence™ survey for 2024 reveals important CX trends for various technologies. Application Development and Maintenance remains a leader in enhancing software solutions in the ITO sector. Enterprise/IT Service Management is gaining recognition, signifying the need to deliver effective IT services. In BPO, Digital Engineering stands out for its transformative impact on business processes. Within emerging technologies, service providers delivered better experiences using cloud-native solutions than AI and GenAI, with AI falling short of expectations.

Among the top 60 service providers, the midmarket (\$1 billion to \$3 billion) achieved CX scores that outshine other categories owing to its agility and nimbleness in challenging outsourcing environments. Among IT and BPO providers, the latter achieved satisfactory CX scores compared with other

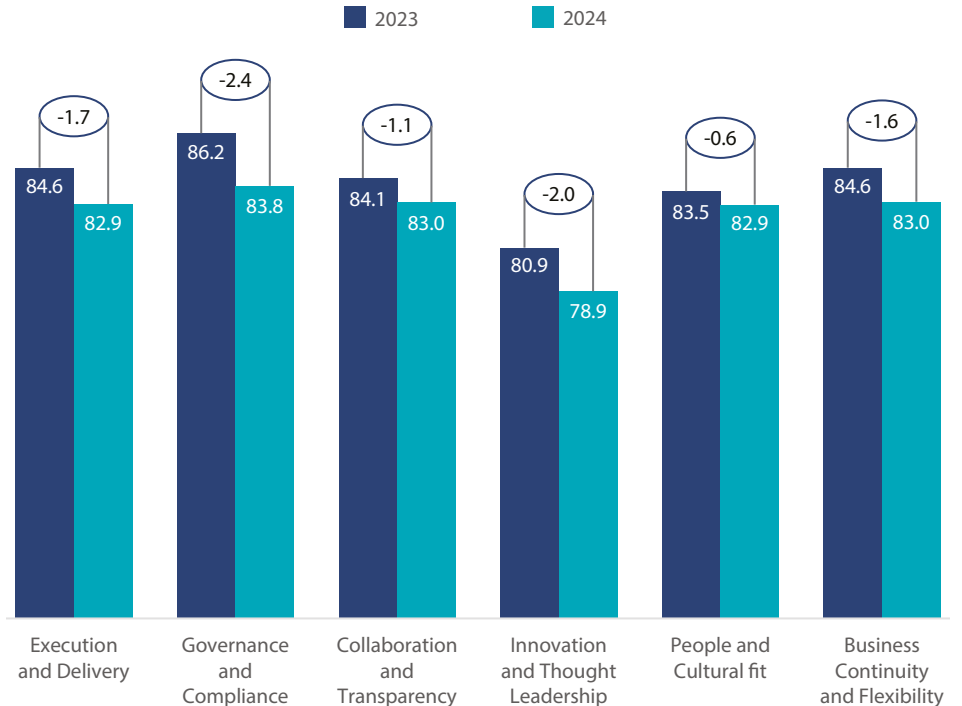
segments, indicating positive results for optimizing services using AI and GenAI.

Among industries, the Power & Utilities sector leads in effective customer engagement strategies. Business services follows closely owing to its customer-centric service delivery.

Regionally, APAC excels, while the Americas is demonstrating improvement. However, EMEA has recorded a notable decline.

The survey reveals a dynamic CX landscape across six key pillars, highlighting areas of continued strength and opportunities for strategic growth. Although most six pillar scores increased last year, this trend shifted in early 2024, aligning with the rapid AI and GenAI adoption. By the end of 2024, the influx of AI-driven solutions and unclear client benefits contributed to a decline in CX scores. This decline indicates challenges in achieving goals, maintaining compliance standards and adapting to technological changes and cultural shifts.

**Shifts in CX Scores by Pillar (2023 vs. 2024)**



## CX Scores by Top 60 Service Providers

The **2024 CX scores** for the top 60 service providers across revenue and service segments reveal performance variations, with most segments experiencing a decline year over year. These shifts highlight the challenges and opportunities where service providers can align with evolving client expectations.

### Revenue Segment Analysis: Scale vs. Agility

#### 1. The Big Segment (> \$10B Revenue):

- Scored **75.8**, down from **76.3** in 2023 (-0.5). The slight decline reflects challenges in maintaining agility amid its size and complexity.
- Insight:** Larger providers must simplify their operations and adopt innovations to better meet evolving customer needs.

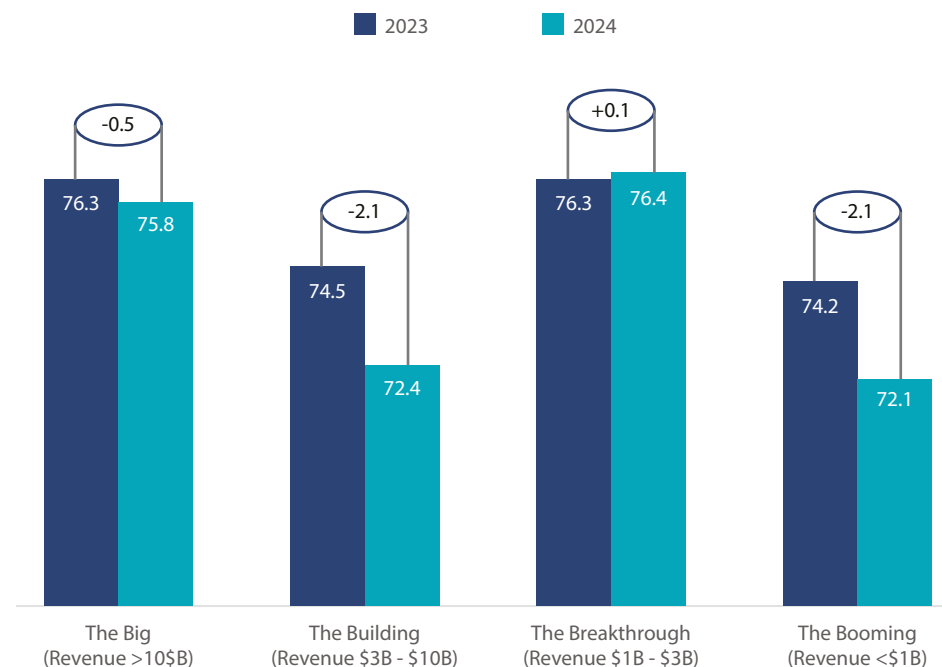
#### 2. The Building Segment (\$3B-\$10B Revenue):

- Dropped to **72.4** from **74.5** in 2023 (-2.1). This decline highlights the segment's struggles to meet growing customer demands while differentiating offerings.
- Insight:** These providers must invest in client engagement strategies and niche expertise to regain momentum.

#### 3. The Breakthrough Segment (\$1B-\$3B Revenue):

- Scored **76.4**, a slight rise from **76.3** in 2023 (+0.1). The segment's performance reflects strong CX initiatives and effective scalability.
- Insight:** Breakthrough providers skillfully balance agility with scalability, positioning them as benchmarks.

## 2024 CX Performance by Revenue Segment: Breakthrough Providers Lead the Way



## 4. The Booming Segment (< \$1B Revenue):

- Declined to **72.1** from **74.2** in 2023 (-2.1). Although inherently agile, this segment struggles with scalability.
- Insight:** Smaller providers must combine flexibility with targeted investments in technology and customer engagement to compete effectively.

## Service Segment Analysis: The IT vs. BPO Divide

### 1. IT-only Providers:

- Dropped to **73.5** from **75.1** in 2023 (-1.6). This decline reflects challenges in adapting to the increasing client demands for digital transformation.
- Insight:** IT providers must streamline services and integrate emerging technologies to enhance satisfaction.

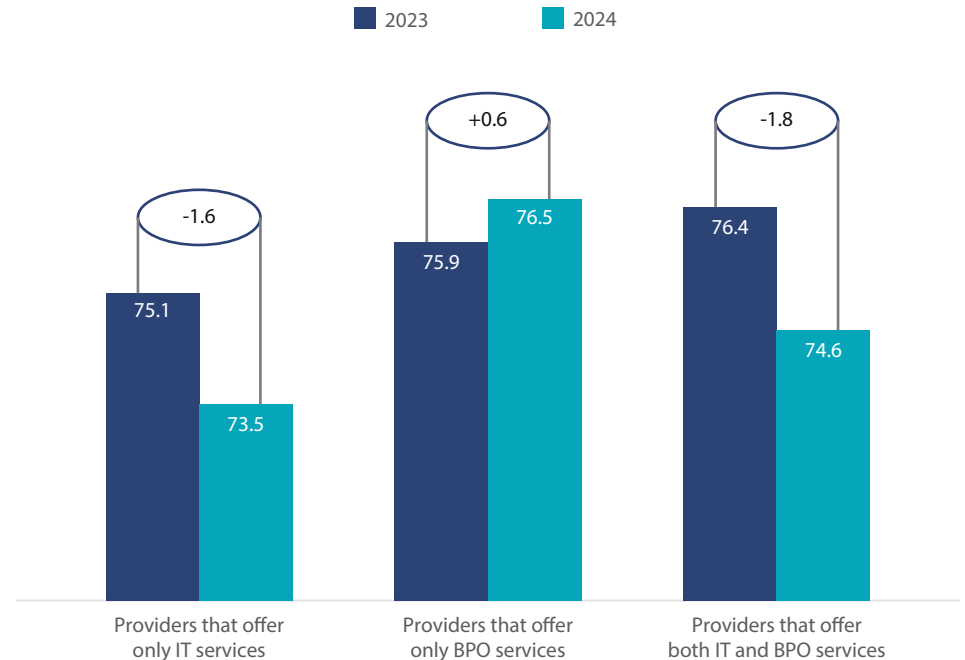
### 2. BPO-only Providers:

- Increased to **76.5** from **75.9** in 2023 (+0.6). This improvement underscores the effectiveness of their customer-centric strategies, setting them apart in 2024.
- Insight:** BPO providers demonstrate the importance of personalized interactions and efficient service delivery.

### 3. IT and BPO Providers:

- Declined to **74.6** from **76.4** in 2023 (-1.8). The hybrid model highlights the complexities of excelling in both domains simultaneously.
- Insight:** Hybrid providers should harmonize their IT and BPO offerings to deliver consistent results.

## 2024 CX Scores By Service Type: BPO Providers Outperform Others



### **Key Takeaway**

While BPO providers lead with improvements, other segments must refocus their strategies to align with client needs and market trends. Organizations should evaluate their providers' strengths and challenges to gain maximum value in this evolving landscape.







# Major Findings and Customer Insights

## ITO CX Scores - Top 5

The ISG Star of Excellence™ survey data for 2024 reveals key insights into CX scores across various ITO technologies. Among the top five ITO technologies, Application Development and Maintenance leads the rankings with a score of 81.1, signifying the importance of enhancing software solutions and driving business innovation. However, it recorded a slight decline in CX scores compared to the previous year.

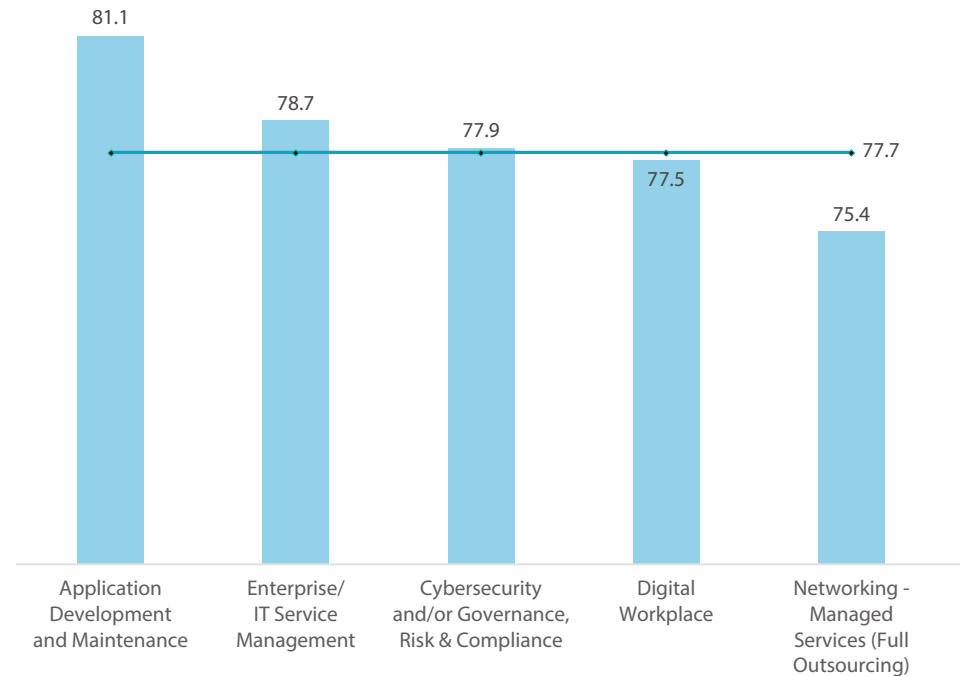
Enterprise/IT Service Management achieved a score of 78.7 owing to its critical role in delivering effective IT services and support to businesses. Although this segment has recorded a slight decrease in CX scores compared with last year, its ranking has improved. Cybersecurity and/or Governance, Risk & Compliance scored 77.9, reflecting the growing

emphasis on security and compliance amid increasing digital threats.

Digital workplace not only ranked fourth with a score of 77.5 but also marked an increase in CX score from last year. This growth indicates a focus on improving remote work capabilities and collaboration tools, which are essential in today's hybrid work environments. Lastly, Networking - Managed Services (Full Outsourcing) rounds out the top five with a score of 75.4, marking its rising significance in outsourcing. This is the first iteration of survey responses recorded for Networking - Managed Services (Full Outsourcing) technology by the ISG Star of Excellence™ program.

Overall, the 2024 data showcases a diverse landscape of ITO technologies, emphasizing the need for organizations to prioritize CX as they adapt to the evolving demands of the digital age.

## ITO CX Score – Top 5



### BPO CX Score – Top 5

Among BPO technologies, Digital Engineering leads with a score of 81.8, showcasing its pivotal role in transforming business processes through innovative technology solutions. This score indicates providers' satisfactory performance and a growing emphasis on digital transformation within organizations.

Following closely, Contact Center - Customer Experience achieves a score of 81.5. The segment's high ranking reflects the importance of effective communication and support channels in fostering customer satisfaction. Ongoing investments in advanced tools and strategies to improve customer interactions also underline this sector's success in driving overall business.

The Finance and Accounting sector received a score of 79.0. This score indicates continuous satisfactory performance by service providers delivering BPO services that enable firms

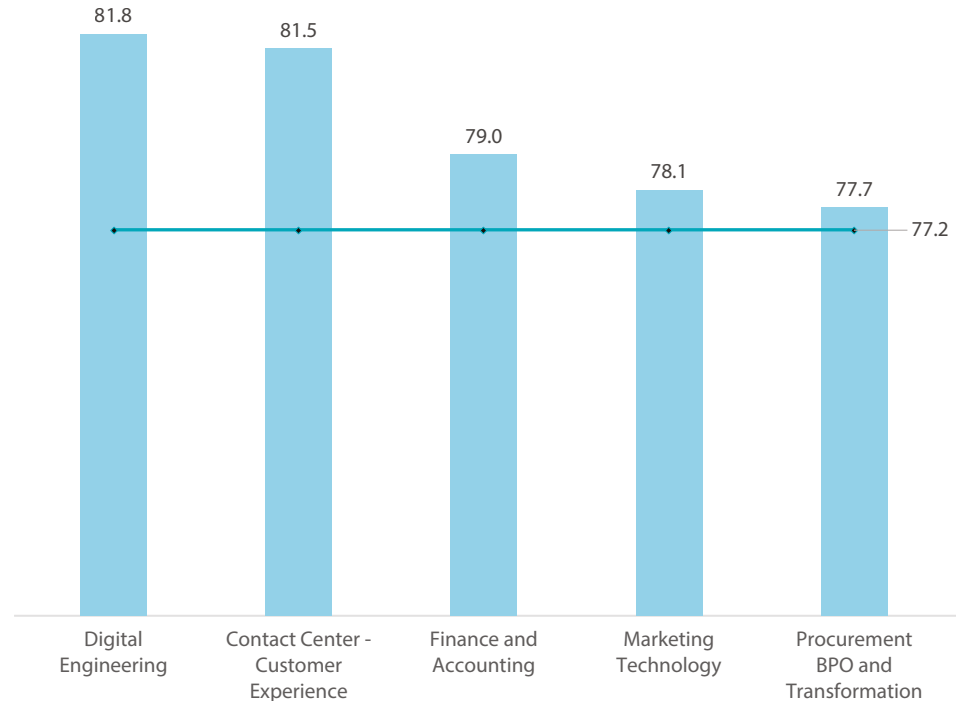
to optimize their financial operations for greater accuracy and efficiency.

Marketing Technology scored 78.1 on the CX scale owing to its crucial role in enhancing marketing strategies and customer outreach efforts. While not in the top three, its high score signifies the importance of data-driven marketing processes in today's competitive landscape.

Lastly, Procurement BPO and Transformation rounds out the top five with a score of 77.7. This technology highlights the increasing need for organizations to streamline procurement processes and drive transformation initiatives to remain competitive.

The 2024 data illustrates a dynamic BPO landscape where digital solutions and customer-centric approaches are paramount. As organizations adapt to evolving market demands, prioritizing these technologies will be essential for enhancing CX and achieving long-term success.

### BPO CX Score – Top 5



### Emerging Technology CX Score – Top 5

Across emerging technologies, the 2024 ISG Star of Excellence™ survey data highlights the top five technologies with high CX scores. Cloud Native technologies, particularly those using containers and serverless architecture, lead with a score of 80.3, showcasing a significant 2.4 percent increase from last year. This strong performance underscores the growing interest in considering cloud-native solutions as firms prioritize agility and scalability.

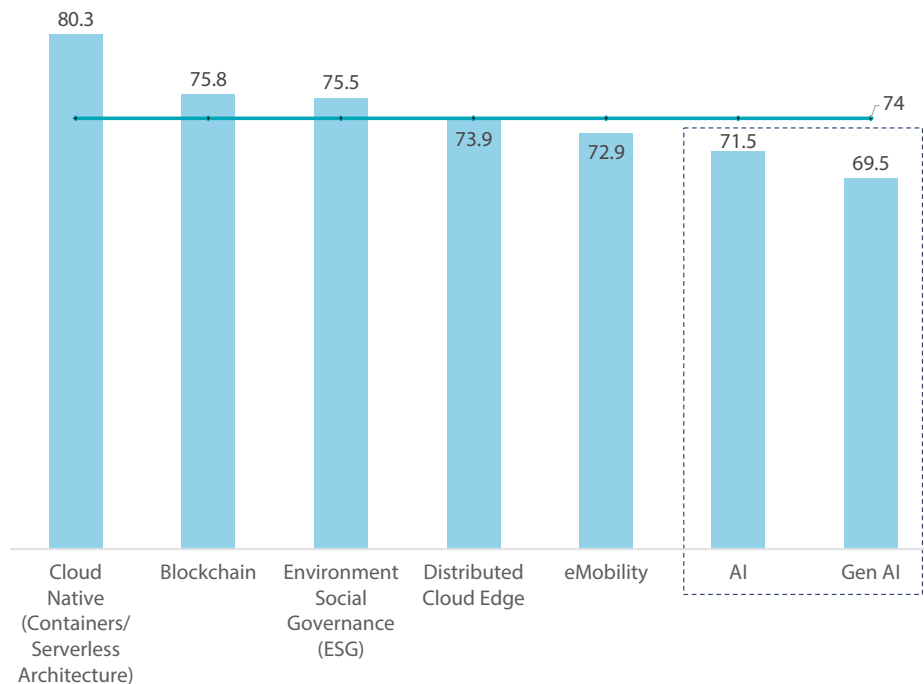
In contrast, Blockchain, though positioned second with a score of 75.8, shows a decline of 1.7 percent. This decrease may indicate challenges in effectively implementing the technology in a way that allows clients to realize tangible benefits. Similarly, Environment Social Governance (ESG) saw a drop of 2.5 percent despite retaining its position in the top three, with a CX score of 75.5. The drop signals complexities in implementing the necessary ESG strategies and stakeholder engagement across organizations.

Distributed Cloud Edge technology scored 73.9, reflecting continued interest in distributed cloud solutions, while eMobility rounded out the top five with a score of 72.9. This score indicates a growing focus on sustainable transportation solutions, aligning with global efforts to reduce carbon footprints.

AI, assessed as a broader category, scored 71.49 on the CX scale, with GenAI trailing at 69.5. GenAI scored the least among all emerging technologies. Although the technology is gaining traction, providers struggle with meeting customer expectations and achieving functional efficacy and ROI.

The 2024 CX scores for emerging technologies illustrate a dynamic landscape where cloud solutions are gaining prominence while other technologies, particularly AI and blockchain, face challenges that must be addressed to enhance CX across delivery.

### Emerging Tech CX Score – Top 5



### Ecosystem Technology CX Scores – Top 5

Topping the CX score among ecosystem technologies is AWS with a score of 78.9, maintaining its status as a leader in cloud computing services. Despite a slight decline in CX score from the previous year, AWS continues to dominate the market and demonstrate its strength in providing robust and scalable cloud solutions that meet diverse business needs.

In the second place, the Salesforce ecosystem achieves a score of 78.4, with a 3 percent increase over the previous year. This upward tick emphasizes service providers' commitment to delivering Salesforce capabilities and exceptional experiences through continuous innovation and customer-centric solutions.

Microsoft ecosystem follows closely with a score of 77.2. Despite a slight decrease from the previous year, this ecosystem has retained its position

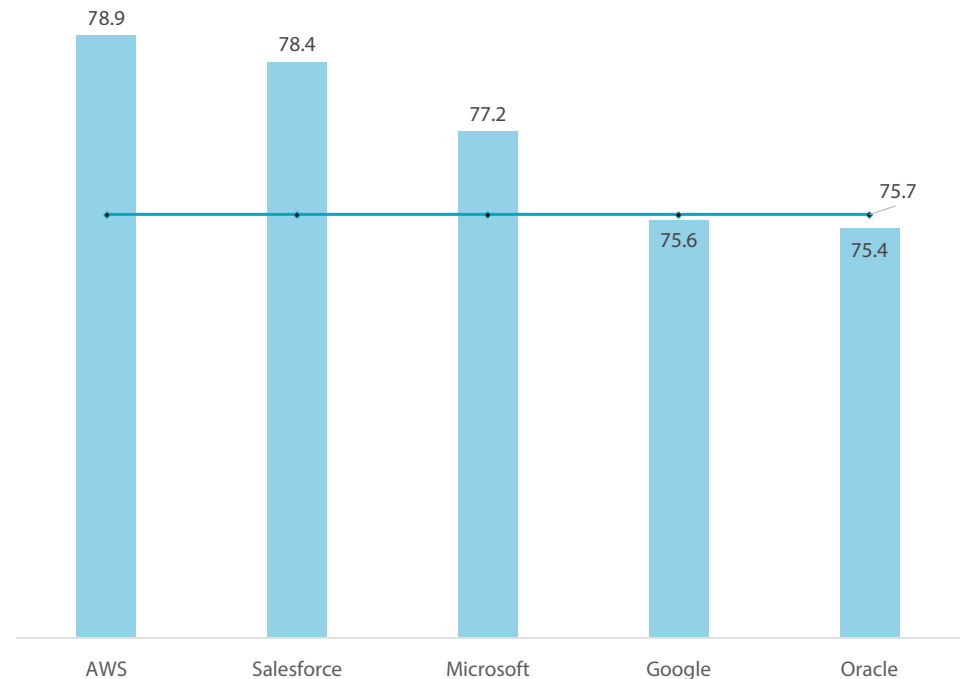
among the top five owing to service providers' offerings for Microsoft's comprehensive suite of productivity and enterprise solutions that cater to a wide range of business requirements.

With a score of 75.6, Google ranks fourth, showing a modest increase of 0.4 percent. This score reflects the service providers' ability to deliver Google's cloud offerings and collaboration tools.

Oracle rounds out the top five with a score of 75.4. Service providers have been able to deliver integrated applications and cloud infrastructure for Oracle.

Overall, the 2024 data illustrates a competitive landscape among ecosystem technologies, where companies must continually innovate and adapt to meet the evolving needs of their customers. Prioritizing UX and responsiveness will be essential for maintaining and enhancing their leadership positions.

### Ecosystem CX Score – Top 5



## CX Insights by Industries

The 2024 ISG Star of Excellence™ survey data unveils several noteworthy trends across various industries based on CX scores. The Power & Utilities industry leads with a score of 81.5 while reflecting a substantial 5.1 percent year-over-year increase. This increase demonstrates that providers' engagement strategies delivered effective client satisfaction. Close behind is the Business Services industry, exhibiting a 5.7 percent rise. This score indicates the growing importance of customer-centric approaches in service delivery.

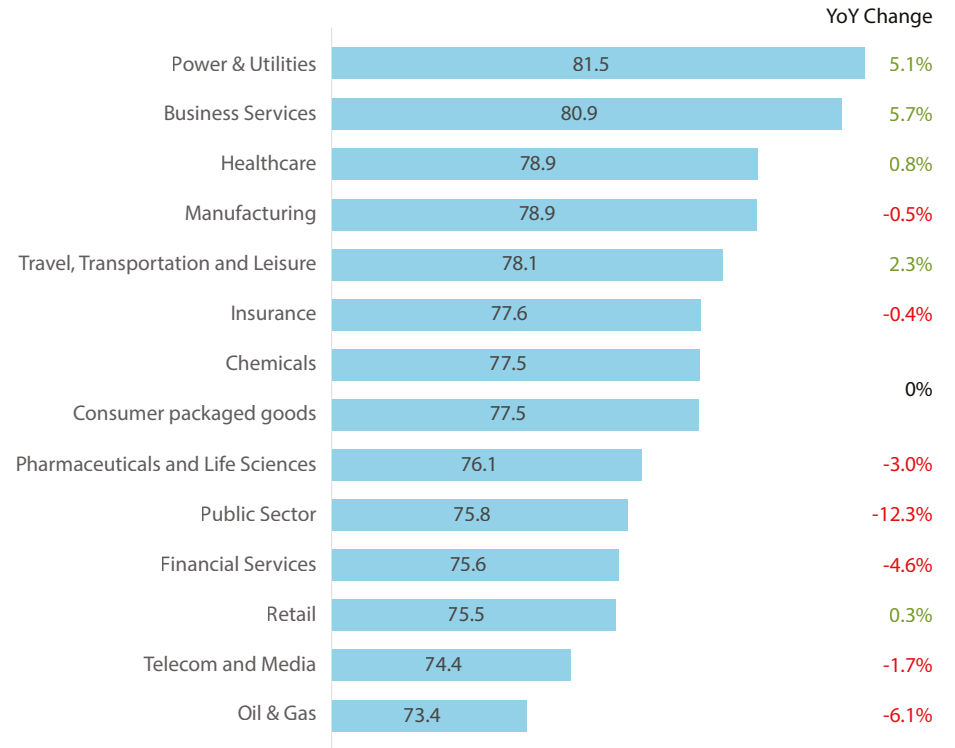
On the other hand, several industries noted a decline in their CX scores. The Public Sector witnessed the most significant drop, plummeting by 12.3 percent, which suggests challenges in meeting customer expectations or evolving service standards. Other declining industries include Pharmaceuticals and Life Sciences, with a 3.0 percent decrease, and Financial Services, down 4.6 percent.

These trends could indicate a need for these industries to reassess their customer satisfaction and retention strategies.

The Healthcare industry shows slight growth at 0.8 percent, signaling that while there is progress, engagement and service quality can still be improved. Meanwhile, Oil & Gas recorded the lowest CX performance score of 73.4, emphasizing its need to prioritize customer centricity.

Overall, the data reveals a mixed landscape, with emerging leaders and underperforming industries needing strategic adjustments to improve CX outcomes.

## CX Score - Industries



## CX Insights by Regions

ISG Star of Excellence™ CX scores for various regions in 2024 present a compelling overview of customer engagement across different markets. APAC emerges as the highest-scoring region, achieving a score of 78.6, a slight improvement from 78.4 in 2023. This incremental gain signals an up-trend, highlighting effective provider initiatives.

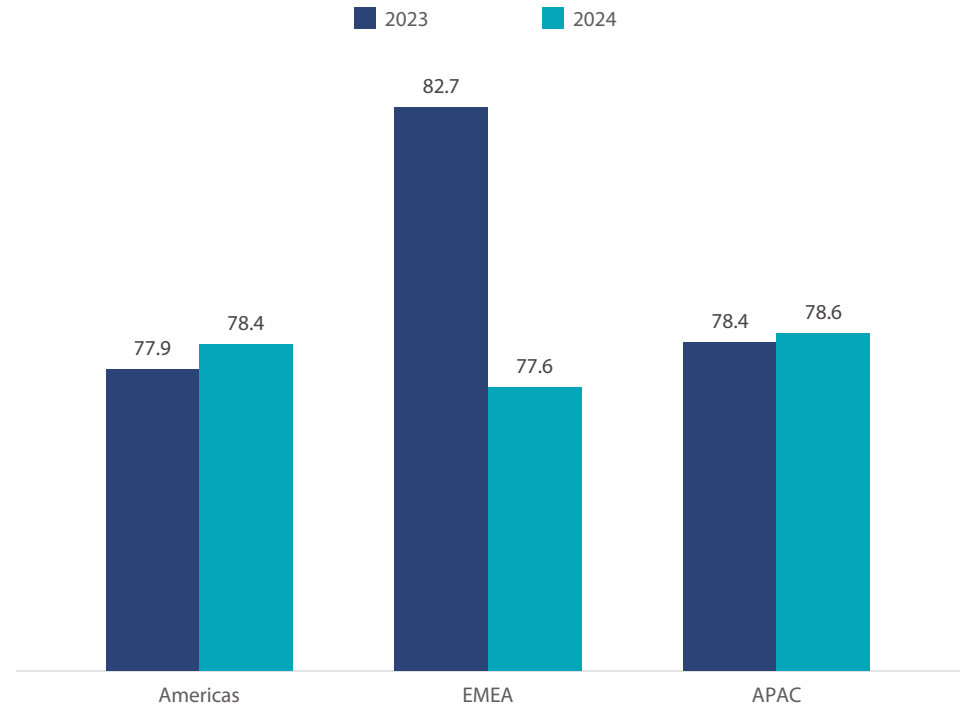
The Americas follows closely, with a score of 78.4 in 2024, up from 77.9 the previous year. This score reflects steady progress in CX through improved services and engagement strategies. Both the Americas and APAC showcase a positive trend in refining customer interactions.

In contrast, the EMEA region encountered negative growth, registering a score of 77.6 in 2024, a notable decline from its much higher score of 82.7 in 2023.

This drop raises concerns about customer satisfaction in the region and indicates that providers should address potential issues to regain consumer trust and loyalty.

While the APAC and Americas regions are showcasing progress in their CX performance, EMEA's significant drop underscores the need for continuous efforts to meet evolving customer expectations. As these dynamics unfold, enhancing CX will be essential for all regions to succeed in a competitive environment.

## CX Score - Regions





Special Edition –  
CX Insights for AI



## Overall CX Insights for AI

The ISG Star of Excellence™ survey reveals that AI services' overall CX performance is nearly satisfactory, and service providers must bridge significant gaps to meet client expectations. A key takeaway: while customization levels might be satisfactory, the overall CX score suggests that responsiveness, reliability and alignment with clients' strategic goals require improvement.

The CX score for Customization Level of AI services is 73.8, signifying that providers are adept at tailoring their solutions to effectively meet their clients' unique needs. This strong performance in customization is crucial as it demonstrates an understanding of client expectations and a commitment to delivering personalized services.

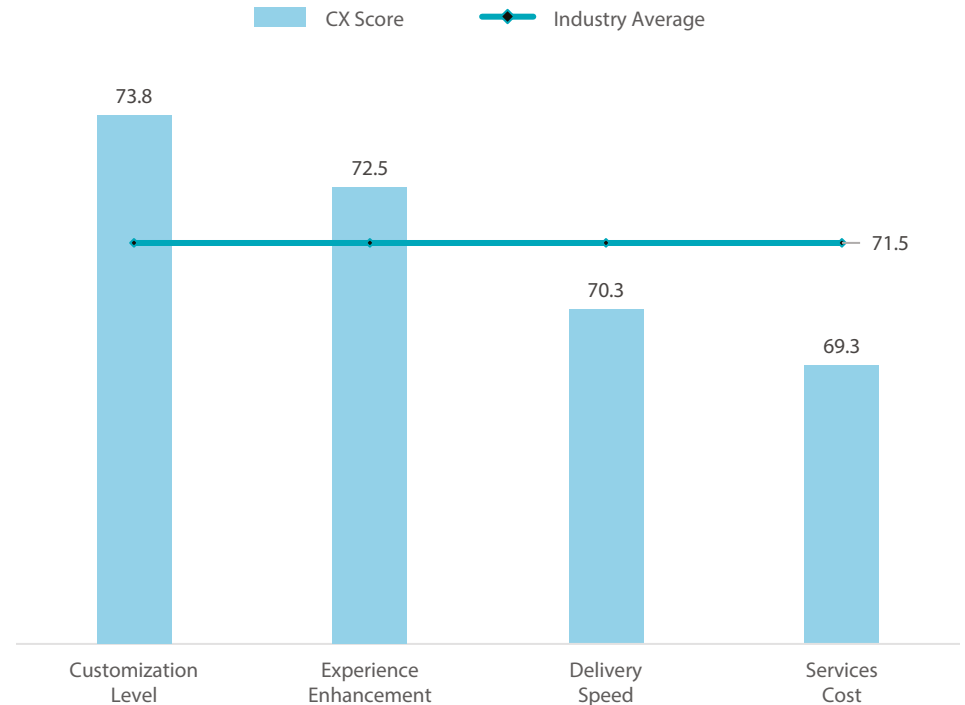
In addition, the Experience Enhancement score stands at 72.5, indicating that service providers effectively added value to client experience, enhancing overall satisfaction through improved interactions and support. However, the

Delivery Speed score of 70.3 suggests that operational efficiency and timely service delivery aspects need improvement, as clients may be encountering delays.

The CX score for Services Cost is 69.3, reflecting below-average satisfaction regarding pricing structures. It highlights a potential disconnect between perceived value and actual costs, which could threaten client retention.

These trends show that providers excel in customization and enhancing client experiences. However, they must address delivery speed and cost concerns to improve overall customer satisfaction in the competitive AI services landscape.

### CX Score for AI



## CX Score for AI by Revenue Segment

The ISG Star of Excellence™ survey analyzes CX scores across various revenue segments of service providers delivering AI services, offering insights into client perception across firms of different sizes. Among these segments, The Big, which comprises companies with revenue exceeding \$10 billion, received the highest CX score of 72.5. This data indicates that larger firms often deliver robust performance and meet client expectations effectively, likely due to their rich resources and established reputations.

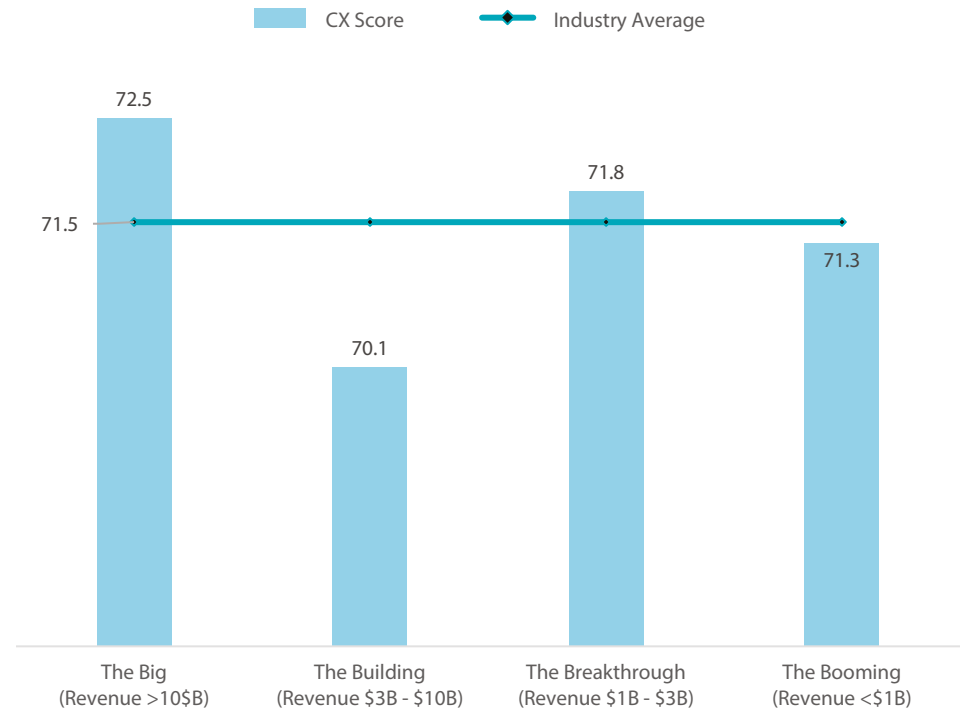
In contrast, The Building, which includes companies with revenues between \$3 billion and \$10 billion, scored slightly lower at 70.1, suggesting satisfactory performance but with room for improvement in customer satisfaction. Companies categorized as The Breakthrough, which generate revenues between \$1 billion and \$3 billion, achieved a CX score of 71.8. This score demonstrates their competitive edge over The Building segment but still trailing behind The Big.

The Booming segment, comprising companies earning less than \$1 billion, scored 71.3 on the CX scale. This score reflects a respectable client satisfaction level but does not surpass the higher revenue segments.

The data illustrates that while larger revenue segments tend to have more advanced capacity to cater to client needs, midsize and smaller firms also provide valuable experiences.

These trends suggest that regardless of size, AI service providers must continue to focus on enhancing customer satisfaction. Larger firms should strive to maintain their edge, while smaller and midsize companies can capture growth and differentiation opportunities by addressing client-specific needs and expectations that may currently be unmet. Prioritizing innovation and responsiveness will also be crucial across all segments to thrive in the competitive AI landscape.

## CX Score for AI - By Revenue Segment



## CX Score for AI by ITO/BPO Providers

The survey provides insights into CX scores across ITO/BPO service providers delivering AI services. The data reveals notable trends based on the nature of services offered, reflecting client preferences and expectations.

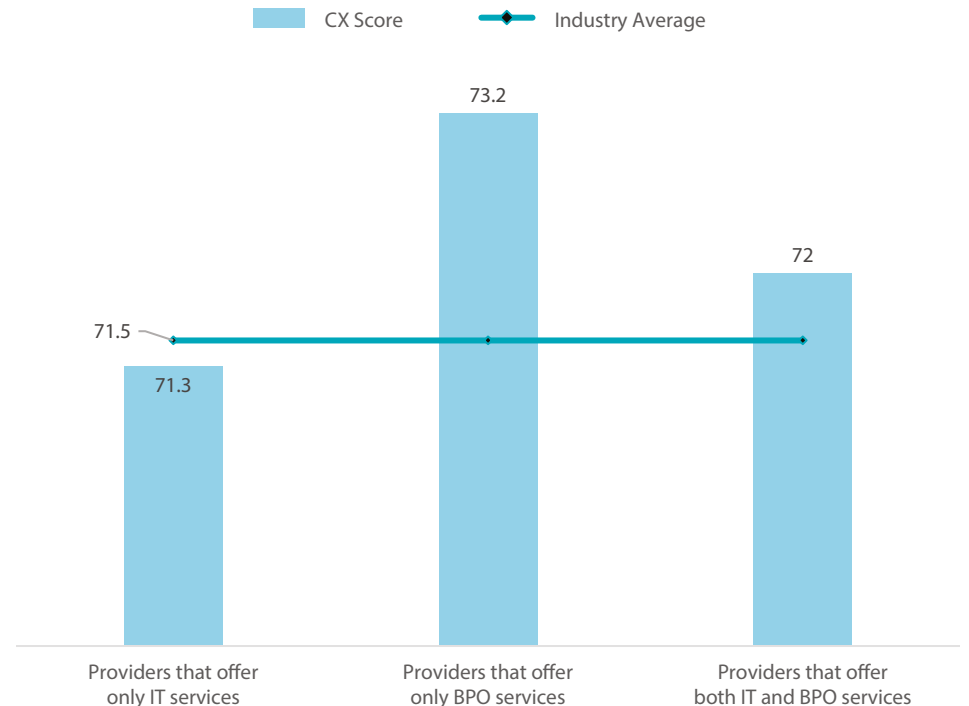
Providers specializing in BPO services achieved the highest customer satisfaction score of 73.2. This data indicates that clients view these providers as delivering exceptional value and service efficacy, likely due to their expertise and focus on operational efficiency. The high score also reflects a strong alignment with client needs, which is essential for cultivating positive relationships.

In contrast, AI providers offering only IT services garnered a lower CX score of 71.3. While this score indicates a solid level of customer satisfaction, it lags behind both BPO-only providers and those taking a dual approach. It also suggests potential areas for improvement in meeting client expectations in IT service delivery.

Providers combining IT and BPO services scored 72.0, demonstrating that a hybrid model can yield competitive satisfaction. This model allows service providers to capitalize on the strengths of both IT and BPO solutions, addressing a broader spectrum of client needs effectively.

The data reveals significant differences in customer satisfaction based on service offerings. While BPO providers excel in client perception, IT-only providers should fine-tune their strategies to improve satisfaction. All providers must emphasize versatility and responsiveness in service delivery as they navigate the evolving AI landscape and work to build long-lasting client relationships. Focusing on delivering comprehensive and tailored solutions will also position them for success in the competitive market.

## CX Score for AI - By ITO/BPO Service Providers





**Overall Awards**



**Service Providers**

- Accenture
- Capgemini
- Persistent Systems

**Technology Provider**

- Cisco



**Universal Awards**



- Universal (Global) Region – Hexaware
- Universal BPO – HCLTech
- Universal Emerging Tech. – LTIMindtree
- Universal Industry Award – HPE
- Universal ISV Ecosystem – LTIMindtree
- Universal ITO – Persistent Systems



**CX Partnership Awards**



- Most Adaptable Partner – Persistent Systems
- Most Collaborative Partner – Capgemini
- Most Flexible Partner – Genpact
- Most Innovative Partner – IBM
- Most Successful Implementation Partner – ITC Infotech
- Most Trusted Partner – HPE



**Regional Awards**



- AMERICAS – Persistent Systems
- APAC – Tech Mahindra
- EMEA – TCS



### ISG Industry classification

- Business services (includes business services and supplies, software and services)
- Energy (chemicals, oil and gas operations and utilities)
- Financial services (banking, diversified financials)
- Insurance
- Healthcare (healthcare equipment and services)
- Pharmaceuticals and life sciences
- Retail (food markets)
- Telecom and media
- Consumer packaged goods (food and beverage and tobacco, household and personal products)
- Travel, transportation, and leisure (hotels and restaurants)
- Public sector
- Manufacturing (aerospace and defense, consumer durables, which includes automotive, capital goods, conglomerates, construction, materials, semiconductors, hardware, and trading companies)

### Technology coverage in ISG Star of Excellence™

#### ITO Services

- Application Development and Maintenance Services
- Digital Workplace
- Cybersecurity and Governance, Risk & Compliance
- Enterprise/IT Service Management
- Industrial IoT (IIoT)
- Mainframes
- Networking - Software Defined
- Private Cloud - Data Center
- Public Cloud services

#### BPO Services

- Contact Center - Customer Experience
- Digital Engineering
- Finance and Accounting
- Procurement BPO and Transformation
- Supply Chain Services
- HR Outsourcing
- Payroll/ Benefits Administration
- Organizational Change Management
- Analytics Services
- Intelligent Automation

#### Technology Provider Ecosystem Services

- AWS
- Google
- Microsoft
- Oracle
- Salesforce
- SAP
- ServiceNow
- Workday



## Author & Editor Biographies

Author



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**Manager and Principal Analyst**

Akhila Harinarayan is Manager and Principal Analyst and the lead author for ISG Provider Lens studies with a focus on ADM and SAP Services. She has more than 15 years of experience across research and consulting including provider strategy, enterprise strategy, industry roadmaps, point-of-view papers, service provider assessment across regions. She has strong expertise on strategy and transformation, digital insights, thought leadership, benchmarking, market assessments and go-to-market strategies.

She has authored many thought leadership papers, digital insight studies, devised go-to-market strategies across products/ industries/regions, built frameworks and maturity models across industries for both enterprises, vendors and service providers.

Data Analyst



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**Senior Data Analyst**

Kiran works as a Data Analyst and has a professional experience of 7+ years. He has pursued master's in Computer Vision and has worked in multiple fields such as IT and Hospitality. He has worked on market segmentation, customer segmentation and derived insights from customer data and had used it to generate additional revenue. He is passionate about research and interested in advanced exploratory data analysis using ML algorithms. He has also worked on data science projects such as 'Time Series Forecasting' and 'Natural Language Processing' using Neural Networks.

He is currently responsible for data insights derivation and task automation using Python.





*Product Owner, Editor*

**Heiko Henkes**  
**Managing Director, Provider Lens™**

Heiko Henkes is a Director and Principal Analyst at ISG; in his role as Global ISG Provider Lens™ (IPL) Content Lead and Program Manager, he is responsible for strategic business management and acts as thought leader for IPL Lead Analysts. In his role as ISG Star of Excellence™ Product Owner, he leads the program design and IPL integration. His core competencies are in the areas of defining derivations for all types of companies within their IT-based business model transformation.

Within this context, Mr. Henkes supports companies to undergo continuous transformation, combining IT competencies with sustainable business strategies and change management. He acts as Keynote speaker in the context of digital innovation.



## About Our Company & Research



The [ISG Star of Excellence™](#), part of the ISG Provider Lens™, is the premier industry recognition program for the technology and services industry. The program solicits client experience information through an ongoing survey. The independent survey seeks an in-depth analysis of clients' satisfaction and experience with IT/BPO service and technology providers. Providers are ranked on the quality of their services based on direct feedback from enterprise clients. Clients rate the provider's performance across six CX pillars: Business Continuity and Flexibility, Collaboration and Transparency, Execution and Delivery, Governance and Compliance, Innovation and Thought Leadership, and People and Cultural fit.



ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value. ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#). For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).



ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments. For more information, visit [isg-one.com](http://isg-one.com).







**FEBRUARY, 2025**

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**2024 ISG STAR OF EXCELLENCE™ ANNUAL CX INSIGHTS REPORT**