

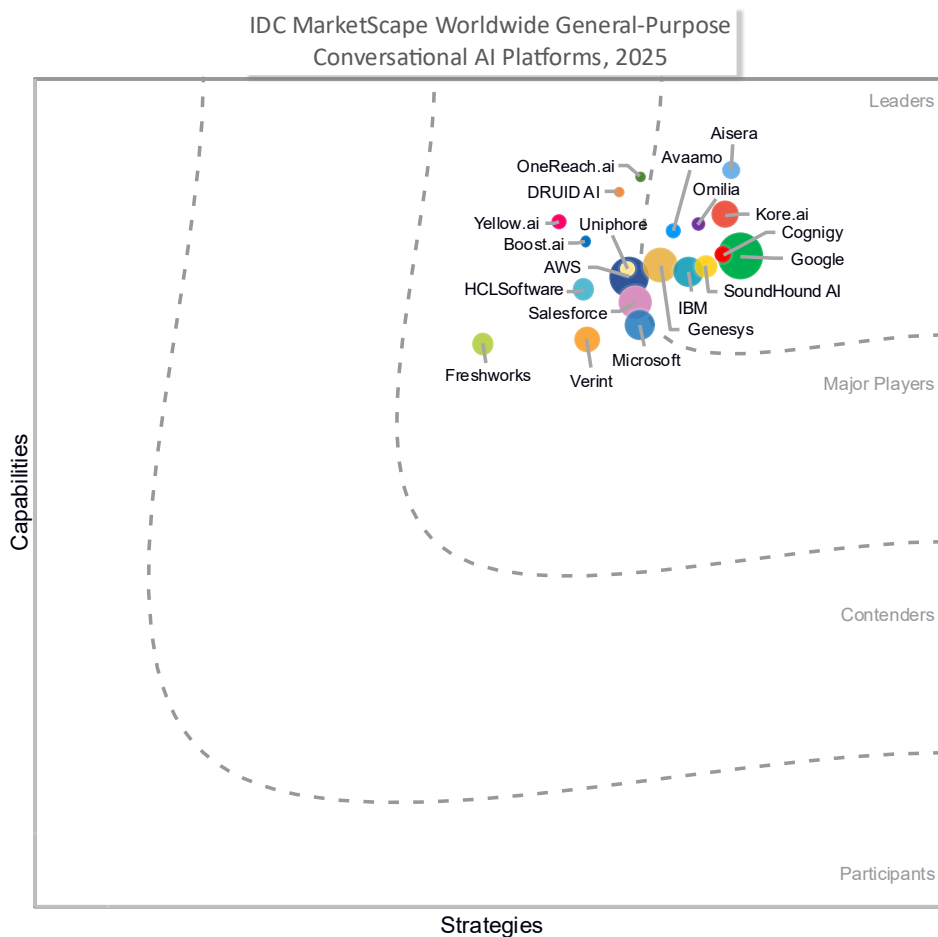
# IDC MarketScape: Worldwide General-Purpose Conversational AI Platforms 2025 Vendor Assessment

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## IDC MARKETScape FIGURE

FIGURE 1

### IDC MarketScape Worldwide General-Purpose Conversational AI Platforms Vendor Assessment



Source: IDC, 2025

See the Appendix for detailed methodology, market definition, and scoring criteria.

## IDC OPINION

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This is the third iteration of the IDC MarketScape for worldwide general-purpose conversational AI platforms, occurring biannually since 2021. Over the past four years, this market has seen fast-paced adoption, major acquisitions, and groundbreaking innovations from long-standing incumbents, hyperscalers, and start-ups alike. As these new innovations make their way from open source and free consumer tools to enterprise-grade features and products, business and IT leaders have had to rapidly evolve their expectations, expertise, and standards around AI, including connecting the dots between IT requirements, high-profile technical advances, and measurable business outcomes.

This is a dynamic market, and conversational AI (CAI) offerings are constantly evolving. Most recently, many of these systems are leveraging the latest innovations in generative large language models (LLMs) as well as agentic capabilities such as enhanced planning, perception, tool calling, and memory. These technologies are greatly improving capabilities, such as accurate research assistance and workflow completion, and moving CAI systems toward advanced reasoning and autonomy. IDC expects integrations with systems of record and databases to support question answering. We also expect integrations with different interaction channels, applications, data formats, and AI systems to be increasingly important in this market. However, AI is still not a "magic button," and many organizations are currently reckoning with infrastructure, data and knowledge management, and technical debt overhauls to make their business "AI ready." Increasingly, organizations are looking for vendors to provide tools, services, and educational resources to assist with key elements of AI success. These can include "universities" to help with platform usage, data/metadata prep algorithms, maturity models and use-case road maps, best practices, and tools for converting previous generations of conversational AI/chatbots into ones that leverage the latest forms of advanced AI. The most important aspect is for technology buyers to feel that their AI vendor is a true partner that can integrate into and even help codevelop their AI strategy.

Several other factors rose in importance this year: no-code customization and development capabilities that have now become common and expected, particularly with natural language coding capabilities; increased support for voice channels, including speech-to-speech translation; the flexibility for organizations to connect their own LLM licenses and other AI applications to conversational AI systems; and the ability to orchestrate multi-agent workflows. As organizations look ahead, they also need to prepare for a future that requires them to manage these multi-agent workflows across

various functional areas and business applications and even from different vendors. While protocols such as agent to agent (A2A) and MCP are still emerging, it will be important for buyers to understand potential vendors' strategies for key issues such as interoperability, data connectivity, and data privacy/security in a multi-agent setting.

As AI innovations rapidly advance the capabilities and expectations for CAI platforms, technology and business leaders must keep a close eye on this shifting landscape, work to cut through the hype, and determine which conversational AI use cases and features are the most important for their organization. They must do this with an eye on reducing IT costs while also preparing the business and its technology for greater use of AI. This IDC MarketScape of general-purpose conversational AI platforms should help such leaders gain valuable insight into what is available in the market today, as well as help inform longer-term strategies.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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The goal of this IDC MarketScape project is to assess vendors that have a notable capability and market share in the general-purpose conversational AI platform space and that meet the following criteria:

- The offering should be commercially available for use as a product or product suite and purchased by customers for all of calendar year 2024. IDC will also consider new product features and capabilities introduced throughout calendar year 2025 as part of vendor strategy evaluation. In addition, IDC will consider these features as part of its capabilities evaluation if there is sufficient customer adoption and use for IDC to properly evaluate them and if these features are generally available to all customers at the time of document publication.
- The product must meet IDC's definition for general-purpose conversational AI platforms and provide the capabilities for developing, training, and deploying conversational AI algorithms and workflows that organizations can use standalone and/or include in their enterprise applications. This includes, but is not limited to, conversational AI solutions that leverage generative AI (GenAI) and agentic AI technologies.
- The product must have at least 100 paying customers and at least \$10 million in revenue in CY24.
- The product must be offered, supported, and available on a worldwide basis (with customers and sales/support offices in North America and at least 2 other global regions).
- The product must be all of or mostly the vendor's own IP.
- The product must have a B2B business model (excluding the vendors primarily focused on a B2C/direct-to-consumer model).

- The offering must have a reasonable level of customer deployment and the ability to support a wide variety of both back-office and front-office use cases.

## ADVICE FOR TECHNOLOGY BUYERS

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IDC offers the following advice for technology buyers considering a general-purpose conversational AI platform:

- **Assess your data readiness.** Develop a clear and complete picture of accuracy, freshness, and other aspects such as data sources and classification models. Examine metadata models and knowledge management/organization principles (e.g., taxonomies, ontologies, and knowledge graphs), and determine if additional work will be needed to prep the data and knowledge sources for AI.
- **Create centers of excellence (COEs).** Use COEs to help to establish and maintain policies for AI governance and use, gather and evangelize best practices, and assist with use case alignment and cross-functional coordination. This can help ensure that AI use across the organization is not just responsible but also valuable.
- **Assess vendor security and privacy.** Data security and privacy concerns are a top barrier to the adoption and expansion of advanced forms of AI. Ensure that data governance and business rules (e.g., access permissions) are maintained and that the AI system has strong, explainable guardrails that meet your organization's ethics standards and/or compliance requirements.
- **Align AI investments to IT, GTM, and product strategy.** Understand the different capabilities and use cases for advanced AI, and prioritize investments based on overall impact and alignment. Leverage maturity and use-case selection road map models, and work with IT and business leaders in your organization to build your own road map for adopting and expanding advanced AI.
- **Leverage IDC's recommended framework to develop your use case road map for CAI.** IDC recommends focusing on four key aspects when selecting a CAI use case: value, feasibility, responsibility, and expandability (see *Leveraging Advanced AI: A Framework for Conversational AI Use Case Selection*, IDC #US50013823, September 2025). By using this methodology, organizations can weave together tactical and strategic plans for CAI to develop a use case road map that ensures value across the business.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### Aisera

After a thorough evaluation of Aisera's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Aisera is a provider of enterprise conversational AI and agentic technologies, including tools for developing, deploying, and orchestrating AI agents and other conversational AI applications. Its core conversational AI product, the Aisera AI Agent Platform, is purpose built to enable autonomous service delivery across the enterprise, leveraging agentic AI and domain-specific workflows. The platform uses a combination of LLMs/domain-specific LLMs, enterprise knowledge graphs and user graphs, retrieval-augmented generation (RAG), and historical context to deliver more accurate, context-aware responses. Its agentic workflow engine, Hyperflows, dynamically triggers actions and enables step-by-step fulfillment across integrated systems such as ServiceNow, Salesforce, Workday, Microsoft 365, and other enterprise applications.

Aisera is privately owned and headquartered in Santa Clara, California, with five other offices worldwide.

### Quick Facts

- **Year founded:** 2017
- **Total number of employees:** 310+
- **Offering name:** Aisera AI Agent Platform
- **GA date:** June 21, 2021
- **Industry focus:** Manufacturing, retail, professional services, transportation, utilities, telecommunications, wholesale, software, healthcare/life sciences, and banking/financial services/insurance
- **Use case support:** Aisera supports a wide range of front- and back-office use cases, as well as industry-specific use cases.
- **Deployment infrastructure options:** Aisera supports most deployment options including private cloud (both customer- and partner-managed), public software-as-a-service (SaaS) cloud (Amazon Web Services [AWS], Google Cloud, and Azure), hybrid cloud (cloud + on premises), and on premises.

- **Deployment/management mode options:** Aisera AI Agent Platform is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** Aisera offers a variety of flexible and modular pricing options, including per agent, per end-user, per transaction (conversation or resolution), platform-based (using builder licenses and Aisera credits), and even outcome-based pricing (aligned to customer-defined success metrics). Most maintenance costs are included in the base license fee, though optional additional costs may apply for certain custom aspects.

## Advanced AI Approach and Features

- **LLM options:** Aisera offers a wide range of options for LLM usage, from providing its own fine-tuned and domain-specific LLMs to allowing customers to integrate and tune their own foundation model to providing access to third-party foundation models, such as OpenAI, Anthropic, Google (via Vertex AI), Meta (with Llama 3), and Amazon (through Bedrock).
- **AI customizability:** Aisera's development capabilities are designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a full set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating natural language processing (NLP)–, LLM–, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and multi-agent scenarios.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Aisera's platform has a slew of prebuilt features leveraging advanced AI technologies such as generative and agentic AI, including AI-generated synthetic training data, AI-generated ontologies and workflows, code generation, automatic question answering, unstructured data vectorization/embedding creation, and an Agent Library to support quick start agent creation.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging GenAI and/or agentic AI include automated knowledge base generation from chat logs (4Q25), an enterprise AI hub for employee experience (EX), an LLM fine-tuning studio, enterprise search, and an AI gateway to support protocols such as MCP and A2A (1Q26).

## Strengths

- **Balance of universal and domain-specific AI:** Aisera's industry/domain-specific approach to conversational AI continues to be a strength in 2025, now including the ability to create or enhance enterprise taxonomies, ontologies, or other

knowledge models with generative AI. However, its customers also chose Aisera for its ability to create a "universal bot" that can manage workflows across a variety of other AI bots, assistants, and agents.

- **Customer partnership model:** Aisera's customers find the vendor to be a strong partner in enterprisewide AI, helping to smooth the way through challenges such as multisystem integration and customization with off-the-shelf solutions and low-code tools while also being responsive to evolving customer needs. Customers and prospects view Aisera as a strong technical innovator that aligns its research and development (R&D) to their business needs.

## Challenges

- **R&D resourcing:** While Aisera is currently providing strong evidence of innovation in the form of patents and new features as well as customer perception and feedback, its R&D resource allocation may put it at a comparative disadvantage in the future if not increased. The pace of innovation has vastly accelerated across the conversational AI market within the last few years, with an accompanying surge of investment in R&D.
- **Customer adoption support:** While Aisera has begun providing more user education and training materials, including Aisera University, the company may need to increase its efforts in assisting customers with internal adoption. Beyond training on how to use conversational AI platforms, customers in this market are increasingly looking for more help with change management, best practices, and real-life customer examples to drive excitement and adoption across the enterprise.

## Consider Aisera When

Consider Aisera when you are looking for an enterprise conversational AI platform with strong integration and customization capabilities. Aisera's domain-specific conversational AI capabilities — including its library of prebuilt connectors and newer features powered by advanced AI (e.g., LLMs and agentic workflows) — can make the company a good choice for organizations that require more industry-tuned conversational AI solutions.

## AWS

After a thorough evaluation of AWS current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

AWS is a provider of cloud infrastructure and other cloud-based computing services that software developers can leverage to build, deploy, and manage applications. Its core conversational AI product, Amazon Connect, is a cloud- and AI-native customer

experience (CX) offering that helps organizations leverage AI across a variety of customer, employee, and partner touch points. Amazon Connect provides omni-channel customer experiences, with AI-driven features embedded throughout to deliver personalized customer experiences at scale. It includes features such as natural language understanding (NLU) intent recognition, multilingual support, contextual conversation management, and sentiment analysis, in addition to AI, agentic AI/GenAI-powered self-service and agent assistance, and conversational analytics (Contact Lens).

AWS is headquartered in Seattle, Washington, has 90+ offices worldwide, and is both publicly held and venture funded.

## Quick Facts

- **Year founded:** 2002
- **Total number of employees:** Undisclosed
- **Offering name:** Amazon Connect
- **GA date:** March 28, 2017
- **Industry focus:** Amazon Connect serves organizations across all industries, with particular strength in regulated industries requiring high security and compliance standards.
- **Use case support:** Amazon Connect supports a wide range of front- and back-office use cases for customer experience, line of business (LOB), HR and IT support, and so forth.
- **Deployment infrastructure options:** Amazon Connect is available as a public SaaS offering deployed on AWS Cloud.
- **Deployment/management mode options:** Amazon Connect is available as a cloud-based software product (including development tools that can be used by customers) or as a fully managed service (including development and deployment services).
- **Pricing model:** Amazon Connect is primarily charged via a per-channel, pay-as-you-go model with a few different options. Customers can either include unlimited AI (inclusive of Contact Lens and Amazon Q in Connect) or pay separately for Contact Lens and/or Amazon Q. All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** AWS provides access to its own LLM, Amazon Titan, as well as Anthropic's Claude, within Amazon Connect.
- **AI customizability:** Amazon Connect is aimed at low-code developers and business users and enables capabilities such as one-click conversational

analytics, in-context learning, and prompt tuning. However, pro-code developers will need additional access to Amazon Bedrock's environment to fine-tune AI models or workflows.

- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Amazon Connect has a variety of prebuilt features leveraging GenAI and agentic AI, including AI-generated synthetic training data, automatic question answering, dialog summarization, and unstructured data vectorization/embedding creation.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map information for Amazon Connect is not publicly available.

## Strengths

- **AI customizability:** Customers appreciate the ability to directly work with and customize LLMs via Bedrock, citing the control this gave them over specific features and release timelines. This may make Amazon Connect a strong choice for companies that are looking to combine prebuilt contact center software features with the ability to custom build and OEM advanced AI capabilities for their own customers.
- **Availability of advanced technology:** AWS does a good job of providing a wide range of AI capabilities rapidly, with its broad base of customers providing a steady stream of domain- and use-case-specific feature requests and benefiting from related innovations. Customers were happy with the modular nature of Amazon Connect in terms of the ability to take advantage of the advanced AI features that matter most to them.

## Challenges

- **Multitenant aspects:** While AWS' multitenant aspects mean that all of its customers instantly benefit from new technological advances, it may be an issue for some customers that have different architecture requirements for AI. Moreover, greater data control capabilities such as automated redaction may incur additional costs via Contact Lens. AWS should ensure that it provides a variety of data privacy options to customers and promotes its capabilities in this area.
- **Comparatively limited LLM ecosystem:** AWS provides access to its own LLM, Amazon Titan, as well as Anthropic Claude (*et al*) within Amazon Connect, and it only partially supports bring-your-own-LLM (BYOLL) options. This may be limiting for customers who want to leverage a wider variety of LLMs.

## Consider AWS When

Consider AWS when you are a large enterprise looking for a reasonably priced conversational AI solution that includes capabilities for contact center and internal use

cases as well as for training, deploying, and managing custom LLMs and applications. Amazon Connect may be a particularly good choice for organizations with strong developer teams that can take advantage of Bedrock's capabilities for customization and OEM applications. It may also be suitable for those willing to also invest in Contact Lens, as its in-depth built-in governance and observability capabilities can make it a good choice for organizations with strong data protection and control requirements for AI.

## Avaamo

After a thorough evaluation of Avaamo's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Avaamo is a provider of enterprise conversational AI technologies and services for developing AI agents and other conversational AI applications. Its core conversational AI product, Avaamo Agentic AI Platform, is built to automate customer, employee, and supplier conversations with multimodal, omni-channel, and multilingual support. It includes an agentic engine, machine learning (ML) models and related capabilities, low-code/no-code tooling, and prebuilt enterprise integrations.

Avaamo is headquartered in Los Altos, California, has two other offices worldwide, and is privately funded and venture backed.

## Quick Facts

- **Year founded:** 2014
- **Total number of employees:** 250
- **Offering name:** Avaamo Agentic AI Platform
- **GA date:** 2017
- **Industry focus:** Banking, financial services and insurance, retail and wholesale, healthcare and life sciences, manufacturing, education, telecommunications and media, and travel, transportation and hospitality
- **Use case support:** It supports a wide range of front- and back-office use cases.
- **Deployment infrastructure options:** Avaamo supports all deployment options including private cloud (customer, vendor, and partner managed), public SaaS cloud (AWS, Azure, or Google Cloud), hybrid cloud (cloud + on premises), and on premises.
- **Deployment/management mode options:** Avaamo Agentic AI Platform is available both as an installable or cloud-based software product (including development tools that can be used by customers), or as a fully managed service (including development and deployment services).

- **Pricing model:** The Avaamo Platform is typically offered in terms of an agentic workforce, where each agent is trained on a specific job (e.g., IT support desk, customer support). Consumption-based pricing options include the number of virtual agents, number of employees, number of sessions, number of calls, number of contact center agents, or number of encounters. In addition, Avaamo offers annual or multiyear license-based pricing options at the level of individual use cases/AI agents, whether departmentwide (i.e., all use cases for a single department) or enterprisewide (i.e., multidepartment use cases). All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** Avaamo offers a BYO-LLM model for customers. The platform also provides access to third-party foundation models from providers such as Microsoft, OpenAI, Anthropic, Mistral, Deepseek, AI21 Labs, AWS, Cohere, DeepMind, and X. Out-of-the-box "prebuilt" LLMs use an ensemble approach, starting with OpenAI and Microsoft and then extending from there. Prebuilt GenAI features support can be tailored for individual customers, based on LLMs. Avaamo also offers small language models (SLMs) that are pretuned for healthcare, IT, HR, and CX verticals and are further fine-tuned per deployment.
- **AI customizability:** Avaamo's development capabilities are designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a full set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including its own low-code framework, LLaMB, which supports building agents to execute tasks in HR, IT, and customer service.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Avaamo's platform has a variety of prebuilt features leveraging advanced AI technologies such as GenAI and agentic AI, including AI-generated synthetic training data; AI-generated taxonomies, lexicons, and workflows; code generation; dialog summarization; automatic question answering; and unstructured data vectorization/embedding creation. In addition, it currently offers over 50 prebuilt agents across the areas of customer service, HR, and IT, allowing enterprises to take proven AI use cases and workflows and quickly customize or deploy them off the shelf.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** The near-term road map features leveraging GenAI and/or agentic AI include an AI data cloud, a production readiness index, and interoperability with other systems, applications, and AI agents via support for protocols such as MCP and A2A.

## Strengths

- **Strong support for advanced AI:** Avaamo continues to offer a strong set of conversational AI capabilities, from its proven NLP and speech/voice handling to more advanced areas such as GenAI and agentic AI. Organizations need to align AI more directly with business outcomes, and Avaamo's strategy of providing prebuilt features (e.g., industry- and use-case-specific agents) and capabilities (e.g., production readiness testing and ROI metrics for newly created agents) offers many paths to outcome-driven AI.
- **Ease of use case expansion:** Avaamo offers a wide range of use-case-specific solution templates that can be used to quickly create conversational AI applications. Customers report strong satisfaction with the ease of rapidly expanding Avaamo platform use cases across their organizations.

## Challenges

- **Highly competitive market:** Avaamo is currently competing in a very crowded market space with hundreds of vendors. While it is doing a good job of aligning new AI capabilities to business outcomes, Avaamo needs to increase its thought leadership activities to ensure that potential customers are not only aware of its products and offerings but also view the company as a thought leader and partner to guide them into the future of enterprisewide AI.
- **Domain-specific LLMs:** While Avaamo is providing a strong set of prebuilt agentic and LLM capabilities for healthcare, it should ensure that it is continuously expanding industry-specific support for clients in other verticals.

## Consider Avaamo When

Consider Avaamo when you are looking for an enterprise conversational AI platform that offers strong multilingual and omni-channel capabilities and out-of-the-box support for a wide variety of industry and use case solutions. Avaamo has already built out a strong set of prebuilt agents and SLMs for CX, EX, and healthcare, so it may be specifically well suited for organizations in the healthcare industry.

## Boost.ai

After a thorough evaluation of Boost.ai's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Boost.ai is a provider of AI-powered customer experience offerings, including tools for developing, deploying, and managing conversational AI applications, with a focus on highly regulated industries. Its core conversational AI product, the Boost.ai Conversational AI Platform, offers a workflow builder with a no-code graphical interface

for designing both conversational and non-conversational workflows, scaled for enterprise use. The platform's visual interface supports the creation of complex logic, decision trees, conditions, and API integrations, allowing nontechnical users to build and manage more advanced virtual agent behavior. Its hybrid engine combines rule-based, statistical, and transformer-based models for intent recognition, generative responses, entity extraction, and multilingual support.

Boost.ai is privately owned and headquartered in Sandnes, Norway. It has seven other offices worldwide, including in Boston, Massachusetts, and London, United Kingdom.

## Quick Facts

- **Year founded:** 2016
- **Total number of employees:** 160
- **Offering name:** Boost.ai Conversational AI Platform
- **GA date:** September 1, 2016
- **Industry focus:** Boost.ai supports a wide variety of industries but is especially focused on regulated industries with complex, large-scale environments such as banking, credit unions, financial services, insurance, government, and healthcare.
- **Use case support:** Boost.ai supports and has deployments in a wide range of front-office and back-office use cases, but it may be especially well suited for customer self-service and internal HR assistance use cases.
- **Deployment infrastructure options:** The Boost.ai Conversational AI Platform is primarily deployed via public SaaS cloud (AWS or Cleura), though on-premises deployments can be supported on an as-needed basis.
- **Deployment/management mode options:** The Boost.ai Conversational AI Platform is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** The Boost.ai Conversational AI Platform is charged on a subscription and/or usage basis, with voice-based usage charged per number of minutes and chat/text-based usage charged per number of conversations. All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** Boost.ai offers customers several LLM options, with a BYO model that directly supports OpenAI, Azure OpenAI, Google Gemini, and Anthropic Claude, as well as the ability to integrate with any chat model via an OpenAI-compatible API interface such as vllm or tgi.

- **AI customizability:** Boost.ai Conversational AI Platform is designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating conversational models, workflows, and applications, including tools for prompt engineering, explainability, and multi-agent scenarios.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt features leverage fine-tuned models from OpenAI and Meta. They include AI-generated synthetic training data, taxonomies, and workflows; automated testing; automatic question answering; dialog summarization; task automation; and unstructured data vectorization/embedding creation.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging GenAI and/or agentic AI include model fine-tuning, a persona-based automated voice testing studio , and support for the A2A protocol.

## Strengths

- **Ease of use:** Boost.ai's customers continue to praise the usability of its platform, particularly its low- and no-code tools and intent customization. This is especially important as Boost.ai expands its GenAI and agentic AI-driven capabilities, which customers report are both easy to use and easy to connect to business value.
- **Customer partnership:** Boost.ai continues to show a commendable focus on helping its customers succeed while expanding use cases across the enterprise. Its customers feel that the vendor is a strong partner to them in this era of advanced AI, taking the time to understand their business and help them to develop an enterprisewide AI use case strategy and related KPIs.

## Challenges

- **Staffing and growth:** Boost.ai has a high-touch customer model that, while helpful in retaining customers, will require some work to scale as the vendor continues to expand. To compete in this market, Boost.ai will need to continue to add new employees and offices, particularly outside of the Nordics region where it is headquartered. This will help it to provide more direct local expertise and adapt to new markets in addition to its current extensive partner network.
- **Advanced AI customizability:** While customers report that Boost.ai is easy to use and get value from, including features built on advanced AI, the vendor may need to provide more capabilities for use case-specific customization. While LLMs provide strong general-purpose conversational capabilities, many customers stand to benefit from near-term road map plans to enable more granular LLM/foundation model fine-tuning.

## Consider Boost.ai When

Consider Boost.ai if you are a midsize or large enterprise looking for a well-documented, no-code conversation builder interface that is intended for business users. The Boost.ai platform may be a good choice for those looking for assistance with AI use case expansion and KPI strategies, especially for those in industries where regulatory compliance and secure handling of information are nonnegotiable requirements.

## Cognigy

After a thorough evaluation of Cognigy's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Cognigy is a provider of enterprise conversational AI technologies and services for developing conversational AI applications. Its core conversational AI product, Cognigy.AI, is a conversational AI platform designed for automating and enhancing customer interactions across voice and digital channels. It enables enterprises to deploy AI agents that combine LLM-powered agentic AI with deterministic NLU-based automation for enhanced context awareness. Cognigy.AI also offers optional add-ons such as a Voice Gateway, Knowledge AI, Agent Copilot, and Cognigy xApps. These mobile-first, microweb applications enable multimodal service uniting text, multimedia, and voice. The company recently entered into an agreement to be acquired by NiCE, which is expected to close CY 4Q25.

Cognigy is privately held and venture funded. It is headquartered in Dallas, Texas, and Dusseldorf, Germany, with nine additional offices worldwide.

## Quick Facts

- **Year founded:** 2016
- **Total number of employees:** 250
- **Offering name:** Cognigy.AI
- **GA date:** July 18, 2017
- **Industry focus:** Cognigy.AI supports a wide variety of industries, with Job Market and Solution Accelerators that provide prebuilt AI agents, industry-specific intents and flows for sectors such as banking, insurance, and retail.
- **Use case support:** Cognigy.AI natively supports a wide range of front- and back-office use cases, with a focus on high-volume customer self-service and agent assistance.

- **Deployment infrastructure options:** Cognigy supports both private cloud (customer, vendor, and partner-managed) and public SaaS cloud (AWS, Azure, and Google Cloud) deployments.
- **Deployment/management mode options:** Cognigy.AI is available as both a cloud-based software product (including development tools that can be used by customers), and a fully managed service (including development and deployment services).
- **Pricing model:** The core Cognigy.AI base license is charged on a subscription basis, tiered by conversation volume. Optional add-ons include a Voice Gateway (multiplier per conversation based on the number of concurrent call lines), Knowledge AI (usage based on document/API call volume), Agent Copilot (per seat or included in the enterprise bundle), and Cognigy xApps (charged per application). All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** Cognigy.AI supports a model-agnostic approach allowing enterprises to bring and orchestrate their own LLMs. The platform provides native support for OpenAI, Azure OpenAI, Anthropic (Claude), Google (Gemini), Mistral AI, and Amazon Bedrock (e.g., Amazon Nova). It also offers a universal LLM connector that supports any LLM with an OpenAI-compatible API, including self-hosted or fine-tuned models.
- **AI customizability:** Cognigy.AI is designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a full set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and multi-agent scenarios.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Some of the prebuilt features, specifically design-time features, leverage Azure OpenAI as the default LLM, which is included in the base license and is fully managed by Cognigy. Customers have the option to switch to any other supported model as needed. For other runtime and agentic AI features, customers can select the LLMs they need and even mix and match different models, depending on the use cases and agent jobs to optimize for cost, performance, and data privacy. Prebuilt generative and/or agentic AI features include AI-generated synthetic training data, taxonomies, and workflows; automated testing; automatic question answering; dialog summarization; task automation; and unstructured data vectorization/embedding creation.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging generative and/or agentic AI include an

enhanced design-time GenAI user experience (UX), LLM-powered simulations, a GenAI conversation evaluator, enhanced content management, and support for asynchronous AI-to-AI and AI-to-human collaboration.

## Strengths

- **Strong research and development:** Cognigy continues to impress customers and prospects with the strength of its AI research and development, including generative and agentic AI. It has done a good job of promoting its thought leadership and innovation to prospects, customers, and potential partners across the globe.
- **Flexibility and ease of integrations:** Cognigy's customers praise its back-end integration capabilities, particularly its Extensions capability that allows nontechnical users to handle integrations. Cognigy continues to extend platform capabilities with advanced AI such as LLMs.

## Challenges

- **Road map transparency:** Cognigy has made strong leaps in advanced AI innovation, including GenAI and agentic AI features. However, sometimes, customers are not clear on when promoted road map features will be production ready, and increasing clarity and transparency will be especially important for reassuring existing customers now that Cognigy has closed its acquisition by NiCE.
- **Road map responsiveness:** On a related note, Cognigy should ensure that it continues to align its R&D strategy not just to its broader competitive environment but also to core customer needs. This will be important to consider, even for those that may not yet be able to take advantage of advanced AI.

## Consider Cognigy When

Consider Cognigy when you are looking for an enterprise conversational AI platform that works to stay on the leading edge of conversational AI features across the enterprise. Cognigy's broad-based channel and integration capabilities can make it a good choice for organizations that have complex integration requirements.

## DRUID AI

After a thorough evaluation of DRUID AI's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

DRUID AI is a provider of enterprise conversational AI capabilities for customer and employee interactions. Its core conversational AI product, DRUID, is a platform for building AI agents and other conversational AI applications. It is designed to enable AI-driven processes by combining business knowledge with intelligent automation, AI

agents, and GenAI capabilities. The platform is powered by the DRUID Conductor, a centralized, context-aware AI hub that orchestrates user interactions and leverages internal organizational knowledge and generative AI models via DRUID's Knowledge Aggregator. The DRUID Conductor mines historical data held in enterprise applications, conversation history, live chat conversation history, voice transcripts in contact centers, and emails to continuously self-learn, and the DRUID platform provides no/low-code capabilities, including prebuilt templates, to accelerate deployment.

DRUID AI is privately held and venture funded. It is headquartered in New York City, with twelve additional offices worldwide.

## Quick Facts

- **Year founded:** 2018
- **Total number of employees:** 250
- **Offering name:** DRUID
- **GA date:** February 15, 2018
- **Industry focus:** DRUID supports a wide variety of industries and offers specific prebuilt AI-driven features, copilots, and agents for healthcare and insurance, banking and financial services, retail and ecommerce, telecommunications, higher education, utilities and energy, and manufacturing and logistics.
- **Use case support:** DRUID natively supports a wide range of front- and back-office use cases, with some specialized use cases such as diagnosis/treatment systems and public safety/emergency response provided via partners.
- **Deployment infrastructure options:** DRUID supports all deployment options including private cloud (customer, vendor, and partner managed), public SaaS cloud (primarily Microsoft Azure), hybrid cloud (cloud + on premises), and on premises.
- **Deployment/management mode options:** DRUID is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** DRUID is charged via either a full DRUID platform license (platform access/tenant basis, annual subscription), or a DRUID bot license (per use case basis with unlimited users, annual subscription). All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** DRUID offers a BYOLLM model that supports Google (PaLM 2/Gemini), Anthropic (Claude), Amazon (Bedrock), Mistral, and Meta (Llama, self-hosted or DRUID managed), as well as any custom LLM via RESTful API.
- **AI customizability:** The DRUID platform is designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a full set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt features primarily leverage OpenAI GPT (via Azure OpenAI or API) or DRUID's own proprietary LLM (Becus). They include AI-generated synthetic training data, taxonomies, and workflows; automated testing; automatic question answering; dialog summarization; task automation; and unstructured data vectorization/embedding creation, as well as a number of purpose-built agents and copilots.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging GenAI and/or agentic AI include agent orchestration in DRUID Conductor, an agentic framework 2.0, and a variety of optimized SLMs and fine-tuned LLMs tailored for enterprise tasks.

## Strengths

- **Ease of use:** DRUID's customers praised the ease of use of its platform. They reported that DRUID does a good job of providing low- and no-code tools for those with little or no technical experience, including business users. Overall, they said that the platform was easy for a wide range of users to learn.
- **Strong support model:** In addition to its easy-to-use technology, DRUID customers liked the active support and guidance provided for new users of the platform. This includes a responsive customer support team as well as in-depth self-service education tools such as DRUID University.

## Challenges

- **Global expansion support:** As DRUID continues to rapidly accelerate its growth, it will need to ensure it can support its growing customer base. While DRUID has a strong partner for sales and implementation support, it will need to ramp up its teams outside of its region of origin.
- **Highly competitive market:** DRUID is currently competing in a very crowded market space with rapid and competitive innovation. The company may need to

increase its marketing and thought leadership activities to ensure that potential customers are aware of its products and offerings.

## Consider DRUID AI When

Consider DRUID AI when you are looking for a conversational AI vendor that has strong technical capabilities and is easy to work with, from both a relationship and platform perspective. DRUID can be a good choice for companies with limited professional development resources that want to involve business users in conversational AI application creation.

## Freshworks

After a thorough evaluation of Freshworks' current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Freshworks is a provider of cloud-based software, including conversational AI, for helping organizations improve customer and employee experiences. Its main conversational AI product, Freshworks for CX and EX, is made up of two core modules: Freshdesk Omni focuses on AI-powered customer and agent experience use cases, and Freshservice is an EX solution intended to help businesses modernize IT operations, transform employee experience, drive workforce productivity, and operationalize AI at scale. The platform also includes various features powered by its AI agent, Freddy AI Agent, to extend its agent copilot, autonomous agent, and conversational insights capabilities. It automatically orchestrates LLMs to select the best fit for different use cases, and it supports over 40 languages within Freddy AI, which is meant to be easily leveraged by business users.

Freshworks is a public company. It is headquartered in San Mateo, California, with 11 additional offices worldwide.

## Quick Facts

- **Year founded:** 2010
- **Total number of employees:** 4,400
- **Offering name:** Freshworks for CX and EX
- **GA date:** August 1, 2023
- **Industry focus:** Freshworks supports a wide range of industries, with 30 industry-specific templated AI agents/chatbots and over 1,400 prebuilt accelerator solutions and integrations available in its marketplace.
- **Use case support:** Freshworks supports a variety of front-office use cases (e.g., customer service, retail product recommendation, and presales/marketing) and

back-office use cases (e.g., knowledge assistance, HR self-service, and IT help desk/ticketing).

- **Deployment infrastructure options:** Freshworks for CX and EX is available as a public SaaS cloud deployment (AWS, Azure, and Google Cloud).
- **Deployment/management mode options:** Freshworks is available as a cloud-based software product with development tools that can be used by clients.
- **Pricing model:** Freshworks for CX and EX is charged on an annual subscription basis, per agent/per month for base features, plus add-on charges per session for Freddy AI consumption. All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** Freshworks for CX and EX does not currently support a BYOLLM model for customers, offering prebuilt features with best-of-breed LLMs used for each feature.
- **AI customizability:** Freshworks for CX and EX is designed primarily for enterprise architects, low-code developers, and trained business users, with a focus on prebuilt templates and features and low/no-code customizability for conversational flows and responses. It offers a number of capabilities for developing, training, testing, deploying, and monitoring NLP-, LLM-, and agentic-based conversational models, workflows, and applications. However, aspects around testing for bias and providing explainability of AI models may be less robust.
- **Prebuilt features leveraging generative and/or agentic AI (currently GA):** Prebuilt features primarily leverage GPT-4o, GPT-4o mini, GPT-3.5 Turbo, Llama 3, and Mistral 8B. They include AI-generated conversation flows and email reply suggestions, automatic question answering, dialog summarization, task automation, and unstructured data vectorization/embedding creation.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging GenAI and/or agentic AI include tools for orchestrating multi-agent workflows, both within the Freshworks ecosystem and with third-party tools and applications.

## Strengths

- **Ease of use/integration:** Customers praised the ease of integrations between Freshworks and other systems, especially for help desk/service desk use cases.
- **Customer service:** Customers also praised the vendor's customer support model. They find Freshworks to be responsive, timely, and supportive to work with on customer service requests.

## Challenges

- **Breadth of use case support:** Customers of general-purpose CAI platforms are increasingly looking for all-in-one use case support, especially for GenAI and agentic AI features such as Freddy AI. Freshworks should ensure that it is providing the expertise and the prebuilt features and templates that customers need to expand CAI across a wide variety of both front- and back-office use cases.
- **Pace of advanced AI:** Innovations are happening at a rapid pace, and customer expectations are rising, especially as new vendors emerge or expand into this market. Freshworks should ensure that it is increasing its R&D efforts to productize key advanced AI capabilities that customers want and is testing new features thoroughly to ensure that they provide business value out of the gate.

## Consider Freshworks When

Consider Freshworks when you are looking for a more traditional conversational AI platform that provides strong support for help desk/IT service desk use cases, including ease of use and integration, and an ecosystem of partners to assist. Freshworks is increasingly providing more advanced AI-based features via Freddy AI.

## Genesys

After a thorough evaluation of Genesys' current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Genesys is a provider of AI-powered experience orchestration for customers and employees. Its conversational AI product, Genesys Cloud CX, is a cloud-native experience orchestration platform that includes conversational AI and automation capabilities across voice and digital channels, from NLU-based self-service to conversational analytics to virtual AI agents. Genesys Cloud CX can be deployed flexibly as digital only, voice only, or omni-channel, with a scalable API-first architecture, helping organizations deliver more intelligent, automated, and personalized customer experiences. Its recently launched Genesys Cloud AI Guides provide quick-start options to help organizations quickly deploy and gain value from advanced AI technologies.

Genesys is privately funded. It is headquartered in Menlo Park, California, with 49 other offices worldwide.

## Quick Facts

- **Year founded:** 1990
- **Total number of employees:** 6,500+
- **Offering name:** Genesys Cloud CX

- **GA date:** October 11, 2021
- **Industry focus:** Genesys Cloud CX supports a wide variety of industries, with industry-specific solutions provided through a combination of its dedicated product strategy, tailored services, and ecosystem of partners for key industries such as banking, insurance, healthcare (including payer, provider, and life sciences), government, retail, and business services (including BPOs).
- **Use case support:** Genesys Cloud CX supports a wide range of conversational front- and back-office use cases, with some specialized industry use cases such as diagnosis and treatment systems provided by partners.
- **Deployment infrastructure options:** Genesys Cloud CX is deployed as a public SaaS offering primarily on AWS Cloud, with integrations offered for Google Cloud and Azure.
- **Deployment/management mode options:** Genesys Cloud CX is available as both a cloud-based software product (including development tools that can be used by customers) and as a fully managed service (including development and deployment services).
- **Pricing model:** Genesys Cloud CX has seven base packages: CX1 (voice-only), CX2D (digital-only), CX2 (omnichannel [voice + digital]), CX3D (digital + workforce engagement management [WEM]), CX3 (omni-channel + WEM), EX (WEM-only), and CX4 (which includes omni-channel, WEM, agent copilot, and journey management). Genesys' AI Experience Tokens are used for automation, augmentation, prediction, optimization, and NLP/NLU, and they are charged on a consumption basis per token. A la carte add-ons for work automation, digital, and WEM are also offered for additional flexibility. Genesys offers both usage-based AI and license-included AI.

## Advanced AI Approach and Features

- **LLM options:** Genesys leverages its own proprietary models, as well as fine-tuned open source models and frontier models, with model selection driven by use case and performance benchmarks. Genesys currently supports a BYOLLM model for customers through its cloud functions.
- **AI customizability:** The Genesys Cloud CX platform is designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a full set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and multi-agent scenarios.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt generative and/or agentic AI features leverage a variety of open source

and frontier models, and they select from multiple models via Amazon Bedrock (e.g., Anthropic Claude, Amazon Titan, Cohere, and AI21) based on use case-specific performance benchmarks. These features include AI-generated synthetic training data, entity detection, and conversational flows; automatic question answering; conversation summarization; task automation; and a GenAI-powered agent copilot. The newly launched Genesys Cloud AI Guides allow business users to describe a process or upload a flow document and automatically receive AI-generated, natural language instructions that can be used by the virtual agent in a conversational flow.

- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** The near-term road map features leveraging prebuilt GenAI and agentic AI capabilities are focused on increasing accuracy and reducing manual work, particularly for contact center use cases. These include auto-generated knowledge articles, intent disambiguation, virtual agent evolution with multilingual and omni-channel support, automated QA and compliance scoring, anomaly detection with performance dashboards, and further enhancements to its agent assist feature, Genesys Copilot, with continuous scoring and real-time coaching.

## Strengths

- **Breadth of offering:** Genesys provides a broad range of conversational AI and other AI-based features for customer support, workforce engagement, sales, and marketing. In addition, the vendor provides an AI maturity model for its customers to help them understand which capabilities are best suited for their current business state and where they need to go to advance in AI use case maturity.
- **Omni-channel capabilities:** Customers praised Genesys' omni-channel capabilities, which they reported goes beyond just supporting multiple channels to provide real cross-channel visibility and insights. Users appreciated the ability to manage and leverage a wide set of customer data in one place via the Genesys Cloud CX platform, as well as the ease of integration and ease of use of its omni-channel capabilities.

## Challenges

- **Timing transparency:** Genesys provides frequent updates with new innovations. However, this rapid pace of delivery makes it critical to clearly communicate the maturity of each feature, whether it is fully business ready, is in beta, or requires additional training and adoption. In today's fast-paced landscape, Genesys need to ensure tight alignment between product development and customer-facing teams (sales, marketing, and support) so that customers can receive realistic, transparent guidance on feature readiness and adoption.

- **Deployment flexibility:** While Genesys has made a strategic choice to focus on cloud, its lack of on-premises and private cloud deployment options may be a challenge for customers that have stringent requirements in these areas.

## Consider Genesys When

Consider Genesys when you are looking for a cloud-based enterprise conversational AI platform that works across the customer and employee experience to provide features such as AI agent building, agent copilot, self-service question answering, automated outreach, and predictive call routing. Genesys' broad set of capabilities can make it a good choice for AI-powered contact centers in a variety of industries, as well as for other use cases such as sales and marketing.

## Google

After a thorough evaluation of Google's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Google provides cloud computing, AI, online advertising, a search engine, and other software, including conversational AI. Its core conversational AI product, Conversational Agents, is part of the Customer Engagement Suite (CES) with Google AI, which provides conversational self-service, agent assistance, and operational insights for customer experiences. Conversational Agents include capabilities for building text- and voice-based multimodal virtual agents, with a strong emphasis on no-code development to speed the production of hybrid agents (GenAI + deterministic AI). It also includes HD voice models; out-of-the-box connectors for data sources such as BigQuery, Salesforce, SharePoint, Jira, and ServiceNow; and prebuilt agents for common use cases such as flight booking, movie ticketing, shopping assistance, and appointment booking, which integrate directly with Google products such as BigQuery and Google Calendar.

Google is a public company. It is headquartered in Mountain View, California, with over 100 other offices worldwide.

## Quick Facts

- **Year founded:** 1998
- **Total number of employees:** 185,700+ (Google overall, not broken out for conversational AI offering)
- **Offering name:** Customer Engagement Suite with Google AI
- **GA date:** April 17, 2018
- **Industry focus:** Customer Engagement Suite with Google AI supports a wide variety of industries, with prebuilt components and offerings specialized for use

cases within automotive, retail/ecommerce, food service, travel and hospitality, government and public sector, media, banking, healthcare, and telecommunications.

- **Use case support:** Customer Engagement Suite with Google AI supports a wide range of front- and back-office use cases.
- **Deployment infrastructure options:** Customer Engagement Suite with Google AI is primarily deployed via public SaaS cloud on Google Cloud, with some on-premises and private cloud (customer-managed) instances supported on a case-by-case basis.
- **Deployment/management mode options:** Google Customer Engagement Suite is available as a cloud-based software product that includes development tools that can be used by clients.
- **Pricing model:** Conversational Agents are priced on a consumption basis, charged per second (voice) or per request/query (chat). Standard and enterprise pricing tiers are offered. All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** Conversational Agents can leverage any LLM in Google's Vertex AI Model Garden, including Google proprietary models such as the Gemini family of models.
- **AI customizability:** Conversational Agents is designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a full set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, multi-agent scenarios, and converting previous generations of bots into GenAI-based assistants or AI agents.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** The currently GA prebuilt features leveraging generative and/or agentic AI are powered by Google's proprietary Gemini model(s) by default. They include AI-generated synthetic training data, taxonomies, and conversational flows; automatic question answering; dialog summarization; automated testing; task automation; unstructured data vectorization/embedding; and GenAI-powered agent assist. Google's well-known search capabilities underpin question answering, other RAG-supported AI features, and other proprietary Google AI models power aspects such as real-time translation, realistic text-to-voice generation, and multimodal experiences.

- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map items include real-time translation and language-switching interactions for chat and voice, AI-augmented agent building, scenario-based evaluations, voices with dynamic and on-the-fly controls, and multimodal interactions for chat and voice.

## Strengths

- **Research and development:** With its extensive research into deep learning-based language models and other technologies such as speech recognition and machine translation, Google has been at the forefront of AI and ML advances affecting conversational AI for many years now. Every year, Google publishes dozens of papers and reports in this area, helping to advance the overall art and science of conversational AI. Google has rapidly adapted to changing market conditions around GenAI and agentic AI, and that is largely due to its ongoing R&D capabilities.
- **User training and documentation:** While Google has traditionally been viewed as a professional developer-focused vendor, it has been working hard in recent years to expand offerings for nontechnical business users. Customers recently praised the ease of use of the Google CES UI, as well as the ease of training/upskilling employees. They reported a wealth of training content and clear documentation that doesn't require deep technical knowledge.

## Challenges

- **Highly competitive market:** While Google continues to build on a strong technical underpinning, the global market has become highly competitive in the past few years, with dozens if not hundreds of companies vying for mind share and wallet share. Meanwhile, the latest wave of AI innovations will level certain playing fields while spurring new entrants to the market. Google should ensure that it is providing support to help its customers succeed with conversational AI, in addition to top-tier thought leadership.
- **Promoting ease of use in AI offerings:** Google has been expanding its GenAI conversational app builder tool — as well as industry- and use case-specific templates for certain areas — to enable more companies to take advantage of its AI. However, many organizations still view Google as primarily providing a developer-first platform, Google should ensure that it is promoting low- and no-code tools sufficiently to overcome this perception.

## Consider Google When

Consider Google if you are an organization looking for a deep and broad set of multilingual conversational AI capabilities that can be used to develop a wide range of conversational AI solutions via APIs. Google offers a variety of options for professional

developers to build and customize LLMs, AI agents, and other AI foundation models, but it has also been rapidly expanding and strengthening low- and no-code capabilities to enable more enterprises with fewer development resources to leverage AI in the Customer Engagement Suite with Google AI.

## HCLSoftware

After a thorough evaluation of HCLSoftware's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

HCLSoftware, which is a segment within HCLTech, was established in 2019 following the acquisition of over 70 products from IBM. HCLSoftware is a provider of enterprise software, including AI and automation, and its core conversational AI product, HCL BigFix AEX, is an agentic AI-based conversational automation platform for employee support and other use cases. It leverages GenAI, NLP, and ML in its conversational AI features, helping organizations automate repetitive tasks and improve workplace productivity with a combination of established and advanced AI technologies. BigFix AEX is specialized for a variety of back-office business functions such as IT, HR, finance, legal, and procurement. It is also used by many customers for front-office business functions such as customer service (including agent assist), sales, and marketing.

HCLSoftware is headquartered in Noida, Uttar Pradesh, India, with 61 additional offices worldwide. It is a fully owned division of HCLTech, a public company listed on the Indian stock market.

## Quick Facts

- **Year founded:** 2019
- **Total number of employees:** 7,000+ (entire company, not broken out for conversational AI offering)
- **Offering name:** HCL BigFix AEX
- **GA date:** October 30, 2016
- **Industry focus:** While designed for universal applicability, HCL BigFix AEX is currently implemented across a diverse set of industries, including healthcare and life sciences, banking and financial services, manufacturing, technology, retail and consumer goods, energy and utilities, hospitality, real estate, and construction.
- **Use case support:** HCL BigFix AEX supports front-office use cases across customer service (customer self-service and agent assist), sales assistance, presales/marketing automation/lead qualification as well as back-office use cases

including knowledge worker assistance, HR assistance, IT help desk/ticketing, and procure to pay.

- **Deployment infrastructure options:** HCL BigFix AEX is primarily deployed as a public SaaS offering, hosted on IBM Cloud. Support for AWS, Azure, and on-premises deployments are on the planned road map. Actions taken via agents support on-prem, public cloud (AWS, Google Cloud, and Azure), and other applications as part of HCLSoftware's tool integration ecosystem.
- **Deployment/management mode options:** HCL BigFix AEX is available as both a cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** The company charges on an annual subscription basis, with tiered pricing based on a combination of number of monthly active users, endpoints, and/or agent assist instances. All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** HCL BigFix AEX supports a wide range of BYOLLM options for customers from a variety of vendors, including OpenAI, Google Vertex AI, IBM watsonx, and Anthropic.
- **AI customizability:** HCL BigFix AEX is designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents. Tools for testing for bias in conversational AI applications and models are on the road map.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt GA features leveraging GenAI and/or agentic AI use a variety of open source models. They include AI-generated synthetic training data, taxonomies, and conversational flows; automatic question answering; dialog summarization; task automation; and GenAI-powered agent assist. Its AEX Agentic AI Studio includes a drag-and-drop interface for creating AI agents and orchestration flows, as well as a conversational virtual agent (CVA), agent assist, autonomous issue resolution/self-healing workflows, and a natural language voice agent.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging advanced AI include proactive service optimization; context extraction from video, voice, and peer insights; intelligent

swarming capabilities for real-time, distributed knowledge sharing; and dynamic routing for complex issues.

## Strengths

- **Strong support model:** Customers found HCLSoftware to be a strong deployment partner, working alongside internal teams to customize or make necessary adjustments for BigFix AEX. They felt that HCLSoftware worked well with them to try to meet capability and infrastructure needs.
- **Depth of offering:** HCLSoftware BigFix AEX includes a number of in-depth technical capabilities for knowledge/data management and analytics. The vendor also provides a number of related products that can integrate closely with BigFix AEX to enhance specific use cases.

## Challenges

- **Decreased focus on front office:** BigFix AEX can be used for a wide variety of front- and back-office use cases, but in recent years, much of the company's focus shifted to enhance back-office/EX use cases. HCLSoftware should ensure that it is not only continuing to provide but also promoting and enhancing capabilities for front office use cases.
- **Highly competitive market:** HCLSoftware is currently competing in a very crowded market space with literally hundreds of vendors, most of whom are innovating at a rapid pace. The vendor may need to increase its R&D efforts to ensure it is remaining competitive, in terms of capabilities and their release pace as customer expectations rise.

## Consider HCLSoftware When

Consider HCLSoftware when you are looking for an enterprise-scale conversational and agentic AI platform that can be used across a wide range of back-office functions with additional specializations for key front-office functions, including customer service, sales, and marketing. HCLSoftware also offers products specialized for commerce and may be especially well suited to organizations focused on this use case.

## IBM

After a thorough evaluation of IBM's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

IBM is a provider of infrastructure, software, and consulting services, including AI, for organizations around the globe. Its core conversational AI product, watsonx Orchestrate, combines conversational AI with automation capabilities to help organizations streamline workflows and enhance productivity. IBM watsonx

Orchestrate's natural language chat interface and catalog of prebuilt tools and agents enable users to quickly build, deploy, and manage AI assistants and agents to orchestrate actions, automate tasks, and guide complex processes. It offers multi-agent orchestration so that employees and customers can quickly complete tasks across agents, assistants and tools from within a single conversational experience.

IBM is a public company. It is headquartered in Armonk, New York, with 841 other offices worldwide.

## Quick Facts

- **Year founded:** 1911
- **Total number of employees:** 282,000 (total company, not broken out for conversational AI offering)
- **Offering name:** IBM watsonx Orchestrate
- **GA date:** January 1, 2022
- **Industry focus:** IBM watsonx Orchestrate focuses on industries that invest heavily in customer care, HR, and sales use cases, such as banking and financial services, telecom, healthcare, computer and information services, and government.
- **Use case support:** IBM watsonx Orchestrate supports a wide variety of front- and back-office use cases, with prebuilt solutions currently available in areas such as HR, sales, procurement, and customer care, with more on the road map.
- **Deployment infrastructure options:** IBM watsonx Orchestrate can be deployed on a public SaaS cloud (IBM or AWS cloud) or on premises.
- **Deployment/management mode options:** IBM watsonx Orchestrate is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** IBM watsonx Orchestrate is charged on an annual subscription basis, with tiers including standard, essentials, and premium (with data isolation). All maintenance costs are incorporated within the base license fee.

## Advanced AI Approach and Features

- **LLM options:** Customers can bring a wide variety of proprietary and open-source models into IBM watsonx Orchestrate through custom extension and watsonx.ai which is further expanded by IBM's partnerships with Meta and Hugging Face.
- **AI customizability:** IBM watsonx Orchestrate is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for

developing, training, testing, deploying, monitoring, and orchestrating LLM- and agentic-based conversational models and applications, including tools for prompt engineering, explainability, managing multi-agent workflows, autobuilding FAQ bots from a knowledge base, and vectorizing unstructured data for RAG use cases. Tools for testing for accuracy and bias are on the road map.

- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt advanced AI features primarily leverage IBM's own Granite foundation models, as well as open source models such as LLaMA and Mistral. They include AI-generated synthetic training data, AI-generated conversation flows, summaries, and question answering, and automated testing. IBM also recently released an agent catalog with prebuilt agents for specific areas such as HR, procurement, and sales; SSO for tool calling; and an agent connect kit for business partners, which allows partners to build, test, certify and publish agents to the catalog via a pro-code or low/no code UX.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features include advanced speech-to-speech models, voice agents, integrations with new channels such as Slack and Microsoft Teams, and document processing tools. To facilitate multi-agent orchestration, IBM will also soon provide users with the ability to connect to remote MCP servers and third-party platforms using A2A.

## Strengths

- **Strong history of AI R&D:** IBM has a robust legacy of AI research and development going back over 50 years, and the company continues to innovate in various fields of AI. Customers IBM watsonx Orchestrate chose the platform for the vendor's reputation in AI and hold a high opinion of its innovation capabilities.
- **Ease of use case expansion:** Customers of IBM watsonx Orchestrate reported high satisfaction with the ease of expanding conversational AI into additional solutions and use cases. They found IBM's client engineering teams to be easy to work with and found its training materials to be clear and helpful.

## Challenges

- **Highly competitive market:** While IBM continues to build on a strong history of AI research and development, the global market has become highly competitive in the past few years, with dozens if not hundreds of companies vying for mind share and wallet share. Meanwhile, the latest wave of AI innovations will level certain playing fields while spurring new entrants to the market.
- **Pricing:** While IBM watsonx Orchestrate is primarily targeted for very large enterprises, prices may be on the higher end for smaller or midsize

organizations. In addition, many customers are expecting to move away from purely seat-based pricing for AI. IBM should consider extending its range of pricing options to meet the shifting customer expectations across a wide range of company sizes.

## Consider IBM When

Consider IBM when you are a very large enterprise looking for a conversational AI platform that can provide multi-agent orchestration across a variety of use cases with prebuilt agents for customer service, HR, sales, and procurement, driven by a vendor with a history of strong R&D in AI. IBM watsonx Orchestrate may be particularly well suited for organizations in banking/financial services, retail/wholesale, telecom, healthcare, or computer and information services.

## Kore.ai

After a thorough evaluation of Kore.ai's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Kore.ai is a provider of enterprise conversational AI software, including tools for building AI agents. Its flagship conversational AI offering, the Kore.ai Agent Platform, provides multi-agent orchestration infrastructure for developing, deploying, and managing agentic applications at scale. The platform enables businesses to create and coordinate AI agents with customizable levels of autonomy, from guided agents to fully autonomous systems, for a variety of business needs. There are three key modules: AI for Work, an enterprise productivity AI framework for knowledge retrieval, task execution, and workflow optimization across business functions; AI for Service, a conversational and service automation framework for handling customer interactions on multiple voice and digital channels (in a synchronous or asynchronous fashion) including intent-driven automation and real-time AI agent augmentation; and AI for Process, a process intelligence and workflow automation suite for optimizing execution paths, managing dynamic exceptions, and enforcing compliance-driven process automation.

Kore.ai is privately owned. It is headquartered in Orlando, Florida, with 10 other offices worldwide.

## Quick Facts

- **Year founded:** 2014
- **Total number of employees:** 1,050
- **Offering name:** Kore.ai Agent Platform
- **GA date:** April 13, 2015

- **Industry focus:** Kore.ai supports a wide variety of verticals including banking/financial services, healthcare and life sciences, pharma, retail, telecom, software, travel and hospitality, utilities, manufacturing, and government. It does not currently support Education use cases.
- **Use case support:** Kore.ai supports a wide range of front- and back-office use cases.
- **Deployment infrastructure options:** Kore.ai supports a variety of cloud-based and on-premises deployment options, including private cloud (customer, vendor, or partner managed) and hybrid cloud. Kore.ai supports cloud deployments on AWS, Azure, and Google Cloud.
- **Deployment/management mode options:** Kore.ai is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** Kore.ai primarily charges for its Agent Platform via annual license per AI agent, plus per agent run usage-based fee.

## Advanced AI Approach and Features

- **LLM options:** Kore.ai supports a variety of Kore.ai proprietary models as well as third-party models in its Model Hub — including from OpenAI, Azure OpenAI, Anthropic, Google, Mistral, Meta, and Hugging Face — and allows customers to fine-tune BYOLLMs and assign them to specific use cases. The platform also allows for runtime switching between models.
- **AI customizability:** The Kore.ai Agent Platform is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents. Kore.ai also offers capabilities for orchestrating multi-agent workflows, either within its own ecosystem or across different vendors and applications.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt GA features leveraging generative and/or agentic AI use Kore.ai's proprietary LLM, XO GPT, by default. They include AI-generated synthetic training data, taxonomies, and conversational flows; automatic question answering; dialog summarization; task automation; and GenAI-powered agent assist. Its AI for Service, AI for Work, and AI for Process modules include prebuilt features for those use cases, such as AI-powered agent assist, integrated search agents, prompt agents, and workflow agents.

- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging advanced AI include Agent Identity Management, the agent-first AI Operating System, Advanced Teachability (reinforcement learning, few-shot instruction, dynamic prompt adaptation, and tool invocation memory), Autonomous Governance 2.0 (including PII redaction, adaptive guardrails, real-time policy enforcement, ethical AI behavior monitoring, and configurable thresholds), and Computer Use and Embodied Agents (unified multimodal capabilities for agents designed for embodied interfaces such as kiosks and AR/VR that blend digital reasoning with physical or visual cues).

## Strengths

- **Customer perception of AI innovation:** Kore.ai's customers are impressed with its technical capabilities and continuous innovation in AI, consistently referring to the vendor as "ahead of the curve." They also feel that Kore.ai continues to focus its AI innovations on its customers' evolving needs and road map requests.
- **Range of deployment options:** While cloud deployments are increasingly popular, many organizations in highly regulated industries still require on-premises deployment, especially for advanced AI and LLMs. In speaking with customers, Kore.ai appears to win some of its deals against competitors based on the strength of its on-premises offerings, including its prepackaged offerings for specific verticals/use cases with strong governance and compliance capabilities.

## Challenges

- **Perception of "no code" tools:** Some customers may have traditionally found Kore.ai to be better for professional developers and not as strong in true "no code" capabilities. However, Kore.ai's latest version of its Agent AI Platform includes various enhancements to low- and no-code development capabilities. The company should ensure that it is promoting not just the capabilities themselves but also the related customer quotes and success stories that show improved ease of use.
- **Promoting technical differentiators to business leaders:** Kore.ai provides a variety of strong AI capabilities, but like many vendors, it needs to ensure that it is clearly communicating the value of new and enhanced technical capabilities in terms of business outcomes. With the rapid pace of AI innovation and increasingly blurred lines between IT and LOB in software decisions, it is especially important to highlight how certain features will benefit specific customers.

## Consider Kore.ai When

Consider Kore.ai when looking for an advanced enterprise-focused conversational AI platform that offers multilingual, multichannel conversational AI with increasingly low-code development for building virtual assistants and customer-facing agents. Kore.ai

may be an especially good choice for companies in highly regulated industries, as it provides a wide range of deployment options and security/compliance certifications.

## Microsoft

After a thorough evaluation of Microsoft's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Microsoft provides software as a service with platform-as-a-service (PaaS) extensibility for building, training, deploying, and managing conversational AI agents across a wide range of channels, as well as a variety of other software for productivity and collaboration. Its core conversational AI product, Microsoft Copilot Studio, is an end-to-end agent platform built on top of Azure and provides a web-based graphical interface for building conversational AI solutions, including professional development capabilities. Through its partnership with OpenAI, Microsoft provides the ability to leverage LLMs and generative AI and to build conversational copilots and agents, while protecting enterprise data and brand reputation with Microsoft's proprietary enterprise guardrails and other security measures. Microsoft's conversational AI products are cloud based and support 27 languages and dialects.

Microsoft is a publicly traded company. It is headquartered in Redwood, Washington, with dozens of additional offices worldwide.

## Quick Facts

- **Year founded:** 1975
- **Total number of employees:** 228,000 (total, not broken out for conversational AI)
- **Offering name:** Microsoft Copilot Studio
- **GA date:** 2023
- **Industry focus:** Manufacturing, retail, professional services, transportation, utilities, telecommunications, wholesale, software, healthcare (including payer, provider, and pharmaceutical), and financial services (including banking, insurance, and investment)
- **Use case support:** Microsoft Copilot Studio supports a wide range of front- and back-office use cases, and native integrations with Microsoft 365 Studio provide in-depth support for back-office use cases such as employee knowledge support, HR copilots, and IT help desk AI agents.
- **Deployment infrastructure options:** Microsoft Copilot Studio is 100% cloud based and can support both multitenancy public cloud and private cloud deployments on Microsoft Azure.

- **Deployment/management mode options:** Microsoft Copilot Studio is available as both a cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** Microsoft Copilot Studio is licensed as a SaaS application via Microsoft 365 Copilot with two primary editions: pay-as-you-go edition (per-message billing) and capacity pack edition (prepaid message bundles). Usage units reflect compute and API calls consumed per interaction.

## Advanced AI Approach and Features

- **LLM options:** Microsoft's close partnership with OpenAI means that Azure OpenAI models are often preferred. However, Microsoft Copilot Studio also supports bring your own model via integration with Azure OpenAI, Custom GPTs, and any compliant OpenAI-compatible LLM endpoint.
- **AI customizability:** Microsoft Copilot Studio is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating LLM- and agentic-based conversational models and applications. However, some advanced features may require custom integration or incur costs via additional related Microsoft Azure products.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt advanced AI features primarily leverage Azure OpenAI Service models (GPT-3.5, GPT-4, and GPT-5) and Microsoft's proprietary embeddings. They include AI-generated taxonomies, lexicons, and conversational flows; automatic question answering; dialog summarization; task automation; AI-powered agent assist; and unstructured data vectorization/embedding creation. Full test automation frameworks and in-depth synthetic data tooling may require partner tools, custom prompts, and/or development.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** These include the use of BYO models for Copilot response generation; action usage analysis for agents; human-in-the-loop informational flows where the agent can automatically request info from a human; and the ability to test and debug agent actions in Copilot Studio.

## Strengths

- **Breadth of technology services:** Between its own IP, its close partnership with OpenAI, and its strong partner network, Microsoft provides a broad set of conversational AI services, including low/no-code tools and the ability to create voice-based assistants and AI agents with custom voices for a wide variety of

industry and use case functions. It offers capabilities in a wide variety of languages, with customers praising translation accuracy, and it provides a strong set of cloud-based, always-on services.

- **Enterprise AI expertise:** Microsoft is a trusted AI partner for many enterprise organizations, and this trust has served them well as businesses proceed with caution in terms of connecting valuable data and IP to LLMs and other foundation models. Microsoft was among the first to offer guardrails for foundation models that help organizations secure their enterprise and customer data, while also enabling them to gain value from this data with advanced AI features. Many customers choose Microsoft for this reason.

## Challenges

- **Highly competitive market:** While Microsoft continues to build on its own reputation and its partnership with OpenAI, the global market has become highly competitive in the past few years, with dozens if not hundreds of companies vying for mind share and wallet share. Meanwhile, the latest wave of AI innovations will level certain playing fields while spurring new entrants to the market. Microsoft should ensure that it is providing clients with in-depth guidance, maturity models, and use case road maps to help guide them into an AI-driven future.
- **Pricing:** While Microsoft offers a wide range and set of conversational AI capabilities, the ongoing cost of the tools and solutions can be a challenging factor for some organizations. Microsoft may have to revisit their pricing, considering increased competition, open source options, the predicted shift toward hybrid pricing models that combine usage- and outcome-based metrics.

## Consider Microsoft When

Consider Microsoft if you are a large enterprise looking for a broad set of cloud-based services for building and deploying conversational AI, including copilots and agents, especially if your organization already uses other Microsoft 365 business applications. Microsoft Copilot Studio is offering organizations a range of capabilities to support advanced AI experimentation and production by providing access to OpenAI models in a safe and controlled environment.

## Omilia

After a thorough evaluation of Omilia's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Omilia is a provider of software services for building and deploying conversational virtual assistants and agents, including no-code options for business users. The Omilia

Cloud Platform (OCP) helps customers improve customer service experiences by automating interactions and empowering human agents. It combines advanced NLU, speech recognition and GenAI and agentic AI technologies to deliver voice and chat automation, real-time agent assistance, and multilayered anti-fraud capabilities. Key modules include Contact Center Security Solutions (authentication and fraud prevention), Omilia Workforce AI (call quality management), Agent Assist (real-time agent support including call transcription, context-aware prompts, and AI-generated response recommendations), Omilia Conversational Insights, and Pathfinder (an integrated knowledge management system for OCP, which ingests information and uses it to bootstrap agentic tools, guardrails, and policies, either fully or semi-autonomously).

Omilia is privately owned and venture funded. It is headquartered in Athens, Greece, with seven other offices worldwide.

## Quick Facts

- **Year founded:** 2002
- **Total number of employees:** 450+
- **Offering name:** Omilia Cloud Platform (OCP)
- **GA date:** 2019
- **Industry focus:** Omilia supports a wide variety of industries, a strong presence in financial services, utilities, quick service restaurants, manufacturing, retail, transportation, telecommunications, automotive, travel and hospitality, and healthcare.
- **Use case support:** Omilia supports a wide range of front- and back-office use cases, though it is not currently optimized for deep research assistance, coding/software development, and procure to pay, with partial support for sales agent assistance.
- **Deployment infrastructure options:** Omilia Cloud Platform is primarily a public cloud SaaS offering (AWS or Azure), but can support a variety of cloud-based and on-premises deployment options, including private cloud (customer, vendor, or partner managed) and hybrid cloud.
- **Deployment/management mode options:** Omilia Cloud Platform is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** Omilia Cloud Platform is primarily charged on a consumption basis per call (for voice) or per session (for chat) and as a SaaS monthly

subscription. All maintenance costs are included, though there is a fixed monthly fee for premium support packages.

## Advanced AI Approach and Features

- **LLM options:** Omilia recommends the use of its own fine-tuned LLMs that have been specialized for specific tasks. However, it also allows customers to BYOLLM under specific conditions, with the ability to select their models of choice and connect with the LLMs served through Bedrock API or SageMaker endpoints for private cloud users.
- **AI customizability:** OCP is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt features use a variety of fine-tuned open source and commercially available models, including Claude Sonnet, Llama, Amazon Nova, Mistral, and GPT 4.x, depending on the task. These features include AI-generated synthetic training data, taxonomies, and conversational flows; automatic question answering; dialog summarization; task automation; and generative AI-powered agent assist.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging advanced AI include autonomous agents for voice channels, speech-to-speech models, automated test creation and Workforce AI evaluations using the Pathfinder design layer, RPA agentic tools, and expanded "BYO agent" capabilities via aspects such as MCP support and the ability to allow external agents to call Omilia's agentic tools.

## Strengths

- **Strong customization capabilities:** Customers appreciate the level of direct control they have over low and no-code customization, guided by Omilia's analytics. In addition, they felt that Omilia's native AI capabilities enable a strong customer focus in innovation, which is especially important at a time when many vendors may be beholden to the latest wave of AI, regardless of how it meets specific customer use cases/industry needs.
- **Strong innovation partner.** Omilia customers continue to laud its high-touch customer support model, the regular dialogue between the vendor and its customers, and the transparency and responsiveness regarding requested road

map items. In addition to its current capabilities, customers cited Omilia as a trusted partner for an enterprisewide AI future.

## Challenges

- **Global market visibility.** Omilia is currently competing in a very crowded and competitive market space with hundreds of vendors from around the world. Omilia will need to continue to increase its marketing and partnering activities to ensure that potential customers are aware of its products and offerings, especially as it continues to expand its global reach.
- **Developer adoption support:** Customers report that OCP is easy to use for nontechnical users but the transition to a different type of environment is sometimes difficult for those with in-depth developer expertise. Omilia should ensure that it is providing broad-based support and alerting professional development resources about major differences to expect.

## Consider Omilia When

Consider Omilia if you are a midsize or large enterprise, particularly in regulated industries, seeking a vendor with modular conversational AI services and strong omnichannel capabilities that is willing to work closely with your organization to ensure a successful deployment and ROI. Omilia is also a good choice for those looking to support and secure conversational AI on voice-based channels, since it has a broad set of voice capabilities including speech recognition and in-depth, multilayered capabilities for anti-fraud detection (such as voice biometrics).

## OneReach.ai

After a thorough evaluation of OneReach.ai's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

OneReach.ai offers a multi-agent orchestration platform and private runtime environment for developing and deploying networks of conversational AI applications. It offers a full spectrum of APIs, low-code tools, and capabilities for building conversational AI applications that can be deployed across a wide array of channels, both digital and voice based. Its product, Generative Studio X (GSX), is a low-code/no-code conversational AI platform for building advanced, integrated customer communications and autonomous AI agents that can be accessed via voice, chat, and visual interfaces. Key features include an integrated communication fabric that integrates channels at the protocol level; a contextual memory system with a suite of advanced data tools such as GraphDBs, Vector DBs, GraphQL, and embeddings; a cognitive orchestration engine that decouples each service, enabling tools to work

concurrently; intelligent digital workers, with autonomous agents that collaborate across channels and languages; and human-in-the-loop capabilities.

OneReach.ai is headquartered in Denver, Colorado, and Berkeley, California, with four additional offices worldwide. It is privately owned and private equity funded.

## Quick Facts

- **Year founded:** 2012
- **Total number of employees:** 200
- **Offering name:** Generative Studio X (GSX)
- **GA date:** 2023
- **Industry focus:** OneReach.ai supports a wide variety of industries, including manufacturing, retail, professional services, transportation, utilities, telecommunications, wholesale, software, healthcare, and financial services.
- **Use case support:** OneReach.ai supports and has deployments in a wide range of front- and back-office use cases.
- **Deployment infrastructure options:** OneReach.ai supports a variety of cloud-based deployments, including public SaaS cloud (e.g., AWS) and private cloud (customer, vendor, or partner managed).
- **Deployment/management mode options:** GSX is available as both a cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** OneReach.ai is charged as an annual subscription license.

## Advanced AI Approach and Features

- **LLM options:** GSX offers BYO and prebuilt support for a large number of LLMs, including those from OpenAI, Anthropic, Google, Meta, Amazon, Cohere, Mistral, and x.ai.
- **AI customizability:** GSX is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into generative AI-based assistants or AI agents.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** Prebuilt GA features leveraging generative and/or agentic AI use a variety of LLMs depending on the task/use case. They include AI-generated synthetic training

data, taxonomies, and conversational flows; automatic question answering; dialog summarization; task automation; and generative AI-powered agent assist. It has a library of over 1,000 prebuilt components including deep integrations with communication channels, data services, AI models, and enterprise systems.

- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features leveraging advanced AI include Agent Swarm for Automated Testing, which allows for testing of conversational applications via AI agents, digital twins, and advanced simulation capabilities.

## Strengths

- **Strength of customer partnership:** Customers have a good perception of OneReach.ai's innovation, viewing it as a company that can provide advanced technology while still being easy for customers to work with directly. Customers feel that it has a strong strategic vision for conversational AI.
- **Breadth of offering:** OneReach.ai offers a broad set of capabilities for building, deploying, managing, and orchestrating various forms of conversational AI, as well as in-depth conversational analytics. Customers appreciate the breadth of the platform's offering as well as its flexibility in terms of integrating with in-house or third-party AI and analytics tools.

## Challenges

- **Global reach:** While OneReach.ai is a global vendor with multilingual support for over 150 languages, it is still quite regionally limited in its sales reach. Currently, OneReach.ai only operates sales in North America, Latin America, and Europe. As OneReach.ai continues to grow and expand, it will become even more important to add sales and support offices in other currently supported, low-saturation regions, in addition to expanding into new regions altogether.
- **Partner ecosystem:** OneReach.ai has a relatively small partner ecosystem. While this is partly intentional based on OneReach.ai's focus on cocreation with partners, it will need to focus on expanding its partner ecosystem more heavily, especially as it attempts to secure more customers outside of its core regions.

## Consider OneReach.ai When

Consider OneReach.ai when you are looking for an enterprise conversational AI platform that offers multilingual, multichannel conversational AI with a low-code development environment, as well as event-driven integration and APIs that will partner closely with you in cocreation and design. OneReach.ai can likely be a good fit for a range of customer sizes because of its close customer support model, while still delivering advanced capabilities such as AI agents and AI-generated summaries and responses.

# Salesforce

After a thorough evaluation of Salesforce's current capabilities and strategy/road map, IDC has positioned the company in the Major Player category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Salesforce is a provider of AI-powered customer relationship management (CRM) and other business software, including conversational AI. Its core conversational AI offering, Agentforce, is Salesforce's agentic platform built on the Salesforce AI platform across its full ecosystem of applications. This includes the core Agentforce platform and Agentforce agents across its product portfolio, such as service agents, sales agents, marketing agents, employee agents, and custom agents. It offers pro-code, low-code, and no-code agent building capabilities for a variety of digital (including Slack and other applications) and voice channels and via API, including the Atlas Reasoning Engine, agent builder, testing center, prompt management, context engineering, observability, and guardrails.

Salesforce is publicly traded. It is headquartered in San Francisco, California, with over 50 additional offices worldwide.

## Quick Facts

- **Year founded:** 1999
- **Total number of employees:** 70,000+
- **Offering name:** Agentforce
- **GA date:** 2018
- **Industry focus:** Agentforce supports a wide variety of industries, with specialized offerings (including over 200 prebuilt industry-specific agent actions) across financial services, healthcare/life sciences, retail/consumer goods, telecommunications, media, energy/utilities, manufacturing, public sector/government, education, transportation, travel/hospitality, and other verticals.
- **Use case support:** Agentforce supports a wide range of front- and back-office use cases, though it is not currently optimized for cybersecurity assistance.
- **Deployment infrastructure options:** Agentforce can be deployed on Salesforce's own multitenant cloud system and on various public cloud providers such as AWS and Google Cloud.
- **Deployment/management mode options:** Agentforce is available as a cloud-based software product, including development tools that can be used by customers.
- **Pricing model:** Customers can purchase Agentforce through either a seat-based license (Agentforce 1 Edition, per-use add-ons with Agentforce for sales, service,

and industry clouds) or a consumption model (Flex Credits, available in packs of 100,000 credits). Employees with a per-user Agentforce add-on set have unmetered usage of employee agent types. Salesforce also recently began offering precommit plans and pay-as-you-go pricing. All maintenance costs are incorporated in the base license fee.

## Advanced AI Approach and Features

- **LLM options:** Salesforce supports a wide range of BYOLLMs through Einstein Studio and the LLM Open Connector: OpenAI (GPT-4 and GPT-3.5), Azure OpenAI, Google Gemini Pro, Anthropic Claude (via Bedrock), Cohere, Mistral, Meta LLaMA, Amazon Titan (via Bedrock), and any API-compatible model (e.g., IBM Granite, DBRX, and AI21 Jamba). Model interactions are secured through the Trust Layer, and Agentforce can host Anthropic models via Amazon Bedrock within the Salesforce Trust Boundary (Salesforce's VPC) for customers in high-compliance industries. Customers can also bring any model with a standard RESTful endpoint.
- **AI customizability:** Agentforce is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents. Tools for bias testing are also on the road map.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** These features use a variety of LLMs (e.g., Open AI, Azure Open AI, Anthropic, Gemini, and Salesforce models such as xgen). They include AI-generated conversational flows; automatic question answering; dialog summarization; task automation; and GenAI-powered agent assist. Agentforce also offers customizable, out-of-the-box agent templates for specific customer needs, including Agentforce Service Agent, Agentforce Sales Agent, Agentforce Sales Coach, Agentforce Shopping Assistant, Agentforce Employee Agent, Agentforce for HR Agent, and many more industry-specific variations of these agents.
- **Features for GenAI and/or agentic AI (near-term road map):** Near-term road map features include multi-agent orchestration with other vendors' agents via support for A2A and MCP. Additional items include a new Agentforce Studio with enhanced observability tooling, a simplified setup of unstructured data pipelines, a spreadsheet-style tool for running AI workflows in batch, and controls over deterministic logic that enable certain workflows to always run, thus enabling adaptive reasoning.

## Strengths

- **Strong CRM integration:** One of Agentforce's strengths is its native connection to the Salesforce CRM platform and Slack, enabling Slack to operate as the interface for working with Salesforce data and agents. Combined with its low/no-code development tools and 200+ prebuilt industry-specific agent actions, this allows customers to quickly get up and running with conversational AI applications, including AI agents that are already pre-integrated with their existing CRM system. External data can also be integrated without having to create data copies, via Salesforce Data Cloud's Zero Copy Integration.
- **Ease of implementation:** Salesforce's customers were happy with the ease of implementing and integrating Agentforce. They find it to be an intuitive platform with logical, easy-to-understand documentation. For customers with more complex deployments, Salesforce is doubling down on Forward Deployed Engineers, which provide professional embedded engineering resources for customers.

## Challenges

- **Highly competitive market:** While Salesforce continues to build on a strong customer base and market recognition, the global market has become highly competitive in the past few years, with dozens if not hundreds of companies vying for mind share and wallet share. Meanwhile, the latest wave of AI innovations are leveling certain playing fields while spurring new entrants to the market. Salesforce should ensure that it is providing in-depth thought leadership and support to help its customers succeed with conversational AI.
- **Timing transparency:** As Salesforce is rapidly expanding its native Agentforce capabilities to support multi-agent AI architectures, it is especially important to be clear with customers about which features are fully business ready, which are in beta, which will require more time and training, and so forth. In the current climate, Salesforce and other vendors need to ensure that their sales, marketing, and support teams are aligned with their internal product development teams in terms of communicating realistically with customers about feature readiness.

## Consider Salesforce When

Consider Salesforce when you are looking for not only conversational AI capabilities but also ways to utilize AI (including AI agents) across your whole CRM stack, especially if you are already a Salesforce or Slack customer. Salesforce has been rapidly expanding its AI capabilities to support a variety of front- and back-office use cases.

## SoundHound AI

After a thorough evaluation of SoundHound AI's current capabilities and strategy/road map, IDC has positioned the company in the Leaders category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

SoundHound AI is a provider of voice, conversational, and generative AI solutions as both standalone and part of its AI-driven automation platform. Its key conversational AI product, Amelia, was recently acquired. It enables the building, testing, and deployment of conversational AI agents to a variety of channels out of the box. Conversational workflows are powered by GenAI and configurable by business analysts in a low-code natural language process design. Key features include a multi-agent architecture; the ability to handle multi-intent conversations with full-context maintenance; real-time knowledge integration through RAG-based retrieval; a proprietary agentic framework, which combines rule-based automation with agentic workflows in real-time, with human controls; and a proprietary multimodal, multilingual automatic speech recognition (ASR) foundation, Polaris, backed by 200+ patents.

SoundHound AI is publicly held. It is headquartered in Santa Clara, California, with 20+ other operating locations worldwide.

### Quick Facts

- **Year founded:** 2005
- **Total number of employees:** 1,000+
- **Offering name:** Amelia
- **GA date:** 2015
- **Industry focus:** Amelia supports a wide range of industries, including banking and financial services, healthcare, manufacturing, retail, professional services, transportation, utilities, telecommunications, wholesale, hospitality, and software.
- **Use case support:** Amelia supports a strong variety of front- and back-office use cases, with coding/software development assistance on the road map.
- **Deployment infrastructure options:** Amelia supports both on-premises and cloud-based deployment options, including private (customer managed) and hybrid cloud. The public clouds it supports include Google Cloud, AWS, Azure, and Oracle.
- **Deployment/management mode options:** Amelia is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).

- **Pricing model:** The Amelia platform uses a flexible, modular licensing model designed to align with the specific service levels, functionality, and requirements of each client. Options include core license fees (annual or monthly) with tiered platform fees determined by various factors, usage-based pricing (number of interactions or conversations), seat-based pricing (number of individually assigned users), and outcomes-based pricing (usage charge based on successful outcomes). Additional charges may be incurred for API and integration (for high-volume API requests, custom integrations, and specialized workflows), modular add-ons (e.g., advanced analytics, AI training, model fine-tuning, and premium support tiers), and professional services (scoped separately and billed on a time-and-materials or fixed-fee basis).

## Advanced AI Approach and Features

- **LLM options:** Customers can choose to use foundational models offered by Amelia as part of the platform. In addition, Amelia allows clients to bring their own LLM licenses and integrate them into the solution, supporting any LLM that implements the OpenAI API specification.
- **AI customizability:** Amelia is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to natural language prompt-based agent building for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** These include AI-generated synthetic training data, taxonomies, and conversational flows; automatic question answering; dialog summarization; task automation; and GenAI-powered agent assist. Amelia also offers capabilities for orchestrating multi-agent workflows, either within its own ecosystem or across different vendors and applications.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** These features include an agentic workflow designer, dynamic turn taking (DTT) for voice channels, and support for MCP and A2A.

## Strengths

- **Quality of voice channel support:** SoundHound Amelia customers report strong satisfaction with the quality of Amelia's voice AI, including AI-generated voice responses. These capabilities should be further enhanced by

SoundHound's native voice/speech capabilities as it further integrates its technology with the recently acquired Amelia.

- **Advanced AI:** SoundHound AI has robust conversational AI capabilities, including strong NLU and LLM intent recognition, voice responses, context switching, and conversational memory. Its customers highly praised the product's ability to handle complex requests, including those with multiple intents.

## Challenges

- **Ease/cost of use:** While one of Amelia's strengths is the platform's sophisticated technology, it may also require a certain level of technical sophistication to set up, even given its low/no-code tools. This may be prohibitive for some organizations not willing to pay for the cost of professional services or build out their own expertise.
- **Flexibility for a range of AI maturity:** SoundHound Amelia offers a range of advanced AI features and is rapidly innovating and releasing new and enhanced ones. While this is a benefit for those that can take advantage, SoundHound should ensure that it is providing support and flexibility for a range of AI maturity levels and feature readiness.

## Consider SoundHound AI When

Consider SoundHound AI's Amelia when you are a large enterprise looking for an installable or fully managed conversational AI platform that can generate dynamic, "humanlike" responses and strong support for voice channels. Amelia's advanced conversational capabilities and on-the-fly learning are well established and pair well with newer and enhanced GenAI and agentic AI capabilities.

## Uniphore

After a thorough evaluation of Uniphore's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Uniphore is a provider of AI-powered conversational automation technology for improving customer and employee interactions. Its core conversational AI product, Uniphore Business AI Cloud, is a composable platform that unifies data, knowledge, models, and agents to enable enterprises to securely leverage their proprietary data, orchestrate AI models, and deploy AI agents across business functions and workflows. The platform offers turnkey applications for conversational AI, self-service, real-time agent guidance, and conversational intelligence, in addition to data agents for handling diverse data types and structures in its knowledge layer. Uniphore has a history of progressing its R&D via organic growth and acquisition, as its most recent acquisitions

of ActionIQ and InfoWorks (December 2024) strengthened its capabilities in connecting to, prepping, and managing data for AI.

Uniphore is privately owned and venture funded. It is headquartered in Palo Alto, California, with six other offices worldwide.

## Quick Facts

- **Year founded:** 2008
- **Total number of employees:** 749+
- **Offering name:** Uniphore Business AI Suite
- **GA date:** June 2023
- **Industry focus:** Uniphore Business AI Suite supports a wide range of industries, including banking/financial services, retail/wholesale, energy/utilities, healthcare and life sciences, education, technology, telecommunications and media, and travel/transportation/hospitality.
- **Use case support:** Uniphore Business AI Suite supports a wide variety of both front- and back-office use cases. Support for retail product recommendations is on the road map.
- **Deployment infrastructure options:** Uniphore Business AI Suite can be deployed on premises, as a public cloud SaaS offering (primarily AWS, plus Genesys Cloud integration), or as a hybrid cloud (mix of cloud and on premises).
- **Deployment/management mode options:** Uniphore AI Business Suite is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** Uniphore sells its Business AI Suite licenses on a named-agent-per-month basis through annual contracts with a prepaid, committed usage model. The licenses include standard global 24 x 7 support. Uniphore charges an annual platform fee a la carte depending on the layer the customer would like access to, or the customer may choose to pay for access to the entire platform on a consumption basis.

## Advanced AI Approach and Features

- **LLM options:** Customers can integrate and orchestrate their preferred LLMs through Uniphore's model-agnostic architecture. Currently supported BYOLLMs include OpenAI models (GPT series), Meta LLaMA, Mistral, and select LLMs from hyperscaler providers (including Microsoft Azure and Google Cloud offerings). Additional model support is part of its road map, with new models being added on a regular basis.

- **AI customizability:** Uniphore Business AI Suite is designed to be used by a variety of enterprise users, from pro-code UIs for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for explainability, prompt engineering, multi-agent orchestration, and autobuilding FAQ bots from a knowledge base. Tools for testing for accuracy and bias, as well as for converting previous generations of conversational AI applications into GenAI-based assistants or AI agents, are on the road map.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** For prebuilt GenAI features within the solution, Uniphore leverages Meta LLaMA models along with Uniphore's own fine-tuned, industry-specific SLMs.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** These include AI agent context memory for Uniphore's self-service agent, pre-call intelligence in its real-time guidance agent, continuous accuracy measurement in its conversational insights agent, and Ask Your Data for natural language data queries.

## Strengths

- **Depth of product offering:** Uniphore's own innovations as well as its strategic acquisitions have resulted in an in-depth and robust product that includes omni-channel multimodal AI, GenAI and agentic AI features, domain-specific offerings, and data capture and management capabilities. These aspects may be especially important for organizations that need strong native data management and control capabilities for AI.
- **Support for small language models:** Uniphore provides strong support for SLMs. Its BYO model framework includes guardrails for SLMs and is fine-tuned for specific industries and business functions, while its Knowledge Layer provides advanced capabilities such as retrieval-augmented generation, data retrieval, embedding generation, synthetic data creation, and fine-tuning — all designed to support the development of small language models.

## Challenges

- **Wide range of customer readiness:** Uniphore's broad customer base means that it is serving organizations across a wide range of AI readiness. Uniphore should ensure it is providing robust tooling to improve ease of use and in-depth use case and feature guidance to help lead a wider variety of organizations into advanced AI usage.
- **Global market visibility:** Uniphore is currently competing in a very crowded and competitive market space with hundreds of vendors from around the world.

While Uniphore has been making a name for itself, the vendor will need to continue to increase its marketing and thought leadership activities to ensure that potential customers are aware of its products and offerings, especially as it continues to rapidly expand its capabilities via innovation and acquisition.

## Consider Uniphore When

Consider Uniphore when you are looking for an innovative conversational AI vendor that offers strong relationship support and in-depth capabilities for speech data capture, in addition to connecting to, prepping, and managing enterprise and customer data for AI. Uniphore may be an especially good choice for large enterprises.

## Verint

After a thorough evaluation of Verint's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Verint is a provider of enterprise customer engagement and workforce management software, including conversational AI. Its core conversational AI product, Verint IVA Studio, represents over a decade of experience delivering voice and digital self-service outcomes to customers in a wide array of industries and geographies. Key elements include the IVA Answer Bot, Smart Transfer Bot, Intent Discovery Bot, Verint Data Insights Bot, Verint Agent Virtual Assistant, and Verint Callback. Additional portfolio elements such as Verint Channel Automation, Verint Open CCaaS, and Verint Voice provide related and integrated functionality. Verint also recently acquired Cogito, a provider of conversational insights and emotional analysis software.

Verint is publicly traded. It is headquartered in Melville, New York, with 15 other offices worldwide.

## Quick Facts

- **Year founded:** 1994
- **Total number of employees:** 4,000+
- **Offering name:** Verint IVA Studio
- **GA date:** 2023
- **Industry focus:** Verint supports a wide variety of industries, with a strong presence in transportation, telecommunications, healthcare, financial services, education, and the public sector.
- **Use case support:** Verint supports a wide range of front- and back-office use cases.

- **Deployment infrastructure options:** Verint's conversational AI offerings can be deployed either in the cloud (Azure, AWS, Google Cloud, or Verint's own cloud) or on premises.
- **Deployment/management mode options:** Verint is available as both an installable or cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** Verint IVA Studio is charged as an annual licensing fee, per interaction. All maintenance costs are incorporated within the license fee.

## Advanced AI Approach and Features

- **LLM options:** Verint IVA Studio provides customers access to Verint Da Vinci AI models and fully supports customers who would like to bring their own models.
- **AI customizability:** Verint IVA Studio is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** These include AI-generated conversational flows, automatic question answering, dialog summarization, task automation, GenAI-powered agent assist, and capabilities for orchestrating multi-agent workflows.
- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map features include AI-generated synthetic training data and AI-generated taxonomies/ontologies.

## Strengths

- **Pretrained capabilities:** Verint's pretrained models have historically been one of this vendor's strengths, and this remains true, particularly as Verint makes use of the latest LLMs and other foundation models. In addition to the pretrained models provided as quick start options, Verint offers agentic AI capabilities that are also intended to be easy for users to leverage to create powerful conversational and agentic applications.
- **Data management and analytics:** Verint provides strong related features for customer support use cases, including conversational analytics and reporting capabilities that provide insights on customer experiences and agent performance. Verint also provides an integrated knowledge base, Verint

Knowledge Management, which can help support conversational self-service and agent assist features with accurate, relevant knowledge.

## Challenges

- **R&D resourcing:** While Verint is currently providing strong evidence of innovation in the form of patents and new features, its R&D resourcing may put it at a disadvantage in the future if not increased. The pace of innovation has vastly accelerated across the conversational AI market, with an accompanying surge of investment in R&D.
- **Thought leadership:** The global market has become highly competitive in the past few years, with dozens if not hundreds of companies vying for mind share and wallet share, and customers need help keeping pace. Verint will need to expand its thought leadership, including providing use case and ROI guidance to customers, to differentiate itself and help guide a variety of customers into an AI-driven future.

## Consider Verint When

Consider Verint when you are a large enterprise — particularly in financial services, retail, transportation, or telco — seeking a conversational AI platform with strong analytics, reporting capabilities, and pretrained models, including prebuilt agents. Verint can also be a good choice for organizations that want to expand to use cases in other business areas, such as HR assistance or IT help desk self-service.

## Yellow.ai

After a thorough evaluation of Yellow.ai's current capabilities and strategy/road map, IDC has positioned the company in the Major Players category of this 2025 IDC MarketScape for worldwide general-purpose conversational AI platforms.

Yellow.ai is a provider of AI-powered software for customer service automation and employee engagement. Its core product offering, the Yellow.ai platform, leverages NLP and agentic AI to help enterprises reduce response times, cut support costs, increase revenue potential, and enhance customer satisfaction by delivering hyper-personalized, omni-channel, and contextual conversations at scale. Key components include GenAI-enabled user assistants, contact-center virtual assistants, employee-facing virtual assistants, and an omni-channel CX automation platform across 35+ channels, in addition to an agentic AI suite. Aspects such as AI Builder, Knowledge Management, Analyze, Inbox, Analytics, and Engage support scalable, omni-channel automation and enhanced collaboration between AI and human agents.

Yellow.ai is privately owned and venture funded. It is headquartered in San Mateo, California, with six other offices worldwide.

## Quick Facts

- **Year founded:** 2016
- **Total number of employees:** ~450
- **Offering name:** Yellow.ai
- **GA date:** January 2018
- **Industry focus:** Yellow.ai supports a wide variety of industries and offers prebuilt virtual agents for sectors such as retail, healthcare, insurance, telecom, travel, manufacturing, logistics, automotive, banking, and HR.
- **Use case support:** Yellow.ai supports a wide range of front- and back-office use cases.
- **Deployment infrastructure options:** Yellow.ai is primarily deployed as a public cloud SaaS offering on AWS.
- **Deployment/management mode options:** Yellow.ai is available as both a cloud-based software product (including development tools that can be used by customers) and a fully managed service (including development and deployment services).
- **Pricing model:** Yellow.ai offers multiple product editions, typically including the Starter, Professional, and Enterprise versions, each tailored to different business sizes and requirements. The platform is typically charged for by number of active users, conversations, or messages processed per month, depending on the selected plan and use case.

## Advanced AI Approach and Features

- **LLM options:** Yellow.ai customers can use the vendor's foundation models or BYOLLM.
- **AI customizability:** Yellow.ai is designed to be used by a variety of enterprise users, from pro-code capabilities for professional developers to no-code visual GUIs for business users. It offers a wide set of capabilities for developing, training, testing, deploying, monitoring, and orchestrating NLP-, LLM-, and agentic-based conversational models, workflows, and applications, including tools for prompt engineering, explainability, and converting previous generations of conversational AI into GenAI-based assistants or AI agents.
- **Prebuilt features leveraging GenAI and/or agentic AI (currently GA):** These include AI-generated synthetic training data, taxonomies, and conversational flows; automatic question answering; automated testing; dialog summarization; task automation; and GenAI-powered agent assist. Yellow.ai also supports building "super agents," which serve as the central controllers in a multi-agent AI

system to execute complex workflows, and the ability to rapidly spin up agents for specific use cases with custom, humanlike voices through VoiceX.

- **Prebuilt features leveraging GenAI and/or agentic AI (near-term road map):** Near-term road map items include enhanced agentic copilots with increased autonomy for issue detection and remediation, multimodal advances including voice and video inputs, AI-AI collaboration, and a MCP marketplace that will provide a plug-and-play library of secure, enterprise-grade data connectors for faster agent setup.

## Strengths

- **Strong research and development:** Yellow.ai has researched and developed several methods using generative and agentic AI technology to improve the development, deployment, and accuracy of conversational AI solutions. Yellow.ai continues to develop and introduce new capabilities, including GenAI-enhanced voice conversations and AI agents.
- **Strong customer partnership:** Customers continue to feel that Yellow.ai provides a strong support network for its customers, partnering closely with them on deployment and development as well as road map requests. Customers report that Yellow.ai works to understand and support their business in being successful with conversational AI, providing insightful blogs, tips, and guides.

## Challenges

- **Highly competitive global market:** As it continues to grow and compete within a broader global market, Yellow.ai should consider further increasing its thought leadership marketing efforts to ensure that prospective customers are aware of its differentiating features. Over the past few years, many vendors have entered the market and/or have increased their R&D capabilities and marketing in these areas. The rise of generative and agentic AI has raised the stakes for all current conversational AI vendors.
- **Staffing and growth for local support:** While Yellow.ai is a global vendor with headquarters in the United States, it is still growing its presence in North America and Europe. Yellow.ai should consider adding more local support to ensure alignment with customers in the variety of time zones in which Yellow.ai is deployed. Yellow.ai has a high-touch customer support model, so continuing to staff for both overall growth and local support to maintain this model while keeping prices down may be a challenge in the future.

## Consider Yellow.ai When

Consider Yellow.ai when you are looking for a conversational AI platform that offers multilingual, multichannel conversational AI with a low-code development environment

as well as APIs for building AI assistants and agents. Yellow.ai's strong customer support and its focus on continued platform development can make it a good choice for enterprises that prefer or require a strong partnership with their conversational AI platform vendor.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

# Market Definition

IDC defines the conversational artificial intelligence (AI) market as products/services that are used to develop conversational AI solutions, such as chatbots, digital assistants, or voice assistants, which users can talk to. They use data, automatic speech recognition, text to speech, machine learning, natural language processing and natural language generation to carry on conversations and perform actions that imitate human interactions, recognizing speech and text inputs across various languages. Increasingly, conversational AI solutions leverage advanced and emerging AI technologies such as generative AI and agentic AI to expand conversational and task automation capabilities.

## Strategies and Capabilities Criteria

Tables 1 and 2 provide key strategy and capability measures, respectively, for success related to general-purpose conversational AI platform vendors. These criteria were used by IDC to evaluate vendors in this IDC MarketScape. They were developed and weighted based on market needs, independent IDC research, and conversations with technology buyer organizations about the factors most important to them in selecting and using general-purpose conversational AI platforms.

TABLE 1

Key Strategy Measures for Success: Worldwide General-Purpose Conversational AI Platforms

| Strategies Criteria                | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Weight (%) |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Functionality or offering strategy | There is a road map based on customer and partner input that covers the evolving needs of the market.                                                                                                                                                                                                                                                                                                                                                                            | 18.0       |
| R&D pace/productivity              | The analyst assesses the following: <ul style="list-style-type: none"><li>▪ The vendor's overall R&amp;D strategy, in addition to acquisitions, patents, and rate of introducing new innovations into product offerings</li><li>▪ Percentage of financial and employee resources dedicated to R&amp;D</li><li>▪ The vendor's thought leadership development, including events, publications, and tools/guidance for developing key metrics and measuring the ROI of AI</li></ul> | 42.0       |
| Innovation                         | The customer assesses the vendor's overall innovation level and the alignment of vendor innovation with customer needs.                                                                                                                                                                                                                                                                                                                                                          | 20.0       |
| Delivery                           | The analyst assesses the following:                                                                                                                                                                                                                                                                                                                                                                                                                                              | 9.0        |

**TABLE 1**

**Key Strategy Measures for Success: Worldwide General-Purpose Conversational AI Platforms**

| Strategies Criteria | Definition                                                                                                                                                                                                                                                                                                                                 | Weight (%) |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
|                     | <ul style="list-style-type: none"> <li>▪ The number and variety of delivery center locations and whether these are partner provided</li> <li>▪ The number and variety of datacenter locations and whether these are partner provided</li> <li>▪ The vendor's ability to meet customer needs around cloud based delivery models.</li> </ul> |            |
| Growth              | The analyst assesses the vendor's customer growth strategy, including regional sales/marketing availability, sales/marketing growth, and demonstrated customer growth.                                                                                                                                                                     | 8.0        |
| Financial/funding   | Consistent growth, or increase in market share is considered.                                                                                                                                                                                                                                                                              | 3.0        |
| Total               |                                                                                                                                                                                                                                                                                                                                            | 100.0      |

Source: IDC, 2025

**TABLE 2**

**Key Capability Measures for Success: Worldwide General-Purpose Conversational AI Platforms**

| Capabilities Criteria     | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Weight (%) |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Functionality or offering | <p>The vendor demonstrates its ability to do the following:</p> <ul style="list-style-type: none"> <li>▪ Offer specific capabilities listed, including support for different interaction channels, developer and low-code capabilities for traditional conversational AI, and basic sentiment/emotion analysis capabilities.</li> <li>▪ Support a wide variety of front- and back-office use cases.</li> <li>▪ Support a wide range of industries via prebuilt features, fine-tuned LLMs, ontologies, conversational and agent templates, security/compliance certifications, and other aspects.</li> </ul> | 26.0       |

**TABLE 2****Key Capability Measures for Success: Worldwide General-Purpose Conversational AI Platforms**

| Capabilities Criteria                          | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Weight (%) |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Customer satisfaction                          | <p>The analyst assesses the following:</p> <ul style="list-style-type: none"><li>▪ The vendor's reported customer success and retention metrics as well as customers' own reports highlighting aspects of customer satisfaction, which include the implementation experience, technical integrations and customization, development and deployment experience, customer support, time to deployment, and level of ROI achieved.</li><li>▪ Customer perception of quality and timeliness of service delivery, as reported through customer surveys and interviews</li><li>▪ The type and range of customer support, knowledge resources, and multilingual support, and customer feedback about ongoing relationship support</li></ul> | 49.0       |
| Customer service offering                      | The analyst assesses the type and range of professional support, the basic requirements for professional support, and the frequency, timing, support, and flexibility of road map updates and upgrade implementations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 5.0        |
| Range of services                              | The analyst assesses the vendor's support for advanced AI such as LLMs and agentic AI, including features such as foundation model support, RAG and other methods of accuracy improvement, model fine-tuning and advanced AI development capabilities, and prebuilt/out-of-the-box features based on advanced AI. The vendor's ability to guide customers through AI maturity models, for example, is also considered.                                                                                                                                                                                                                                                                                                               | 10.0       |
| Pricing model or structure of product/offering | The analyst assesses the vendor's range and flexibility of pricing and contract models in line with customer input and current industry standards.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 5.0        |
| Portfolio benefits                             | The analyst assesses the vendor partnership ecosystem, using both publicly available information and the information provided by vendors and customers.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 5.0        |
| Total                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 100.0      |

Source: IDC, 2025

### Related Research

- *Leveraging Advanced AI: A Framework for Conversational AI Use Case Selection* (IDC #US50013823, September 2025)
- *NiCE Announces Agreement to Acquire Cognigy, Advancing Conversational AI and Analytics Capabilities for CX* (IDC #lcUS53725225, August 2025)
- *IDC Market Glance: Agentic AI Applications, Tools, and Technologies, 2Q25* (IDC #US53565925, June 2025)
- *Agentic AI Disruption in Enterprise Intelligence* (IDC #US53549125, June 2025)
- *Agentic AI Impact on Enterprises: From the Tech Stack to the Future of Work and Services* (IDC #US53272524, April 2025)

### Synopsis

This IDC study represents a vendor assessment of the general-purpose conversational AI platforms market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that provide guidance about general-purpose conversational AI platform vendors and their offerings. This IDC MarketScape covers a variety of vendors participating in the market and focused on offering platforms that can provide conversational AI solutions, including AI assistants, copilots, and agents, for a wide variety of use cases and communication channels. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another, and it highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"As AI innovations rapidly advance the capabilities and expectations for CAI platforms, technology and business leaders must keep a close eye on this shifting landscape, work to cut through the hype, and determine which AI use cases and features are most important for their organization," said Hayley Sutherland, research manager, Conversational AI at IDC. "They must do this with an eye to reducing IT costs, while also preparing the business and its technology for greater use of AI. This IDC MarketScape evaluation of general-purpose conversational AI platforms should help such leaders gain valuable insight into what's available in the market today, as well as help inform longer-term strategies."

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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