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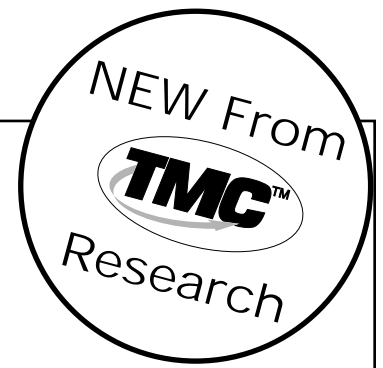
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Groundbreaking Market Research.

An absolute must-have report for:

- Teleservices agencies
- Outsourcing professionals
- Private Equity Investors
- Contact center and CRM hardware and software vendors
- Call centers of all sizes
- M&A Specialists
- Investment Banks

- > **Before you select an agency.**
- > **Before you hire another agent.**
- > **Before you purchase any technology.**
- > **Before you acquire a teleservices agency.**

You MUST read this definitive report from the world's most respected source.

The Worldwide Teleservices Outsourcing Market: Analysis & Forecast, 2002-2003

The Teleservices Agency Market:

- Revenue and Growth Forecasts
- B-to-B vs. B-to-C Comparisons
- Analysis of Pricing Models
- Profiles and comparisons of Inbound, Outbound, and Multimedia Agencies
- Equipment Needs and Plans to Purchase by Agency
- International Outsourcing Trends

Teleservices Agency Clients and Prospective Clients:

- Detailed Plans to Buy Outsourced Services
- Criteria Used in Service Agency Selection — Including Objections

Call Center Technologies:

- Detailed Service Agency Technology Installed Bases
- Teleservices Agency Purchasing Forecasts for Every Important Technology

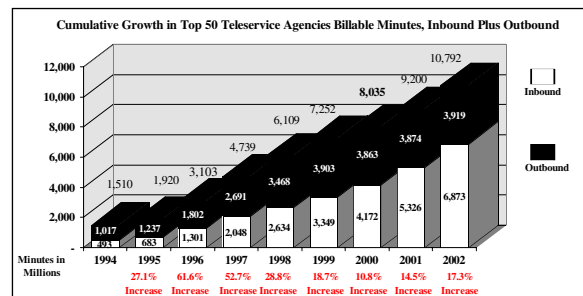
Why Focus on Teleservices Agencies?

- Top 100 Global Teleservices Agencies Use More Than 26 Billion Billable Minutes Every Year
- Teleservices Agencies Represent The Largest and Fastest-Growing Segment of the Call Center Industry, Averaging Uninterrupted Growth of 30% Per Year.

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The Worldwide Teleservices Outsourcing Market: Analysis & Forecast, 2002-2003

According to TMC Research and *Customer Inter@ction Solutions*[®] magazine, the market for outsourced teleservices and inbound and outbound call centers is growing at double-digit rates — and has been for the past 15 years. This is not only good news for the agencies themselves, but also for the telecom and CRM hardware and software vendors who've watched their other target markets experience serious declines since 2000.



Outsourced teleservices agencies have enjoyed double-digit growth for several reasons:

- Lower investment costs
- Offer cost-effective alternative to in-house call center
- Their focus and experience in CRM
- Eliminate expense of training, hiring in-house agents

This report provides critical research for:

1. Teleservices agencies.
2. Contact centers of all sizes who are considering — or are currently — outsourcing.
3. Contact centers of all sizes who are contemplating new hardware and software purchases.
4. Equipment manufacturers and software publishers targeting the contact center market.

For Teleservices Agencies, the report provides:

- Detailed plans to purchase and budgets for outsourcing services of large and small contact centers.
- Comparative pricing models for B-to-B, B-to-C, inbound and outbound services.
- Survey results showing the most crucial technologies and services you need to offer.
- Comprehensive profile of the teleservices outsourcing buyer — size of company, size of outsourcing budget, most prevalent vertical markets, size of in-house call center, services required (sales, service, lead generation, etc.), desired pricing model and more.
- Profiles of leading teleservices agencies.

For Contact Centers, and purchasers of outsourced services, the report provides:

- Detailed profiles of teleservices agencies, including:
 - Technological capabilities
 - Areas of specialty (B-to-B, B-to-C, inbound, outbound, sales, service, lead generation, etc.)
 - Pricing structures
 - Size
 - Growth rate
 - Years in business
 - Agent profile
 - Recognition (awards, certifications)

For Equipment Manufacturers and Software Publishers, the report provides:

- Detailed survey results showing you the technologies and services most sought after by agencies
- Budgets and plans to purchase for all contact center technologies by individual agencies.

It is simply not practical to think that you can create a sound strategic plan — one that both positions your company to be profitable AND improves your chances of attracting necessary investment and/or M&A interest — using only your own company history and projections. Whether you are a teleservices agency, an equipment or software vendor, or a high-volume teleservices customer, you need the independent survey results and forecasts contained in *The Worldwide Teleservices Outsourcing Market: Analysis & Forecast, 2002-2003*.

**Order your copy today and save \$1,000 by taking advantage of
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The Worldwide Teleservices Outsourcing Market: Analysis & Forecast, 2002-2003

Why Purchase Now?

- Save \$1,000 with our pre-publication discount.
- Gain access to TMC Research anytime to answer your questions about the report.

Benefits to Enterprises

Get all the crucial data you need to select the right agency for your needs.

Determine if outsourcing is the best route for your company or if you should build your own in-house call center.

Get detailed profiles of hundreds of service agencies.

Benefits to Teleservices Agencies

Determine where your customers plan to spend their teleservices budgets now and in the future.

U.S. teleservices agencies: find out the impact global competition will have on your business. Get the information you need to devise a strategy to combat the threat.

International agencies, find out the capabilities and services most sought after by enterprises.

Benefits to Equipment and Software Vendors

Use the profiles to determine which teleservices agencies will be buying hardware and software — and when.

Be certain you know what equipment and software are most sought-after now and will be in the coming years.

Discover new international markets for your products.

Who Should Purchase This Report?

Enterprises:

Any enterprise planning to spend more than \$10,000 this year on outsourced teleservices, including:

Amazon.com
American Airlines
American Express
Boeing
ChevronTexaco
Dell Computer
Delta Air Lines
DuPont
Exxon Mobile
Ford Motor Company
General Electric
General Motors

Home Depot
Honeywell
IBM
JP Morgan Chase
Lands' End
LL Bean
Microsoft
Morgan Stanley
Oracle
Philip Morris
Phillips Petroleum
SBC Communications
Sears, Roebuck
Target
Verizon
Wachovia
Wal-Mart

Teleservices Agencies: *All Top 50 and MVP Quality Award Winners, plus any agency expecting to grow their business this year, including:*

Abacus Communications
Access Direct Telemarketing
Aegis Communications
Americall Corp.
APAC Customer Services
Call_Solutions
ClientLogic
Communications & Commerce
The Connection
Convergys Corp.
CyberRep, Inc.
DialAmerica Mktg.

EDS
Excell Agent Services
FutureCall
GC Services
ICT Group
InfoCision Management Corp.
Millennium Teleservices
Precision Response Corp.
Reese Brothers
RMH Teleservices
SITEL Corp.
Stream International
TCIM Services
Teleperformance
TeleTech Holdings
Telvista
West Corp.

Technology Providers: *Any company selling equipment to teleservice agencies, including:*

Aculab	Carlo Gavazzi	eGain	IEX	NEC America	Siebel Systems
Apropos	Cisco Systems	eOn	Intecom	Oracle	Siemens
Artisoft	Click2Ring	e-talk	InterVoice Brite	PeopleSoft	Simtrex
Aspect	Concerto	e.Piphany	Interactive	Pivotal	Sun
Avaya	Crystal	Genesys	Intelligence	Rockwell	SYMON
Blue Pumpkin	Divine	HP	Mercom Systems	SAP America	Teltone
Brooktrout	Envox	IBM	Mitel	SCS	Unveil

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About TMC Analysts



Nadji Tehrani

(formerly *Telemarketing*[®]) magazine, he is an acknowledged leader in bringing this exciting, multibillion-dollar marketing discipline to the forefront of acceptance in America, as well as other nations around the world. As an industry leader once said, "Nadji has done more for the telemarketing industry than anyone." Among the prestigious subscribers of *Customer Inter@ction Solutions*[®] magazine, one can find members of the U.S. Senate and House of Representatives as well as leading universities,

Since starting *Telemarketing*[®] magazine in 1982, Nadji Tehrani has gained distinction as the nation's most recognized spokesman for the teleservices industry. As executive group publisher and editor-in-chief of *Customer Inter@ction Solutions*[®]

such as the Harvard Graduate School of Business. Since its launch in 1982 as *Telemarketing*[®] magazine, *Customer Inter@ction Solutions*[®] has served as the "Bible" in helping companies around the globe and tens of thousands of people learn how to increase their sales, deliver superior customer service, and build market share like never before possible. The magazine has remained number one in its field since its inception. It was renamed *Customer Inter@ction Solutions*[®] in 2000 to better reflect the wide spectrum of businesses it serves, which now includes CRM (customer relationship management), e-sales and e-service.

Customer Inter@ction Solutions[®] magazine has been translated in Japanese and Portuguese, and to the best of our knowledge, it is the only marketing/business publication that has earned this high honor.

Linda Driscoll

Linda Driscoll joined TMC in 1981 and has served as head editor of *Customer Inter@ction Solutions*[®] magazine since it was launched as *Telemarketing*[®] magazine

in 1982. Linda is currently executive editorial director of the magazine and has been vice president of TMC since 1991. Linda has been instrumental in the creation and judging of all of TMC's award programs and has participated in the launch of various TMC magazines.

Rich Tehrani

Rich Tehrani's involvement in communications began in 1982 at TMC. Since then, he has led TMC in many capacities, including six years as MIS director. Today, Rich is TMC's president, group editor-in-chief and group publisher driving editorial direction of *Customer Inter@ction Solutions*[®] and *INTERNET TELEPHONY*[®] magazines. Rich also drives conference content for TMC's leading industry trade shows — including the *Global Teleservices Summit*, scheduled for Spring 2003.

Marc Robins

Marc Robins joined TMC in 1998 and is VP of Publications & Trade Shows, Associate Group Publisher, and Group Editorial Director. Marc's career in communications began in 1980. In directing editorial content of TMC's *INTERNET TELEPHONY*[®] magazine, Marc keeps a keen eye on and reports the impact of technological changes and advancements on the contact center.

Erik Lounsbury

Erik Lounsbury, editorial director, *Customer Inter@ction Solutions*[®] magazine, joined TMC in January 1993. Erik is the chief editor of the Top 50 Teleservices Agency awards and Rising Stars award as well as one of the judges of the MVP Quality awards. Beside his duties with the magazine, Erik writes a monthly online column, Gallimaufry, for TMCnet.com[™].

Tracey Schelmetic

Tracey Schelmetic, managing editor of *Customer Inter@ction Solutions*[®], has been with TMC since 1998. In addition to her editorial duties for *Customer Inter@ction Solutions*[®], Tracey contributes a weekly column to TMCnet.com titled "Dot Com Commerce." Tracey has spoken at numerous trade shows and industry events and is also an MVP Quality awards judge and the chief editor of the CRM Excellence awards.

Newsletters

TMC Research analysts literally monitor and analyze the teleservices market on an hourly basis in creating the in-depth weekly and monthly newsletters, *Teleservices User Group*, *Teleservices Outsourcing Insider*, and *Customer*

Inter@ction Solutions eNews. Led by Chris Donner, an industry veteran of more than 5 years, TMC's staff of editors and analysts know better than anyone the trends driving growth in the market.

About TMC Research



For more than 20 years, teleservices outsourcers have been the cornerstone of the call center market. They have helped fuel the economy and have provided careers for millions. Most consumers have some idea of the functions of teleservices outsourcers, but due to a total void in market research on this important segment of the economy, comprehensive knowledge does not exist. At TMC, we know very well that corporate teleservices users have many questions about teleservices outsourcers. As the publisher of *Customer Inter@ction Solutions*[®] magazine, the first magazine to serve the call center, CRM and outsourcing industry, beginning with its debut in 1982, we have been inundated with questions from potential purchasers of call center services who want to make wise purchasing decisions. In addition, we have frequently been called upon by all of Wall Street as a resource in mergers and acquisitions of teleservices outsourcers.

A number of factors have helped us to answer these questions on a case-by-case basis. For one, the original publisher, Nadji Tehrani, and the original editor, Linda Driscoll — with over 45

years of focused experience between them — remain active contributors to *Customer Inter@ction Solutions* and have attained personal knowledge of many teleservices agencies and their management. Second, our awards programs for

teleservices outsourcers, namely the Top 50 Inbound and Outbound awards, the MVP Quality awards and the Rising Stars awards, have provided us tremendous insight into some of the activities and challenges of teleservices agencies, which we have been able to impart to those who query us. Nevertheless, we recognize that this is not enough. In fact, we have regularly been asked if a strategic view of the entire teleservices market exists. It does not.

The information and forecasts you need to create a successful strategic plan

This report is intended to provide the critical information you need to build a profitable business plan involving teleservices. Specifically, you'll learn who all of the players are, the opportunities and services they offer, their size, financial standing, staffing, trends, technologies used, pricing structures, and much more. It will be the industry's first complete source of information on the outsourcing community. As such, anyone looking to purchase outsourcing services will need to obtain this report. Those who are in the teleservices outsourcing business will find it an invaluable source of information on:

- What your competitors are doing, which can help you adjust your own businesses accordingly.
- Growth areas in teleservices outsourcing.
- Forecasts for prevailing industry trends: international competition, Internet-based services, etc.

In addition, this report will provide an in-depth examination of the call center community at large — those who have in-house call centers, those who outsource all of their call center needs, and those who have an in-house call center and outsource as well. It will specifically look at their outsourcing practices, plans for future outsourcing, budgets for outsourcing, needs for outsourcing, preferences for services, and much more.

Whether you're a teleservices outsourcer, a member of the call center community or a vendor of technologies with call center applications, this proposed report will answer all of your questions about the teleservices outsourcing market.

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