

FROST & SULLIVAN
BEST PRACTICES



2026
ASIA-PACIFIC
AGENTIC AI IN THE
BUSINESS PROCESS SERVICES

**TECHNOLOGY INNOVATION
LEADERSHIP**

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Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Tech Mahindra excels in many of the criteria in the agentic AI solution in the BPS space.

RECOGNITION CRITERIA	
<i>Business Impact</i>	<i>Technology Leverage</i>
Financial Performance	Commitment to Innovation
Customer Acquisition	Commitment to Creativity
Operational Efficiency	Stage Gate Efficiency
Growth Potential	Commercialization
Human Capital	Application Diversity

The Transformation of the AI-Powered BPS Industry

Although AI has existed for decades and the BPS industry has leveraged it for years, recent advances have accelerated its evolution at an unprecedented pace. The second half of 2024 marked a clear inflection point as market momentum shifted toward agentic or autonomous AI. Unlike earlier implementations focused on discrete functions, agentic AI operates as a unifying orchestration layer, integrating complex processes and disparate data environments to enable real-time, adaptive decision-making. Its ability to function across organizational boundaries alongside digital agents, bots, and human workers signals a meaningful step toward intelligent orchestration, continuous optimization, and more autonomous operations.

In the last couple of years, enterprises have actively experimented with AI, yet many still face significant challenges. Traditional robotic automation and rule-based bots no longer deliver strategic outcomes. Enterprises often manage excessive information flows and juggle multiple tasks across fragmented systems, reducing employee productivity. Implementation timelines frequently exceed expectations, while infrastructure costs remain substantial as organizations attempt to scale AI initiatives. Enterprises also encounter risks such as AI hallucinations, outdated data dependencies, and weak governance frameworks, which hinder the responsible adoption of autonomous technologies. As a result, enterprises become trapped in experimentation without impact, where pilots fail to transition into production-grade deployments. This disconnect between experimentation and transformation underscores the need for AI approaches that prioritize orchestration, governance, and repeatability, enabling enterprises to move beyond isolated automation toward sustained, enterprise-wide value creation.

Tech Mahindra Orion Marketplace: Redefining BPS Industry Through Autonomous, Action-Oriented AI Agents

In response to the evolving enterprise demand for autonomous and intelligent operations, Tech Mahindra (TechM) introduced Orion, its next-generation agentic AI solution, in 2025. TechM Orion marketplace represents the company's vision for the future of BPS by enabling enterprises to agentify business processes through an ecosystem of intelligent, action-oriented AI agents. The marketplace assists enterprises in building and deploying autonomous and accurate agents that adapt to dynamic conditions and collaborate with employees. These agents make real-time decisions and orchestrate complex workflows, transforming contact centers into intelligent, agile engagement hubs. Its open, flexible architecture supports rapid deployment across assisted and fully autonomous operating models while maintaining enterprise-level governance, transparency, and lifecycle control.

TechM Orion is platform-agnostic, operating across NVIDIA, Google Cloud, AWS, and Microsoft Azure environments. Built on NVIDIA's accelerated computing platform and AI Enterprise stack, TechM Orion marketplace leverages NVIDIA NIM, NVIDIA NeMo, and NVIDIA RAPIDS for efficient AI inference, model training, and customization. Pre-configured connectors, Python-based adapters, and integrations with enterprise adapters such as SAP and Salesforce enable rapid integration with persistent data structures.

In addition, the company expanded its ecosystem of intelligent and action-oriented AI agents delivering real-time query resolution, autonomous decision-making, adaptive responses, and collaborative problem solving. By applying agentic AI frameworks, LLMs, and ML, the marketplace improves productivity, reduces operational errors, and minimizes reliance on continuous human supervision while ensuring governance and scalability.

The marketplace acts as a one-stop shop featuring a large catalogue of more than 200 pre-built, domain-specific agents across telecom, eCommerce, banking, financial services, and insurance. These

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production-grade agents address end-to-end use cases—such as customer service, claim processing, predictive maintenance, onboarding clients, quality assurance, or inventory optimization—driving enterprises to move quickly from pilot to deployment. Through TechM's proprietary chat-to-agent (C2A) interface, companies can build and deploy intelligent agents in under one week, dramatically accelerating time to value.

To ensure enterprise-grade trust and experience, TechM embeds governance and security protocols into the Orion under its "AI Delivered Right" philosophy. AI-powered voice agents deliver human-like interactions supported by strict compliance controls. Orion applies data protection measures such as real-time detection and masking of sensitive information, automated policy

enforcement, and restricted content controls. The marketplace leverages TechM's proprietary VerifAI system to establish guardrails for ethical AI usage, mitigate model drifts and hallucinations through

retrieval-augmented generation (RAG) and fine-tuned models, and enforce more than 30 configurable governance checks aligned with regional compliance standards.

Enterprises can deploy Orion within private cloud or on-premise environments, ensuring data remains within approved security and compliance boundaries. Support across major hyperscaler environments ensures full control over infrastructure, data, and compliance. This combination of autonomous capability, platform flexibility, and end-to-end accountability sets TechM apart from pure technology platforms and traditional outsourcing models.

Delivers Governed, Context-Aware AI Agents That Drive Measurable Operational Outcomes

TechM Orion marketplace enables enterprises to design, build, and deploy AI agents through a no-/low-code builder and a hyperscaler-agnostic orchestration layer embedded directly within enterprise operations. Enterprise teams can design single or multi-agent workflows, integrate preferred LLMs, and connect enterprise systems through a lightweight integration fabric compatible with both RESTful APIs and legacy systems.

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From an execution perspective, Orion marketplace supports deployment across voice and digital channels with advanced speech-to-speech and text-to-speech capabilities. It incorporates an enterprise-grade governance framework—including guardrails, red teaming, validation, and quality assurance agents that audit other agents, and VerifAI-based protection for sensitive information—deployed within the client’s environment of choice. This integrated approach accelerates the transition from design to secure production while maintaining controls, compliance, and performance at scale.

Orion marketplace addresses enterprise frustration with traditional bots by using speech-to-speech models, high-quality voice outputs, and persona-based agent design make conversations more human-like and less

repetitive. Agents become context-aware through continuous learning using BPS and CX data, domain expertise, crowdsourced inputs, advanced architectural frameworks, and enterprise knowledge integration with strong human-in-the-loop controls.

By integrating AI voice agents with context-aware orchestration and enterprise connectivity, Orion improves containment rates (fewer hand-offs), customer satisfaction (less frustration in comparison to legacy bots), and scalability during high-volume season while allowing smooth escalation to human agents when needed. The marketplace supports fully capable voice agents across telephony and cloud contact center channels, extending beyond traditional chatbots. It delivers quick, natural-sounding responses and enables experimentation with persona- and locale-specific voices—including gender variations, regional accents, and tonal styles—to maintain engaging interactions.

A key differentiator is Orion marketplace's deep integration with TechM's live BPS operations. Built and operated within its BPS engine, the marketplace enables seamless ownership of discovery, build, deployment, and ongoing value realization. The company analyzes real customer interactions, such as high net promoter score (NPS) outcomes and effective resolutions, to continuously refine agent design and tuning. Self-learning agents adapt based on past data, evolving trends, and proven behaviors, allowing human-like decision-making while managing complex workflows and delivering measurable business impact. Frost & Sullivan notes that embedding Orion directly into live BPS operations allows it to tackle operational challenges from a fundamentally different perspective than standalone technology platforms.

TechM builds on this foundation by applying large-scale process and task mining to identify transformation opportunities and engineer high-value use cases. Its commercial construct blends BPS and AI delivery under outcome-linked models rather than traditional licensing. The company also uses its operational workforce as an active test bed across quality assurance, automation, finance, travel, and human resources, continuously feeding real-world insights into persona refinement and speech voice optimization.

When enterprises require capabilities not yet available in the Orion marketplace, TechM Populii activates a global crowdsourced workforce to rapidly develop or configure new agents. Orion functions as the enterprise marketplace for discovering and deploying agents, while Populii supplies scalable human-in-the-loop support for data generation, validation, customization, and continuous improvement. This combined operating model addresses two major barriers to large-scale AI adoption—operational integration and governance—positioning Orion as a mature and differentiated marketplace for large-scale agentic AI deployment.

Client-Centric Approach to Operations and Service Delivery Serves as a Roadmap to Success

TechM's leadership focus is deeply rooted in guiding clients through an increasingly complex technology-enabled BPS landscape. As solution choices expand rapidly, enterprises often struggle to select advanced technologies aligned with their long-term goals. Leveraging a deep domain understanding and market insights, TechM offers personalized guidance that helps enterprises adopt effective, future-ready solutions. Frost & Sullivan recognizes TechM's commitment to delivering tailored value delivery, cutting-edge technology integration, and client-centric transformation strategies.

The company positions itself as a BPS-led transformation partner, integrating discovery, design, and execution into a single, seamless continuum. The TechM Orion marketplace is deeply integrated with its BPS operations, creating an ROI-driven pipeline that transitions high-impact ideas into production-ready agents. Domain competency experts identify automation opportunities through workflow analysis, process mining, and task mining, while delivery teams that manage operations also design and run the agents. This unified model accelerates the journey from ideation to measurable impact and removes traditional handoff friction between IT and operations teams.

Furthermore, TechM reinforces client confidence by embedding agentic AI internally before client rollout, ensuring solutions are battle-tested in real-world scenarios. Rather than replacing employees, autonomous agents automate repetitive, low-value activities, reducing cognitive load and enabling

workforce transition toward higher-value roles. By cannibalizing its own full-time equivalent (FTE)-based model, the company aligns automation adoption with sustainable efficiency gains and cost reductions.

To further support this transition, the TechM Orion marketplace offers flexible commercial models, including "try and buy" options and outcome-linked pricing. Enterprises can opt for bundled BPS-plus-AI or performance-based pricing tied directly to achieved business results rather than usage volume or licensing metrics. This approach aligns incentives, reduces commercial friction, and gives clearer ROI visibility.

The Project Collections Guru engagement exemplifies TechM's client-centric execution model. A global financial services institution partnered with TechM to modernize complex debt-collections operations characterized by fragmented workflows, regulatory requirements complexity, and heavy reliance on tacit SME knowledge. Leveraging its Orion marketplace, TechM implemented an agentic AI-driven advisor-assist solution that embedded SOPs, policies, and historical case intelligence directly into day-to-day workflows. The solution combined secure identity management, centralized AI governance, orchestration agents, enterprise middleware, and foundation models grounded through RAG to deliver explainable next-best-action recommendations within existing advisor interfaces. By standardizing decision-making and reducing cognitive burden, the engagement delivered measurable outcomes, including ~30% reduction in average handling time, ~40% reduction in screen toggling, ~40% lower dependency on subject knowledge, ~25% reduction in operating costs, and ~60% less reliance on SMEs. This clearly demonstrates TechM Orion marketplace's ability to translate advanced AI into practical, human-centric, and regulatory-ready solutions, reinforcing its positioning as a partner that engineers technology around client priorities rather than forcing clients to adapt to technology.

Strategic Investment in Training, Reskilling, and Retaining Employees

TechM has made a long-term strategic investment in structured reskilling to prepare for higher-value roles in the AI era rather than relying on headcount reductions as automation expands. Within the BPS division, the company created Impactathon, an internal program focused on identifying agentic AI opportunities. Non-technical frontline teams bring real operational problems to the table, while technology teams build the solutions. This uncovers practical use cases and helps frontline employees adjust to new ways of working, including shifting toward team leadership and supervisory roles.

Additionally, TechM has created a tiered Ninja certification program that begins with basic AI awareness and progresses toward designing and delivering projects that generate measurable ROI. The highest levels of certification link to the ability to run projects that deliver major productivity improvements for clients.

At the same time, the company is redesigning learning paths for both operations and sales teams. Operations teams are trained on how agentic AI works and how job profiles will evolve, while sales teams follow a dedicated track focused on selling the Orion marketplace and the broader AI portfolio. This helps sales teams move beyond generic discovery discussions toward clear explanations of platform value and marketplace offerings.

This effort connects to a broader strategy that asks operations teams to identify what truly still requires people rather than what can be automated. A project management office (PMO) function and an account management council help convert these ideas into funded automation programs with clear ROI. As a

result, reskilling becomes embedded in daily business decisions and financial goals rather than being treated as a separate initiative. At the leadership and go-to-market level, the company runs executive-focused programs to ensure C-suite executives, account leaders, and delivery heads can speak confidently about AI, sustainability, security, and outcome-based pricing. Frost & Sullivan commends TechM for its ongoing investment in training and employee retention strategies that keep institutional knowledge and industry expertise embedded in the company's culture and day-to-day operations.

Conclusion

TechM demonstrates thought leadership by tightly integrating advanced technologies with real-world operations, ensuring solutions remain scalable, secure, and outcome-driven. The company's Orion marketplace enables enterprises to design, deploy, and run autonomous AI agents directly within live business process operations, allowing continuous learning and optimization using production data rather than isolated pilots. The Orion marketplace combines a large catalog of production-grade domain agents, a hyperscaler-agnostic architecture, and built-in governance through VerifAI and human-in-the-loop controls. This architecture enables secure, scalable adoption of agentic AI across customer experience and core enterprise workflows. TechM's client-centric model—supported by deep domain expertise, outcome-aligned commercial models, and enterprise-grade controls—strengthens long-term trust, maximizes ROI, and supports sustainable enterprise transformation. With its strong overall performance, TechM earns Frost & Sullivan's 2026 Asia-Pacific Technology Innovation Leadership Recognition in the Agentic AI solution in the BPS industry.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Recognition identifies the company that has introduced the best underlying technology for achieving remarkable product and customer success while driving future business value.

Best Practices Recognition Analysis

For the Technology Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT			
STEP		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

