

FROST & SULLIVAN

LANGUAGELINE SOLUTIONS

2022
MARKET
LEADER

*GLOBAL LANGUAGE SERVICES
AND TRANSLATION INDUSTRY*

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. LanguageLine Solutions excels in many of the criteria in the Global Language Services and Translation industry.

AWARD CRITERIA	
Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

Company Overview

Market Leadership - LanguageLine Solutions

LanguageLine Solutions® (LLS) is being recognized specifically for its compelling product line strategy, financial performance, brand reputation and market leadership. LanguageLine Solutions is a division of Teleperformance, the worldwide leader in outsourced Omnichannel customer experience management. Teleperformance has stated that LanguageLine will continue to operate as a stand-alone business, headquartered in Monterey, California. The verticals that LLS serves include health care, government and enterprise.

Implementation Excellence

Implementing Future Growth Initiatives

LanguageLine has over 30,000 clients and boasts a 99% retention rate across the verticals listed above. The company serves 62% of Fortune 100 companies. LanguageLine’s prestigious client list includes:

- 13 of the top 16 Health Care Companies
- 7 of the top 11 Technology Companies
- 17 of the top 25 Financials

LanguageLine Solutions' market penetration for interpretation and document translation services continues to grow with penetration among small and large companies and across multiple industries, including:

- **Business:** Product information, customer communication, employee materials
- **Health care:** Vital documents, discharge instructions, notices of eligibility, patient forms
- **Financial services:** Loan documents, contracts, mortgage papers, financial applications, account statements, credit reports
- **Insurance:** Claims forms, policy information, accident reports
- **Government:** Notices of rights, consent forms, complaints, letters requiring response, applications, public outreach

LanguageLine's record of diversified revenue, future technology investment and strong client retention, is a testament to its ability and commitment to lead the market for years to come.

Product Quality

LanguageLine's offers a comprehensive set of solutions and a commitment to quality that creates value for its clients and the communities they serve, providing 360 degrees of coverage when it comes to client language needs—from on-demand interpretation 24x7,365 days a year, as well as Onsite interpretation, translation, localization as well as testing and training.

- Interpreters on location
- Virtual Onsite
- Document translation
- Database-driven websites & interfaces
- Training materials & E-learning applications
- Help systems
- Interpreter Skills Testing
- Advanced Medical Interpreter training

Competitors in the industry are unable to match the quality, breadth and diversity of LanguageLine's product line and customer market potential.

Technology Leverage

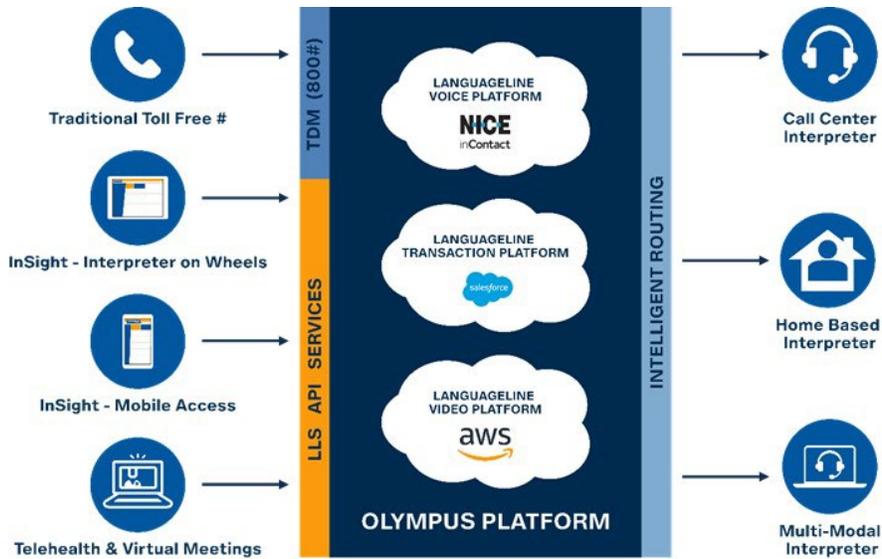
Competitive Differentiation and Technical Superiority

The language services industry is being stimulated by new technology. The best example of this is LanguageLine's investment in its proprietary cloud-based technical platform, Olympus. Over recent years, LLS has invested nearly \$49 million in engineering, research, and development, all with the aim of enhancing existing solutions and developing new ones. This investment strategy will support clients' need for new language access solutions today and far into the future. Figure 1.0 illustrates some important components of the Olympus platform. It is one of LLS' most important differentiators that competitors today cannot replicate.

“LanguageLine's record of diversified revenue, future technology investment and strong client retention, is a testament to its ability and commitment to lead the market for years to come.”

*- Michael DeSalles,
Principal Analyst*

Figure 1.0



Source: LanguageLine Solutions

Customer Service Experience

Linguistic excellence minimizes call length and increases mutual understanding. LanguageLine’s (LLS) world-class connect times increase client satisfaction and eliminate wasted time. Listed below are the company’s mission, vision and manifesto:

LLS Mission

We provide language access that faithfully drives higher-value experiences at the moment of need.

LLS Vision

We are an essential partner in managing and growing a modern organization that welcomes all people, regardless of language, culture, or ability.

Innovation

We are restless, curious, bold, and forward-leaning. We view our position as the industry leader as a privilege and mandate to pioneer. We believe in the power of language access to be transformative and strive to build new pathways to access.

Excellence

Good enough is not enough. We exceed expectations. Our commitment to the empowerment of all people is unsurpassed.

LLS Manifesto

- ✓ We are fanatical about people understanding people.
- ✓ We strive to improve the world and empower relationships one word at a time.
- ✓ We are inspired by our clients, colleagues, and the communities we collectively serve.
- ✓ We are united in our differences. We learn from each other and are enriched by a diversity of people, thought, and culture.

High Quality Customer Care: Accessible and Stress-free

LanguageLine is able to connect its clients to a team of more than 25,000 professional linguists, 16,000 on-demand interpreters via audio or video in 30 seconds or less. LLS accomplishes this in more than 240 languages. LanguageLine can also translate and localize written content. The company provides these services 24 hours a day, seven days a week, 365 days a year.

Product Differentiation

LanguageLine offers on-demand language access, wherever and whenever it is needed across all client touchpoints. This includes, but is not limited to, language solutions as shown in Figure 2.0:

Figure 2.0

On-Demand Interpretation 240+ Languages 24/7/365	Face-to-face interpretation 130+ languages	Translation and Localization 340+ languages	Testing and Training 57 languages
InSight Video Interpreting One touch access to video/audio interpreters	OnSite Interpreting Live interpreters by appt at your location	Translation Documents and marketing materials	Testing Fluency testing of bilingual staff and recruits
Phone Interpreting Outbound calls to audio interpreters	Virtual OnSite Interpreting Live interpreters by appointment for virtual meetings	Localization Websites, software, apps, eLearning	Training Ongoing in-house interpreter skills development
DirectResponse Inbound calls in language from LEP communities		Transcription Digital and multimedia content	
Telehealth & Virtual Meetings Integrated access to video/audio interpreters TeamLink Virtual call center for client interpreters		Clarity® Macro and micro content simplification	

Source: LanaguageLine Solutions and Frost & Sullivan analysis

Brand Strength

“With its strong overall performance, product differentiation and customer service focus, LanguageLine Solutions has achieved a dominant leadership position in the global language services market.”

- Michael DeSalles,
Principal Analyst

Market Leadership and Brand Identity

LanguageLine founded the on-demand interpreting industry and is clearly the world’s largest provider of over-the-phone interpretation, with more than 25,000 professional linguists. The company boasts 30,000 satisfied clients, with 52 million connections in 2020 and a 99% client retention rate. LanguageLine Solutions is a company that continues to proactively put forth initiatives on employee health and safety. They maintain this singular focus while simultaneously deploying Business Continuity (BC) plans to follow safety measures and limit the spread of the COVID-19 virus. LanguageLine Solutions® (LLS) has remained committed to providing critical information to the public, regardless of language, culture, or ability.

2021 Great Place to Work Recognition

In 2021 LanguageLine Solutions, was awarded “Great Place to Work” and certified for a second consecutive year. Certification is based on an employee survey that is the most widely taken in the world. Among the [survey’s findings](#) was that 93 percent of LanguageLine employees say they are passionate about their work and believe in the company’s mission. LanguageLine is the only language-services company to receive the definitive “employer of choice” designation.

Conclusion

LanguageLine Solutions has the experience, team, expertise and technology to convert the complexities of the nation’s linguistic landscape into a powerful business asset for its clients. With its strong overall performance, product differentiation and customer service focus, LanguageLine Solutions has achieved a dominant leadership position in the global language services market. For the third year in a row, Frost & Sullivan is proud to bestow the 2022 Market Leadership Award to LanguageLine Solutions.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

Best Practices Award Analysis

For the Market Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Growth Strategy Excellence: Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

Implementation Excellence: Company processes support efficient and consistent implementation of tactics designed to support the strategy

Brand Strength: Company is respected, recognized, and remembered

Product Quality: Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

Product Differentiation: Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate

Technology Leverage: Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and of high quality

