

FROST & SULLIVAN
BEST PRACTICES



2026

BRAZILIAN CUSTOMER
EXPERIENCE MANAGEMENT

COMPANY OF THE YEAR



Relacionamento com
Responsabilidade

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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. AeC excels in many of the criteria in the Customer Experience Management space.

RECOGNITION CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

The Transformation of the Customer Experience Management Industry

Over the past decade, Brazil’s Customer Experience Management (CXM) industry has undergone a profound transformation. Once dominated by traditional voice-based interactions and cost-driven outsourcing models, the market now demands advanced digital capabilities, omnichannel engagement, and hyper-personalized experiences. The rise of born-digital companies and fintech disruptors has accelerated this shift, forcing providers to deliver not only efficiency but also agility, security, and innovation at scale.

This evolution has introduced new challenges: shrinking contact volumes due to automation, heightened cybersecurity risks, and increasing complexity in customer interactions. Frost & Sullivan research shows that the Brazilian CXM market reached \$2.46 billion in 2025, down 2% year over year. Organizations must balance cost optimization with the delivery of empathetic, high-quality service—a task that requires robust technology integration and a human-centric approach. This year is expected to mark a return to positive growth, with a 2.2% Compound Annual Growth Rate (CAGR) for 2024/2023.

AeC has emerged as the more solid and consistent market participant in this environment. While many competitors struggled with market contraction and operational inefficiencies, AeC tripled its revenue over four years and increased its market share year over year, from 6.2% in 2018 to 17.9% in 2024, according to independent Frost & Sullivan research. The company’s ability to combine proprietary AI-driven solutions with a deeply human approach has redefined industry standards, positioning AeC as the benchmark for innovation, resilience, and customer trust.

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**- Sebastian Menutti, Industry Director,
Customer Experience**

Visionary Innovation and Technology Leadership

The CXM industry faces relentless pressure to innovate, yet many providers still rely on off-the-shelf technologies or partnerships that limit flexibility. AeC took a different path: it invested heavily in proprietary solutions tailored to local market needs, ensuring agility and cost-efficiency.

AeC’s TeIA platform exemplifies this vision—a GenAI-powered ecosystem that enhances operator performance, prevents fraud in real time, and enables

copilot and autopilot functionalities. Complementing TeIA is Digitech, a hybrid chat copilot that autonomously handles initial contacts and recommends next-best actions for live agents. These innovations have improved CSAT and NPS scores and reduced Average Handle Time (AHT), delivering measurable value to clients.

The company’s Vision AI solution monitors every agent’s activity in real time, driving performance improvements at individual, operational, and process levels. Combined with Agent Connect, which uses AI to match customers with the most qualified specialists, AeC has achieved retention rate improvements of up to 14 percentage points in banking and telecom operations. Importantly, these solutions are up to 50 times more cost-effective than market alternatives, enabling mass-scale deployment across 36,000 agents.

Growth Strategy and Market Leadership

Brazil’s CXM market has seen consolidation and margin pressure, yet AeC has consistently outperformed. The company successfully completed vertical diversification: in 2019, the telecommunications vertical accounted for the majority of the business; in 2024, it accounted for just under 30%. Furthermore, from 2020 to 2025, AeC’s growth was 100% organic, in contrast to competitors that relied on acquisitions. The company’s client portfolio underscores its market dominance: it serves five of the five largest financial groups, five of the five leading digital banks, two of the three biggest e-commerce platforms, and every major telecom group in Brazil. Moreover, AeC is the only company serving all top 10 CXM clients in the country, a testament to its trust and operational excellence.

This success is rooted in AeC’s strategic footprint. By expanding into smaller cities in Brazil’s Northeast and countryside regions, AeC created a structural advantage that competitors cannot replicate. In 2025 alone, AeC opened operations in Patos, Palmeira dos Índios, and other cities, reinforcing its position as a major employer and talent magnet in underserved regions.



Financial Performance and Operational Excellence

Rapid growth often comes at the expense of financial health—but not for AeC. The company invested BRL 500 million (≈USD 100 million) in CAPEX over the last three years while maintaining a net debt-to-EBITDA ratio of 0.5, far below the industry average of 2-to-3 points. This disciplined approach ensures AeC can fund innovation without compromising stability.

Operationally, AeC leads the market in efficiency and security. This is a key success component, according to Frost & Sullivan's IT Decision Makers survey, which shows that “Security” is the most important factor for organizations evaluating CX vendors. AeC is the only CXM company in Brazil to hold a perfect 100 score across all ten dimensions of Security Scorecard—network security, DNS health, patching cadence, and more. The company also maintains ISO 27001 and PCI certifications, reinforcing its commitment to data protection. These achievements translate into superior client confidence and widespread industry recognition.

Customer Value and Trust

In a market where client expectations are evolving rapidly, AeC has built enduring relationships based on trust and performance. Its ability to deliver tailored solutions for both traditional enterprises and digital-born companies sets it apart. Today, one-third of AeC's revenue comes from digital-native brands, reflecting its agility in serving high-growth sectors.

AeC's proprietary AI tools enhance not only operational metrics but also customer experience outcomes. For example, its AI copilot interprets voice interactions in real time and triggers corrective actions to prevent errors and ensure compliance. This proactive approach safeguards brand reputation and elevates customer satisfaction.

By combining advanced analytics with human warmth, AeC delivers a differentiated value proposition: technology that amplifies empathy rather than replacing humans. This philosophy resonates strongly with clients seeking long-term partnerships in an increasingly complex CX landscape.

ESG, Organizational Maturity, and Governance

Beyond financial and technological leadership, AeC stands out for its commitment to sustainability and social impact. The company publishes its GRI-compliant sustainability report, adheres to ISO 14001 (Environmental Management), ISO 37001 (Anti-Bribery), and ISO 37301 (Compliance), and ranks among Brazil's Top 6 companies in Ethics and Citizenship for two consecutive years.

AeC's diversity and inclusion efforts are equally noteworthy. It is the first CXM provider in Brazil certified under ISO 30415 for Diversity & Inclusion. Today, 68% of its workforce identifies as Black or mixed race, 23% as LGBTQIA+, and 83% are pursuing higher education—figures that underscore AeC's role as a catalyst for social mobility.

The company invests 500,000 training hours per month, creating one of Brazil's largest professional development ecosystems. This focus on people not only strengthens AeC's talent pipeline but also reinforces its reputation as a Great Place to Work (GPTW) for the sixth consecutive year, including a Top 3 nationwide ranking for flexible work environments.

Conclusion

AeC's journey reflects a rare combination of visionary innovation, disciplined growth, financial strength, and unwavering commitment to people and society. By leveraging proprietary AI solutions, expanding strategically into underserved regions, and maintaining the highest standards of security and ESG, AeC has redefined what excellence means in Brazil's Customer Experience Management industry.

With its strong overall performance, AeC earns Frost & Sullivan's 2026 Brazilian Company of the Year Recognition in the Customer Experience Management industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging megatrends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

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.

STEP		VALUE IMPACT	
		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)**

