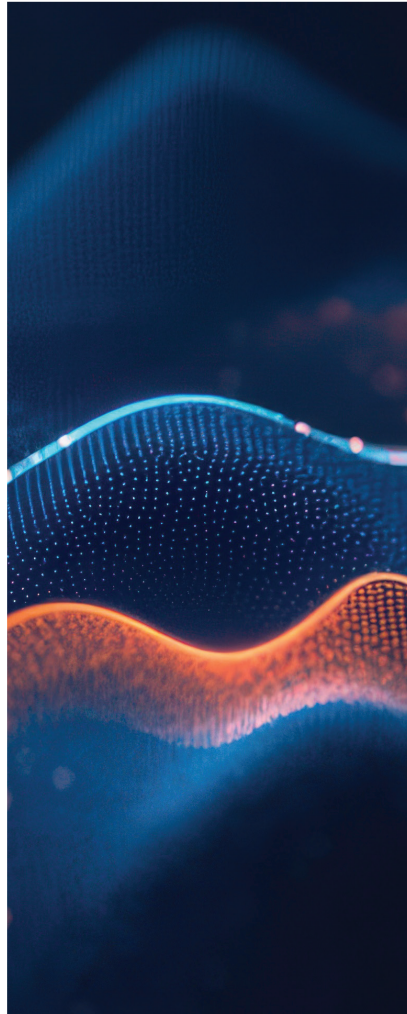


FROST & SULLIVAN
BEST PRACTICES



2026

AUSTRALIAN
CUSTOMER EXPERIENCE
MANAGEMENT SERVICES

COMPANY OF THE YEAR

probe**cx**
NEXT GENERATION DRIVEN

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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. Probe Group excels in many of the criteria in the customer experience management services 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 Services Industry

By aligning customer expectations, operational processes, and overarching business strategy, Customer Experience (CX) has transitioned from a tactical support function into a board-level imperative tied directly to growth, brand equity, and customer lifetime value. The 2026 Frost & Sullivan annual global survey of IT decision-makers found that 64% of Australian businesses ranked improving CX among their top business priorities, a measure of how far the discipline has climbed on the corporate agenda.

Delivering on that priority has grown harder. Customer interactions now span digital and physical channels, asynchronous messaging, and an expectation of service shaped to the individual. Australian organizations face these challenges against shifting consumer behavior, rising labor costs, managing hybrid workforce models, and persistent talent shortages, and most still struggle to adopt and connect new technologies across organizational silos. That gap has lifted demand for CX management (CXM) services, which help organizations design, orchestrate, and ultimately deliver the experience their customers long for but couldn't build on their own.

The market is shifting from labor-intensive delivery toward AI-led, evidence-based operations designed to resolve interactions at lower cost and at the pace set by demand, while positioning real-time insight generation as a vital differentiator. In Australia, the shift carries extra weight. Regulatory obligations, data sovereignty expectations, and a high bar for empathetic, culturally attuned service mean providers must pair global delivery efficiency with local service design, using automation to strengthen the human element rather than remove it.

The Australian CXM market is mature and contested, home to global majors, regional specialists, and local champions. The current inflection is agentic AI, which can now handle entire categories of interaction. However, most buyers hesitate to deploy it at scale because the savings remain unproven and the risk of disrupting live operations is high. The global majors hold scale but must restructure vast workforces; the digital-native challengers hold the newest models but lack the agent base and operational judgment to land them.

Strengthening Market Leadership: Digitally-Enabled, Data-Driven, People-Led Vision

Established in 1979, Probe Group sets the pace in the Australian CX transformation conversation by putting advanced technology to work while keeping human empathy at the center of delivery, an approach that turns capability into measurable client outcomes. As a distinguished Australian service provider specializing in comprehensive CX services, the company covers the entire customer life cycle, from lead generation and sales through service, retention, collections, and back-office support. Serving over 100 marquee clients, including long-tenured ones across many industries, and with a growing workforce and expanding technology prowess, Probe Group has become the leading provider of digitally enabled, human-centric CX in its home market.

Probe Group's core value lies in its ability to design intelligent CX that rapidly aligns with each client's needs at the required level of complexity. In Australia, the provider pairs onshore proximity with offshore scale and its own agentic AI and automation, providing government agencies, iconic Australian brands, and emerging challengers a partner with reach and range few local rivals can match.

Probe Group's market leadership position rests on onshore depth that competitors cannot easily match. The company fields over 4,000 frontline staff in Australia and the largest onshore team of CX transformation specialists in the region, with senior decision-makers based locally. For government and regulated enterprises that require onshore handling of sensitive interactions, proximity and local accountability convert directly into wins. The company also operates a sizable offshore capability in the Philippines (with close to 15,000 staff) and an emerging digital services hub in India, enabling it to deliver cost-effectively without compromising service quality.

Unlike outsourcers that sell fixed, siloed packages, Probe Group runs a modular framework spanning the front, middle, and back office, so a client can begin with a single service and add others under the same governance model. Australian revenue returned to growth in 2025 after a softer 2024, with the mix continuing to shift toward non-voice work, now ~70% of the total. The company enters its next phase with the strongest installed base in the local market.

Removing the Risk That Stalls Transformation

Probe Group's central insight is that the binding constraint in Australian CX is not the availability of technology, but the buyer's concerns about deploying it, and the company has built its offer around addressing that fear. Rather than selling large, irreversible programs, it initially provides proof of concept and consulting engagements that demonstrate value early and then scales as the client's confidence grows. This meets a need that global platforms and digital-native vendors leave open: a route to an AI-enabled service that does not jeopardize the operations clients depend on. The same insight shapes Probe Group's expansion in high-empathy, high-complexity work. With interest rates and inflation shrinking

household budgets, there has been a sharp increase in demand for customer hardship and vulnerability services. Offshore, automated systems cannot adequately address these issues. Probe Group's onshore scale and expertise in sensitive interactions have enabled it to win multiple hardship contracts that competitors are less equipped to serve. In New Zealand, the company extended the same principle to language access, building a bilingual voice service for Te Reo Māori speakers for which global vendors offered no usable option, an early sign of how the provider identifies and serves underserved needs across the value chain.

Turning Intelligence into Outcomes Clients Can Measure

Probe Group turns its technology into repeatable client outcomes more reliably than any locally based competitor, a claim its deployment record supports: more than 40 contact-center-as-a-service (CCaaS) implementations on the company's books, the largest count in the local market. Its delivery rests on a multi-brand stack rather than a single product. Oration, the agentic voice and conversation engine developed by its Convai business, enables seamless operational orchestration to drive continuous insight generation, allowing the business to dynamically surface and rectify issues before they impact the

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**- Krishna Baidya,
Senior Director, ICT Practice**

customer experience. Oration has moved through version 5.4 and now learns from its own outcomes to lift accuracy. Innovior, its automation and Salesforce practice, runs intelligent automation and Agentforce deployments. Atlas, a unified analytics engine built on Microsoft Fabric, consolidates digital and operational data into a single source. The provider has taken digital handling, through its various tools, to 57% of its contacts and processed more than 200 million AI-assisted interactions, with nearly 75% virtual agent automation rates and 80% automation rates for Innovior's Billing-as-a-Service solution.

This shift has yielded noticeable results. For a state transport department facing a projected 30% surge in

inquiries, Probe Group replaced the legacy virtual agent with a like-for-like alternative to enhance self-service and reduce live chat volumes. In just six weeks, a 48% higher automation rate was achieved, enabling human agents to handle more complex interactions requiring a higher degree of empathy. The total number of customer questions answered by the new virtual agent increased by 20%, achieving a ~90% resolution rate. For an Australian tertiary institution, intelligent automation compressed admissions turnaround from 26 days to under four hours and removed 75% of the team's manual workload. For a national health and beauty retailer, a phased rebuild lifted quality assurance scores from 79.6% to 97.6% across 2025 while holding service levels above 80%. In each case, Probe Group paired technology with process redesign, an approach that helped ensure durable gains, instead of pilots that fail beyond a point.

The company is closely monitoring where the service is heading and building services and positioning products accordingly. Probe Group maps every contact type onto a spectrum from full automation to full human handling and uses that map to tell clients what AI can absorb now and what needs to be done manually. It already runs Oration in production, has established a Salesforce Agentforce service line, and

is aligning with the rise of autonomous resolution with governance, moving toward ISO 42001 certification for responsible AI ahead of regulation. Few local competitors pair this reading of the shift with the deployment record to act on it.

Growing Alongside the Client: From First Engagement to Full Lifecycle

Probe Group wins clients through a consultative, modular sales approach rather than a packaged pitch, which makes the purchase process smoother and allows clients to enter at the point of least risk. About half of new engagements come through formal request for proposal (RFP) processes, and the rest through direct consultative selling, with terms, deliverables, and performance measures set out plainly from the start. Clients typically begin in a specific area, such as customer care, back-office processing, or collections, and widen the relationship as results show. Pricing is flexible, accommodating various models, from managed-service models to fixed outcome-based deals, allowing clients to commit on their own terms.

This initial engagement helps lead to long-term partnerships. Probe Group has built digital and AI

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transformation roadmaps for partners that contribute more than 65% of its revenue. Each roadmap is tailored to the client's maturity level, risk appetite, and budget. Accounts that begin in service delivery are now engaging the provider's services to run the full customer lifecycle, from acquisition through retention and collections, a shift the company describes as the defining change of the past year. The commercial model is structured to reward this trajectory. For instance, one retail client agreed to pay Probe Group based exclusively on the incremental revenue generated by its virtual agent. This arrangement resulted in approximately A\$2.9 million in additional

sales in its first year. Moreover, the company helped a state transport program fund itself entirely through the savings generated by its automation. Thus, Probe Group ensured that the technology was compensated for by its own outcome.

Across its digital deployments, Probe Group reports a 25% reduction in contact center operating costs, more than 60 seconds cut from average handle time, and a 15-point lift in Net Promoter Score (NPS), while its Innovior billing-as-a-service product achieves ~80% automation across more than 100 hospitals. Re-contracting above 95% and the steady widening of scope results in a customer base that deepens its commitment year over year rather than testing the market.

Earning Trust as a Brand: From Offering Secured CX Service to Ensuring Positive Social Impact

Probe Group remains one of the most trusted brands in Australian CX, with clients describing the company as an extension of their own operations. The company has earned this reputation by delivering measurable outcomes consistently and maintaining the security posture that regulated buyers require. Probe Group is the first locally based CX provider to run a fully implemented, globally recognized information-security framework, with ISO 9001, 27001, and 22301 certification, PCI-DSS accreditation, and conformance to National rules set by the Institute of Standards Technology (NIST), the Australian

Essential Eight, and the General Data Protection Regulation (GDPR), backed by a zero-trust architecture. For public-sector, healthcare, and banking clients, that posture is often the deciding factor.

The brand also carries a social dimension that resonates with the enterprises and agencies Probe Group serves. Its environmental, social, and governance (ESG) record spans Indigenous employment initiatives in Australia, a clean-water program reaching hundreds of households in the Philippines, and a children's cancer charity partnership that helped raise more than six million dollars in 2025, alongside a target to halve full-scope emissions by 2030.

A distributed workforce and roughly 90% cloud adoption provide clients with round-the-clock support and resilient operations under peak load, while agent co-pilot tools and conversation analytics reduce resolution times and sharpen accuracy. Independent recognition reinforces the company's reputation, with leadership roles in respected industry associations, acknowledgment from global analyst firms, and Frost & Sullivan's repeated awards and inclusion in the Frost Radar. Clients stay with the provider and recommend to others, a strong indication of brand equity in a market where service is the primary product.

Conclusion

Probe Group leads Australian CXM services from a position its competitors cannot quickly replicate. It carries the largest onshore footprint among locally headquartered providers, the deepest regional bench of CX specialists, and client relationships that continue to grow across decades. At a moment when AI has made transformation both unavoidable and daunting for buyers, Probe Group has built its offering around removing the risk of change, proving value through measurable deployments, and pricing based on the outcomes it delivers. Continued investment in agentic AI, governance ahead of regulation, and outcome-based commercial models help the company set the industry benchmark. With this combination of market leadership, deployment discipline, and customer value, Probe Group earns Frost & Sullivan's 2026 Australian Company of the Year Recognition in the customer experience management services 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.

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)**

