FROST & SULLIVAN
BEST PRACTICES

2026 ASIA-PACIFIC CUSTOMER EXPERIENCE MANAGEMENT SERVICES

COMPANY OF THE YEAR

Table of Contents

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. TP excels in many of the criteria in the Asia-Pacific customer experience management services space.

RECOGNITION CRITERIA

Visionary Innovation & Performance	*Customer Impact*
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 CX Management Services Industry

Customer experience (CX) management services in Asia-Pacific are moving from labor-led outsourcing to intelligent experience orchestration. Cost efficiency remains important, but enterprise buyers now expect providers to improve customer journeys, deploy AI safely, manage data responsibly, and link delivery to measurable business outcomes.

This shift is especially significant in the Asia-Pacific. The region remains the world's largest offshore CX delivery base, anchored by India and the Philippines, while markets such as Japan, Singapore, South Korea, China, and fast-growing Southeast Asian economies are increasing demand for compliant, high-quality, locally relevant delivery. As a result, providers must now compete across three layers: offshore scale, nearshore flexibility, and onshore regulatory assurance.

Agentic AI is accelerating this transition. The market is moving beyond pilots and isolated automation toward production use cases in agent assist, quality assurance, knowledge management, self-service, sales, collections, and back-office workflows. The new competitive frontier is not who has AI tools, but who can deploy, govern, calibrate, and improve human-AI operating models at scale.

Commercial expectations are changing in parallel. Clients are pushing providers beyond FTE-based pricing toward models tied to productivity, first-contact resolution, containment, revenue conversion, compliance, and customer satisfaction. This requires providers to assume greater accountability for outcomes, not just activity.

Within this environment, TP stands out for combining regional scale, AI orchestration, operational discipline, and client proximity. Its Asia-Pacific strategy reflects the industry's next phase: global in architecture, local in execution, and increasingly focused on transforming CX from a support function into a measurable driver of customer loyalty, operational resilience, and business growth.

> *"TP.ai FAB is the anchor of this transition. FAB serves as an AI orchestration layer across virtual agents, agent assist, analytics, knowledge management, workflow automation, data services, and industry-specific use cases."*
>
> ***– Krishna Baidya***
> ***Vice President, ICT Practice***

Orchestrates the Next Phase of AI-Led CX Transformation

TP is a global leader in digital business services, consistently blending advanced technology with human empathy to deliver customer care that is simpler, faster, and safer for the world's biggest brands and their customers. The Group's comprehensive, AI-powered service portfolio spans from front-office customer care to back-office functions, including operations consulting and high-value digital transformation services, as well as Specialized Services such as interpreting and localization, visa and consular services, and recruitment process outsourcing.

With nearly five decades in the market, the group has operations in close to 100 countries, a workforce of nearly 490,000 multilingual experts and advisors serving more than 170 markets. The company is now organized as a technology, products, and services (TPS) company, anchored by its TP.ai foundational AI backbone (FAB), which serves as the company's operating system. When it comes to pushing the envelope on innovation, TP has a $115 million AI investment portfolio that includes minority stakes in Ema, Parloa, and Sanas, and the acquisition of the Agents Only crowdsourcing platform.

TP's recognition rests first on its ability to address one of the most urgent unmet needs in CX management services: helping enterprises move from AI curiosity to production-grade outcomes. Many organizations recognize the potential of GenAI and agentic AI, but remain constrained by fragmented systems, uncertain data readiness, regulatory caution, unclear ROI, and internal resistance to change. TP's response is not to position AI as a toolset layered on top of existing delivery. It is building an operating architecture that brings people, process, technology, data, and governance into a single transformation model.

TP.ai FAB is the anchor of this transition. It serves as an AI orchestration layer across virtual agents, agent assist, analytics, knowledge management, workflow automation, data services, and industry-specific use cases. The platform is modular by design. It integrates proprietary capabilities with partner technologies and hyperscaler ecosystems, providing clients with a structured path to deploy AI without being locked into a single model, vendor, or implementation approach.

This matters because enterprise clients are no longer asking whether AI can improve CX. They are asking where it should be applied, what should remain human-led, how risks will be governed, and how benefits will be measured. TP's architecture addresses those questions through solution suites, including TP.ai Connect, TP.ai Assist, TP.ai Growth, TP.ai Collect, and TP.ai Data Services. These capabilities support both frontline experience improvement and back-office productivity, making TP relevant across a broader portion of the customer value chain. The foundation is LLM-agnostic, capable of integrating with DeepSeek, Doubao, and Japan-specific models as readily as Western counterparts, which matters for a company with substantial momentum in China and growing exposure to North Asian markets governed by sovereign AI architectures.

The company's innovation strategy is also increasingly verticalized. Banking, insurance, healthcare, retail, travel, tech, workflows have distinct compliance, knowledge, and outcome requirements. TP's vertical blueprints recognize that generic automation is insufficient in regulated or high-complexity environments. In healthcare, for example, an agentic triage use case in APAC shows how AI-enabled workflow redesign can reduce referral-to-booking turnaround from approximately 24 hours to minutes while materially improving booking conversion. The significance is not just automation. It is the translation of AI into the patient experience, operational productivity, and measurable business value and associated health outcomes.

"The company's centers of excellence in Asia-Pacific contribute to the development of solutions across AI, machine learning, natural language processing, analytics, and automation. This gives the region a role beyond labor delivery. It becomes a capability engine for global transformation."

– Krishna Baidya
Vice President, ICT Practice

TP's approach reflects a mature view of human-AI collaboration. Rather than presenting AI as a substitute for people, TP positions it as a mechanism to elevate the work humans do. This is evident in agent assist, summarization, translation, quality assurance, training simulation, supervisor coaching, workforce management, and recruiting. In markets such as India and the Philippines, and the up-and-coming Indonesia, where scale remains central to global delivery, these capabilities are critical to maintaining competitiveness as clients increasingly ask providers to do more with less.

Frost & Sullivan believes TP's ability to convert AI from a standalone capability into an orchestration framework is central to its value proposition. It gives clients a credible path to transformation without forcing a disruptive reset of existing operations.

Institutionalizes Operational Excellence at AI Scale

A common challenge in CX transformation is that pilots often look promising but fail to scale. TP differentiates itself through its operational infrastructure, which turns innovation into repeatable execution. The company's legacy in process discipline, quality management, delivery governance, and global operating standards provides it with a foundation many AI-native entrants lack. The difference in 2026 is that TP is applying that discipline to the economics of AI-enabled delivery.

TP's global business services program supports standardization, cross-skilling, and process consistency across global operations. The company has centers of innovation in Asia-Pacific. A notable pocket of innovation is in Malaysia, where TP has operationalized a unique AI-backed recruitment program that is scaling across the globe and contributes to the development of solutions across AI, machine learning, natural language processing, analytics, and automation. This gives the region a role beyond labor delivery. It becomes a capability engine for global transformation.

The company's additional internal AI deployment across five operational streams shows how deeply it is embedding AI into its own operating model. These streams include quality assurance, training simulation, recruitment, workforce management, and supervisor performance. In quality assurance, TP's agentic AI approach enables complete transaction coverage, unlike the traditional industry practice, which reviews only a small sample of interactions. This shifts QA's function from retrospective sampling to continuous intelligence. It also improves coaching precision, compliance visibility, and operational learning.

Supervisor enablement is another important example. TP is applying AI to prioritize coaching, surface performance gaps, recommend next-best interventions, and document follow-up actions. The objective is not to eliminate supervisory judgment but to make frontline leadership more focused, data-driven, and consistent. This is particularly important in large-scale operations, where performance variability can directly affect service quality and client trust.

Training simulation reflects the same practical understanding of workforce transformation. AI-powered role play, persona-based coaching, and simulation-driven learning can accelerate proficiency while preserving the human coaching needed for empathy, motivation, and behavioral change. This aligns with the emerging reality of CX work: the easier tasks will increasingly be automated, while human agents will handle more complex, emotional, or exception-based interactions.

TP's commitment to responsible AI strengthens this operating model. The company's AI governance approach includes control centers, configurable guardrails, safety thresholds, escalation protocols, and risk monitoring. These controls are increasingly important as clients in Asia-Pacific navigate divergent regulatory environments, including India's DPDP Act, Australia's privacy reforms, Singapore's AI governance frameworks, Japan's privacy requirements, and global obligations such as GDPR, HIPAA, SOC 2, and sector-specific compliance rules.

Operational excellence in the AI era is not simply about deploying automation. It is the ability to govern, measure, recalibrate, and sustain it. TP's advantage lies in combining innovation with industrialized execution.

Drives Sustained Momentum in Asia-Pacific

TP's leadership in Asia-Pacific is reinforced by the scale and complexity of its regional operations. The company operates across a diverse set of delivery and demand markets, supporting global and regional clients through offshore, nearshore, onshore, hybrid, and work-from-home delivery models. This footprint gives TP the flexibility to tailor solutions around cost, language, regulatory, and cultural requirements.

Asia-Pacific plays a dual strategic role for TP. It is the company's primary offshore delivery architecture for global enterprise clients and a high-growth demand region in its own right. This distinction is important. Many competitors use the Asia-Pacific mainly as a delivery base. TP is increasingly using the region as both a delivery engine and a growth platform. The company is expanding go-to-market capacity in markets such as Japan and South Korea, strengthening regional leadership engagement, and building country-specific solutions that account for local expectations and regulatory realities.

Leadership proximity is an important part of the company's model. TP's country and regional executives maintain direct relationships with enterprise clients and, where relevant, government stakeholders. This gives TP visibility into boardroom-level concerns around AI, data, risk, outsourcing, and transformation. It also supports a consultative engagement model in which TP helps clients build roadmaps rather than simply respond to RFPs.

The company's China "ChuHai" strategy illustrates this market-led approach. As Chinese eCommerce, technology, and automotive brands expand internationally, they need partners who understand both the operating expectations that originate from China and destination-market requirements. TP's ability to support these brands across international markets creates a distinctive growth vector that competitors with less global reach may struggle to match. TP has made parallel structural investments in Japan and Korea.

In Australia, TP is using AI, nearshore delivery, and language technologies to reframe the onshore-offshore debate. Capabilities such as accent harmonization, AI-powered agent assist, and Bali-based nearshore delivery can help clients balance cost efficiency with service quality. This is a practical response to a mature labor market where onshore delivery does not always guarantee higher customer satisfaction.

In India and the Philippines, TP is also reframing the scale. The company recognizes that the next phase of growth will not be a linear expansion of headcount. It will depend on embedding AI into operations, increasing productivity, elevating human roles, and supporting clients with more outcome-based commercial models. This leadership posture reflects an important market reality: in the AI era, the best CX management providers will not be those with the most people alone, but those that combine scale with technology, governance, and transformation capability.

Expands Value Beyond Traditional CX Outsourcing

TP's Company of the Year performance is also rooted in its ability to expand the economics of CX management services. The company is moving beyond traditional customer care into back-office solutions, AI data services, analytics, marketing, collections, technology-as-a-service, revenue-as-a-service, and broader business process transformation. This strengthens its relevance to clients who want fewer fragmented vendors and more integrated accountability across the customer value chain.

The market is moving in this direction. Enterprises are increasingly asking whether their providers can manage not only interactions but also the knowledge systems, data pipelines, AI workflows, back-office dependencies, and revenue outcomes that shape the end-to-end experience. TP's portfolio expansion enables it to participate in those conversations earlier and more strategically.

TP.ai Data Services is especially important. Data labeling, annotation, data operations, model training support, and human-in-the-loop AI workflows are becoming core components of the AI economy. By formalizing these services, TP is positioning itself not only as a user of AI in CX operations but also as an enabler of enterprise AI development. The acquisition of Agents Only and minority investments in companies such as Ema and Parloa further strengthen TP's exposure to the broader AI value chain.

Commercial model innovation is another sign of the company's evolution. TP is increasingly exploring outcome-based and gain-share models that move beyond FTE-linked pricing. This is consistent with client demand for clearer ROI and accountability. In India, TP has been actively positioning transformation engagements around productivity gains, automation benefits, and shared value. In Asia-Pacific more broadly, TP is moving toward commercial structures in which AI costs, productivity gains, and business outcomes are embedded in the solution rather than sold as disconnected add-ons.

This shift is not easy. Outcome-based pricing requires confidence in delivery, strong measurement discipline, and a clear understanding of client processes. TP's existing client base gives it a structural advantage because it often understands the operations well enough to identify where automation can reduce costs, improve accuracy, and deliver measurable improvements. Existing clients also provide a more practical environment for gain-share models because TP has operational data, process familiarity, and established governance relationships.

The company's broader price-performance value is therefore no longer limited to labor cost efficiency. TP's value increasingly comes from reducing operational friction, improving quality, increasing automation coverage, accelerating decision-making, strengthening compliance, and helping clients navigate AI adoption with lower execution risk.

Provides Customer Impact Through Experience Design, Co-Ownership, and Measurable Outcomes

TP's customer impact is most evident in its engagement with clients beyond traditional service delivery. In a market where many enterprises are still struggling to turn AI ambition into operational reality, TP brings a grounded, practical approach. It works with clients to first understand the problem, then designs the right mix of people, processes, technology, data, and governance to solve it.

This co-ownership model is increasingly important in the Asia-Pacific, where clients face very different maturity levels, regulatory requirements, language needs, and cost pressures. Many organizations want to use AI but remain cautious about data exposure, integration complexity, business disruption, and unclear returns. TP helps reduce this uncertainty by bringing tested use cases, implementation experience, operational benchmarks, and market-specific knowledge into the engagement.

The company's work with a major hospitality brand in Singapore illustrates this broader role. TP's engagement involved not only operational delivery but also technology integration across complex legacy and modern systems, CRM enablement, telephony integration, analytics, and phased rollout across multiple lines of business. The significance of this example lies in the scope: TP is not merely taking over contact center volume. It is helping redesign the service infrastructure behind a high-touch, premium customer experience.

Similarly, TP's healthcare triage work in Australia demonstrates how AI-enabled workflow redesign can create tangible customer value. By reducing the referral-to-booking turnaround from approximately 24 hours to minutes and improving booking conversion, TP helped solve a real service bottleneck, with a direct impact on patients, providers, and business performance.

TP's customer impact is also strengthened by its ability to localize delivery. Asia-Pacific is not a uniform market. Expectations in Japan, Korea, Australia, India, Singapore, China, Malaysia, Thailand, Vietnam, Indonesia, and the Philippines differ significantly. TP combines global tools with local leadership and delivery knowledge, enabling consistent standards while adapting execution to cultural, regulatory, and operational realities.

Frost & Sullivan recognizes TP for turning CX transformation into practical client outcomes. Its customer value proposition extends beyond cost reduction. It is increasingly anchored in faster resolution, better orchestration, stronger compliance, improved productivity, and more resilient customer relationships.

Demonstrates Brand Equity Built on Trust, Scale, and Human-Centered Transformation

TP's brand equity in Asia-Pacific is anchored in three reinforcing attributes: trust, scale, and transformation credibility. The company has long been recognized for its delivery reach, multilingual capability, process discipline, and ability to serve large, complex enterprise clients. What is changing is the basis of the brand promise. TP is increasingly associated not only with reliable delivery but also with AI-enabled transformation.

This evolution matters because the competitive environment is crowded. A handful of global providers remain strong competitors, and many regional and specialist providers are investing aggressively in AI, analytics, and vertical capabilities. However, TP's position is differentiated by the combination of global enterprise credibility, Asia-Pacific delivery depth, AI investment, data services expansion, and local market ownership. The company ranks among the top-tier providers in the 2026 Frost Radar, advancing in both Growth and Innovation and demonstrating that its transformation is translating into stronger competitive positioning.

Brand trust is especially important in regulated and sensitive industries. TP's emphasis on responsible AI, data protection, security, compliance, and governance supports its credibility with clients that cannot risk uncontrolled automation. In industries such as BFSI, healthcare, travel, technology, and public-sector-adjacent services, trust is not an intangible marketing benefit. It is a procurement requirement.

The company's people strategy also reinforces brand equity. In the AI era, employee capability becomes a differentiator for clients. Reskilling, emotional intelligence, supervisor enablement, coaching, and AI fluency affect the quality of delivery. TP's high-tech, high-touch philosophy remains relevant because it recognizes that automation must improve human experience, not remove empathy from customer engagement.

TP's brand also benefits from its demonstrated ability to evolve through market cycles. From telemarketing origins to global CX, from omnichannel service to digital integrated business services, and now to AI-enabled orchestration, TP has repeatedly adapted its model. The current Future Forward strategy reinforces this trajectory by aligning AI, portfolio choices, workforce renewal, ecosystem development, and internal productivity improvement.

Frost & Sullivan finds that TP's brand equity no longer rests solely on being one of the largest CX management providers. It is increasingly based on the company's ability to help clients safely and at scale transition to the next operating model.

Conclusion

TP exemplifies the evolving dynamics of the Asia-Pacific CX management services industry and the industry's next operating model. The company is not simply defending a leadership position built on scale. It is rearchitecting that scale for an AI-led future. Frost & Sullivan views TP's strengths as mutually reinforcing. TP.ai FAB provides a coherent AI orchestration architecture. TP's responsible AI controls address governance concerns that slow enterprise adoption. The company's Asia-Pacific delivery footprint provides reach, resilience, and language flexibility, while a local leadership model supports market-specific execution. Investments in data services, AI partnerships, and technology-as-a-service expand the addressable opportunity. TP's shift toward outcome-based and gain-share commercial models aligns with how enterprise buyers increasingly want to procure CX transformation. Most importantly, TP's strategy keeps the human dimension of CX visible. AI is deployed to improve productivity, consistency, speed, and insight, but human empathy, judgment, coaching, and relationship management remain central to the service model. This balance is essential in a region as diverse as Asia-Pacific, where customer expectations, regulatory conditions, languages, and delivery economics vary widely.

With its strong innovation architecture, expanding growth pipeline, deep regional footprint, and measurable customer impact, TP has set a high benchmark for industry leadership. Frost & Sullivan commends TP for its sustained performance and recognizes the company as the 2026 Asia-Pacific Company of the Year 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.

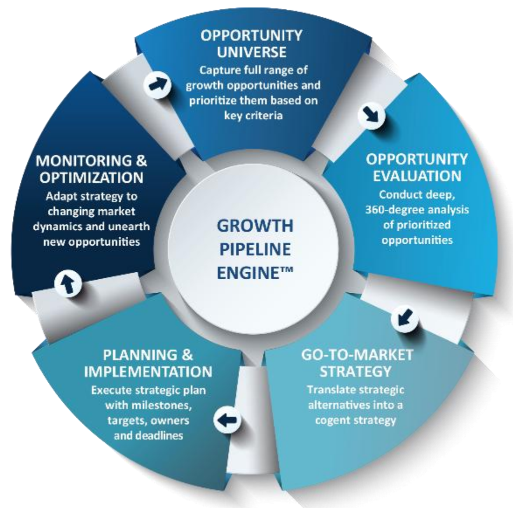
The Growth Pipeline Generator™

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)