FROST & SULLIVAN

2024

TECHNOLOGY INNOVATION LEADER

IN THE NORTH AMERICAN ACCENT TRANSLATION SOLUTIONS INDUSTRY

sanas

FROST & SULLIVAN

2024 BEST PRACTICES AWARD

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. Sanas excels in many of the criteria in the accent translation solutions space.

AWARD CRITERIA

Technology Leverage	Business Impact
Commitment to Innovation	Financial Performance
Commitment to Creativity	Customer Acquisition
Stage Gate Efficiency	Operational Efficiency
Commercialization Success	Growth Potential
Application Diversity	Human Capital

Challenges Hindering Real-time Accent Translation

Customer experience (CX) is an integral factor influencing customer loyalty and a critical competitive differentiator deciding a business's fate. By now, organizations have realized that they need to set up their game and provide an optimal experience to their customers. The right combination of humans, processes, and technology is the key to creating a consistent customer journey. However, this task can be expensive if not approached correctly. Amidst a challenging macroeconomic environment, most companies are increasingly pressured to find ways to reduce costs. As a result, many organizations are near and offshoring contact center volumes to lower-cost locations, such as India and The Philippines. This trend has significantly accelerated in the last two years, as Frost & Sullivan's independent research shows. While India and The Philippines as delivery regions exhibited double-digit revenue growth in 2023, onshore delivery experienced a 4.7% decline in the North American CX Management market.

Yet, the difference in accent can be significant between North American customers and offshore agents. This situation has historically led to resistance from consumers who prefer not to interact with agents they find difficult to understand, thereby limiting the growth and adoption of offshore delivery.[1] The concentration of contact center operations in large urban centers presents another challenge. While these Tier I cities provide more sizeable talent pools, they face higher costs and greater employee turnover

---

[1] *Global Customer Experience (CX) Outsourcing Services Growth Opportunities* (Frost & Sullivan, January 2024)

rates. In contrast, smaller Tier II and Tier III cities across India, the Philippines, Latin America, and other Asian countries offer lower costs, attrition, and absenteeism rates, and companies can create stronger engagement bonds with contact center agents. Yet, inhabitants of these cities often feature stronger, more pronounced accents.

Given the context, accent translation is becoming increasingly vital as it directly addresses the exclusion of potential employees due to linguistic biases. It also creates a tremendous opportunity for organizations looking to expand further in offshore locations and leverage its associated benefits. However, this technology might be difficult to implement as many contact centers operate on outdated systems that cannot meet the low-latency requirement for real-time accent translation. Upgrading the hardware to achieve the necessary low latency can be prohibitively expensive, with capital expenditures for AI and cloud-based solutions further posing financial burdens. Plus, operational inflexibility remains an issue, resulting in heightened costs and significant disruptions during upgrades.

Uniquely tackling these issues with its artificial intelligence (AI)-driven accent translation technology, Sanas facilitates seamless, real-time communication and reduces the need for costly infrastructure upgrades. By preserving agents' authentic voices, silences, and tones, the company broadens opportunities for a diverse workforce, significantly improving customer satisfaction.

Sanas: Focus on AI-based Innovation

Founded in 2020 and headquartered in Palo Alto, California, Sanas is a developer of cutting-edge real-time accent translation solutions. Established by three Stanford students from the prestigious Stanford Artificial Intelligence Lab, the company's team and advisors include some of the world's top speech machine-learning scientists. Sanas's AI solution acts as a sophisticated voice filter, seamlessly removing the native accent and replacing it with a regional accent (e.g., American) while avoiding robotic-sound voices. Unlike competing offerings, the company maintains the authenticity of the agent's voice, avoiding a robotic sound and ensuring a more natural and genuine communication experience.

Breaking Barriers: One Conversation at a Time

Sanas's innovative accent translation technology addresses key market challenges by eliminating strong regional accents without requiring high-end infrastructure. Its technology removes one of the main barriers to offshore, enabling companies to relocate their customer service operations to lower-cost regions without compromising the quality of customer interactions. This capability is particularly transformative for companies looking to expand their operations in countries like India and the Philippines, where accent barriers have previously limited growth.

Further beyond, the company neutralizes accents to enable customers to expand operations to Tier II and Tier III cities. These smaller cities offer lower operational costs, reduced turnover rates, and the potential for a more loyal workforce. In these regions, jobs in the contact center industry are often viewed as valuable, long-term career opportunities rather than temporary positions, reducing absenteeism and enhancing employee satisfaction.

Sanas's technology improves communication, reduces misunderstandings, and alleviates the stress associated with language barriers. End customers become less frustrated by misunderstanding the agents

and are less aggressive with them. This approach results in a more positive work environment, higher employee morale, and better customer interactions. The improved employee experience directly translates into enhanced CX, creating a virtuous cycle of satisfaction and loyalty. Unlike similar solutions that create high latency by transforming speech to text and back, Sanas converts speech-to-speech without the intermediate step, generating a real-time experience.

> *"Tailored to meet any team's specific needs, the company offers customizable, secure, and local deployment, and supports a variety of accents. Compatible with over 800 communication apps, the AI solution goes beyond facilitating conversations: It enhances understanding by 31% and increases customer satisfaction by 21%, demonstrating its substantial and practical impact in real-world scenarios."*
>
> *- Sebastian Menutti*
> *Industry Director – Customer Experience*

The company addresses low latency issues without requiring high-end infrastructure. Sanas works locally as a desktop application, which reduces information security issues as well as the need for expensive technological overhauls, democratizing access to advanced AI capabilities and allowing smaller operations to compete effectively. To this end, Sanas's solution is compatible with older chipsets, ensuring backward compatibility and minimizing the need for extensive systems changes and downtime. The deployment of the company's technology involves a simple-to-use ".exe" file that functions as a virtual microphone layer, utilizing existing equipment and networks. This operational simplicity significantly lowers the barrier to entry for advanced customer experience technologies.

Tailored to meet any team's specific needs, the company offers customizable, secure, and local deployment and supports a variety of accents. Compatible with over 800 communication apps, the AI solution goes beyond facilitating conversations: it enhances understanding by 31% and increases customer satisfaction by 21%, demonstrating its substantial and practical impact in real-world scenarios.[2]

Furthermore, the company's accent translation feature directly addresses workforce exclusion based on linguistic biases and proves transformative for large-scale operations. For instance, large healthcare companies with extensive networks of support agents can integrate Sanas's technology with their existing infrastructure while seamlessly improving communication quality. By providing a platform that equitably benefits enterprises, customers, and support staff, Sanas ensures that improvements in service quality do not result in workforce reductions. At the same time, it drives impact sourcing by opening up previously inaccessible job opportunities worldwide for millions of English-speaking individuals, democratizing employment access and promoting global economic inclusion.

The company boosts customer success by enhancing the confidence and efficiency of customer service agents. Alleviating the pressure of perfect pronunciation and diction enables them to concentrate on understanding and resolving customer issues instead of navigating language barriers. It also counteracts customers' biases when interacting with agents from different regions.

From the outset, the AI solution improves key performance indicators by ensuring customers feel understood and appreciated. The result is an enhanced Net Promoter Score, which underpins Sanas's

---

[2] "Sound Solutions for Next-Gen Enterprise Communication" (Sanas website: https://www.sanas.ai/solutions)

customers' success by adeptly handling the technical and human elements of customer service interactions.

Driving Next-Generation Enterprise Communication

The simplicity of the on/off toggle feature enhances usability, giving agents control and further boosting adoption rates. Over the years, Sanas has achieved remarkable commercial adoption across various industries, including banking, financial services, insurance (BFSI), healthcare, and hospitality. For example, the company achieved a 99.2% adoption rate among customer service agents in Manila on the first day.[3] Sanas monitors adoption rates at 15-day intervals to ensure sustained engagement, and over the past 180 days, the rate has remained steady.[4] This consistency highlights the agents' appreciation for the technology's ability to address customer issues without language barriers. The simplicity of the on/off toggle feature enhances usability, giving agents control and further boosting adoption rates. Customers adopting Sanas's technology saw impressive improvements in key performance indicators, such as a 36% reduction in employee attrition, which reduced the challenges associated with recruiting and training new staff, ultimately improving customer satisfaction.[5]

The company also drives remarkable operational efficiencies, as evidenced by metrics like a 43% increase in sales transfer rates and an 18% decrease in "average handle time."[6] These improvements indicate that agents can handle calls more effectively and resolve issues faster, leading to better first-call resolution rates. In addition, the platform results in a 22% increase in customer likeliness towards agents, showcasing enhanced customer-agent interactions.[7]

Implementation begins with pilot deployments involving no more than 500 agents, allowing enterprises to evaluate the technology's impact before scaling up.[8] Expansion to 2,000 agents within the first few months indicates successful integration and high customer satisfaction.[9] Sanas excels in customer support during these initial stages, ensuring a strong on-the-ground presence. Beyond providing technology, the company values support, offering dedicated personnel on-site for the first two to four weeks to assist with any queries.[10] This proactive support and regular check-ins emphasize Sanas's commitment to human interaction and trust-building, ensuring customer confidence through visible and consistent assistance.

Finally, Sanas's commitment to improving Employee Experience (EX) has significant implications for mental health. As contact center agents are no longer subject to customer aggressiveness, a more positive work environment and higher employee morale reduce stress and improve productivity. Sanas's mission is to bring its technology to every agent, enhancing their mental health and overall job satisfaction, which drives better customer interactions and a more successful industry overall.

"Sanas' real-time speech engine has the potential to disrupt and revolutionize digital communications, and Assurant is excited to back and partner with Sanas."

---

[3] Frost & Sullivan Interview with Sanas (Frost & Sullivan, May 2024)
[4] Ibid.
[5] Frost & Sullivan Interview with Sanas (Frost & Sullivan, April 2024)
[6] Ibid.
[7] Ibid.
[8] Frost & Sullivan Interview with Sanas (Frost & Sullivan, May 2024)
[9] Ibid.
[10] Ibid.

- Bob Lonergan, Assurant[11]

"This is crazy; my agent did not want to move to a new campaign when she got to know Sanas isn't used on that campaign; never in my 23 years in this industry have I heard an agent say that."

- Large Enterprise Customer (shared with Sharath Keshava, Co-founder at Sanas)[12]

"Our partnership with Sanas has been a game-changer, enabling us to achieve double-digit improvements in key performance indicators and a remarkable 15% increase in revenue earned per agent. Integrating Sanas into our operations has not just been about enhancing communication; it's been a strategic move towards creating a more inclusive and effective customer engagement model."

- *Pankaj, Fusion BPO[13]*

Sanas's Impact: Changing Lives at Scale

Frost & Sullivan has not identified a technology that matches Sanas's exceptional performance, positioning it in a blue ocean market space with little to no competition. Sanas combines patented innovation and flawless performance, distinguishing itself in the industry with its unique real-time accent translation technology that operates seamlessly without any lag. The platform's scalability, capable of incorporating thousands of new agents daily, allows it to meet the demands of large clients, including Fortune 500 companies across BFSI, healthcare, and hospitality sectors.[14] Some of the largest contact centers spend nearly 50% of their operational expenses on hiring costs and with Sanas, they can now access additional hiring pools in underprivileged areas. Sanas's technology enhances communication and aligns with the rising environmental, social, and governance (ESG) standards required by large enterprises. Hiring in underprivileged areas, a common ESG requirement, further enhances the value of Sanas's offerings, adding a socially responsible dimension to its technological innovations. Moreover, after its implementation,

> *"These improvements indicate that agents can handle calls more effectively and resolve issues faster, leading to better first-call resolution rates. In addition, the platform results in a 22% increase in customer likeliness towards agents, showcasing enhanced customer-agent interactions."*
>
> *- Manuel Albornoz*
> *Best Practices Research Analyst*

Sanas has documented significant improvements in cross-selling and sales transfers, net calling scoring, average handle time, revenue earned per agent, and customer likeliness towards agents.

Sanas's growth has been remarkable, with a workforce of over 30,000 agents operating from India and the Philippines. The company charges for its service on a per-agent, per-month basis under a SaaS model, requiring a minimum one-year commitment but offering flexibility afterward. The company has also experienced rapid user adoption and significant team expansion.

Sanas forges strategic partnerships that significantly enhance customer experiences and drive industry innovation. For example, a key partnership with Continuum Global Solutions, established in July 2023,

---

[11] "Learn how Sanas' accent translation technology changes lives at scale." (Sanas website: https://www.sanas.ai/solutions)
[12] Provided by Sanas (Frost & Sullivan, April 2024)
[13] Ibid.
[14] Frost & Sullivan Interview with Sanas (Frost & Sullivan, April 2024)

allows Continuum's agents to eliminate background noise and adjust accents to align with local dialects, thereby transforming customer interactions.[15] The technology enables Continuum to engage a broader agent pool, overcoming previous barriers caused by strong regional accents. Furthermore, esteemed companies such as Insight Partners, Quiet, GV (formerly Google Ventures), DN Capital, General Catalyst, Index Ventures and Human Capital have invested in Sanas, recognizing its potential to transform digital communications.[16]

Looking ahead, Sanas is actively developing micromodels to address the complex nature of speech, encompassing aspects like confidence, grammar, and verbal expression. Ultimately, Sanas's ongoing investments in research and development are geared towards overcoming the physical limitations of data transfer and further enhancing its product capabilities.

Conclusion

To stay relevant in the marketplace, organizations must deliver optimal customer experiences while keeping rising costs at bay. Sanas's groundbreaking real-time accent translation technology helps achieve both outcomes simultaneously. The company uniquely eliminates strong regional accents without requiring high-end infrastructure, enabling companies to relocate their customer service operations to lower-cost regions while maintaining high-quality interactions.

Sanas has achieved remarkable commercial adoption across various industries, including BFSI, healthcare, and hospitality. This success relates to its technology significantly improving key performance indicators, reducing employee attrition, increasing sales transfer rates, and decreasing average handle time. On top of the previous, the company's commitment to innovation and customer support is evident in its proactive approach to implementation and ongoing assistance.

By combining patented innovation, flawless performance, and strong customer support, Sanas demonstrates leadership and a transformative impact in the industry. Its ability to meet the demands of large clients, including Fortune 500 companies, and its alignment with ESG standards underscore its significant contributions to the customer experience landscape.

With its strong overall performance, Sanas earns Frost & Sullivan's 2024 North American Technology Innovation Leadership Award in the accent translation solutions industry.

---

[15] "Continuum Global Solutions and Sanas.AI Form Partnership to Further Enhance Customer Experience" (Sanas press release, July 2023)
[16] "Our Visionary Partners" (Sanas website: https://www.sanas.ai/)

What You Need to Know about the Technology Innovation Leadership Recognition

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

Best Practices Award Analysis

For the Technology Innovation Leadership Award, 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 Success: 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 financial performance is achieved in terms of revenues, 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: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

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 Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled 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:

■ Mega Trend (MT)

■ Business Model (BM)

■ Technology (TE)

■ Industries (IN)

■ Customer (CU)

■ Geographies (GE)