FROST & SULLIVAN

2024
TECHNOLOGY INNOVATION LEADER

*IN THE GLOBAL
LANGUAGE SERVICES
AND TRANSLATION
INDUSTRY*

FROST & SULLIVAN

2024 | BEST
PRACTICES
AWARD

LanguageLine
Solutions®

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

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

LanguageLine Solutions (LLS), headquartered in Monterey, California, has been the world leader in innovative multilingual language solutions for over 40 years. LanguageLine is trusted by more than 30,000 clients, globally, to enable communication with limited English proficient (LEP), Deaf and Hard-of-Hearing communities. LLS is the leading language solutions partner for major Fortune 500 companies and has been recognized with three previous Frost & Sullivan Best Practices Awards for Market Leadership and another for New Product innovation.

Commitment to Innovation

In the last three years, the market has seen language access shift, far beyond the traditional telephone and call-center connections. This language services market is rapidly moving toward more dynamic modes, user-friendly devices and models of communication.

LanguageLine's latest innovation involves the real-time transformation of its written-word solutions. LLS has evolved from the traditional translation of words to developing, designing, implementing, and managing multilingual content programs that reside within its clients' workflows and content management platforms. These programs have human expertise at the core, with pervasive AI technologies embedded in machine translation, as well as Large Language Models (LLMs) equipped with Natural Language Processing (NLP).

For 2024 LanguageLine Solutions is offering new services, building new tools, and linking their processes and technology with that of their customers to provide better, faster, and more reliable products and services. It will be monumentally difficult for other competitive language service companies to match LLS' expertise and reliability of LanguageLine's professional interpreters.

> *"LLS provides unparalleled on-demand access to reliably fast, secure, scalable language services that are available 24 hours a day, 365 days a year. Few language services companies can even come close to LLS' expertise and the reliability of its offerings and professional interpreters."*
>
> *Michael DeSalles*
>
> *Principal Analyst*

Commercialization Success

For decades, LanguageLine has been the language access partner of choice for businesses worldwide. Listed below are just a few of the top industry challenges and multiple LLS technology applications and success stories:

Maintaining security. Security is top of mind for LLS clients and prospects. LLS takes measure to ensure that each interaction is secure and confidential. Clients audit LLS hundreds of times per year to make sure operations are compliant with PHI, PCI, and other industry standards. LLS continues to make investments in defense against fraud and cyber-security threats.

Sustaining reliability. Clients require demand language access, 24 hours a day, seven days a week, 365 days a year - wherever and whenever it is needed. LanguageLine Solutions offers a platform that exceeds its own 99.99 percent uptime goals. LLS maintains and manages interpreter teams that are always available in both voice and video channels to assure quick connection times.

Addressing the shift toward mobility and video. Ubiquitous language access has moved beyond the traditional telephone and call-center connections. It is now moving toward more dynamic modes and models of communications. LanguageLine continues to invest in its mobile and video options to support ease-of-use in diverse locations. This could include examples like video in ambulances, telehealth applications, kiosks for businesses, and handheld smartphone applications.

Application Diversity

Listed below are components of the **LanguageLine Mercury Tech Stack**. It is LLS's foundational technology and is supported by:

The LanguageLine Portal. This is a secure, easy-to-use client portal for online project management and reporting.

LanguageLine Connect. This element is a collection of 60+ out-of-the-box connectors that automatically retrieves content and returns completed translations to the predefined repository; integrating authoring, translating, and publishing.

LanguageLine Website Proxy. This feature provides a seamless workflow for real-time localization for websites that require regular updates.

LanguageLine Machine Translation. This important collection of 40+ machine translation engines, with specific language or domain expertise, can translate large-scale content quickly and cost-effectively that supports:

- MTPE: Machine Translation followed by expert linguistic editing
- MTQE: Predictive assessment of machine translation accuracy without reference translations.
- Machine Translation Quality Evaluation: Assessment of translation quality by both AI algorithms and human reviewers.
- Content suitability: Evaluation of content appropriateness for specific audiences or purposes.
- MT customizations and training: Tailoring and refining machine translation systems to specific languages, terminologies, or contexts.

Customer Acquisition

LanguageLine has unrivaled experience working with an extensive list of marque clients across industries, including financial services, retail, education, government, legal, public safety and business:

- 62% of Fortune 100 companies
- 19 of 20 "Best Hospitals"*
- 10 of 10 top insurance companies
- 15 of 27 top commercial banks
- 1,000s of government agencies

LLS is a leader in the industry and committed to client success through innovation and executional excellence, offering a complete array of scalable language access services. In the industry, the gold standard for effective communication is Plain English. LLS has taken the lead in the market with its LanguageLine Clarity**TM** offering. It improves language access and equity by offering simple, clear, well-designed content that people can easily read, understand and use.

Key components include:

- Microsimplification®
- Macrosimplification®
- Streamlining communication systems
- Plain Language Training
- Customized education for executives and staff

Client benefits with LanguageLine Clarify include better organizational comprehension, fewer customer service requests, improved customer/staff satisfaction, and increased engagement. This innovative offering meets compliance with language access and equity requirements for Section 1311 of the Affordable Care Act (ACA) and the Plain Writing Act of 2010. These laws require the Federal government to publish all publicly distributed documents in Plain English.

As shown in Exhibit 1.0 below LanguageLine is able to offer superior client support solutions. LLS utilizes customer-facing processes and an internal service culture that drives efficient and consistent new customer acquisition, while strengthening existing customer engagements.

Exhibit 1.0

LanguageLine Excellence in Client Support

IMPLEMENTATION
- In-person or recorded
- 7,276 locations implemented during pandemic
- 14,251 clients trained
- 100% client satisfaction rating

TRAINING AND MATERIALS
- User training videos
- Custom support materials
  - Quick reference guides
  - Language Access notices and posters
  - Language ID guides

DEDICATED CLIENT SUPPORT
- Dedicated account manager
- 24/7 live client and account support for all services
- 24/7 live technical support
- 99.99% client satisfaction rating in 2020

CLIENT PORTAL & REPORTING
- 24/7 access to password protected client portal for account management and oversight
- Custom reporting and billing options

Source: LanguageLine Solutions and Frost & Sullivan Analysis

LLS helps client organizations treat language as a strategic asset and expertly manages their multilingual initiatives. This way, Language Line assists clients in sustaining a competitive edge; supporting improved customer relations, adhering to legal standards, and broadening the company's market reach.

Operational Efficiency

LanguageLine sets the global standard for audio, video, and onsite interpreting, as well as translation, localization, and testing/training for bilingual staff and interpreters. LLS' hiring practices, monitoring and linguistic excellence minimizes call length and increases mutual understanding. LLS offers world-class connect times, which increases client satisfaction and reduces cost. LanguageLine is committed to full partnership with its clients, offering dedicated account managers, 24/7 technical support personnel, comprehensive reporting and a national implementation team.

Exhibit 2.0 highlights LanguageLine's planning, scheduling and forecasting experience. This ensures 100% availability in any language at any time.

Exhibit 2.0

Source: LanguageLine Solutions and Frost & Sullivan Analysis

LanguageLine has a long history of collaborating with clients to achieve operational efficiencies that increase customer satisfaction, market share, help clients sustain a competitive edge and adhere to strict legal standards. This has resulted in the broadening of LLS' expansion and reach as the market leader in the industry.

> *"The human element is the foundational thread woven into the cultural fabric of LanguageLine and its Global Content Solutions."*
>
> *Michael DeSalles*
>
> *Principal Analyst*

Human Capital

The human element is the foundational component woven into the fabric of LanguageLine's culture and its Global Content Solutions. At the core of LanguageLine's multilingual programs are its human technologists, solution architects, and LLS-certified expert linguists. As demonstrated in Exhibit 3.0, LLS ensures the highest quality of language service delivery through rigorous certification; frequent quality monitoring; audits; training; and the continued professional development of its employees.

Exhibit 3.0

LanguageLine Certification, Monitoring and Development
LanguageLine Certified[SM] interpreters exceed the requirements of all recognized certification programs

LANGUAGELINE CERTIFIED INTERPRETERS

- Thorough training to instill professional standards
- Must pass bidirectional interpreter skills assessment test to demonstrate:
  1. Language proficiency
  2. Industry specific terminology
  3. Accuracy & completeness
  4. Interpreting skills
  5. Interpretation protocol
  6. Customer service skills

QUALITY MONITORING

- Senior Language Specialists[SM] monitor and score interpreting and customer service skills
- Feedback and coaching provided
- Technology-aided monitoring of interpreter environment
- 2,000 work-at-home audits in 2020
- Voice of the Customer program enhances interpreter coaching and recognition

CONTINUOUS DEVELOPMENT

- Continuing education, mandatory compliance training, and collaborative learning options
- Career pathing through advanced interpreting courses
- Ongoing development & support through robust interpreter resources department
- Recognition programs for high performing interpreters

Source: LanguageLine Solutions and Frost & Sullivan Analysis

Competitors in the industry are unable to match the quality, breadth and diversity of LanguageLine's talented, and well-trained linguistic teams. Other language service firms are hard-pressed to compete on the number and quality of LLS products, the company's technology stack and customer market penetration.

Conclusion

When asked about LanguageLine's outlook on innovation, LanguageLine Solutions CEO Scott Klein said this:

"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."

LanguageLine Solutions treats language as a strategic asset and, through its people and products, strives to accomplish its stated mission:

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

With its strong overall performance, LanguageLine Solutions earns Frost & Sullivan's 2024 Technology Innovation Leadership Award in the global language translation services industry.

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)