FROST & SULLIVAN

2025 Frost & Sullivan
Customer Value Leadership
Recognition

The Australian Customer Experience Management
Services Industry
Excellence in Best Practices

Maximizing the Price/Performance ROI for Customers

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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 CX excels in many of the criteria in the customer experience management services space.

RECOGNITION CRITERIA

Business Impact	Customer Impact
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

The Transformation of the Customer Experience Management Services Industry

Customer experience (CX) has evolved from a peripheral function to a core strategic imperative, especially as organizations across industries recognize its direct link to business growth, brand equity, and customer lifetime value. A recent Frost & Sullivan global survey of IT decision-makers revealed that 65% of respondents ranked improving CX as a top business priority, highlighting its growing strategic importance in boardrooms.

The path to superior CX delivery is complex. Today's customer interactions are multifaceted, involving digital and physical channels, asynchronous messaging, and expectations of highly personalized service. Organizations in Australia are confronting several challenges, including hybrid workforce models, rising labor costs, shifting consumer behaviors, and post-pandemic talent shortages. Many organizations struggle to adopt and integrate emerging technologies across business silos effectively. This has fueled the demand for customer experience management (CXM) services, which help organizations design seamless, personalized, and omnichannel customer journeys. In recent years, CXM providers have evolved from mere service vendors to strategic transformation partners.

The Australian CXM services market is mature and competitive, featuring global majors, regional specialists, and local champions. In such an environment, providers must distinguish themselves by integrating human insight with intelligent automation to achieve tangible outcomes, rather than just scale. The CXM landscape is undergoing a shift from traditional, labor-intensive models to AI-driven, data-informed systems. The objective is to provide real-time, context-aware, and seamless CX delivery

that scales with demand while lowering service costs. In Australia, this shift is particularly nuanced due to regulatory obligations, data sovereignty expectations, and the high bar for empathetic, culturally attuned service. Providers must blend global delivery efficiency with local service design, ensuring digital transformation enhances rather than replaces the human element.

Frost & Sullivan thinks Probe CX leads the CX transformation conversation by incorporating advanced technology in its solutions while preserving human empathy at the center of its service delivery, enabling exceptional outcomes and sustained competitive advantage.

Elevating Experiences by Empowering People, Driving Innovation, and Harnessing Technology

Established in 1979, Probe CX is a distinguished Australian service provider specializing in comprehensive CX services. It helps clients sell, serve, and support their customers through a customized, end-to-end portfolio spanning CX, digital, shared services, and managed operations. The company's expertise covers the full customer life cycle—from lead generation and sales to service, retention, collections, and back-office support. With decades of heritage, a growing workforce, and satisfied clients across various industries, Probe CX has established itself as a leader in digitally enabled, human-centric CX solutions. The company's value lies in its ability to provide agile, flexible, and customized intelligent CX designs. In Australia, its model combines onshore intimacy, offshore scalability, and proprietary digital enablement, making it a trusted partner that can offer the necessary scale and diversity for government agencies, blue-chip enterprises, and emerging disruptors.

Probe CX's service delivery strategy is distinctly shaped by its *Designed in Australia, Delivered Globally* philosophy. With its headquarters and leadership based in Melbourne, the firm provides clients in Australia with proximity, accountability, and cultural alignment, which are especially important in regulated sectors such as government and financial services. At the same time, the company operates a sizable offshore capability in the Philippines (with more than 14,400 employees) and an emerging digital services hub in India, allowing it to offer cost-effective delivery without compromising service quality.

Unlike traditional outsourcers that offer siloed or static service packages, Probe has built a modular CXM framework. It spans front-, mid-, and back-office operations, enabled by a comprehensive suite of solutions such as digitally enabled CX, enterprise transformation, data and analytics, and augmented workforce services. Clients can start with specific services—such as collections, customer care, or billing—and progressively integrate complementary services, all under a single governance and delivery framework.

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Senior Director, ICT Practice,
Asia-Pacific

Today, the company serves more than 900 clients across 29 delivery locations in 5 countries, backed by a workforce of more than 19,000 employees. Frost & Sullivan thinks that with this scale, a robust alignment with market demands, and a comprehensive range of end-to-end CX solutions, Probe CX is well-equipped to sustain its leadership in the Australian CXM services market, responding effectively to its clients' needs.

Innovation at the Core: Transforming CX Through Intelligence, Automation, and Co-creation

In today's rapidly evolving CX landscape, innovation is no longer a differentiator but a prerequisite. Within Probe CX, innovation culture is embedded as a strategic pillar across every layer of the organization and is not a one-off initiative. The company has grown from boutique traditional contact center outsourcing to a transformation partner, delivering intelligent, agile, and secure CX solutions built for the digital age.

Probe CX's innovation is grounded in its *Uniquely Digital, Naturally Human* guiding principle. This philosophy reflects a commitment to blending advanced technologies with empathetic service design, ensuring digital transformation enhances—not replaces—the human experience. The company's innovation strategy is centered on 4 key tenets: simplicity of interaction, empowered decision-making, trust as a foundation, and mutual understanding driven by data-led insights. It has invested in proprietary technologies, digital capability centers, and client co-creation models to turn innovation into value.

At the heart of Probe CX's innovation ecosystem are its proprietary platforms developed in-house to meet Australian clients' nuanced requirements. These platforms are built to deliver interoperability, security, and measurable outcomes. They are the foundation of the company's digital-first engagement approach and are leveraged to accelerate time-to-value, aligning with client-specific needs.

- **Oration Platform**: Probe's AI-powered digital engagement engine facilitates intelligent conversations across voice and digital channels. With 80% billing-related interactions automated and 69% digital resolution achieved, Oration delivers efficiency, speed, and scalability without compromising customer empathy.

- **Apollo Insights**: This GenAI-enabled analytics suite enables clients to understand call drivers, predict customer behavior, and identify friction points. The platform supports root-cause analysis and proactive CX redesign.

- **Aggy Agent Assistant**: This embedded co-pilot tool equips front-line agents with real-time prompts, contextual guidance, and compliance checks, reducing average handle times and improving resolution accuracy.

Beyond proprietary platforms, Probe CX has infused AI and automation across its operational ecosystem. These capabilities have enabled the company to digitize more than 42% of all customer interactions and handle 75+ million engagements through AI-assisted workflows. Innovation is applied to simultaneously improve speed, compliance, personalization, and agent empowerment. This includes:

- Automated quality assurance and sentiment analysis
- GenAI-driven contact summarization and disposition tagging
- Smart routing and workforce optimization engines
- AI-based microlearning and coaching systems

Probe CX distinguishes itself by engaging clients through co-creation models, such as proof of concept (POC) and proof of value (POV) frameworks. These engagements enable rapid iteration, real-world

testing, and direct input from client stakeholders. Rather than offering monolithic solutions, Probe CX builds modular services that evolve with the client's maturity curve and transformation goals. This collaborative approach ensures higher solution adoption and long-term alignment. Innovation is not imposed—it is co-developed.

Innovation at Probe CX is as much about empowering people as it is about technology. The company has built a digital services team of more than 150 engineers, analysts, and designers. It is expanding its innovation delivery hubs in India and the Philippines to meet growing demand. Internally, tools such as Aggy and AI-based coaching are used to enhance agent performance and job satisfaction, ensuring that technology serves the workforce and not the other way around. In addition, the company has significantly reduced onboarding time through automation-led training, contributing to faster ramp-ups and consistent service quality across regions.

All innovation at Probe CX is underpinned by stringent security and compliance frameworks. The company operates under a zero-trust architecture, supports geo-fencing for hybrid teams, and aligns with globally recognized standards such as ISO 27001 and PCI-DSS, as well as the Australian government's Essential Eight maturity model. The company also employs real-time dark web monitoring and proactive incident response frameworks to protect data across all environments. These safeguards are particularly crucial in engagements with public sector, healthcare, and banking clients—sectors where Probe CX has become a trusted provider based on its ability to innovate securely.

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Client-centered by Design: Creating Seamless, Evolving, and Empowering Experiences

Probe CX sees the client experience as more than a touchpoint; it is a continuous journey of co-creation, delivery, and value evolution. From initial engagement to long-term partnership, the company's customer life cycle strategy reduces friction to improve client maturity and provide enhanced outcomes. Its service model is innovative, flexible, transparent, and simple, and it is a trusted partner for companies dealing with complex CX transformations.

Probe CX initiates partnerships with clients through a highly consultative and modular approach to solutioning. Its intentionally designed sales process is focused on minimizing complexity and ensuring alignment with client needs, budgets, and constraints. With nearly 50% of new engagements originating from formal request for proposal (RFP) processes and the remainder from direct consultative selling, the company's commercial model emphasizes tailored design and clarity.

Clients usually engage Probe CX in narrow solution areas—such as customer service enhancement or back-office processing—and scale as results are demonstrated. Flexibility in the firm's offering, be it fixed outcome-based pricing or managed services, makes clients confident that they are entering into a partnership according to their requirements rather than a packaged model. Transparency around

deliverables, performance indicators, and commercial terms builds trust from the early days of the partnership.

The company's long-standing relationships, including 30 years with some marquee clients across sectors, are a testament to its shared success and life cycle alignment. Clients benefit from an adaptive delivery model that continuously optimizes services based on evolving business needs, customer behavior insights, and technological advancements. Probe CX does not view the solution as static; instead, it embeds mechanisms such as Apollo Insights and automated QA to identify opportunities for improvement in real time. Clients actively shape service enhancement roadmaps through collaborative initiatives, such as voice-to-digital transitions, chatbot integration, experience redesigns, and automation rollouts. Probe CX co-develops next-phase solutions that match the client's strategic trajectory. This deep integration fosters ownership and ensures services evolve with clients' expectations, internal transformation goals, and competitive pressures.

Probe CX delivers its services with a sharp focus on availability, responsiveness, and quality. Through its distributed workforce, the company provides clients with round-the-clock support and resilient operations. Its hybrid delivery model (onshore and offshore) is further enhanced by 90% cloud adoption, enabling high availability and rapid response even under peak loads or during service transitions.

Probe CX also builds accessible yet intelligent and adaptive customer service. The Aggy agent assistant, along with GenAI-enabled summarization, are examples of tools that considerably reduce resolution times and enhance service precision. Embedded feedback loops and VoC programs also support early detection and remediation of pain points to ensure constant refinement of service delivery to exceed expectations. While Australian organizations seek partners that understand how to adapt, lead, and deliver, Frost & Sullivan is impressed with how Probe CX stands out by making client success its operating system and not just its promise.

Earning Trust, Building Loyalty: The Enduring Brand Power

Probe CX remains one of the most respected and trusted brands in Australia's CXM services landscape. Over the years, the company has evolved into a transformation partner characterized by operational excellence and value-driven innovation—attributes increasingly sought by enterprise and public sector clients navigating the rapid industry shift.

The company's brand equity is rooted in its reputation for being responsive, adaptive, and committed to client success. Increasingly, clients view Probe CX as an extension of their operations, thanks to its focus on aligning with changing requirements and delivering quantifiable outcomes with reliability and integrity. Probe CX successfully maintains a strong intimacy and strategic partnership with clients in a progressively competitive and commoditized market.

What further elevates the Probe CX brand is its alignment with client values around ethics, transparency, and social responsibility. The company's focus on ESG—evident through Indigenous employment initiatives in Australia, clean water and sustainability programs in the Philippines, and stringent data governance practices—demonstrates a commitment to making a meaningful impact beyond business KPIs. This value-based positioning resonates well with large enterprises and government clients held to similar accountability and stakeholder scrutiny.

Industry recognition reinforces Probe CX's strong brand position. The company has received numerous accolades from industry associations and independent analyst firms for service capability, technology excellence, and business performance. Such recognition validates Probe CX's market impact and offers assurance of a future-ready partner for clients and prospects. The company effectively measures its brand health through established methods such as net promoter score (NPS) and VoC insights. These metrics consistently indicate high customer satisfaction and loyalty, showcasing the brand's ability to transform excellent service delivery into robust emotional and professional bonds. Clients not only remain with Probe CX but also advocate for it, reflecting strong brand equity in a service-centric market.

Frost & Sullivan research shows that clients value long-term relationships with their outsourcing providers and increasingly rely on them for CX innovation. Probe CX's unwavering commitment to excellence transcends its previous achievements in forging enduring client partnerships.

Conclusion

Probe CX has solidified itself as a CX transformation partner of choice in Australia, combining local insight, global delivery, and embedding innovation to meet the evolving needs of enterprise and public sector clients. With customer value at the core of its approach, the company goes beyond transactional service delivery to co-create meaningful, measurable, and future-ready experiences. Its ability to seamlessly integrate human empathy with digital intelligence has accelerated its ascent from a boutique operation to a market-leading CX powerhouse.

Through continued investment in proprietary technologies, AI-led platforms, and outcome-based delivery models, Probe CX is not just responding to change—it is paving the trajectory of CX transformation in the country. Strategic acquisitions, new market entries, and a commitment to ESG further reinforce the company as a growth-oriented, purpose-driven long-term partner. As it scales its impact across industries and geographies, Probe CX exemplifies the qualities of a trusted partner that is innovative, resilient, and relentlessly committed to client success.

Probe CX's strong overall performance earns Frost & Sullivan's 2025 Customer Value Leadership Recognition in the Australian customer experience management services industry.

What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership 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 Customer Value Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, 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: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

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

FROST & SULLIVAN

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 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:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)