

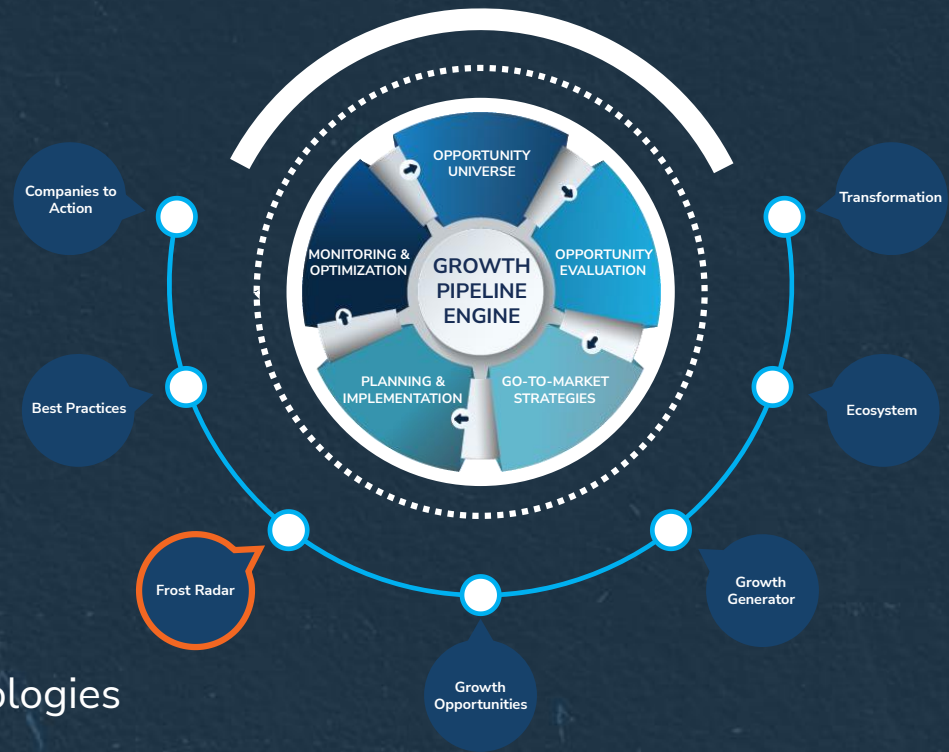
# Frost Radar™: Intelligent Virtual Agents for Customer Experience, 2026

A Benchmarking System to Spark Companies to Action - Innovation That Fuels New Deal Flow and Growth Pipelines

Global Information & Communications Technologies Research Team at Frost & Sullivan

Authored by: Bernardin Arnason

Contributors: Sebastian Menutti



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# Contents

Section	Slide Number
<a href="#">Strategic Imperative and Growth Environment</a>	5
<a href="#">Frost Radar™: Intelligent Virtual Agents for Customer Experience, 2026</a>	11
<a href="#">Frost Radar™: Visionary Leader Companies to Action</a>	16
• <a href="#">Amazon Web Services</a>	17
• <a href="#">Fin</a>	20
• <a href="#">Five9</a>	23
• <a href="#">Genesys</a>	26
• <a href="#">Kore.ai</a>	29
• <a href="#">NiCE Cognigy</a>	32
• <a href="#">Salesforce</a>	35
<a href="#">Frost Radar™: Innovator Companies to Action</a>	38
• <a href="#">Ada</a>	39
• <a href="#">Avaamo</a>	42

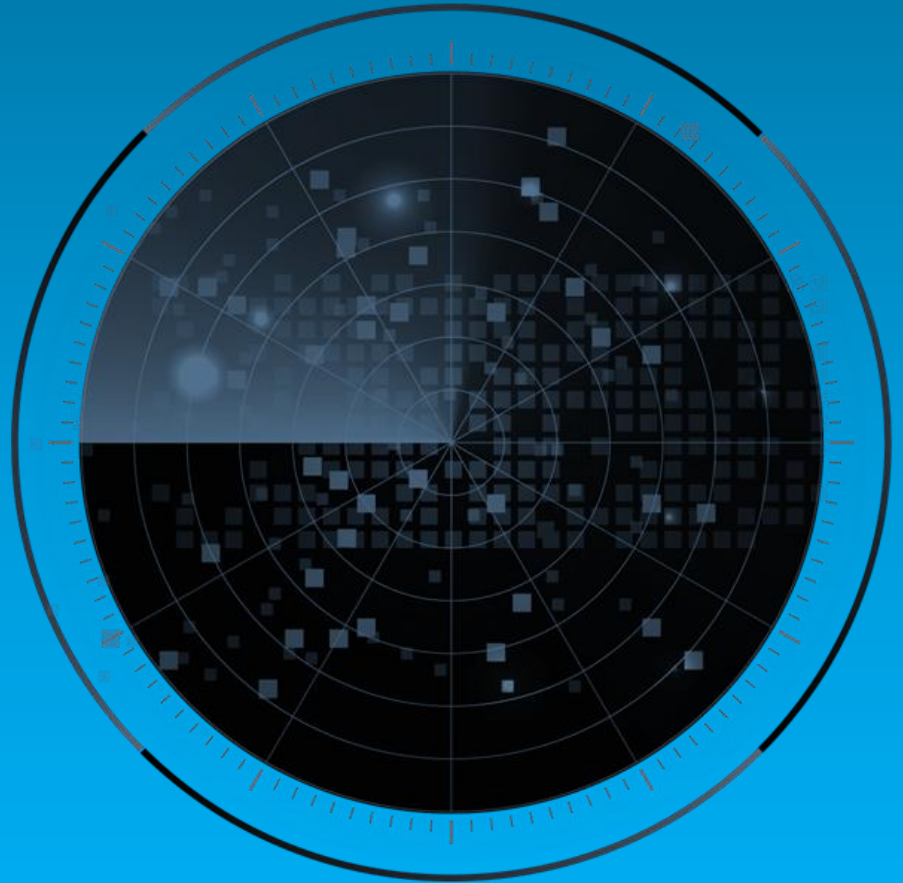
# Contents (continued)

Section	Slide Number
• <a href="#">Cisco</a>	45
• <a href="#">Dialpad</a>	48
• <a href="#">Engageware</a>	51
• <a href="#">Quiq</a>	54
• <a href="#">Sprinklr</a>	57
• <a href="#">Talkdesk</a>	60
<a href="#">Frost Radar™: Contender Companies to Action</a>	63
• <a href="#">Assembled</a>	64
• <a href="#">Content Guru</a>	67
• <a href="#">Verint</a>	70
<a href="#">Best Practices &amp; Growth Opportunities</a>	73
• <a href="#">Best Practices</a>	74
• <a href="#">Growth Opportunities</a>	75

# Contents (continued)

Section	Slide Number
<a href="#">Frost Radar™ Analytics</a>	76
<ul style="list-style-type: none"> <li>• <a href="#">Frost Radar™: Benchmarking Future Growth Potential 2 Major Indices, 10 Analytical Ingredients, 1 Platform</a></li> </ul>	77
<a href="#">Next Steps: Leveraging the Frost Radar™ to Empower Key Stakeholders</a>	79
<ul style="list-style-type: none"> <li>• <a href="#">Significance of Being on the Frost Radar™</a></li> </ul>	80
<ul style="list-style-type: none"> <li>• <a href="#">Frost Radar™ Empowers the CEO's Growth Team</a></li> </ul>	81
<ul style="list-style-type: none"> <li>• <a href="#">Frost Radar™ Empowers Investors</a></li> </ul>	82
<ul style="list-style-type: none"> <li>• <a href="#">Frost Radar™ Empowers Customers</a></li> </ul>	83
<ul style="list-style-type: none"> <li>• <a href="#">Frost Radar™ Empowers the Board of Directors</a></li> </ul>	84
<a href="#">Next Steps</a>	85
<a href="#">Legal Disclaimer</a>	86

# Strategic Imperative and Growth Environment



# Strategic Imperative

- The obsolescence of legacy interactive voice response (IVR) systems and rule-based chatbots is upon us, as higher-functioning voice and digital intelligent virtual agents (IVAs) have emerged. Those legacy systems were designed to route and contain, not to understand and resolve. IVAs can comprehend intent rather than match keywords, maintain context across multiturn conversations and channel transitions, integrate in real time with enterprise systems to execute workflows, and apply large language model (LLM) reasoning to achieve outcomes. Customer experience (CX) leaders should recognize that a fundamentally more capable technology has arrived and should build toward it accordingly.
- The era of measuring self-service success by containment rate is closing. Resolving customer interactions is now the expectation. The gap between deflection and resolution is where customer trust is won or lost. Solutions that optimize for containment without resolving underlying intent have trained customers to distrust self-service. CX leaders should reframe self-service performance around resolution, measured by the rate at which an automated interaction delivers a complete and accurate outcome without requiring a human to repair the damage of an unmet expectation.
- The IVA market is best understood not as a binary choice between legacy chatbots and modern agentic AI, but as a continuum of architectural maturity running from fully deterministic, rule-based natural language understanding (NLU) systems at one end through hybrid scripted and LLM designs in the middle to fully autonomous, goal-directed agentic workflows at the other end.
  - At the deterministic end, agents execute only what they have been scripted to do, properties that remain valuable in regulated industries.
  - Hybrid architecture, which represents most production enterprise deployments today, blends deterministic flows for high-stakes or compliance-critical interactions with LLM-powered reasoning for open-ended conversation, intent discovery, and knowledge retrieval.

## Strategic Imperative (continued)

- True agentic systems, where the agent autonomously plans multistep task sequences, selects tools, invokes APIs, manages exceptions, and adapts its approach based on real-time context, is the architectural destination that most IVA solutions are building toward but that few have fully realized in production at enterprise scale.
- Agentic AI has become the dominant narrative in the IVA market. The technology is maturing, but enterprise adoption is still relatively low. Frost & Sullivan research reveals that only 12% of organizations globally have implemented agentic AI in multiple use cases. Most true agentic pilots remain confined to one or two functions, and organizations that try to scale before establishing clean data pipelines, rearchitected workflows, mapped customer journeys, and defined governance frameworks risk failure. The organizations that will lead in agentic AI recognize that they must first invest in proper process and journey architecture, governance, and change management.
- Governance, accountability, and explainability are mandates for IVA deployment. As these automated workflows manage more transactional items, such as processing refunds or modifying accounts, the governance requirements increase significantly. Auditability, or the ability to reconstruct why an AI system made a specific decision in a specific interaction with a specific customer, is now required.
- AI systems also need explainability, observability, bias monitoring, and human-in-the-loop capabilities built into their core architecture. CX leaders should evaluate AI governance capability with the same rigor applied to security and trust.
- The most consistent challenge in IVA performance is data quality. IVAs relying on fragmented knowledge bases, unstructured legacy documentation, or siloed data produce inconsistent and potentially harmful results. Structured knowledge management, real-time system integration, and clean data ingestion are foundational capabilities. CX leaders should audit their data infrastructure before deploying IVAs at scale, recognizing that AI performance is a direct function of the data environment.

## Strategic Imperative (continued)

- A prevailing multiagent orchestration approach for CX use cases involves a general-purpose conversational agent serving as the intelligent front door, which then invokes specialist agents that execute specific tasks. This approach resolves a fundamental tension in IVA design where a single monolithic agent capable of handling every intent becomes brittle and complex to scale. The orchestrator and specialist architecture concentrate NLU, intent routing, and conversational continuity in a front-end agent, while downstream specialists, purpose-built for action, execute workflows. This approach is scalable to better meet governance, observability, and accountability demands for enterprise deployments.
- The emergence of open interoperability protocols, including model context protocol (MCP) and agent-to-agent (A2A), is a structural inflection point in enterprise AI deployment, enabling multiagent ecosystems to flourish. MCP establishes a standardized interface through which AI agents can discover and invoke tools, data sources, and external services without custom connector development. A2A defines how agents built on different platforms can communicate, transfer context, and collaborate. Production-grade MCP and A2A adoption position a platform as a composable participant in the enterprise AI stack as the CX industry continues to standardize on interoperable agentic frameworks.
- The IVA market has largely been focused on reactive CX use cases where a customer contacts an organization and an IVA responds accordingly, but proactive, outbound interactions are gaining attention. These AI systems identify a triggering condition in real time, initiate outreach, and resolve an issue potentially before a customer is aware of it. Outbound transaction capabilities include real-time event detection, predictive intent modeling, consent-compliant outreach orchestration, and the ability to act across back-end systems without human initiation. IVA solutions that either already provide this capability or have it on the roadmap are building differentiation and potential competitive advantage.

# Growth Environment

- The growth environment for AI and IVAs is strong. Frost & Sullivan 2025 research revealed that 57% of enterprises cite AI as their top technology budget item over the next 12 months, up from 52% in 2024. While enterprise AI budgets are growing, so too are expectations. AI has moved past its novelty where enterprise AI spend was forgiving and experimental. AI return on investment (ROI) now needs to be demonstrable, with chief financial officers now expecting results commensurate with investment.
- Key growth vectors are shaping the IVA market. IVA vendors that emphasize measurable business outcomes rather than technology and features are achieving durable growth. Domain-specific capabilities, including prebuilt agent libraries, native industry workflow integrations, and vertical compliance solutions, also can positively affect growth.
- The transition from scripted or hybrid IVAs to fully autonomous agentic workflows is a key product investment of the next 12–24 months. Seventy-nine percent of contact center leaders tell Frost & Sullivan that they plan to upgrade IVAs in the next two years. Vendors that can demonstrate multiagent orchestration at production scale stand to gain as enterprise buyer confidence in agentic AI grows from cautious pilots to full-scale deployment.
- Geographically, the growth environment for IVAs is varied:
  - In EMEA, the growth opportunity is real but structured differently by subregion. Western Europe is a compliance-first market where GDPR enforcement, the EU AI Act's August 2026 disclosure mandate, and data sovereignty requirements create meaningful procurement friction for vendors without regional cloud infrastructure, local partner participation, and compliance-first posture, but where enterprise contracts (once won) can be sticky and multiyear. The Gulf states in the Middle East have a digital-first economy posture, with high interest in AI portfolios, leading to great growth opportunities there, albeit with high government policy friction. The Iranian conflict has tempered this momentum as well, but hopefully only temporarily.

## Growth Environment (continued)

- North America benefits from the deepest concentration of enterprise contact center-as-a-service (CCaaS) deployments, the most mature AI vendor ecosystem, and a regulatory environment that historically is less stringent than its EMEA or Asia-Pacific counterparts, all of which lead to accelerated IVA adoption.
- The Asia-Pacific region (particularly Southeast Asia) is a high-volume, mobile-first, multilingual opportunity where WhatsApp, LINE, and regional messaging platform penetration make digital IVA channel deployment immediately viable.
- This Frost Radar™ divides IVA growth rates for 2025 into four categories: flat (9% or less); moderate (10% to 49%); accelerated (50% to 99%); and outperform (100% or more). The growth category is identified in each company's profile.
- Frost & Sullivan studies related to this independent analysis:
  - [AI Orchestration in CX – Powering Innovation & Transformation](#)
  - [CX Growth Opportunities in the Information & Communications Technology Industry 2025–2026](#)
  - [AI Analytics – Powering Decision Intelligence for the CX Industry](#)

# Frost Radar™: Intelligent Virtual Agents for Customer Experience, 2026



# Frost Radar™: Intelligent Virtual Assistants for Customer Experience



In a highly competitive and fragmented IVA market with a broad pool of qualified vendors meeting enterprise-grade deployment and revenue thresholds, Frost & Sullivan independently evaluated the landscape and selected just 18 companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market; demonstrating not only strong growth, but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

These industry leaders are categorized into four distinct areas:

**Visionary Leaders** – Leading today and best positioned to lead in the future

**Growth Champions** – Strong market traction and execution, with the next step being deeper innovation

**Innovators** – Driving where the market is going through technology and disruption, with the next step being scale

**Contenders** – Strong in specific areas with clear growth potential, but not yet operating at full scale across the market

# Frost Radar™ Competitive Environment

- The competitive IVA environment in 2026 is complex and defined by overlapping company categories competing for the same enterprise budget. They include:
  - CCaaS-embedded platforms whose proprietary AI solutions providing bundled distribution are their primary advantage;
  - pure-play conversational AI vendors whose IVA-specific architectural depth and vertical specialization are their primary differentiators;
  - hyperscalers whose bundling in existing cloud and customer relationship management (CRM) contracts is a structurally competitive force in the market; and
  - frontier AI labs whose direct API access can bypass IVA platforms entirely for enterprises with sufficient engineering sophistication to build their own orchestration layer.
- CCaaS-embedded vendors portray the IVA as inseparable from the contact center infrastructure it resides in. The argument is that routing intelligence, agent desktop context, telephony-layer integration, workforce management (WFM), and quality management must be unified on a single platform in order to deliver a seamless IVA experience.
- Pure-play conversational AI vendors argue that natively built conversational AI architectures with advanced NLU, multi-agent orchestration, and vertical-specific agent libraries can outperform embedded CCaaS AI and deliver quicker time to value and broader flexibility across platforms.
- Hyperscalers contend that sophisticated IVA functionality can easily be embedded as features of cloud infrastructure and CRM platforms that enterprises already operate at low marginal procurement cost in existing contracts.

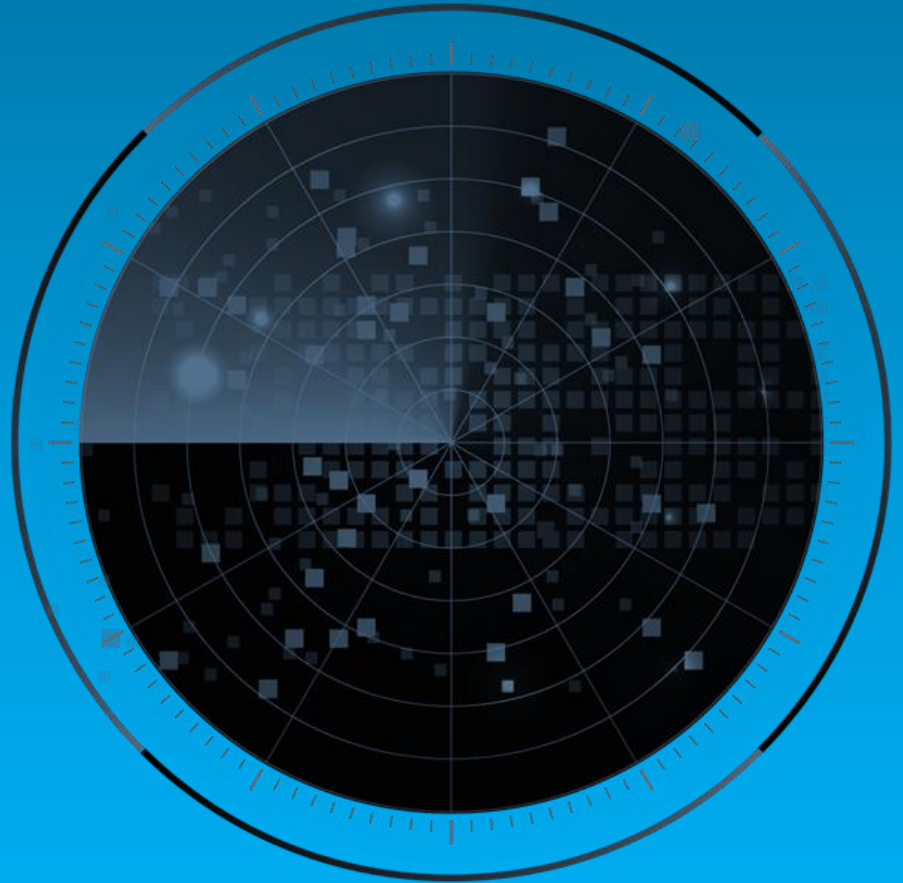
## Frost Radar™ Competitive Environment (continued)

- None of these contenders are natively integrated across all the enterprise systems that agentic AI-enabled IVAs may need to access. Orchestration across all these systems, no matter who does it, requires some combination of integration, APIs, interoperability protocols, and governance compliance.
- The 18 IVA market leaders profiled in this analysis differentiate themselves in the market utilizing a variety of tactics, some of which are:
  - deep AI expertise and proprietary technology;
  - specialized industry vertical solutions, integrations, and expertise;
  - deep integrations with leading enterprise and business systems;
  - access to multiple foundational and specialized LLMs;
  - extensive go-to-market (GTM) partner ecosystems; and
  - extensive professional services and consulting support, including forward-deployed engineers.
- Companies profiled in the Frost Radar™ have registered consistent growth with a strong focus on innovation. All Frost Radar™ participants have:
  - a prominent position in the market;
  - an established IVA customer base across different verticals;
  - a well-defined IVA product with functional agentic AI features or a defined roadmap to it;
  - a well-defined GTM strategy; and
  - native integrations with leading business and enterprise platforms.

# Frost Radar™ Competitive Environment (continued)

- The Growth and Innovation leaders on the Frost Radar™ met key criteria, such as longevity of their offering, consistent and increasing growth, strong GTM strategies, robust customer support, a commitment to local market presence, and investments in vital research and development.
- These industry leaders are categorized into four distinct areas:
  - **Visionary Leaders** – Leading today and best positioned to lead in the future
  - **Growth Champions** – Strong market traction and execution, with the next step being deeper innovation
  - **Innovators** – Driving where the market is going through technology and disruption, with the next step being scale
  - **Contenders** – Strong in specific areas with clear growth potential, but not yet operating at full scale across the market

# Frost Radar™: Visionary Leader Companies to Action



# Amazon Web Services

## INNOVATION

- Amazon Connect's IVA platform supports deterministic workflows, agentic AI agents, and human agents in a single orchestration and analytics layer, allowing enterprises to blend predictability and autonomy based on use case requirements. The platform treats IVAs as integral CX execution components, embedded in the same workflows, analytics, and governance model as human agents.
- Amazon Connect demonstrates agentic AI capabilities through autonomous, multistep task execution and dynamic decision-making. IVAs can reason over customer intent, invoke tools and APIs, and adapt workflows in real time, while still allowing deterministic logic to be enforced for regulated or high-risk interactions. The platform also supports AI-to-AI collaboration, enabling agents to call specialized AI services as part of task execution rather than relying exclusively on human escalation.
- Voice remains a central innovation pillar, supported by Amazon Nova Sonic, a purpose-built speech-to-speech model designed to reduce latency and preserve conversational context. The unified speech architecture enables more natural turn-taking, interruption handling, and tone adaptation.
- Amazon Connect's integration and orchestration capabilities are deeply tied to the broader AWS ecosystem. IVAs can access business systems through AWS Lambda, Step Functions, MCP, and Amazon Bedrock AgentCore Gateway, enabling interaction with thousands of APIs and services. Connect agents can access a curated portfolio of specialized models including multimodal, mixture of experts, and domain-optimized models.
- Analytics and observability are applied consistently across IVA and human agent interactions. Amazon Connect provides real-time monitoring, conversational analytics, sentiment analysis, intent trending, performance benchmarking, and predictive forecasting through a unified data layer. Importantly, IVAs are evaluated using the same quality, performance, and outcome metrics as human agents.

# Amazon Web Services (continued)

## GROWTH

- Amazon Connect benefits from AWS's established enterprise footprint and global cloud infrastructure, enabling rapid scaling of IVA deployments across regions and industries. The company is experiencing accelerated IVA growth.
- AWS's GTM strategy is developer and IT buyer centric, relying on AWS enterprise account teams, AWS Marketplace, and a global partner network of certified implementation specialists rather than a direct CX specialist sales force. Its unique unlimited AI pricing model, which bundles all AI capabilities at channel-based per-minute or message rates, offers a differentiated AI pricing approach.
- The geographic distribution of the customer base has strong North American representation. AWS operates Amazon Connect across nine global regions with data residency controls, providing the infrastructure for international expansion, but the GTM footprint reflects a North American enterprise market focus.
- Vertical penetration is a notable growth driver, with AWS highlighting healthcare, financial services, retail, public sector, telecommunications, and automotive use cases. AWS's vertical strategy is reinforced by industry-specific IVA solutions with prebuilt use case libraries, templates, and partner solutions.
- The partner ecosystem contributes to growth by extending Amazon Connect into industry-specific and regional deployments. System integrators, ISVs, and AWS Marketplace partners deliver customization, integration, and managed services around the core platform. AWS's growth strategy relies on ecosystem scale rather than direct CX sales expansion.

# Amazon Web Services (continued)

## FROST PERSPECTIVE

- Amazon Connect has demonstrated significant adoption scale, supporting millions of daily interactions and billions of AI-driven interaction minutes annually. The platform crossed the \$1 billion annual revenue benchmark in 2025, indicating strong enterprise traction.
- The 2025 introduction of agentic AI capabilities in Amazon Connect was a significant platform evolution, moving beyond scripted bots toward autonomous task execution. This shift reflects AWS's ability to operationalize generative AI and reasoning models in production CX environments, aligning with broader enterprise AI market trends.
- The introduction of simplified AI pricing models is a notable market move. By removing per-feature AI costs, AWS is attempting to accelerate adoption and shift competitive dynamics in the IVA and CX platform market.
- Amazon Connect's IVA security architecture enforces tenant isolation at the account and instance level, with all data protected in transit via TLS 1.2/1.3 and at rest via customer-managed KMS keys scoped per Amazon Connect instance. Access is governed through AWS IAM with SigV4 signing, RBAC security profiles, SAML 2.0 SSO federation, and passive Voice ID biometric authentication, while PrivateLink VPC endpoints keep API traffic off the public internet. CloudTrail provides audit logging, and Amazon Bedrock Guardrails enforce prompt attack detection and content boundaries at the AI agent API layer.
- Amazon Connect should consider how to address enterprises seeking multicloud or vendor-neutral IVA strategies. The platform's tight AWS integration is a strength, but it may limit appeal for organizations standardizing across heterogeneous cloud environments. Clear guidance on interoperability and coexistence with non-AWS CX systems could mitigate perceived lock-in concerns. Addressing this proactively could broaden market reach.

# Fin

## INNOVATION

- Fin is architected as a tightly integrated AI agent in a native customer service platform, combining IVA capabilities with a built-in helpdesk, knowledge base, workflows, and analytics. Fin operates directly in the Intercom environment, enabling the execution of tasks and escalation to human agents with full context.
- The platform supports deployment across chat, email, social, messaging apps, and voice, with centralized configuration via a “train-test-deploy-analyze” lifecycle. However, cross-session memory persistence remains limited, with context retained primarily in a single interaction session.
- The Fin AI Engine™ leverages a hybrid AI approach combining multiple foundation models and its own Fin Apex model with proprietary orchestration, retrieval-augmented generation (RAG), and deterministic workflows. The system routes queries dynamically across models and applies validation layers for safety and accuracy before response delivery. The multimodel orchestration strategy is consistent with emerging best practices for enterprise-grade conversational AI.
- Fin demonstrates agentic capabilities through its Procedures workflow environment and API integrations, enabling multistep workflow execution without requiring rigid deterministic scripting. The system can combine knowledge retrieval with real-time API calls, warranty checks, and account validation as examples and dynamically adapt responses based on customer context.
- Fin Voice launched in 2025, supporting both SIP and call forwarding, and integrates with third-party telephony providers. Fin Voice Procedures can execute real-time transactional actions during live calls. As of early 2026, voice support covers 28 languages.

## Fin (continued)

### GROWTH

- Fin demonstrates traction across mid-market and enterprise segments, with a defined ideal customer profile based on conversation volume rather than seat count. The company's growth trajectory places it in the outperform category. It can upsell its Fin IVA into the large installed base of its helpdesk platform.
- Fin's historical GTM model is structured for self-service acquisition, aiming to avoid significant presale professional services engagement. Fin can be deployed with a credit card and be working within days. The company employs outcome-based pricing with a simplified billing approach of \$0.99 per resolved conversation.
- Fin employs an upmarket strategy, with dedicated teams targeting higher-volume enterprise opportunities (exceeding 100,000 conversations/month). Customer references, such as Anthropic, Lightspeed, and Clay, indicate traction in high-scale, digitally native organizations as well.
- Fin identifies four primary verticals based in large part on their conversational volume opportunity: software and technology, financial services and fintech, retail and eCommerce, and gaming.
- The company is pursuing geographic expansion with global coverage, including support across North America, EMEA, Asia-Pacific, and Latin America, and multilingual capabilities spanning more than 45 languages. The platform's cloud-native architecture and data residency capabilities support international deployments, although regional GTM depth varies by market.

## Fin (continued)

### FROST PERSPECTIVE

- Fin has built a varied customer base of more than 8,000 Fin deployments across 45+ countries and languages as of February 2026, much of which comes from its much larger helpdesk platform installed base.
- The fact that Anthropic, a leading global AI infrastructure player, chose to deploy Fin rather than build an equivalent capability in-house is a notable IVA accomplishment.
- Fin holds SOC 2 Type II, ISO/IEC 42001 (AI management systems), HIPAA compliance covering US and French health data standards, and AIUC-1 certification (an emerging AI governance standard analogous to SOC 2 for AI agents). Additionally, Fin maps controls to OWASP LLM risk categories. The company is investing in the governance infrastructure that enterprise buyers increasingly require.
- Fin's strategic vision centers on the "customer agent" concept, expanding beyond support into sales, success, and eCommerce use cases. The long-term goal is a unified AI agent with modular capabilities across the customer lifecycle, rather than separate point solutions. While this vision aligns with market direction, several components, including unified orchestration across agents, remain undefined.
- The company would benefit from expanding its global SI and partner ecosystem, particularly for large-scale enterprise deployments. While the self-service model is a strength in mid-market segments, complex enterprise environments often require deeper consulting, integration, and change management capabilities.

# Five9

## INNOVATION

- Five9's IVA and AI agent platform is built on a hybrid architecture offering scripted IVA, scripted IVA with generative AI, and agentic AI workflows, balancing control and autonomy. The platform allows for legacy scripted IVA capabilities with a newer agentic execution layer to operate simultaneously, enabling both rule-based and LLM-driven interactions in a single environment. The introduction of generative AI nodes enhances flexibility by enabling agentic-powered and rules-based workflows.
- A new agentic execution layer adds important capabilities, such as real-time voice intelligence, multi-agent orchestration, and a governed tool execution framework. The platform enables multiple specialized agents to coordinate tasks, improving scalability for complex workflows while mitigating LLM limitations in prolonged workflows. The inclusion of versioning, testing environments, and conditional execution logic reinforces enterprise-grade deployment controls.
- Five9 emphasizes voice-first generative AI innovation, particularly through its agentic voice switch, which supports low-latency streaming responses, interruption handling, and multilingual voice capabilities. This allows for more natural conversational flows than traditional turn-based IVR systems. The focus on real-time processing and turn-taking detection indicates a focused investment in improving the IVA voice channel. The capability was live in beta with customers as of Q1 2026, with broader availability targeted for Q2 2026.
- The platform includes a strong governance and guardrails framework, addressing enterprise concerns around LLM risk. Entity redaction, conditional execution controls, simulated testing, and prompt-level governance are embedded into the platform. Five9 employs mechanisms to prevent sensitive data from being exposed to LLMs while still enabling downstream system actions.

## Five9 (continued)

### GROWTH

- Five9 demonstrates strong enterprise traction, with more than 1,000 enterprise customers using its AI solutions as of Q4 2025. The installed base provides a significant foundation for upselling AI agents and IVA enhancements. The company is experiencing a moderate growth trajectory for its IVA solutions.
- Five9 has shifted its GTM strategy, placing more emphasis on account-based selling and engaging the C-suite. The company is navigating a typical 6- to 12-month sales cycle as customers work through AI governance, integration, and internal alignment.
- Five9 benefits from its position as a cloud-native CCaaS provider, allowing it to embed IVA and AI agent capabilities directly into the contact center platform. The integrated approach supports cross-sell and upsell opportunities across its entire Genius AI portfolio.
- Vertical expansion is supported through industry-specific use cases and emerging vertical templates, particularly in healthcare, financial services, and retail. The roadmap includes prebuilt vertical agent packs to accelerate deployment and improve domain accuracy.
- Five9 maintains a strong North American concentration, with the vast majority of revenue derived from clients in the region. The platform is available globally, with key markets in EMEA, Latin America, and Asia-Pacific.

## Five9 (continued)

### FROST PERSPECTIVE

- Five9 crossed \$1 billion in annual revenue for the first time in 2024 and extended that milestone to \$1.149 billion in 2025, establishing itself as one of a small number of CX platform providers operating at that scale. The company reached enterprise AI annualized subscription revenue exceeding \$100 million as of Q4 2025.
- The company continues to innovate with its Genius AI platform, focusing on agentic AI. Five9's Agentic Execution Layer, comprised of the agentic voice switch, Multi-Agent Orchestrator, and Agentic Tool Server, entered live beta production with enterprise customers in Q1 2026. Production deployments span healthcare, logistics, insurance, and telecommunications verticals.
- Five9 secures IVA deployments through end-to-end encryption in transit and at rest, SSO and SAML 2.0 authentication with a hybrid RBAC/ABAC permission model, active and passive voice biometrics for end-customer verification, multitenant data isolation across application and infrastructure layers, and TLS-enforced API communication with continuous monitoring. Its compliance-focused security posture is suited to regulated enterprise environments.
- Five9 should accelerate its MCP server implementation. The absence of a native MCP creates an AI interoperability gap that will increasingly matter as enterprise buyers standardize AI agent tooling. The company's proprietary Agentic Tool Server addresses tool integration but hinders the platform's participation in the emerging open agentic ecosystem.
- As a global provider of CX and AI solutions, Five9 should accelerate its global expansion efforts to diversify its AI revenue beyond its strong North American position.

# Genesys

## INNOVATION

- Genesys delivers its Agentic Virtual Agent (AVA) as a native capability of the Genesys Cloud platform. This architecture enables shared context, unified state management, and consistent governance across voice and digital channels. Because automation, orchestration, and channel handling are unified, the system can maintain context and complete complex, multistep workflows even when customers switch channels or deviate from scripted paths.
- Genesys differentiates its IVA strategy through the use of large action models (LAMs) that focus on planning and executing actions that complement the generative capabilities of LLMs. The agent reasons over customer goals, determines appropriate next steps, and executes multistep workflows across enterprise systems. This approach addresses the limitations of LLM-centric virtual agents, particularly in scenarios requiring workflow execution, policy adherence, and outcome confirmation.
- Genesys embeds enterprise governance directly into the agentic execution layer, including guardrails that define permissible actions, escalation thresholds, and compliance boundaries. Decision paths, tool usage, and outcomes are logged and explainable, supporting audit and regulatory requirements. This governance-focused design reflects compatibility with regulated industries and risk-sensitive deployments.
- Genesys Cloud AI Studio allows CX teams to configure agent purpose, behavior, tools, and knowledge sources without building extensive deterministic flows. By shifting configuration to role definition and outcome design, Genesys enables broader scalability of automation initiatives. The approach also shortens iteration cycles while maintaining centralized control.

## Genesys (continued)

### GROWTH

- Genesys benefits from a substantial global CCaaS customer base already standardized on Genesys Cloud. AVA is positioned as an extension of platform investments rather than a net-new system, lowering adoption barriers. The company is experiencing accelerated growth with its IVA solution.
- Genesys emphasizes financial services, healthcare, and large enterprise service environments where governance, auditability, and execution reliability are essential. In addition to complex, regulated enterprises, the company targets enterprises in growth mode that are looking for innovation and value, and experience leaders who recognize the enterprise value of CX and EX and are looking for a strategic vendor partner.
- Genesys operates across multiple regions with particular strength across EMEA and the Americas. The company maintains a broad set of certifications, including data residency and sovereignty options that help fuel global growth.
- Genesys' GTM strategy leans heavily into its partner and channel network. Strategic partnerships with AWS, Salesforce, and ServiceNow create significant co-selling engagements. Its global system integrator partner network is also a chief growth driver.

# Genesys (continued)

## FROST PERSPECTIVE

- Genesys is building on its Genesys Cloud platform-centric strategy with the introduction of AVA in February 2026. The company is positioning this new approach as a transition from scripted automation to autonomous execution. By introducing an execution-oriented agent that can plan, adapt, and act across systems under enterprise governance, Genesys is extending its CX platform from conversational automation to end-to-end service resolution.
- Genesys' model-agnostic approach supports proprietary, open-source, and third-party models alongside its LAM strategy. Support for standards such as MCP and A2A reflects an intent to function as an orchestration control plane and positions Genesys to integrate with broader enterprise AI ecosystems.
- Genesys has aligned its agentic strategy with formal responsible AI frameworks, emphasizing transparency, auditability, and human-in-the-loop controls. The posture is supported by compliance certifications across the Genesys Cloud platform, including SOC 1 Type 2 and SOC 2 Type 2, HIPAA, HITRUST, PCI, ISO 27001, and ISO 42001, along with strong foundations of regulatory compliance, such as GDPR. Governance is positioned as foundational rather than incremental.
- As the industry adopts LLM-based orchestration with tool invocation, Genesys should articulate how LAMs differ in determinism, reliability, and governance. More explicit comparisons would help enterprise buyers assess risk and suitability. This clarity will become more important as agentic terminology proliferates.
- The LAM-powered agentic agent narrative resonates with technical and analyst audiences but can be dense for non-technical executives. Simplifying messaging around cost reduction, productivity gains, and CX KPI impact could broaden its appeal.

# Kore.ai

## INNOVATION

- Kore.ai has evolved from a traditional conversational AI platform into a broader agentic AI platform architecture, combining IVA capabilities with process automation, enterprise search, and multi-agent orchestration. The platform is structured across AI for Service, AI for Work, and AI for Process modules, supported by a unified agent platform, data layer, and orchestration framework. The layered architecture enables the reuse of capabilities across CX and adjacent enterprise workflows rather than maintaining siloed IVA deployments.
- The platform supports hybrid AI models, combining proprietary NLU, ML-based dialog management, and LLM-driven reasoning. Kore.ai maintains an LLM-agnostic approach, integrating models from multiple providers alongside its own domain-tuned models. This reduces dependency on a single model provider and allows enterprises to align model selection with governance, cost, and performance requirements.
- Kore.ai demonstrates strong capabilities in agentic orchestration and automation, enabling multistep workflows, tool invocation, and interagent communication. The platform supports structured orchestration patterns, allowing agents to collaborate across tasks such as authentication, retrieval, and transaction execution. The capabilities extend IVA functionality beyond conversational interfaces into end-to-end task completion, aligning with emerging enterprise demand for autonomous workflows.
- A notable recent innovation is Kore.ai's AI-native platform rebuild, introducing an agent blueprint language (ABL) that enables a programmable agentic system including Arch, an AI architect that supports full agent lifecycles. The redesign aims to address scalability, governance, and maintainability challenges associated with early LLM-based deployments. While still early in adoption, the architecture reflects a shift toward treating AI agents as software artifacts with version control, auditability, and lifecycle management, which could provide significant differentiation if broadly adopted.

## Kore.ai (continued)

### GROWTH

- Kore.ai is seeing strong enterprise adoption across multiple industries, including financial services, healthcare, retail, and telecommunications, indicating alignment with complex, high-value use cases rather than SMB-focused automation. The company's growth trajectory is in the accelerated category.
- In the past couple of years, the company has put more focus on improving margin predictability that focuses on outright growth. During this exercise, the company targets growth in the 70–80% range.
- Customer expansion in existing accounts is a structural growth engine. Kore.ai reported a 300% increase in customers running more than one major use case on the platform, reflecting the land-and-expand motion that the company's broad AI portfolio enables.
- The company has expanded its footprint, with customer distribution across North America, EMEA, Asia-Pacific, and Latin America. North America remains the largest market, but growth in the United Arab Emirates and Southeast Asia indicates increasing international penetration. The company now operates 10 offices globally to support this expansion strategy.
- The Kore.ai GTM model runs approximately 66% direct and 34% partner-led, with a stated FY 2027 target to invert that ratio to majority partner-led. Microsoft and AWS co-sell relationships are structurally significant, as purchases through either hyperscaler marketplace count against the customer's existing cloud spend commitments. Global system integrator relationships with Accenture, Deloitte, PwC, TCS, Wipro, and Mphasis extend reach and pipeline in verticals where system integrators help drive enterprise AI decisions.

## Kore.ai (continued)

### FROST PERSPECTIVE

- Kore.ai operates at a materially large enterprise deployment scale, handling 11 billion interactions per month in aggregate, with its five largest deployments individually processing between 5.1 million and 59.2 million conversations per month. A leading US financial institution has operated on the platform for about nine years, with voice and digital IVA now supporting over 300 million calls annually. The company demonstrates global enterprise IVA scalability that is rare among its cohort.
- The company recently embarked on a significant platform rearchitecture that includes its IVA platform in a broader AI for Work, Service, and Process approach that institutes a next-generation AI-native architecture. These developments, if executed properly, transition Kore.ai from a traditional conversational AI vendor to a broader enterprise AI platform enabler
- Kore.ai's enterprise security posture covers encryption in transit and at rest (TLS 1.2 and AES-256-GCM with HSM-managed key rotation), federated identity and SSO via SAML, OpenID Connect, and OAuth, RBAC with audit logging, WAF and DDoS protection. PII detection, masking, data residency controls, and right to deletion are reinforced by SOC 2, PCI, HIPAA, GDPR, and FedRAMP certifications.
- The company would benefit from clearer positioning against CCaaS providers and hyperscalers, especially as its platform increasingly overlaps with contact center and orchestration capabilities. Kore.ai's flexible deployment model is a strength, but clearer articulation of when it complements versus replaces existing systems would help buyers navigate adoption decisions.
- Kore.ai's evolving platform architecture is a primary differentiator, but it also presents challenges with its complexity and implementation cycles with steep learning curves. Kore.ai should continue its investment in reducing complexity with its no/low-code builders and its customer training academy.

# NiCE Cognigy

## INNOVATION

- NiCE Cognigy delivers a modular, enterprise-grade IVA platform built on a hybrid architecture combining LLM-based reasoning with deterministic workflows. The composite approach allows rule-based guardrails to be invoked at specific points in a conversation, such as account number validation, GDPR consent flows, or medication reporting protocols, while the rest of the interaction remains LLM-driven. It addresses the inability of LLMs alone to guarantee accuracy in structured, compliance-sensitive tasks.
- The platform demonstrates advancements in agentic AI and multi-agent orchestration capabilities. AI agents can decompose tasks, invoke tools, collaborate with other agents, and escalate to humans while maintaining shared context and goals. The system supports vendor-agnostic LLM orchestration with multimodel selection and fallback mechanisms, enabling cost and performance optimization. Integration with foundation models and MCP-based interoperability extends flexibility.
- The platform supports broad omnichannel and multimodal CX delivery, including voice, chat, messaging, and mobile-native interactions. Voice capabilities are particularly mature, with integrated telephony, speech-to-text/text-to-speech flexibility, and WebRTC-based experiences that blend voice and digital interfaces. The system also supports persistent memory, enabling cross-session and cross-channel personalization through structured contact profiles. The approach enhances continuity and powers unified customer journeys.
- Within the past 18 months, NiCE Cognigy launched an LLM-powered Agent Simulator that enables predeployment evaluation across thousands of synthetic conversations, including edge cases. Multivariate testing, running side-by-side comparisons across different LLMs, prompts, guardrails, and fulfillment strategies, is on the 2026 roadmap.

## NiCE Cognigy (continued)

### GROWTH

- NiCE Cognigy demonstrates strong enterprise adoption and market momentum, with a focus on large, complex organizations. The company's growth trajectory places it in the outperform category.
- The acquisition by NICE materially strengthens Cognigy's growth trajectory by expanding its global reach, enterprise sales capacity, and access to the CXone installed base. The combined offering enables tighter integration between IVA capabilities and workforce engagement management, supporting the concept of a unified human + AI workforce. At the same time, Cognigy continues to operate as a stand-alone platform, fueling its growth opportunity to other CX platforms beyond NiCE.
- NiCE Cognigy benefits from a robust partner ecosystem, including CCaaS providers, global system integrators, VARs, and BPOs. Partners play a key role in scaling deployments, driving regional expansion, and embedding the platform into broader digital transformation initiatives. However, some CCaaS partnerships may face competitive tension post-acquisition by NICE.
- NiCE Cognigy's customer base skews heavily enterprise, with more than half of deployments at organizations with at least 2,500 employees. Geographic concentration is largely clustered in North America and EMEA. Asia-Pacific penetration remains limited and presents a growth opportunity.
- The company demonstrates deep vertical traction across transportation, utilities, insurance, retail, and telecommunications. These deployments often involve complex use cases, such as logistics disruption handling or roadside assistance automation.

## NiCE Cognigy (continued)

### FROST PERSPECTIVE

- NiCE Cognigy has achieved significant enterprise-scale deployments, supporting over 1,000 global brands and processing billions of interactions annually. Deployments include high-volume, mission-critical use cases across logistics, airlines, and utilities. Approximately 30% of NiCE Cognigy customers are actively using agentic AI capabilities in production, with many others in pilots or proofs of concept, demonstrating agentic AI market leadership.
- The 2025 \$955 million acquisition by NiCE was a strategic milestone, enhancing market visibility and competitive positioning. The combined entity brings together innovative IVA capabilities and a leading CCaaS platform, enabling end-to-end transformation that supports the concept of a unified CX platform.
- NiCE Cognigy carries an extensive compliance and security certification portfolio: ISO 27001, ISO 27701, SOC 2 Type II, BSI C5 Type II (Germany), ISO/IEC 42001:2023 (AI management system), HIPAA, GDPR, CCPA, PCI DSS SAQ D, and CSA STAR CAIQ. The BSI C5 Type II certification is a meaningful differentiator for the public sector and regulated industries in Europe, where German data residency and sovereignty requirements are procurement criteria.
- The company should seize on the emerging machine-to-machine CX landscape, where NiCE Cognigy-powered IVAs will interact with virtual agents employed by human end customers. Through thought leadership tactics, the company can establish market leadership in this emerging category.
- NiCE Cognigy's relatively small Asia-Pacific footprint is a structural risk for a platform that positions itself as a globally scalable enterprise AI. Asia-Pacific markets, including Japan, Australia, Southeast Asia, and India, are high-growth IVA opportunities, but with considerable competition. NiCE's existing Asia-Pacific footprint will assist in this effort, but the company should not rely on that synergy alone.

# Salesforce

## INNOVATION

- Salesforce Agentforce represents a shift from assistive AI to autonomous digital agents embedded directly in the Salesforce platform. Powering a multistep reasoning framework is the Atlas Reasoning Engine and Agent Script. Atlas executes a structured reason-act-observe loop in which an agent decomposes a query into discrete steps, executes actions against enterprise systems, evaluates whether the outcome satisfies the original goal, and iterates if not. The iterative design moves beyond the limitations of conventional deterministic bots and enables agents to handle ambiguous or multiturn scenarios.
- The platform architecture integrates four core layers: a reasoning engine, a real-time data context layer, a trust and governance layer, and a low-code development environment. Agentforce is tightly coupled with Salesforce metadata, workflows, and APIs, supporting any customization that a customer already made to its CRM, such as custom fields, Flows, and Apex code, without any additional integration work.
- Agentforce innovations announced in late 2025 included hybrid reasoning, which provides configurable control over the balance between deterministic scripted flows and autonomous LLM-driven behavior to address enterprise risk tolerance for IVAs. Voice capabilities were extended natively into the platform rather than via telephony APIs. The company also introduced native MCP and A2A protocol support, enabling interoperability between Agentforce agents and third-party agents or tools.
- Agentforce extends beyond channel-based automation into event-driven and proactive use cases. Agents can be triggered by changes in customer state, operational data, or external signals, enabling outbound actions without human initiation. This positions the platform closer to autonomous workflow orchestration than conventional conversational AI.

# Salesforce (continued)

## GROWTH

- Salesforce reports strong early momentum for Agentforce following general availability, supported by usage-based and subscription licensing options. Adoption appears to be driven by Salesforce customers expanding automation in familiar environments. Agentforce growth trajectory places it in the outperform category.
- The growth pattern is predominantly driven by expansion in the Salesforce customer base rather than net-new logo acquisition. Salesforce reports that more than 60% of Agentforce and Data 360 Q4 FY 2026 bookings came from existing customers' expansion. This land-and-expand dynamic is advantageous given Salesforce's estimated 150,000-strong customer base.
- The GTM strategy emphasizes positioning Agentforce as “digital labor” rather than just a productivity tool. This narrative aligns with the platform as autonomous entities that can be assigned roles, responsibilities, and outcomes. Salesforce's ability to connect agent performance to business outcomes, such as resolution rates or cycle time reduction, strengthens its executive-level value proposition.
- The AgentExchange marketplace, launched in March 2025, has become a growth catalyst for partner-driven Agentforce adoption. The marketplace launched with more than 200 initial partners. ISV partners can now build and commercially distribute agentic components (actions, prompt templates, topics, and agent templates), extending Salesforce's GTM reach into verticals and locations beyond its direct sales coverage. Vertical traction is most evident in service-intensive industries, such as financial services, healthcare, retail, technology, and manufacturing, and partner-delivered solutions.

## Salesforce (continued)

### FROST PERSPECTIVE

- Salesforce has developed an agentic AI platform with Agentforce that has achieved operational maturity at the largest enterprise scale. As of early 2026, the company reported 18,500 Agentforce deployments, executing billions of workflows per month.
- Salesforce introduced Agentforce as a core extension of its CRM platform rather than as a bolted-on AI product. The integration enables agents to operate across service, sales, and marketing workflows using shared data and orchestration services. The approach reinforces Salesforce's long-term enterprise platform strategy.
- The Einstein Trust Layer provides the security and compliance architecture that enterprise buyers require before deploying autonomous agents at scale. It operates between the Atlas reasoning engine and external LLM providers, enforcing PII masking through pattern matching and NLP redaction, toxicity filtering on outputs, zero-data-retention agreements with third-party model providers, and a full audit trail of reasoning steps and data access events. The design allows Agentforce to use frontier LLMs without exposing sensitive enterprise data to external model training. Agentforce compliance scope covers GDPR, HIPAA, CCPA, and other requirements.
- Agentforce's pricing scheme, while flexible, introduces budgeting complexity that can create friction in enterprise procurement cycles. Operating three concurrent models (per-conversation, flex credits, and agentic enterprise license agreements) requires customers to model multiple cost scenarios with variables that can be overly complex. Salesforce should consider simplifying the pricing model.

# Frost Radar™: Innovator Companies to Action



# Ada

## INNOVATION

- Ada's platform is built on a scalable, multitenant architecture with a unified reasoning layer operating across all channels, including voice, chat, SMS, and messaging. This “build once, deploy everywhere” approach reduces duplication of logic and ensures consistent experiences across channels. The platform is API-driven, with customization handled through integrations. The architecture aligns with Ada's positioning of enabling enterprises' CX teams to manage AI agents internally rather than relying on vendor professional services or forward-deployed engineers.
- A core technical approach is Ada's dual-layer reasoning architecture, consisting of a low-latency response model (“talker”) and a deeper reasoning model (“thinker”). This design enables the system to handle simple queries in real time through the talker layer and complex, orchestrated multistep workflows and tool execution through the thinker layer. The system dynamically determines when deeper reasoning or API calls are required, supporting more advanced use cases, such as transaction completion and issue resolution.
- Playbooks, launched within the past 24 months, are Ada's primary mechanism for tackling complex, multistep tasks that separate genuine agentic behavior from deterministic workflows. Playbooks enable CX teams to author multistep standard operating procedures in plain language, enabling API calls and record updates without rigid scripted flows. The Playbooks Library provides prebuilt templates across eCommerce, SaaS, financial services, travel, health insurance, and gaming.
- Ada's recent MCP integration allows Ada agents to connect with and act on external enterprise systems and data sources. Ada also maintains a curated multi-LLM architecture drawing from OpenAI, Anthropic, Cohere, and Grok. Customers retain the option of bringing their own LLMs.

## Ada (continued)

### GROWTH

- Ada is seeing strong demand for its IVA solution and is experiencing early-stage acceleration growth for its IVA portfolio. The company's growth trajectory fits Frost's accelerated category.
- Ada's GTM strategy includes direct sales, and the company has significant partner relationships, including with AWS and Microsoft for market expansion. As a Co-Sell Benefit partner in AWS ISV Accelerate, Ada benefits from AWS co-selling motions and marketplace discoverability. Through Microsoft, Ada's IP Co-sell Incentivized Status allows Microsoft customers to apply Azure cloud commit balances toward Ada purchases.
- A strategic partnership with CX voice of the customer provider Medallia, announced in the past 12 months, integrates Ada's AI agent platform with Medallia's system of signals, enabling the AI agent to act in real time on deep customer intelligence from Medallia to resolve issues autonomously. This partnership extends Ada's presence into the broader CX management discussion, creating a cross-sell motion with Medallia's installed enterprise base.
- Ada's presence spans North America, EMEA, and Asia-Pacific, with the majority of customers concentrated in North America. The geographic distribution suggests room for further international expansion, particularly in high-growth CX markets in Asia-Pacific and Latin America. The platform's multilanguage capabilities (60+ languages) support this expansion strategy.

# Ada (continued)

## FROST PERSPECTIVE

- Ada has demonstrated strong operational scalability, including high concurrency levels and multicloud deployments. The platform has processed over 6.4 billion cumulative interactions, with over 1 billion customer conversations since its founding. It is currently processing 1.5 trillion tokens per month.
- Ada has introduced several key product innovations over the past two years, including the unified reasoning engine, Playbooks, voice AI capabilities, and MCP server integration. Continuing innovation reflects focused execution on agentic AI and workflow automation capabilities.
- Ada achieved AIUC-1 certification in July 2025—the first CX company to hold this credential. AIUC-1 is an AI-specific security and reliability framework covering data and privacy, security, safety, reliability, accountability, and societal impact. Ada was a founding technical contributor to the standard. Ada’s full compliance stack includes SOC 2 Type II, HIPAA, GDPR, PCI Level 1, PIPEDA, CCPA, and CCRA compliances, alongside zero data retention agreements with all LLM providers, which is comprehensive.
- Ada should continue to strengthen enterprise GTM capabilities, particularly in large, complex deployments requiring deeper integration and change management. The company appears to be building an enterprise narrative with its scalability prowess, broad compliance initiatives, and product innovation, yet a significant portion of its customer base remains SMB. Expanding enterprise-focused services and partner-led delivery could accelerate adoption in this segment.
- Ada’s voice capability, while growing rapidly, carries some limitation risk that could constrain voice channel expansion. Its voice roadmap identifies WebRTC/SIP digital voice delivery and outbound calling, some of which would be considered table stakes in any competitive comparison. Ada should prioritize accelerating voice to functional parity with its digital channels.

# Avaamo

## INNOVATION

- Avaamo's core architecture includes a hybrid AI stack that combines proprietary small language models and domain-specific language models with support for third-party LLMs. Proprietary models handle approximately 90% of natural language processing (NLP) pipeline tasks, including knowledge graph construction, query intent detection, context ranking, and security filtering. Foundational LLMs are invoked selectively for response generation and semantic search. This design reduces latency, constrains LLM token costs, and structurally limits hallucination risk in enterprise deployments.
- Launched in 2025, Avaamo's agentic capabilities extend to multi-agent orchestration, autonomous task execution, and integration with enterprise systems. The platform supports A2A communication and MCP, enabling interoperability with third-party agents and tools. The system is designed to orchestrate multiple specialized agents or consolidate capabilities into a single "super agent."
- Voice AI is a core focus. Avaamo emphasizes advanced speech capabilities, including diarization to exclude ambient voices during voice capture, low-latency STT/TTS via ensemble approaches, and a unique voice AI pipeline, better enabling support for hybrid languages, such as Hinglish and Spanglish. The platform also supports seamless transitions between voice and digital channels in a single interaction, preserving context across channels. The capability addresses a potential gap in IVA deployments where channel switching leads to context loss.
- Avaamo's Agent Workbench offers a structured workflow environment for agentic deployment. Teams can configure agent behavior, define guardrails across four hierarchical levels (platform, organizational, domain, and agent-specific), and run scenario-based testing prior to production release. The capability addresses a common enterprise AI production issue of agents working well in demos but not being able to scale in production.

## Avaamo (continued)

### GROWTH

- Avaamo targets large enterprise customers, with an average deal size of approximately \$300,000, prioritizing high-value, complex deployments over volume-driven growth. The company is experiencing accelerated growth for its IVA portfolio.
- Avaamo demonstrates traction in specific verticals, particularly healthcare, financial services, and travel. A vertical focus enables the reuse of domain knowledge and accelerates deployment timelines.
- Avaamo's GTM runs through three channels: direct enterprise sales, a network of system integrator partners, and cloud marketplace listings on AWS, Google Cloud, and Microsoft Azure. Marketplace availability on Genesys, NICE, and Vonage extends distribution into the CCaaS installed base.
- Healthcare is the most mature vertical and is a growth engine. Deployments span several large health system networks. Avaamo's 2026 expansion into the Epic Showroom, adding a dedicated healthcare AI agent workforce to the Epic partner ecosystem, deepens healthcare integration and creates an embedded sales channel in the platform used by the majority of large US health systems.
- Geographic presence is weighted toward North America and EMEA, with more limited penetration in Asia-Pacific and Latin America. The company supports deployments across at least 35 countries, indicating operational capability for multinational customers.

## Avaamo (continued)

### FROST PERSPECTIVE

- Avaamo has demonstrated deployment success across multiple large enterprises, particularly in healthcare and travel. Case examples include large-scale patient engagement systems handling millions of interactions annually. These deployments often involve complex workflows, such as appointment scheduling, billing, and medication management. The scale and diversity of use cases support Avaamo's positioning as an enterprise-grade IVA provider.
- Avaamo has expanded its IVA capabilities to include more than 50 prebuilt agents spanning CX, EX, and patient experience use cases. The library of preconfigured agents supports faster deployment and aligns with the company's agent workforce positioning. This approach reduces implementation time and lowers barriers for enterprise adoption.
- The platform holds 14 granted US patents across conversational AI, voice processing, and agentic architecture domains, with more than 20 other patents pending. Security compliance includes AES-256 encryption at rest, TLS 1.2 in transit with AES-256 and SHA-2 signatures, multifactor authentication across all environments, and SSO via SAML 2.0. Privacy controls encompass PII detection and masking, data anonymization, conversation retention management, right to deletion, and data residency/sovereignty controls.
- While Avaamo's enterprise focus is delivering success for the company, its product portfolio, including its prebuilt agent library, is well suited for the mid-market. Avaamo should consider an expansion into this market, using a partner network as its primary channel, allowing the company to not lose focus on its enterprise vector.

# Cisco

## INNOVATION

- Cisco's IVA strategy centers on Webex AI Agent, a purpose-built conversational AI product generally available as of March 2025. The architecture distinguishes between two complementary agent types: scripted agents using deterministic intent-and-entity flows and autonomous agents powered by LLM-based reasoning—both configurable in a single no-code/low-code environment called AI Agent Studio.
- Cisco supports a flexible model approach combining scripted and autonomous agents, including a conversational concierge agent that handles customer-facing dialogue, optimized for low latency and natural turn-taking, while separate task agents execute multistep backend processes, such as appointment booking or order updates, with full reasoning capability. The flexibility addresses the dual challenge of conversational fluency degradation when the same model must simultaneously reason through complex, multistep workflows and heavy reasoning models adding latency that can degrade voice quality. Cisco's concierge task split allows model optimization at each layer independently.
- Cisco has invested in voice-first AI optimization, particularly around latency, turn-taking, and interruption handling. The platform includes proprietary enhancements, such as dynamic turn detection and streaming-based response generation, to improve conversational fluidity over telephony networks.
- A key differentiator on the near-term roadmap for Cisco is its robust security and observability framework, including AI-specific guardrails, red teaming, and continuous testing. The platform incorporates system-level and agent-specific guardrails, leveraging the capabilities from Cisco's broader security and observability portfolio.
- Cisco's roadmap includes a persistent context and memory layer designed to unify customer data, interaction history, and behavioral signals across sessions.

## Cisco (continued)

### GROWTH

- Cisco is experiencing enterprise traction across multiple industries, including healthcare, logistics, financial services, and telecommunications. The company is experiencing accelerated growth for its IVA portfolio.
- Cisco's GTM model for IVA leverages its Webex Contact Center installed base. The primary growth motion targets Webex Contact Center customers expanding into AI, supplemented by an AI Solution Consulting team that performs use case qualification and ROI modeling before deployment. The internally developed consultative model is now being implemented with its partner network.
- The company demonstrates broad geographic reach, with IVA capabilities available across North America, EMEA, Asia-Pacific, and Latin America. Cisco's Webex Contact Center has scaled its global footprint to 160 countries. This aligns with Cisco's enterprise footprint and supports multinational deployments.
- Cisco's growth also comes through a partner-led and consulting-driven GTM model, combining system integrators and internal solution consulting to accelerate deployments. Partner ecosystem depth, estimated at 484 certified partners globally, provides geographic and vertical coverage that Cisco's direct salesforce cannot achieve alone.

## Cisco (continued)

### FROST PERSPECTIVE

- Cisco's introduction of the Webex AI Agent as a unified IVA offering has consolidated previously separate bot types into a single architecture spanning scripted and autonomous agents. This simplifies development and aligns with broader industry movement toward unified agent frameworks that can best enable agentic AI.
- Cisco has established early traction across enterprise customers and industries, spanning healthcare, financial services, logistics, automotive, telecommunications, and the public sector. The platform is performing in complex, regulated environments where security and integration are important.
- The platform's security and compliance posture is broad. Webex AI Agent maintains PCI-DSS, GDPR, and HIPAA compliance across all data centers, with AES-256 encryption at rest, TLS 1.2+ in transit, tenant-level isolation, and regional data residency options covering the United States, European Union member states, and Australia-New Zealand. The platform uses Cisco's Common Identity framework for role-based access control, with mutual authentication for fulfillment calls between AI agents and backend systems, eliminating open API key dependencies. PII masking prevents sensitive information from being passed to LLM providers—a necessity for regulated industries.
- Cisco should prioritize general availability of persistent memory and context, which are important competitive benchmarks. The capabilities are on the company's roadmap through its Agentic Context Engine.

# Dialpad

## INNOVATION

- Dialpad's IVA innovation is anchored in a proprietary AI stack built on real business conversation data. At its core sits DialpadGPT, a proprietary instruction-tuned language model trained on business communications that underpins AI capabilities, such as call and meeting recaps, sentiment analysis, and intent classification, working alongside specialized models for speech recognition and NLP.
- The company employs a hybrid AI strategy combining its proprietary DialpadGPT with external foundation models, such as OpenAI and Google, where needed. Dialpad is incorporating external LLMs to accelerate agentic AI innovation, particularly for complex task execution. The dual approach reflects a balance between cost efficiency, control, and time to market.
- Dialpad's most consequential innovation over the past 18 months was the Agentic AI Platform, introduced in October 2025 and brought to general availability in early 2026. The architecture introduces four functional layers: Skill Mining of historical transcripts to surface automation candidates; AI Studio, a no-code agent builder; Proving Ground, a predeployment agent simulator generating synthetic voice and chat test scenarios; and Guardian, a real-time safety and guardrail supervisor.
- The platform's dialog management employs a hybrid architecture combining LLM-driven conversational handling with deterministic workflow paths. MCP is the integration standard for connecting agents to external business systems, such as Salesforce, Zendesk, and Google Calendar, with the capability to allow customers to bring their own MCP servers and custom connectors.

## Dialpad (continued)

### GROWTH

- Dialpad is experiencing strong IVA growth momentum, with its product evolution toward generative and agentic AI helping fuel growth. The company's growth trajectory fits the accelerated category.
- Dialpad's geographic IVA footprint is concentrated in North America, with a limited presence in EMEA and Asia-Pacific. While the platform is globally available, this distribution indicates that international expansion remains an opportunity for growth. Regional language support and customization capabilities provide a foundation for broader geographic adoption, but GTM expansion beyond North America is currently limited.
- The company's customer base is skewed toward SMBs and the mid-market, which together account for the majority of IVA deployments. Enterprise penetration remains relatively limited, suggesting that while Dialpad has strong adoption, it is still expanding into larger, more complex environments. This distribution reflects its historical positioning as a unified communications and CCaaS provider.
- Dialpad benefits from its installed base in UCaaS and CCaaS, enabling cross-sell of IVA capabilities. Its "AI for every seat" approach drives high feature adoption, with company-reported widespread usage of AI features across its customer base. The embedded distribution model supports growth without requiring stand-alone IVA sales motions.

## Dialpad (continued)

### FROST PERSPECTIVE

- Dialpad has a rich history of strong adoption of AI-powered features, including large-scale deployment of automated summaries and AI-driven analytics across its platform. This foundation should serve it well as it expands its IVA portfolio to include agentic capabilities.
- Dialpad has expanded integration capabilities with enterprise systems, including CRM and scheduling platforms, enabling end-to-end task execution by AI agents. The introduction of MCP-based connectors supports faster integration and workflow automation.
- Dialpad's IVA security architecture combines standard enterprise controls, including AES-256 encryption at rest, TLS/SRTP in transit, SSO via SAML/SCIM, and OAuth 2.0 API authentication. AI-powered PII redaction operates automatically across transcripts and recordings, and the platform supports PCI-compliant payment workflows via PCI Pal integration.
- With the vast majority of its IVA deployments clustered in the SMB and mid-market space, Dialpad should consider strengthening its enterprise positioning, particularly for large, complex deployments requiring advanced governance, compliance, and multiregion scalability. Enhancing enterprise-specific packaging and case studies would support this effort.
- The platform should advance cross-channel parity, particularly in real-time translation and persistent customer memory, to strengthen its competitive positioning, especially against point IVA solutions.

# Engageware

## INNOVATION

- Engageware's IVA platform is enabled by Agent Studio, a unified design-and-runtime environment that facilitates multi-agent orchestration. The platform separates three distinct functions, including a no-code Agent Builder for workflow design, an orchestration layer that coordinates specialized AI agents and enterprise systems, and a centralized knowledge management engine that populates content updates across all agents. This is deliberate to support its customers' regulated environments.
- The platform adopts a hybrid AI approach, combining deterministic workflows with LLM-based reasoning, supported by retrieval-augmented generation (RAG). This enables Engageware to balance compliance and flexibility, particularly in regulated environments. Deterministic agents, such as authentication, operate alongside probabilistic agents, such as billing inquiries, coordinated through the platform's orchestration layer.
- Engageware demonstrates strong domain specialization through prebuilt use case libraries and agents across regulated domains, including financial services and telecom. Agents for card services, lending, billing, service troubleshooting, and knowledge retrieval are each aligned to specific operational workflows.
- The company emphasizes governed knowledge integration as a core differentiator, particularly for regulated industries. Answers are grounded in curated enterprise knowledge bases with version control, ensuring traceability and compliance. This is reinforced by centralized knowledge management and real-time propagation of updates across agents without retraining. The capability is important in industries where policy changes must be reflected immediately in customer interactions.

# Engageware (continued)

## GROWTH

- A large majority of Engageware's annual recurring revenue comes from heavily regulated sectors, such as financial services, telecom, and insurance, indicating a focused GTM strategy. The company is strong in verticals where compliance complexity and customer service demands create the strongest pull for AI-powered engagement. Its IVA growth trajectory has been steady and lands in the moderate category.
- Engageware's land-and-expand strategy is a core growth driver, beginning with a single use case and expanding into additional workflows, business units, and solutions. This is supported by a multiproduct platform that includes IVA, appointment management, and employee knowledge management. The integration of these capabilities enables cross-sell opportunities and deeper account penetration.
- Geographic distribution reflects Engageware's AI roots in Latin America, which represents a majority of its IVA customer base. North America stands to benefit as the company extends its proven Latin American scale across the full Americas footprint. The company enjoys success with large enterprises, including a significant share of top-tier banks and telecom providers.
- The company's Service Blueprinting methodology for developing production-ready agents has been deployed across at least 450 customer implementations, yielding a library of more than 1,000 documented high-impact use cases. The methodology operates as a structured predeployment process and is certified through a partner ecosystem, which extends its delivery capacity.
- The company's growth strategy is deliberate by design. Outbound sales and marketing efforts target regulated industries, with healthcare identified as an adjacent vertical under evaluation. Non-regulated enterprises are not actively pursued, though the company will accept inbound interest.

## Engageware (continued)

### FROST PERSPECTIVE

- Engageware holds notable market penetration at the enterprise tier across its core verticals, including 25% of the top 50 banks in the Americas, 24% of the top US wealth management firms, and 20% of the top 20 telecom providers in the Americas.
- Engageware has demonstrated the ability to execute large-scale, multiregion deployments, particularly in telecom. For example, a Latin American deployment spanned 11 countries, 40+ channels, and 90+ integrations in a 15-week timeframe, highlighting operational scalability. Such implementations reinforce its positioning as a provider capable of handling complex, multimarket enterprise requirements.
- Engageware implements TLS 1.2+ encryption in transit and AES-256 at rest across its cloud environments, with role-based access control, SAML SSO support, tenant-isolated virtual private clouds, WAF/IDS/IPS enforcement, and API traffic monitoring. Privacy controls include PII detection and masking, conversation data retention controls, right to deletion, and data residency/sovereignty capabilities, with the platform certified to SOC 2 and ISO/IEC 27001 standards.
- Engageware should accelerate its voice AI strategy, as voice is a critical channel in IVA deployments. While enhanced voice capabilities are on its roadmap, as the offering matures, prioritizing real-time, low-latency, natural conversational experiences will be essential for keeping pace with category-leading platforms and maintaining the company's momentum.
- The company should consider offering a curated agent marketplace, given its domain specialization of prebuilt agents. Prebuilt, industry-specific agent libraries with rapid deployment paths would accelerate time to value and potentially lower professional services dependency, providing a competitive advantage.

# Quiq

## INNOVATION

- Quiq's platform is structured as an AI orchestration layer that combines LLM-based reasoning with deterministic guardrails defined through its Process Guides. Introduced in 2025, the guides define objectives, constraints, and available tools, allowing the AI to determine dynamic workflows rather than relying solely on scripted flows. The hybrid architecture is used in production environments to support multistep workflows, enabling adaptive decisioning while maintaining enterprise control and predictability.
- Operating in the Quiq platform, simultaneous multimodal interactions are enabled. A voice session can spawn a parallel SMS thread in real time, with shared context maintained across channels in a single, continuous conversation. This allows a customer to receive information that is not easily shared in voice via text while a voice exchange remains active, and to respond through either channel without loss of continuity.
- Quiq supports a model-agnostic architecture, enabling enterprises to select and orchestrate multiple foundational models without fine-tuning dependency. This provides flexibility for enterprises but may introduce variability in performance and governance complexity. The ability to orchestrate multiple models in a single interaction is a notable architectural strength.
- A 2025 platform expansion introduced a four-agent typology: customer-facing AI Agents, AI Assistants for human agents, AI Analysts for quality management, and AI Services for API-exposed workflow automation. The AI Analyst capability applies LLM-based scoring to 100% of conversations in near real time, identifying sentiment trends, knowledge gaps, failure patterns, and conversation-level insights.

## Quiq (continued)

### GROWTH

- Quiq demonstrates focused enterprise traction, with its growth trajectory registering in the accelerated category. The customer base skews heavily toward large enterprises, indicating an ability to manage complex CX environments rather than mid-market volume expansion. The positioning supports larger deal sizes but may constrain rapid market share growth relative to larger, more scalable SaaS competitors.
- The company reports strong expansion in existing accounts, supported by a land-and-expand model and high net revenue retention. Customers often begin with limited deployments and expand across channels and use cases over time. This suggests that the platform's breadth enables incremental adoption, which is consistent with enterprise buying patterns for AI.
- Quiq's GTM strategy combines direct enterprise sales with partner channels, with partners contributing a meaningful portion of the pipeline and supporting enterprise deployments. Quiq reports increasing partner engagement, particularly among telecom service distributors and system integrators.
- Quiq's growth is supported by clear ROI-driven value propositions, including cost reduction and sales growth. The company focuses on retail, travel and hospitality, healthcare, insurance, consumer services, and financial services.

## Quiq (continued)

### FROST PERSPECTIVE

- Quiq has demonstrated enterprise-scale deployments, including implementations supporting multibrand, multicountry, and multilanguage operations. For example, a deployment across four retail brands spans seven countries, five languages, and multiple channels, indicating the platform's ability to handle complex global CX environments.
- The company shows evidence of notable innovation progression, including the introduction of process guides, simultaneous multimodal interactions with omnichannel continuity, and AI-driven analytics over the past 12–18 months. This reflects a consistent product evolution aligned with broader market trends toward agentic AI and LLM-based CX automation.
- Quiq's platform is built on a zero trust security architecture encompassing end-to-end encryption, multifactor authentication, network isolation, and secure API communication, meeting the security and compliance requirements typical of large enterprise buyers.
- Quiq should expand its ecosystem integrations and interoperability strategy, particularly for enterprises operating multivendor CX environments. The requirement that channels be managed within Quiq to enable full omnichannel continuity may limit adoption among organizations with established CCaaS or messaging infrastructures.
- The company may benefit from more targeted verticalization, building deeper preconfigured solutions for industries such as retail, travel, and healthcare. While the platform is flexible, more vertical-specific solutions could accelerate time to value and improve competitive positioning against vendors with strong vertical specialization.

# Sprinklr

## INNOVATION

- Sprinklr's IVA capabilities are delivered as part of its broader unified Customer Experience Management platform, with AI functionality centralized in its AI+ Studio layer that manages models, governance, and agent orchestration. The architecture integrates IVA, agent assist, analytics, and social listening in a single platform, enabling shared data and workflow reuse across functions. The unified design allows IVA workflows to leverage signals beyond conversational data, including agent actions and macros.
- Sprinklr deploys a practical multi-LLM architecture. The AI+ Studio layer allows per-task LLM assignment so different models can be designated for RAG retrieval, response generation, guardrail evaluation, and voice processing, with support for bring-your-own-key deployment across OpenAI, Anthropic, Google Vertex, AWS Bedrock, and others. Proprietary fine-tuned models handle specific operational tasks, including PII masking and quality scoring. The inclusion of agentic capabilities, such as tool invocation, multistep reasoning, and dynamic workflow branching, aligns with emerging enterprise requirements for autonomous task completion.
- Sprinklr offers broad omnichannel support (30+ channels) with context continuity across interactions, including transitions between voice, messaging, and social channels. The platform supports multimodal inputs and outputs, real-time language translation, and persistent customer memory through unified profiles. Integration capabilities include 70+ prebuilt connectors and support for custom APIs and MCP.
- A predeployment evaluation framework generates AI-synthesized test cases from historical interactions, runs simulated conversations against current configurations, and surfaces task-level improvement recommendations, including suggested prompts, workflow modifications, and knowledge base gaps. After deployment, the Insights hub continuously monitors live conversations and generates recommended corrective actions, including draft knowledge articles for admin review and approval.

## Sprinklr (continued)

### GROWTH

- Enterprise clients represent the majority of Sprinklr IVA deployments, with the company able to leverage a large installed base for IVA upsell/cross-sell. The company's growth trajectory places it in the accelerated category.
- Sprinklr operates across North America, EMEA, Asia-Pacific, and Latin America, with a relatively balanced distribution but higher concentration for IVAs in EMEA. Its global presence is supported by regional offices and the ability to support multilingual interactions (100+ languages). This positions the company well for multinational enterprises seeking consistent CX automation across regions.
- Sprinklr's GTM strategy emphasizes proof-of-concept programs, verticalized demo assets, presales hackathons, and dedicated forward-deployed engineers. The company is also exploring outcome-based pricing models, which could align pricing more closely with business value. The initiatives reflect a shift toward consultative and value-based selling models.
- The company is pursuing verticalization as a growth lever, targeting industries including telecom, retail, airlines, financial services, and healthcare. This includes developing prebuilt workflows, fine-tuned models, and industry-specific templates to accelerate deployment. Sprinklr is also aligning its sales and delivery teams around vertical expertise to support this strategy. The approach is consistent with broader market trends toward industry-specific IVA solutions.

# Sprinklr (continued)

## FROST PERSPECTIVE

- Sprinklr has a global customer base with deployments across multiple industries and regions, supported by multilingual capabilities and omnichannel coverage. Its ability to support use cases beyond customer service, including sales, marketing, and employee support, indicates platform extensibility. The broad applicability strengthens its position as a cross-functional CX automation platform with a natively integrated IVA solution.
- A differentiating capability inherited from Sprinklr's social media heritage is IVA triggering via social listening. The system can detect brand hashtag mentions and handle tags across platforms such as X and LinkedIn, routing them into automated engagement flows and escalating to live chat or DM if the conversation exceeds the IVA's scope.
- Sprinklr's enterprise security architecture covers encryption, identity management, network isolation, and API security at standards consistent with large-scale enterprises. Data is protected by AES-256 encryption at rest and TLS 1.2 or higher in transit. Authentication supports SSO, two-factor authentication, SCIM provisioning, and integration with enterprise identity platforms including Okta and LDAP. Network isolation is enforced through VPC deployment with VPN-gated backend access, perimeter firewalling, and OSSEC-based traffic monitoring. All API communication is restricted to authenticated HTTPS within private network boundaries.
- Sprinklr should consider expanding its ecosystem strategy beyond native integrations to include deeper partnerships with system integrators and technology vendors. While the platform offers extensive connectors, enterprise adoption often depends on implementation partners and service ecosystems. Strengthening alliances could accelerate deployment at scale and improve competitive positioning against vendors with strong partner networks.

# Talkdesk

## INNOVATION

- Talkdesk's IVA innovation centers on a strategic architectural pivot through the June 2025 launch of Customer Experience Automation (CXA), a new, stand-alone platform that houses the company's agentic AI and automation for its CX portfolio. IVAs in CXA are built on multi-agent orchestration, where a workforce of specialized AI agents, each scoped to a specific task within various industries, such as patient identification, symptom triage, or appointment management, can complete workflows. The system includes orchestration logic, contextual reasoning, and continuous learning loops to improve performance over time.
- Talkdesk employs a hybrid AI approach that combines deterministic workflows with LLM-based reasoning, allowing it to balance control and flexibility in automation. Deterministic guardrails are used for structured processes, such as payments or scheduling, while generative AI supports conversational understanding and reasoned decision-making. The model aims to satisfy compliance concerns while enabling more complex automation scenarios.
- The Talkdesk Data Cloud serves as the foundational data layer, unifying enterprise knowledge, contextual interaction data, industry-specific models, and integration data to give AI agents full operational context. A Databricks partnership enables zero-copy data integration, allowing enterprises to keep data in their existing infrastructure while making it accessible to Talkdesk agents. The Data Cloud also powers persistent cross-session memory, enabling IVAs to recognize returning customers.
- The March 2026 launch of the CXA Operations Center adds a live observability and lifecycle management layer for AI agents, monitoring interaction similarity, trend shifts, and agent behavior. The platform includes an Agentic AI Evaluator, which allows organizations to stress-test AI agents against historical bad interactions before production deployment.

# Talkdesk (continued)

## GROWTH

- Talkdesk serves mid-market and enterprise organizations, with the majority of its IVA deployments in the mid-market. The company's growth trajectory places it in the moderate category.
- The CXA platform is the primary growth vector for Talkdesk. A CCaaS-agnostic overlay strategy, positioning CXA as deployable atop any CCaaS or on-premises contact center platform, opens a substantially larger addressable market than Talkdesk's CCaaS installed base alone.
- Talkdesk supports IVA deployments across North America, EMEA, Asia-Pacific, and Latin America. The platform's multilingual capabilities and regional adaptation features support international expansion.
- Talkdesk demonstrates vertical market focus through its Industry Experience Clouds, which currently includes 12 prebuilt IVA use cases and integrations for sectors including healthcare, financial services, and retail. The vertical strategy is a key enabler of expansion into enterprise accounts.
- A UiPath partnership announced in late 2025 extends CXA's workflow reach into enterprise automation ecosystems beyond the contact center perimeter, providing a GTM co-sell motion and a technical bridge to back-office processes.

# Talkdesk (continued)

## FROST PERSPECTIVE

- Talkdesk, an established CCaaS provider, has made a bold strategic statement with the launch of CXA, a platform it has positioned not as an AI enhancement to its existing CCaaS stack, but as an architecturally separate and distinct software category. Where other CCaaS platforms have largely evolved by embedding AI features into existing infrastructure, Talkdesk has drawn a deliberate architectural boundary that it aims to exploit for a broader addressable market.
- Talkdesk introduced several key product innovations in the past 12 months, including the CXA platform, agentic autopilot, and AI workforce orchestration capabilities. The company also introduced tools for AI evaluation and interaction mining, indicating ongoing investment in AI lifecycle management and aligning with broader industry shifts toward autonomous CX.
- Talkdesk's certification portfolio is broad. The company holds FedRAMP ATO, ISO 27001, ISO 22301, ISO 42001, SOC 2, SOC 3, HIPAA, and PCI DSS certifications. The security architecture includes TLS 1.2+ in transit, AES-256 at rest, SSO via SAML 2.0 with Okta and Azure AD integration, and a dedicated AI trust layer providing guardrails, PII redaction, and hallucination detection in real time.
- While the introduction of CXA is strategically bold, it is not without risk. The dual identity as a CCaaS vendor and an AI automation platform can create messaging complexity in the market and operational tension in the company. Talkdesk should continue to develop a clear public integration roadmap that articulates how CCaaS and CXA evolve together, including explicit commitments to CCaaS feature investment to protect the installed base while the CXA market motion matures.
- Talkdesk should continue expanding its ecosystem strategy beyond integrations to include deeper partnerships with system integrators and industry specialists. As deployments become more complex and workflow-driven, enterprise customers will require implementation and integration support.

# Frost Radar™: Contender Companies to Action



# Assembled

## INNOVATION

- Assembled positions its platform as a support orchestration layer that unifies AI agents, agent assist, and WFM in a single architecture. The platform is designed to connect AI automation with real-time operational data, such as agent availability, SLAs, and queue conditions. The integration of IVA capabilities with WFM is a core differentiator, although competing integrations from other CX platforms exist.
- The IVA solution is built on a model-agnostic, LLM-based architecture, leveraging multiple models with failover capabilities to support reliability and flexibility. Assembled combines LLM-driven conversational AI with structured workflows, enabling FAQ-style responses and multistep automation. The platform also incorporates guardrail mechanisms, such as escalation detection and jailbreak prevention models, reflecting a design emphasis on risk mitigation and CX quality over pure automation.
- A key Assembled feature is the workflow-driven automation model, where CX teams define guides or procedures in natural language for the AI agent to execute. The workflows support conditional logic, API integrations, and tool calling, enabling agents to complete end-to-end transactions, such as account updates or order management. The platform can generate workflows from existing documentation and refine them through human input; however, automation discovery, such as process or intent mining, is still evolving on the roadmap.
- The platform includes an observability and analytics layer, providing conversation traceability, sentiment tracking, resolution metrics, and workflow-level performance insights. AI also analyzes live conversations to identify missing articles and knowledge gaps, recommending updates and improvements, positioning the platform as self-improving at the knowledge layer.

## Assembled (continued)

### GROWTH

- Assembled demonstrates strong recent IVA growth momentum, although the company's IVA is new to the market with a relatively small customer base. The company's growth trajectory fits the accelerated category.
- The company's GTM strategy leverages its WFM footprint, particularly among mid-market and enterprise CX organizations. Assembled reports that many customers adopt IVA capabilities after initially deploying WFM, creating a land-and-expand motion.
- The company's ideal customer profile is the head of CX or chief customer officer at a tech-native or digital-first organization with high-volume, digitally native support operations where CX leaders hold purchasing authority without IT-led cycles. The company prioritizes mid-market for now, hoping to capitalize on shorter sales cycles.
- Assembled has achieved broad geographic coverage, with deployments across North America, EMEA, Asia-Pacific, and Latin America, and a customer distribution weighted toward North America. The platform is used across multiple industries, including eCommerce, fintech, SaaS, and healthcare.
- Assembled's partner ecosystem is primarily integration-driven, with connectivity to CRM, ticketing, and knowledge platforms. It does not rely on system integrators or large channel partners, instead emphasizing ease of deployment by CX teams.

# Assembled (continued)

## FROST PERSPECTIVE

- Assembled has expanded its platform from WFM into AI-driven CX automation, launching omnichannel AI agents across voice, chat, and email. The evolution reflects a strategic shift toward becoming a broader CX platform rather than a single-point solution. The integration of AI agents with WFM was a notable product milestone.
- The company reports hundreds of customers including Canva, Etsy, Cash App, Stripe, Datadog, and Shopify and spanning fintech, eCommerce, B2B SaaS, marketplace, healthtech, and retail across its broader platform. While only a subset currently uses IVA capabilities, this installed base provides a foundation for continued expansion.
- Assembled holds SOC 2 Type II, GDPR, HIPAA, CCPA, and A+ SSL Labs certifications. PII redaction via Amazon Comprehend covers at least 22 universal and 14 country-specific entity types at sub-100 ms latency impact, with tenant-level data isolation and a commitment that customer data is never used to train its models.
- Assembled should expand its ecosystem strategy, particularly with system integrators and consulting partners that can support larger deployments. A stronger partner network would also improve global reach and competitive positioning in complex deals.
- Assembled may also benefit from greater external validation of performance metrics, including independent benchmarks or customer case studies at scale. Many currently reported outcomes are vendor-provided. Third-party validation would enhance its credibility with buyers, especially if Assembled makes a definitive move upmarket.

# Content Guru

## INNOVATION

- Content Guru delivers IVA capabilities as part of its broader CCaaS platform storm®, with conversational AI embedded natively. The architecture centers on the brain® Machine Agent, a voice-first, real-time conversational AI layer that integrates tightly with routing, orchestration, and analytics components across its CX stack.
- The brain® framework operates as a model-agnostic AI orchestration layer, integrating models from OpenAI, Google, Meta, Anthropic, Speechmatics, and open models including Parakeet. Customers can swap underlying models as the market evolves or bring their own models within a sovereign enclave. This architectural approach can be appealing to enterprise buyers operating under evolving data governance requirements, particularly in European regulated sectors.
- Content Guru has transitioned from deterministic IVAs to LLM-driven conversational systems, with an emphasis on voice-first experiences. Its voice-to-LLM architecture reduces latency and improves NLU through full-duplex interactions and real-time processing. The design enhances turn-taking, interruption handling, and multilingual switching in a single session, which are essential for high-volume voice environments.
- The platform supports multistep orchestration through API integrations and workflow automation, enabling IVAs to execute transactions and access backend systems. While agentic AI capabilities are described as being in development, current functionality already supports structured task execution and integration-driven automation.

## Content Guru (continued)

### GROWTH

- Content Guru's brain® Machine Agent is relatively new to the market, having launched in 2025, impacting its growth profile. It currently registers in the moderate category for IVA growth.
- Content Guru demonstrates traction primarily in public sector and large enterprise environments. Deployments such as the UK's Driver and Vehicle Licensing Agency (DVLA) and National Health Service (NHS) related services highlight its ability to support high-volume, mission-critical use cases. These deployments indicate strong alignment with organizations that require secure, compliant, and scalable CX infrastructure.
- The company benefits from its installed base of CCaaS customers, using IVA as an upsell and expansion lever in existing accounts. Its GTM strategy emphasizes embedding conversational AI into broader CX transformation initiatives rather than only selling IVA as a stand-alone solution.
- Content Guru has expanded multilingual and global deployment capabilities, supporting operations across all major regions and enabling real-time language switching in conversations. This is particularly relevant for government and multinational organizations with diverse customer bases, reinforcing the vendor's positioning in global enterprise and public sector markets.

## Content Guru (continued)

### FROST PERSPECTIVE

- Content Guru has demonstrated success in large-scale public sector deployments, including the UK's DVLA, where its IVA handles approximately 300,000 webchat sessions per month. The deployment achieved 30% self-service adoption, reduced IVR time, and contributed to measurable improvements in customer satisfaction, highlighting the platform's ability to operate at scale in high-demand environments.
- Content Guru has deployed IVA solutions across multiple UK public sector organizations beyond DVLA, including NHS 111 non-emergency pathways, Companies House, and Southampton Council. The NHS deployment led to improved routing accuracy and faster escalation to appropriate clinical specialists. The deployments establish Content Guru as the dominant IVA provider in the UK public sector, where mission-critical reliability requirements are among the most stringent in any industry.
- Content Guru emphasizes direct delivery and platform ownership, with less emphasis on its partner ecosystem. While it supports integration with external systems and AI providers, its partner ecosystem strategy appears less mature than that of comparable competitors.
- Continued investment in persistent memory and cross-session context retention would enhance personalization and long-term CX outcomes. Current session-bound context limits the ability to deliver more advanced, personalized interactions that add greater value to IVA deployments.

# Verint

## INNOVATION

- Verint's IVA is architected as part of a broader CX automation platform that integrates conversational AI, analytics, workforce engagement management (WEM), and orchestration layers under a unified architecture. Central to this is Verint Da Vinci AI, which acts as an abstraction layer that allows any application on the Verint stack, including IVA, copilot bots, and analytics, to draw from a curated mix of proprietary, open-source, and third-party LLMs while also allowing customers to bring their own models.
- The IVA solution emphasizes a hybrid AI approach, combining deterministic workflows, NLU, and LLM-driven agentic AI. Verint enables organizations to govern exactly which interactions are handled by scripted deterministic flows versus LLM-driven agentic reasoning. This is particularly relevant for regulated industries where explainability, compliance, and control are important requirements.
- The platform supports multichannel and multimodal interactions, including voice, chat, messaging, and social channels, with continuity of context across channels. Demonstrated capabilities include switching between digital and voice channels during a single interaction while preserving conversation context, as well as incorporating multimodal inputs, such as images.
- Verint's innovation roadmap includes the imminent release of its Agent Factory capability, which aims to enable enterprises to build, manage, enrich, and coordinate multiple AI agents across use cases. Through Verint's integrated WEM, contact center leaders will be able to deploy and leverage these AI agents using the same platform they use to manage a human workforce. This aligns with the broader industry movement toward a hybrid workforce of agentic AI-powered digital labor working alongside humans.

## Verint (continued)

### GROWTH

- Verint demonstrates solid enterprise traction with its AI portfolio, including IVAs. The company focuses on complex, high-value deployments rather than volume-driven SMB and mid-market opportunities. The company is seeing marginal growth in its IVA category.
- A \$2 billion November 2025 acquisition by Thoma Bravo took Verint private and combined it with Calabrio, a Thoma Bravo portfolio company specializing in WEM and workforce optimization. The resulting entity positions itself as a unified, AI-powered CX platform with combined capabilities spanning IVA, WEM, quality automation, and analytics.
- The GTM model relies on a land-and-expand motion in existing Verint and Calabrio accounts across their CX automation portfolio, starting with a single use case and scaling across channels and functions. It is supplemented by a channel partner ecosystem that includes deep integrations with Avaya and many other enterprise communications vendors. Verint positions its open platform as complementary rather than disruptive, enabling integration with existing infrastructure. This reduces barriers to entry for large enterprises that are not interested in full platform replacement.
- Verint's presence spans North America, EMEA, Asia-Pacific, and Latin America, with the vast majority of IVA customers concentrated in North America. The platform is deployed across 150 languages and supports regional regulatory requirements. The company's experience in regulated industries strengthens its IVA positioning in compliance-sensitive markets.

## Verint (continued)

### FROST PERSPECTIVE

- Verint deployments across regulated industries highlight the platform's ability to satisfy complex compliance and operational requirements. The emphasis on hybrid AI and deterministic control reinforces Verint's position as a trusted vendor for high-risk, high-complexity use cases.
- The Thoma Bravo ownership transition introduces opportunity as well as uncertainty for Verint's AI and IVA strategy. Private ownership removes the quarterly earnings pressure that can sometimes constrain investment, and the Calabrio combination deepens the WEM + IVA narrative that Verint has advanced. However, the leadership and strategy transitions that accompany these transactions can introduce uncertainty at a moment when IVA market competition is intensifying.
- Verint's deep partner ecosystem is a meaningful accomplishment in coverage and depth. Native or deep integrations span Amazon Connect, Genesys Cloud, Avaya, Five9, RingCentral, Twilio, and others, enabling IVA deployment across the dominant CCaaS and telephony platforms without infrastructure replacement. This vast ecosystem is difficult to replicate, especially for point-solution IVA competitors.
- Verint's AI platform supports role-based access controls, full audit logging, data encryption in transit and at rest, PII detection and redaction, right to deletion, and conversation data retention controls. Regional deployment instances across the Americas, EMEA, and Asia-Pacific address data residency requirements in multiple regulatory jurisdictions.
- To help grow its AI and IVA penetration beyond North America, Verint should pursue and articulate a clearly defined sovereign cloud capability. While current capabilities support regional deployment and access controls, the lack of explicit sovereign cloud offerings may become a competitive gap.

# Best Practices & Growth Opportunities



# Best Practices

# 1

When initially implementing IVA capability, lead with a use case that has a high probability of success and is visible enough to engender confidence. It does not need high interaction volume or have to be the most technically ambitious, but it should have a clean data source and a well-defined workflow to demonstrate success and build confidence that helps scale to additional use cases.

# 2

Treat IVAs as an extension of the human workforce, requiring the same amount of attention and investment. IVAs will need to be managed in much the same way that human agents are, requiring onboarding, training, and performance reviews in order to achieve optimal performance. Hybrid WFM is now the norm.

# 3

IVAs are replacing a first generation of bots that have not been enthusiastically accepted by end consumers. Poorly functioning bots based on deterministic workflows frequently tied to FAQ keywords often left consumers frustrated. The next generation of IVA functionality stands to drastically improve this experience but will require vendors to offer full transparency regarding the use of virtual agents and focused demonstration of the value of the experience improvements.

# Growth Opportunities

# 1

Deepening industry vertical specialization for IVAs is an important growth opportunity. Enterprise buyers in healthcare, financial services, or insurance are looking for IVA technology that enables specific operational outcomes, and vendors that arrive with prebuilt Epic integrations, HIPAA-validated voice workflows, or PCI-DSS-certified hybrid architectures help reduce implementation and improve time-to-market timelines.

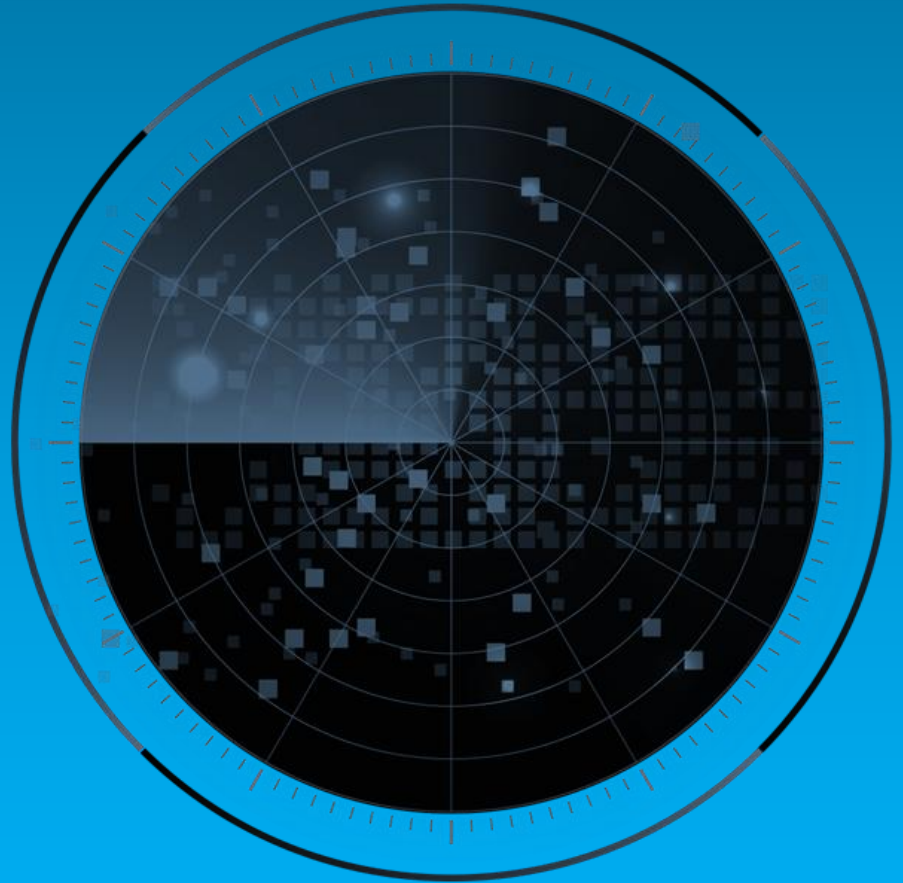
# 2

Proactive outbound IVA capability where AI systems identify a triggering condition, initiate customer contact, and resolve an issue before the customer needs to contact a brand is an underpenetrated growth opportunity in the IVA market because it expands the vendor's value proposition from cost reduction to potential revenue protection and generation.

# 3

An emerging growth opportunity is the reversal of the interaction model: instead of a brand deploying an AI agent to serve human customers, the customer's own AI agent initiates contact with the brand on their behalf, creating an agent-to-agent interaction paradigm, requiring IVA platforms to be designed for both machine-to-machine and human-to-machine conversation. The vendors that recognize this shift early and build a customer agent accessibility layer will be positioned to capitalize on a new category.

# Frost Radar™ Analytics



# Frost Radar™: Benchmarking Future Growth Potential

## 2 Major Indices, 10 Analytical Ingredients, 1 Platform

### Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

**GI1**

#### MARKET SHARE (PREVIOUS 3 YEARS)

This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

**GI2**

#### REVENUE GROWTH (PREVIOUS 3 YEARS)

This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

**GI3**

#### GROWTH PIPELINE

This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

**GI4**

#### VISION AND STRATEGY

This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

**GI5**

#### SALES AND MARKETING

This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

# Frost Radar™: Benchmarking Future Growth Potential

## 2 Major Indices, 10 Analytical Ingredients, 1 Platform

### (continued)

### Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.



**II1**

#### INNOVATION SCALABILITY

This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

**II2**

#### RESEARCH AND DEVELOPMENT

This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

**II3**

#### PRODUCT PORTFOLIO

This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

**II4**

#### MEGATRENDS LEVERAGE

This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found [here](#).

**II5**

#### CUSTOMER ALIGNMENT

This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

# Next Steps: Leveraging the Frost Radar™ to Empower Key Stakeholders



# Significance of Being on the Frost Radar™

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Companies plotted on the Frost Radar™ are the leaders in the industry for growth, innovation, or both. They are instrumental in advancing the industry into the future.

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## GROWTH POTENTIAL

Your organization has significant future growth potential, which makes it a Company to Action.

## BEST PRACTICES

Your organization is well positioned to shape Growth Pipeline™ best practices in your industry.

## COMPETITIVE INTENSITY

Your organization is one of the key drivers of competitive intensity in the growth environment.

## CUSTOMER VALUE

Your organization has demonstrated the ability to significantly enhance its customer value proposition.

## PARTNER POTENTIAL

Your organization is top of mind for customers, investors, value chain partners, and future talent as a significant value provider.

# Frost Radar™ Empowers the CEO's Growth Team

## STRATEGIC IMPERATIVE

- Growth is increasingly difficult to achieve.
- Competitive intensity is high.
- More collaboration, teamwork, and focus are needed.
- The growth environment is complex.

## LEVERAGING THE FROST RADAR™

- The Growth Team has the tools needed to foster a collaborative environment among the entire management team to drive best practices.
- The Growth Team has a measurement platform to assess future growth potential.
- The Growth Team has the ability to support the CEO with a powerful Growth Pipeline™.

## NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**
- **Growth Pipeline™ Dialogue with Team Frost**

# Frost Radar™ Empowers Investors

## STRATEGIC IMPERATIVE

- Deal flow is low and competition is high.
- Due diligence is hampered by industry complexity.
- Portfolio management is not effective.

## LEVERAGING THE FROST RADAR™

- Investors can focus on future growth potential by creating a powerful pipeline of Companies to Action for high-potential investments.
- Investors can perform due diligence that improves accuracy and accelerates the deal process.
- Investors can realize the maximum internal rate of return and ensure long-term success for shareholders.
- Investors can continually benchmark performance with best practices for optimal portfolio management.

## NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Opportunity Universe Workshop**
- **Growth Pipeline Audit™ as Mandated Due Diligence**

# Frost Radar™ Empowers Customers

## STRATEGIC IMPERATIVE

- Solutions are increasingly complex and have long-term implications.
- Vendor solutions can be confusing.
- Vendor volatility adds to the uncertainty.

## LEVERAGING THE FROST RADAR™

- Customers have an analytical framework to benchmark potential vendors and identify partners that will provide powerful, long-term solutions.
- Customers can evaluate the most innovative solutions and understand how different solutions would meet their needs.
- Customers gain a long-term perspective on vendor partnerships.

## NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Growth Pipeline™ Diagnostic**
- **Frost Radar™ Benchmarking System**

# Frost Radar™ Empowers the Board of Directors

## STRATEGIC IMPERATIVE

- Growth is increasingly difficult; CEOs require guidance.
- The Growth Environment requires complex navigational skills.
- The customer value chain is changing.

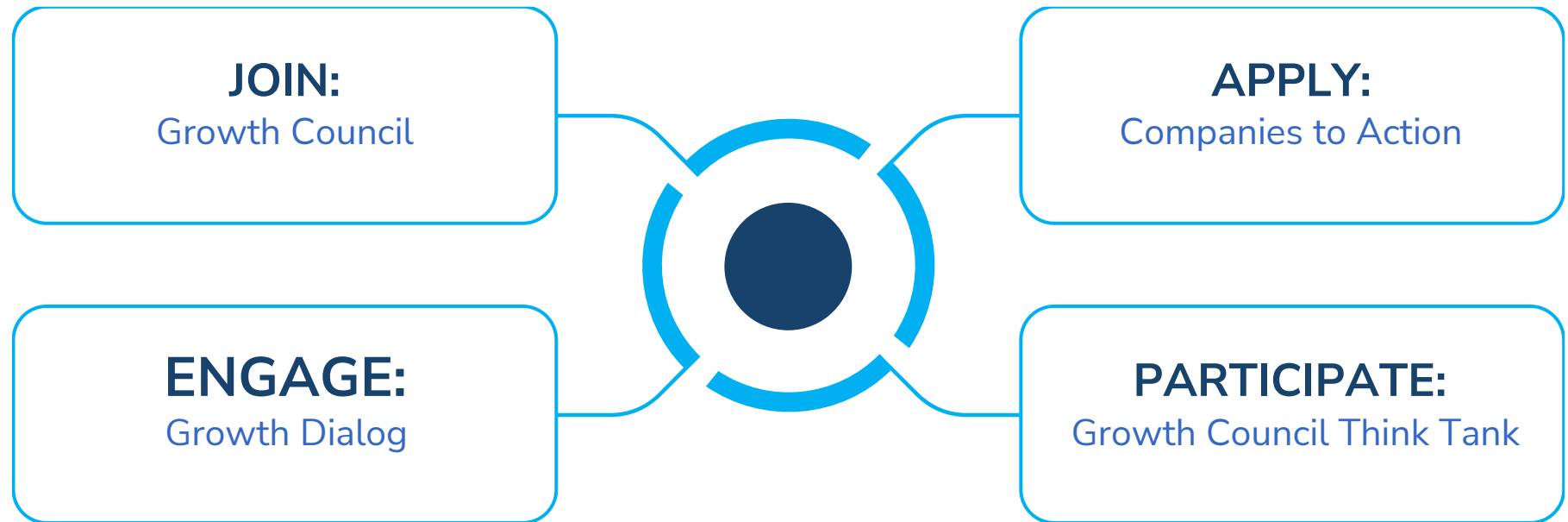
## LEVERAGING THE FROST RADAR™

- The Board of Directors has a unique measurement system to ensure oversight of the company's long-term success.
- The Board of Directors has a discussion platform that centers on the driving issues, benchmarks, and best practices that will protect shareholder investment.
- The Board of Directors can ensure skillful mentoring, support, and governance of the CEO to maximize future growth potential.

## NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**

# Next Steps



**Does your current system support rapid adaptation to emerging opportunities?**

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