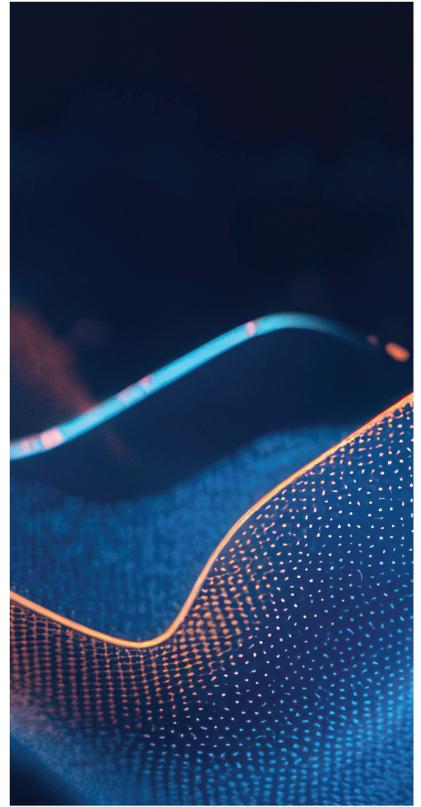
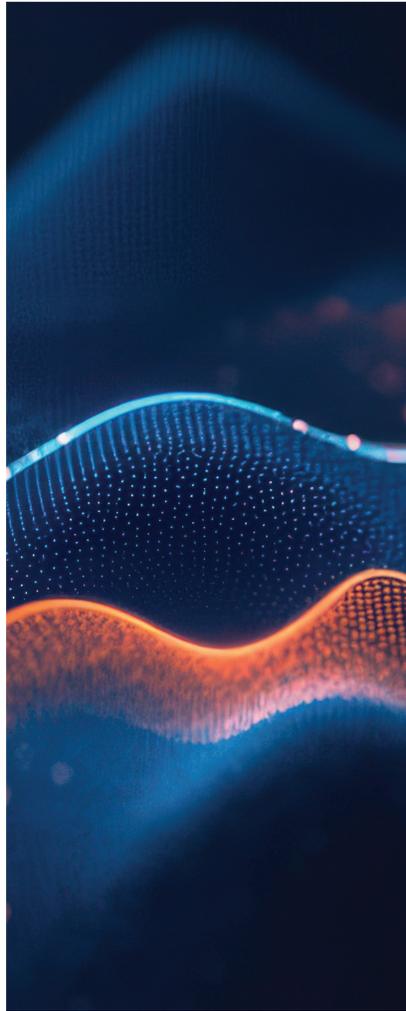


FROST & SULLIVAN
BEST PRACTICES



2026

NORTH AMERICAN

CX PLATFORM

ENABLING TECHNOLOGY LEADERSHIP

 dialpad

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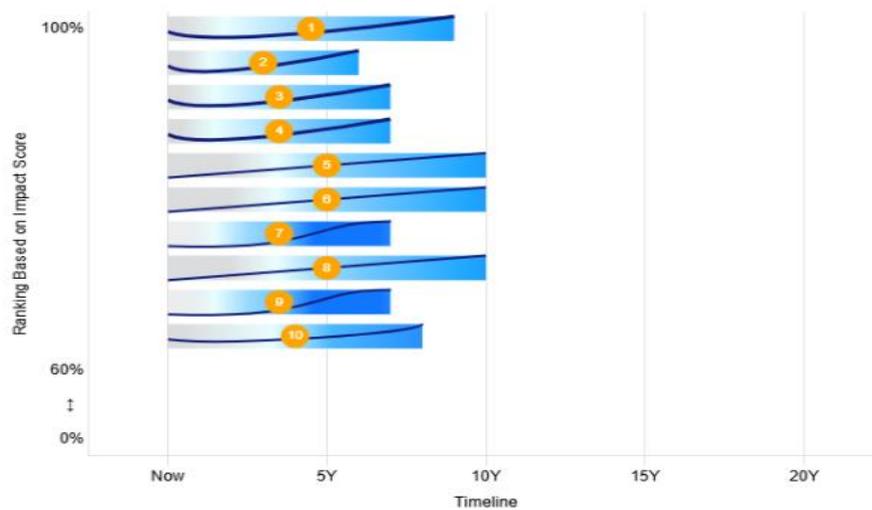
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Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Dialpad excels in many of the criteria in the CX platform space.

| RECOGNITION CRITERIA | |
|----------------------------|-------------------------------|
| <i>Technology Leverage</i> | <i>Customer Impact</i> |
| Commitment to Innovation | Price/Performance Value |
| Commitment to Creativity | Customer Purchase Experience |
| Stage Gate Efficiency | Customer Ownership Experience |
| Commercialization Success | Customer Service Experience |
| Application Diversity | Brand Equity |

Top Transformations Impacting Growth in the CX Platform Industry



Legend :

Ranking : ●

Impact : Moderate High

The Transformation of the CX Platform Industry

North America's customer experience (CX) landscape continues to evolve amid a complex economic backdrop. Inflation shows signs of stabilizing, yet labor conditions remain inconsistent and shifting tariff policies under the Trump administration introduce uncertainty that affects planning and investment. Cross-border tension between the United States and Canada adds additional pressure, prompting customer experience platform (CXP) providers to strengthen their agility.

Even with these challenges, business sentiment across the region is cautiously optimistic, with limited disruption to the CX ecosystem. The enterprise market, however, faces lengthier procurement cycles as organizations delay commitments in response to geopolitical and trade-related uncertainty. CXP vendors must stay agile and ready for protracted deal timelines, especially in industries most affected by economic volatility.

At the same time, organizations across North America continue to elevate expectations for customer engagement. Demand increases for seamless omnichannel continuity, advanced self-service, scalable personalization, and actionable analytics. Legacy CX solutions struggle to meet these requirements, creating opportunities for unified CXPs that integrate artificial intelligence (AI) to enhance customer journey orchestration and workforce performance. Companies that prioritize integrated, AI-driven engagement capabilities position themselves to meet emerging expectations for consistent, high-quality interactions across voice, digital, social, and emerging channels.

Cloud adoption for CX continues to accelerate. Cloud contact center revenue reached \$5.3 billion in 2024, reflecting 20% growth over 2023, and is projected to climb to \$6.4 billion in 2025, according to Frost & Sullivan.¹ To fully benefit from this expansion, enterprises must adopt well-structured migration frameworks that minimize operational disruption.

Hybrid deployment models continue to impact the North American CX landscape as more organizations blend public and private cloud resources with existing on-premises infrastructure. This shift creates meaningful opportunities for CXP providers that can ensure interoperability and support complex, mixed environments.

AI now serves as a primary competitive differentiator across the ecosystem. Enterprises increasingly seek production-ready AI capabilities that demonstrate measurable improvements in customer engagement and operational efficiency. The rise of AI-native competitors heightens pressure on traditional vendors to innovate through integrated, value-driven AI rather than incremental add-ons. As organizations compare multiple AI options, evaluation timelines grow longer and more rigorous.

Agentic AI expands this momentum by moving CX beyond basic automation toward autonomous systems that reason, execute multistep tasks, and resolve issues proactively. Providers that invest in these emerging architectures strengthen their long-term market position.

The rapid growth of AI and cloud integration also elevates cybersecurity demands. Organizations require zero-trust architectures, AI-specific protections, and observability to secure distributed

¹ Frost Radar™: Customer Experience Platforms in North America, 2025 (Frost & Sullivan, October 2025)

operations. These needs increase the importance of strong governance and ethical oversight as agentic AI technologies scale.

Partnership ecosystems play a critical role in innovation, enabling shared governance, interoperability, and coordinated customer success. Vendors that offer unified platforms with advanced AI, robust APIs, and workflow integration across all business functions deliver the end-to-end orchestration that enterprises now consider essential.

Dialpad: Intelligent Cloud Communications for the Modern Enterprise

Founded in 2011 and headquartered in San Ramon, California, United States, Dialpad offers a cloud-native communications platform that natively embeds its proprietary AI engine, Dialpad AI, into business voice, video, messaging, and contact-center workflows. Dialpad's AI layer enables real-time transcription, sentiment analysis, automated call summaries, coaching cues, and action-item extraction built on a large-scale dataset of conversation minutes. Dialpad AI enables organizations to gain actionable insights into customer and employee interactions, improve agent performance, and automate routine service tasks. The platform emphasizes enterprise-grade security and scalability, supporting global deployments and compliance with standards such as Service Organization Control 2 and International Organization for Standardization.

Innovation Engineered, Not Assembled

Dialpad's innovation leadership is defined by architecture, scale, and scientific rigor. The company has built an AI platform that is native end-to-end, a platform where voice, digital channels, and analytics coexist within one intelligence fabric. By owning every layer of the stack, from its proprietary small-language model (Dialpad GPT) to real-time transcription, natural language processing (NLP), and agentic reasoning frameworks, Dialpad ensures innovation is not an external integration exercise but an intrinsic design principle.

This vertical integration enables breakthroughs to move rapidly from lab to production. More than 11 billion minutes of conversations have been processed through Dialpad AI, generating 700 million recaps annually.² Such scale demonstrates maturity, not experimentation: technology in continuous use, refined through live data, and validated by measurable business impact.

The company's research and intellectual-property engine further sustains this competitive edge. With 26 peer-reviewed papers, 17 patents, and 70 AI specialists, including 22 PhDs, Dialpad converts scientific research into operational value at unmatched velocity.³ Innovation is not a periodic initiative; it is a continuous research-to-market loop where discovery immediately informs customer outcomes.

Dialpad's forward trajectory is anchored in its emerging Agentic Operating System, which moves beyond predictive analytics to autonomous reasoning and decision orchestration. This evolution—AI that can simulate, plan, and act alongside humans—signals leadership in defining the next enterprise paradigm. Each step is tempered by simulation-based validation and ethical guardrails, ensuring progress never compromises responsibility.

² Frost & Sullivan's Best Practices Research Discussion with Dialpad (October 2025)

³ Ibid.

“Dialpad’s forward trajectory is anchored in its emerging Agentic Operating System, which moves beyond predictive analytics to autonomous reasoning and decision orchestration. This evolution—AI that can simulate, plan, and act alongside humans—signals leadership in defining the next enterprise paradigm. Each step is tempered by simulation-based validation and ethical guardrails, ensuring that progress never compromises responsibility.”

**- Marcos Ainchil,
BPR Analyst**

In Dialpad’s world, innovation is systemic and scalable: a disciplined fusion of science, architecture, and accountability that turns every conversation into a source of intelligence and every advancement into measurable enterprise value. Dialpad’s competitive strength lies in its ability to transform architectural integrity into sustained market advantage. The outcome is consistency, reliability, and security at a depth that externally sourced solutions cannot replicate.

At the technical core of this differentiation is Dialpad GPT, the company’s proprietary language model, supported by its own automatic speech recognition and NLP engines. These models are trained specifically

on the linguistic and emotional texture of business communication, enabling real-time summarization, intent recognition, and coaching with exceptional precision and speed.

The company’s commitment to trust-by-design adds another layer of differentiation. Customers experience Dialpad’s predictive return on investment (ROI)/total cost of ownership simulations before adoption, allowing them to visualize impact and verify claims. This transparency, coupled with a culture of ethical engineering and human oversight, converts technological sophistication into customer confidence.

Furthermore, Dialpad’s AI-first organizational culture ensures its differentiation is self-renewing. More than 1,500 employees are trained in applied AI, ensuring innovation is collective, not departmental.⁴ The result is a company that evolves quickly because its innovation is embedded in architecture and mindset.

Through this integration of proprietary technology, responsible design, and adaptive culture, Dialpad has built a defensible position as the category’s true AI-native enterprise platform, a company that defines, rather than follows, the competitive curve.

Every innovation, whether an AI feature, product enhancement, or customer deployment, advances through measurable stage gates. This replaces subjective review cycles with empirical validation, ensuring that only initiatives proven to deliver value proceed to release, and showcases that efficiency is not a by-product of speed but a product of intelligent control.

The company’s unified data and real-time infrastructure enable this rigor. Billions of conversational data points flow through ingestion, model training, deployment, and live analytics. This constant loop compresses feedback cycles from months to days. Each stage learns from the previous one: research informs design, live usage informs retraining, and customer outcomes feed directly back into model evolution. The system effectively operates as a living innovation engine, self-correcting, continuous, and transparent.

⁴ Ibid.

Efficiency also extends to people and process. Through organization-wide AI literacy programs and iterative product development rituals, more than 1,500 employees actively participate in innovation cycles.⁵ This democratized technical understanding reduces decision latency and fosters agile governance across departments.

Through this blend of predictive gating, real-time insight, and cultural fluency, Dialpad has built an operational framework that turns execution into a strategic advantage. The company delivers innovation with precision, fast enough to lead, disciplined enough to last.

Proof in Performance, Power in Scale

Dialpad's commercial success is the natural outcome of disciplined innovation translated into measurable market performance. The company's AI technology has not only scaled but also monetized responsibly, creating a virtuous cycle between adoption, customer outcomes, and recurring growth. With more than 97% of contact center customers actively using Dialpad AI, the platform's penetration signifies operational trust at enterprise scale.⁶

This scale is anchored in measurable customer value. Once live, automated CSAT scoring and real-time analytics replace manual, sample-based measurement with comprehensive insight coverage. This approach strengthens retention by continuously reaffirming the platform's ROI in the customer's own data, not in marketing claims. Early access to the Agentic Operating System further positions Dialpad for future monetization, where agentic reasoning and autonomous task orchestration become new revenue catalysts.

Ultimately, Dialpad's commercialization success is the proof point of its philosophy: innovation that earns revenue because it delivers verified results. By uniting architectural control, transparent ROI, and scalable adoption, the company demonstrates how AI leadership becomes enduring commercial performance.

Dialpad's impact is amplified by the breadth and adaptability of its AI applications, which extend seamlessly across industries, communication channels, and business functions. This unified omnichannel architecture transforms fragmented customer journeys into a continuous intelligence loop, where information flows effortlessly across touchpoints and is instantly actionable.

Beyond customer-facing functions, Dialpad extends AI deeply into operational and managerial domains. Generative AI modules power automated Quality Management, agent coaching, and Workforce Management, an integration further enhanced through acquisitions like Surfboard. These features allow organizations to optimize performance, staffing, and resource allocation dynamically, ensuring efficiency and customer experience evolve in parallel.

The platform's versatility is proven by its adoption across diverse verticals, including technology, healthcare, finance, and retail. By training domain-specific models that adapt to each sector's compliance and language nuances, Dialpad ensures contextual accuracy while maintaining intelligence that is capable of being generalized. This capability makes the platform equally effective in a regulated hospital contact center or a global retail customer service hub.

⁵ Ibid.

⁶ Ibid.

Application diversity also extends to the Agentic Operating System, which broadens AI utility beyond CX into sales enablement, analytics, and decision support. This evolution reflects Dialpad’s vision of an enterprise AI ecosystem, flexible, collaborative, and increasingly autonomous, where every user benefits from intelligence that anticipates, not just reacts.

By fusing omnichannel integration, operational depth, and cross-vertical reach, Dialpad demonstrates that the value of AI lies not in isolated use cases but in cohesive, adaptive intelligence. Its platform delivers breadth without fragmentation, an ecosystem where every function, industry, and interaction become part of one unified conversation.

“Ultimately, Dialpad’s commercialization success is the proof point of its philosophy: innovation that earns revenue because it delivers verified results.”

**- Bernardin Arnason,
Industry Director**

Redefining the Economics of AI

Dialpad establishes a rare equilibrium in enterprise technology: delivering world-class AI performance with structural cost efficiency. Its pricing and value equation are not marketing constructs but outcomes of deliberate engineering choices. By developing its in-house AI stack, the company avoids third-party licensing fees, data latency, and vendor dependency. This control over its core technology yields a structural cost

advantage that strengthens with scale, allowing Dialpad to provide enterprise-grade functionality at a fraction of traditional costs.

This advantage translates directly into customer value. Dialpad’s AI features are embedded natively within all product tiers, meaning that organizations of every size gain access to advanced capabilities without incremental complexity or cost. Company leadership describes the platform as “very cost-effective, if not free in many cases,” reflecting how operational efficiency enables affordability without compromise. Through architectural optimization, the company has democratized access to AI, transforming what was once a premium feature into a standard feature of modern business communication.

Performance is central to the value equation. Dialpad’s infrastructure delivers real-time responsiveness, providing immediate transcription, coaching, and analytics with minimal latency. Every millisecond of saved processing time converts into agent efficiency and customer satisfaction, proving that performance itself is a form of economic value.

Efficiency gains extend to analytics and customer insight. Dialpad’s AI generates over 450 million automated CSAT scores annually, replacing the cost and delay of manual surveys while covering 100% of interactions.⁷ Customers thus receive continuous feedback and full visibility into experience quality at virtually zero incremental cost. Clients can preview expected payback and operational impact before deployment, ensuring alignment between investment and outcome.

This balance of affordability, speed, and verified impact benefits both customers and Dialpad’s own economics. As usage scales, compute costs per transaction decline, enabling margin accretion alongside customer savings, a model where innovation fuels mutual profitability.

⁷ Ibid.

In redefining the price/performance paradigm, Dialpad has proven that technological excellence and accessibility can coexist. Its architecture-driven cost efficiency ensures that AI innovation remains both powerful and attainable, a sustainable advantage that benefits every stakeholder.

Dialpad transforms the enterprise purchase journey into a transparent, data-driven, and confidence-building experience. Its process mirrors the same principles that define its technology, clarity, immediacy, and intelligence, ensuring every step from evaluation to activation reinforces trust and perceived value. The result is a buying experience that is as frictionless as the platform it delivers.

Dialpad's unified platform packaging further simplifies evaluation and procurement. By delivering a single, AI-native stack that integrates voice, messaging, analytics, and automation, the company removes the fragmentation and complexity of multi-vendor ecosystems. Buyers are no longer comparing disparate modules; they are selecting a cohesive system that is already optimized to function as one. This architecture clarity streamlines procurement and accelerates organizational alignment during decision cycles.

Dialpad's implementation follows the same philosophy as its cloud-native architecture enables near-instant deployment, with AI features activating automatically post-purchase. The ability to realize value within days, rather than months, has become a hallmark of the brand's buyer experience and a competitive differentiator in enterprise adoption.

The company enhances this simplicity with transparency and education. Customers receive clear pricing tied directly to outcomes, ensuring alignment between cost and performance. Throughout the presales and onboarding cycle, Dialpad hosts "AI Literacy" and proof-lab sessions, enabling clients to explore the platform hands-on and understand the technology powering their investment.

Dialpad delivers a purchase experience defined by evidence and ease, a seamless process that merges analytical rigor with intuitive simplicity. By proving value upfront and delivering on that proof instantly, the company replaces the traditional enterprise sales narrative with one grounded in transparency, trust, and verified performance.

Trust, Proven in Every Interaction

Dialpad's brand equity is the culmination of its proven performance, intellectual authority, and ethical leadership in enterprise AI. The company has built a reputation grounded in results, technology that works at scale, research that advances the field, and governance that ensures innovation remains responsible. Each achievement reinforces a brand identity defined by credibility, purpose, and trust.

The company's unwavering commitment to responsible innovation strengthens its reputation. Dialpad embeds guardrails, human oversight, and ethical simulation into its AI lifecycle, ensuring that safety and fairness are engineered as defaults, not add-ons. This commitment to "trust by design" has become part of its brand promise, a visible differentiator in a market increasingly defined by accountability.

Dialpad's strongest endorsements come from customers who integrate its AI daily into mission-critical operations, a testament to dependability under real-world conditions.

Culturally, Dialpad embodies its ethos of AI + Human Harmony, expressing it consistently across product design, communication, and employee engagement. Its AI-first workforce, innovation showcases, and

internal AI literacy programs ensure that the brand's principles are lived internally as much as projected externally. This alignment between culture and communication reinforces brand authenticity and continuity.

Dialpad's brand equity ultimately reflects a deeper truth: leadership is not claimed but demonstrated. Through scientific rigor, measurable trust, and human-centered innovation, the company has evolved from a technology provider into a symbol of credibility and confidence in the AI enterprise era.

Conclusion

Dialpad stands as a definitive example of how disciplined innovation, ethical intelligence, and measurable performance can converge into lasting artificial intelligence (AI) market leadership. Across every dimension, technological, commercial, operational, and cultural, the company demonstrates that AI excellence is not a matter of promise, but of proof. It has engineered an end-to-end platform where proprietary models, real-time infrastructure, and human-AI harmony operate in concert to deliver continuous, verifiable value. From its in-house Dialpad GPT and Agentic Operating System to the predictive simulations that underpin every deployment, Dialpad has replaced speculation with science, making innovation accountable, repeatable, and trusted.

Its impact is evident in both scale and substance: billions of minutes processed, hundreds of millions of AI-driven insights generated, and customer adoption rates that reflect unwavering confidence in its technology. Yet its true distinction lies beyond performance metrics. Dialpad has proven that profitability and accessibility can coexist, that automation can amplify empathy, and that responsible governance can accelerate, not restrain, progress. By aligning architecture, culture, and purpose, the company has built an AI enterprise that is as ethical as it is intelligent, as human as it is advanced. Dialpad's story is therefore not only about leading a category, but also about redefining what leadership means in the age of intelligent transformation.

With its strong overall performance, Dialpad earns Frost & Sullivan's 2026 North American Enabling Technology Leadership Recognition in the CX platform industry.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Recognition identifies the company that applies its technology in new ways to improve existing products and services and elevate the customer experience.

Best Practices Recognition Analysis

For the Enabling Technology Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company’s long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

| STEP | | VALUE IMPACT | |
|------|-------------------------------|--|--|
| | | WHAT | WHY |
| 1 | Opportunity Universe | Identify Sectors with the Greatest Impact on the Global Economy | Value to Economic Development |
| 2 | Transformational Model | Analyze Strategic Imperatives That Drive Transformation | Understand and Create a Winning Strategy |
| 3 | Ecosystem | Map Critical Value Chains | Comprehensive Community that Shapes the Sector |
| 4 | Growth Generator | Data Foundation That Provides Decision Support System | Spark Opportunities and Accelerate Decision-making |
| 5 | Growth Opportunities | Identify Opportunities Generated by Companies | Drive the Transformation of the Industry |
| 6 | Frost Radar | Benchmark Companies on Future Growth Potential | Identify Most Powerful Companies to Action |
| 7 | Best Practices | Identify Companies Achieving Best Practices in All Critical Perspectives | Inspire the World |
| 8 | Companies to Action | Tell Your Story to the World (BICEP*) | Ecosystem Community Supporting Future Success |

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

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

