



The Clarity Advantage

How Speech Understanding Powers CX,
Compliance, and AI Performance



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Executive Summary

Enterprises have spent years modernizing CX, scaling AI, and optimizing contact centers. But one overlooked capability continues to erode value across every interaction: speech clarity.

Speech remains the fastest, most trusted channel, especially in high-emotion, high-stakes moments. Still, many organizations treat clarity as a technical metric, rather than a driver of experience, compliance, and automation outcomes. The cost of poor clarity, including repeated calls, miscommunication, agent burnout, compliance gaps, and corrupted AI training data, is often unmeasured but material.

Historically treated as a service channel, **speech is now beginning to evolve into something more foundational: an input layer for enterprise-wide performance.** As this evolution unfolds, clarity is emerging as a critical enabler across customer understanding, regulatory accuracy, and downstream system effectiveness.

ISG research and enterprise observations indicate that clarity is beginning to take on a broader role in how organizations architect for service performance. Limitations in speech quality, mostly driven by environmental noise, accent variation, multiple languages or infrastructure inconsistency, have constrained voice channels for decades. With advancements in clarity-enabling technologies, organizations are beginning to unlock new potential: faster resolution, more inclusive service delivery, improved agent effectiveness, and higher-quality speech data for automation and analytics.

To support this progression, enterprises will need structured methods for assessing their current capabilities and identifying what's required to scale clarity as a core enabler. ISG uses the **Speech Clarity Maturity Framework** to support enterprise planning in this area. The four-stage model helps organizations assess current-state capabilities and identify the process, technology, and talent enablers required to scale clarity as a core business capability. This paper also features examples of how real-time clarity solutions, such as Sanas' speech understanding platform, are being applied to reduce friction in voice interactions and improve outcomes across service, compliance, and automation domains.

As clarity gains traction, ISG expects more enterprises to embed it into how they serve, scale, and automate, positioning it not as a peripheral enhancement, but as infrastructure supporting end-to-end performance improvement.

At a Glance

Speech is still the frontline channel: Customers default to voice in high-stakes, high-emotion moments.

Poor clarity = hidden costs: Miscommunication, repeat calls, agent fatigue, compliance risk, and corrupted AI data quietly erode value.

Clarity is evolving into infrastructure: No longer just a call-center issue, clarity now shapes customer understanding, regulatory accuracy, and automation effectiveness.

Enterprises need a roadmap: ISG's Speech Clarity Maturity Framework guides organizations in assessing capabilities and scaling clarity across tech, process, and talent.

Proof point: Sanas' real-time speed understanding platform is already helping global contact centers improve resolution, reduce fatigue, and deliver more inclusive, compliant service.

Reframing Speech: The Emerging Role of Clarity in Enterprise Performance

Speech remains the most direct and trusted interface between brands and customers. It carries more than just words, it communicates urgency, emotion, intent, and trust with a richness digital channels struggle to match. Even in a digital-first world, 75% of customers still prefer phone calls when they need support¹.

Yet in many organizations, speech is still treated as a legacy cost center, which is managed for efficiency, not impact. It's optimized for call handling, not for clarity.

Clarity is where operational performance either compounds or collapses. Whether through accent variation, poor audio quality, multilingual interaction or background noise, unclear speech affects far more than call quality, it undermines business outcomes.

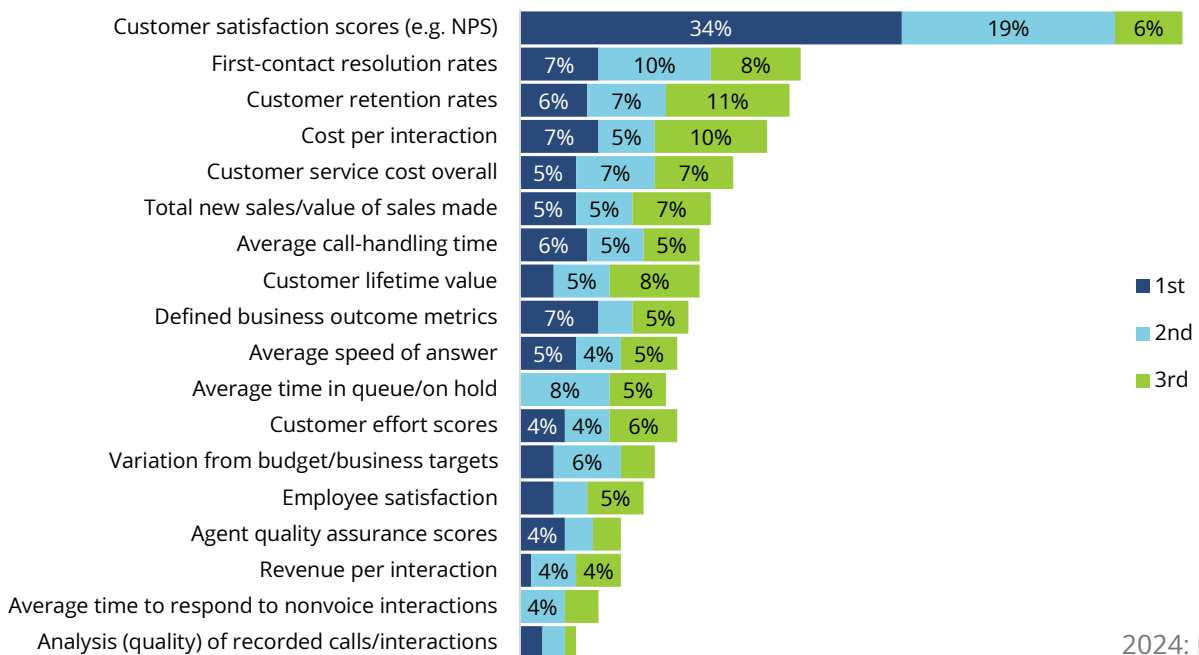
The result? Higher repeat volumes, lower customer satisfaction, agent fatigue, and AI systems trained on unreliable inputs.

According to ISG's 2024 BPO Market Lens research, customer satisfaction, first-contact resolution, and customer retention remain top enterprise priorities. All three outcomes hinge on one capability: **the ability to clearly understand and be understood – the first condition for resolution, compliance, and trust.**

And as AI adoption accelerates, clarity is becoming even more critical. ISG data shows that AI is now being deployed in CX more than nearly any other enterprise domain.

Exhibit 1: ISG 2024 BPO Market Lens Chart

Which are your organization's top three priorities for improvement in customer service metrics



2024: BPO

Reframing Speech: The Emerging Role of Clarity in Enterprise Performance

Yet many CX transformation efforts continue to deprioritize speech clarity, treating it as a network-level issue measured in latency or jitter rather than a systemic enabler of business performance. **When clarity is not addressed as a foundational capability, organizations risk missing its full potential to enhance experience, performance, and risk mitigation.**

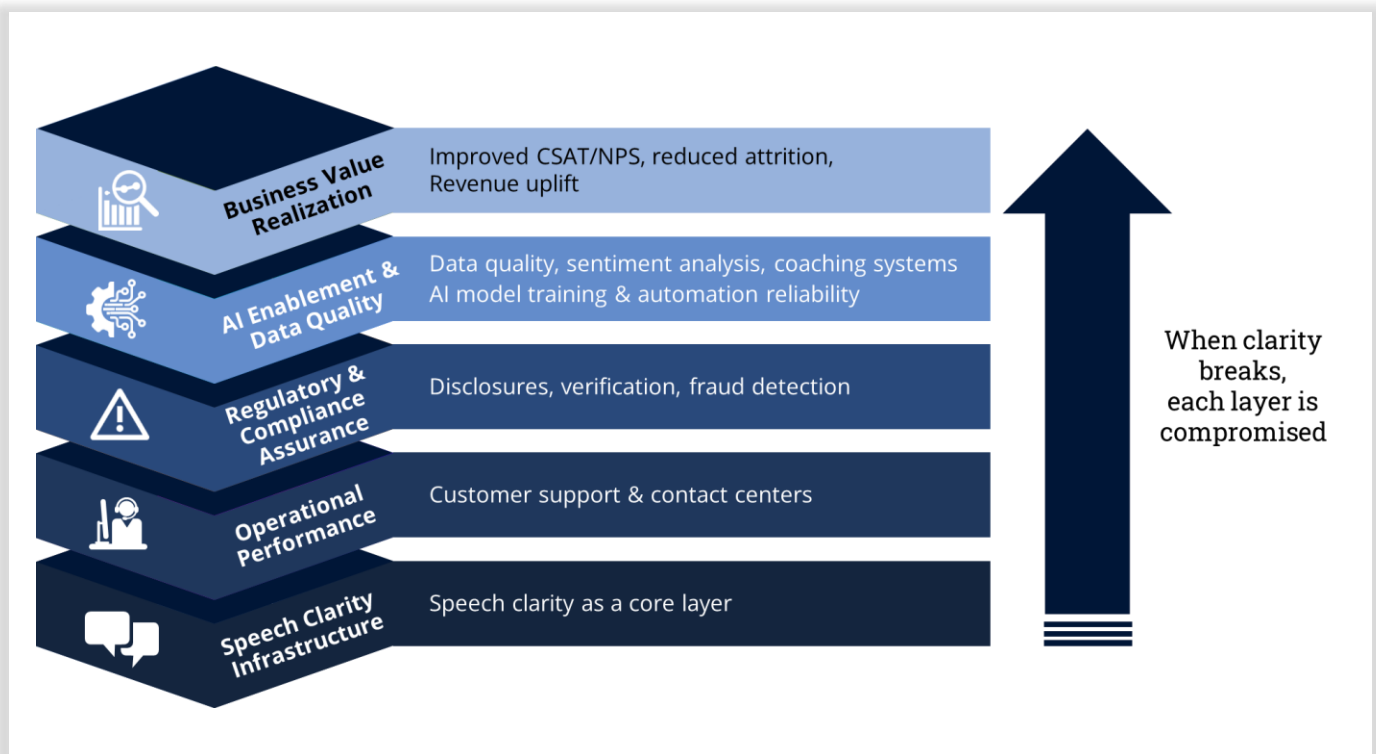
This gap between technical quality and conversational clarity has material consequences. Across contact centers, compliance functions, and AI systems, unclear speech contributes to operational drag, regulatory exposure, and customer churn, costs that are rarely tracked directly, but tend to compound over time.

Speech Clarity Is Moving Up the Enterprise Agenda

Leading enterprises are beginning to reframe speech from a support function to a clarity-driven capability with material impact across the business.

As shown in Exhibit 2, this shift involves more than better headsets or noise suppression. It's about treating clarity as infrastructure, built into the voice layer, embedded in compliance and AI pipelines, and designed to reduce friction across every spoken interaction.

Exhibit 2: The Strategic Shift in Speech – From Channel to Infrastructure



The Hidden Cost of Poor Speech Clarity

Poor speech clarity is not just a technical concern; it limits enterprise performance in ways that are frequently underrecognized and rarely measured. **Every unclear conversation introduces friction, increases cost, and elevates risk across service operations.**

And when scaled across thousands of agents and millions of calls, the business impact is both significant and systemic.

ISG analysis shows that speech clarity issues surface most visibly across four high-impact domains, each associated with operational inefficiency and compounded enterprise risk:

1. Customer Experience: More Calls, Lower Loyalty

Unclear communication drives repeat interactions, longer handle times, and poor first-contact resolution. Industry estimates suggest **15% to 20% of inbound calls are**

avoidable repeats, often caused by misunderstood conversations.

For a contact center handling 1M calls a year, this adds up to \$1.1M in excess cost at \$2.70 to \$5.60 per live agent call².

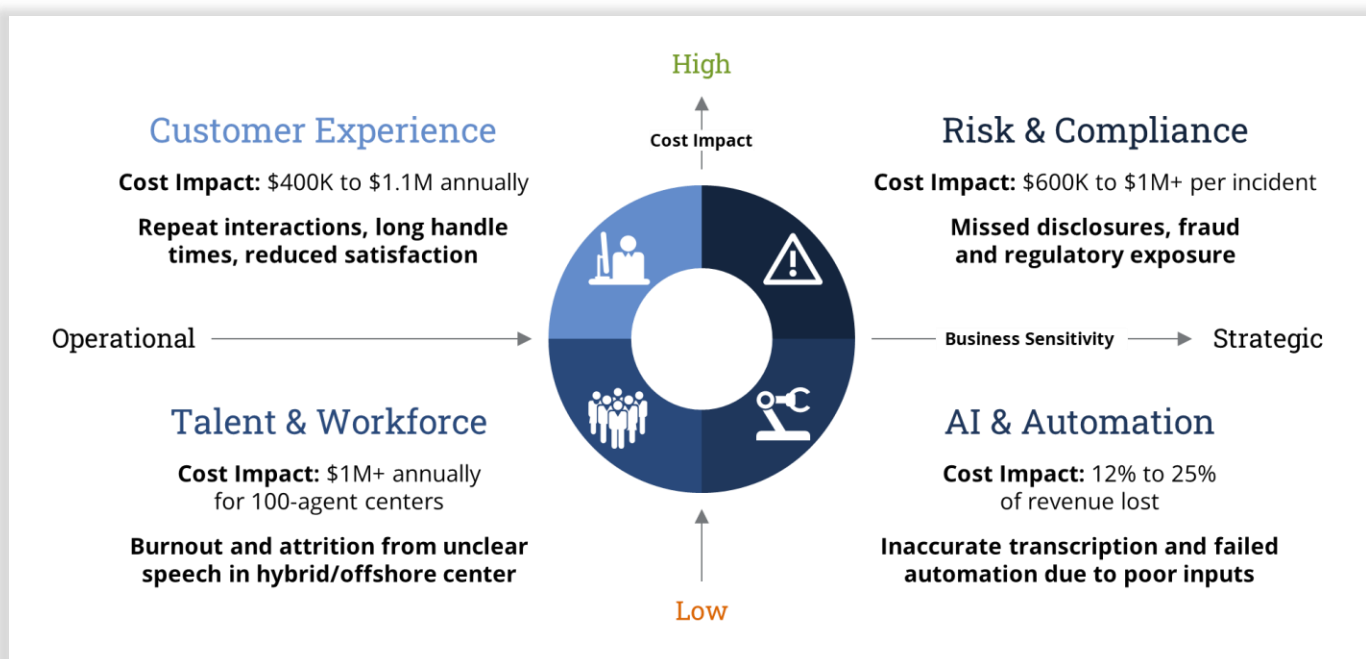
The downstream impact is even greater: reduced satisfaction, churn, and lower customer lifetime value.

2. Risk & Compliance: When Misunderstanding Becomes Liability

In regulated industries, a single missed disclosure or failed verification can trigger audits, penalties, or worse, especially with the rise of voice fraud and deepfake attacks.

One incident can cost \$600K to \$1M+³, not including remediation and reputational fallout. Without clarity, even the best compliance systems can't perform.

Exhibit 3: Prioritizing Speech Clarity: Cost Exposure vs. Strategic Importance



The Hidden Cost of Poor Speech Clarity

3. Talent Efficiency: Burnout at the Frontline

Agents struggling to hear or be heard, especially in offshore, hybrid, or noisy environments, experience **higher cognitive load, fatigue, and error rates**. The result is turnover.

Contact center attrition averages 35% to 40% annually⁴, with replacement costs at \$10K to \$20K per agent⁵. That's \$1M+ in turnover cost for a 100-agent operation, before factoring in ramp time and lost productivity.

Clarity reduces effort, builds confidence, and improves retention, especially in remote or multilingual teams.

4. AI & Automation: Garbage In, Failure Out

AI systems rely on clean, structured speech data. If clarity is compromised, transcriptions are flawed, intent is misread, and automation breaks down.

Research shows **12% to 25% of enterprise revenue is lost due to poor data quality**⁶, and speech is among the most error-prone inputs. Without clear speech data, AI investments underdeliver or outright fail.

As shown in Exhibit 3, failure to invest in clarity can lead to missed revenue, rising risk, and growing operational drag. But when addressed strategically, speech clarity has potential to become a multiplier across people, platforms, and processes.

Clarity in Action: How Leading Enterprises are Operationalizing Speech Clarity

Leading enterprises are beginning to integrate speech clarity into core service functions, including customer support, compliance processes, and AI enablement, treating it as a capability that supports measurable business outcomes.

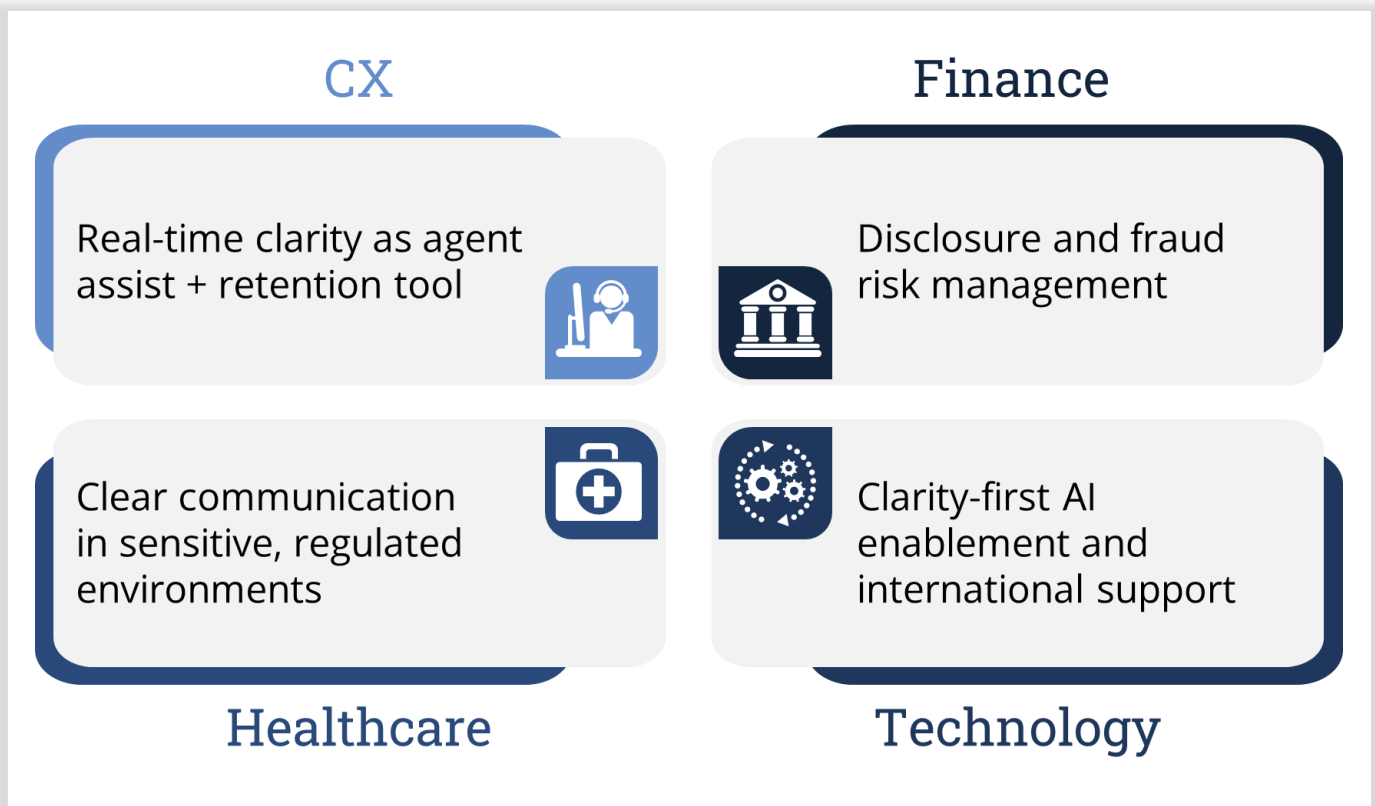
Two models of leadership are emerging:

- BPO providers like Teleperformance, Alorica, and Transcom are deploying real-time accent translation and speech enhancement to reduce friction in multilingual speech interactions. These capabilities are fast becoming differentiators in offshore and hybrid delivery models, helping reduce agent effort, improve CSAT, and strengthen retention.

- Enterprises in regulated and global sectors, particularly healthcare and financial services, are embedding clarity technologies into their compliance, risk, and CX ecosystems. From ensuring that disclosures are clearly understood, to improving fraud detection accuracy, to enabling confident communication across distributed teams, clarity is becoming a critical layer of control and performance in high-stakes speech interactions.

In both cases, **speech clarity is no longer a technical fix, it's an operational advantage.**

Exhibit 4: The Rise of Speech Clarity Adoption across Industries



Solution in Focus: Sanas

As clarity becomes a performance layer, not just a service fix, [Sanas](#) exemplifies how speech understanding technology can be operationalized at scale to drive measurable business outcomes.

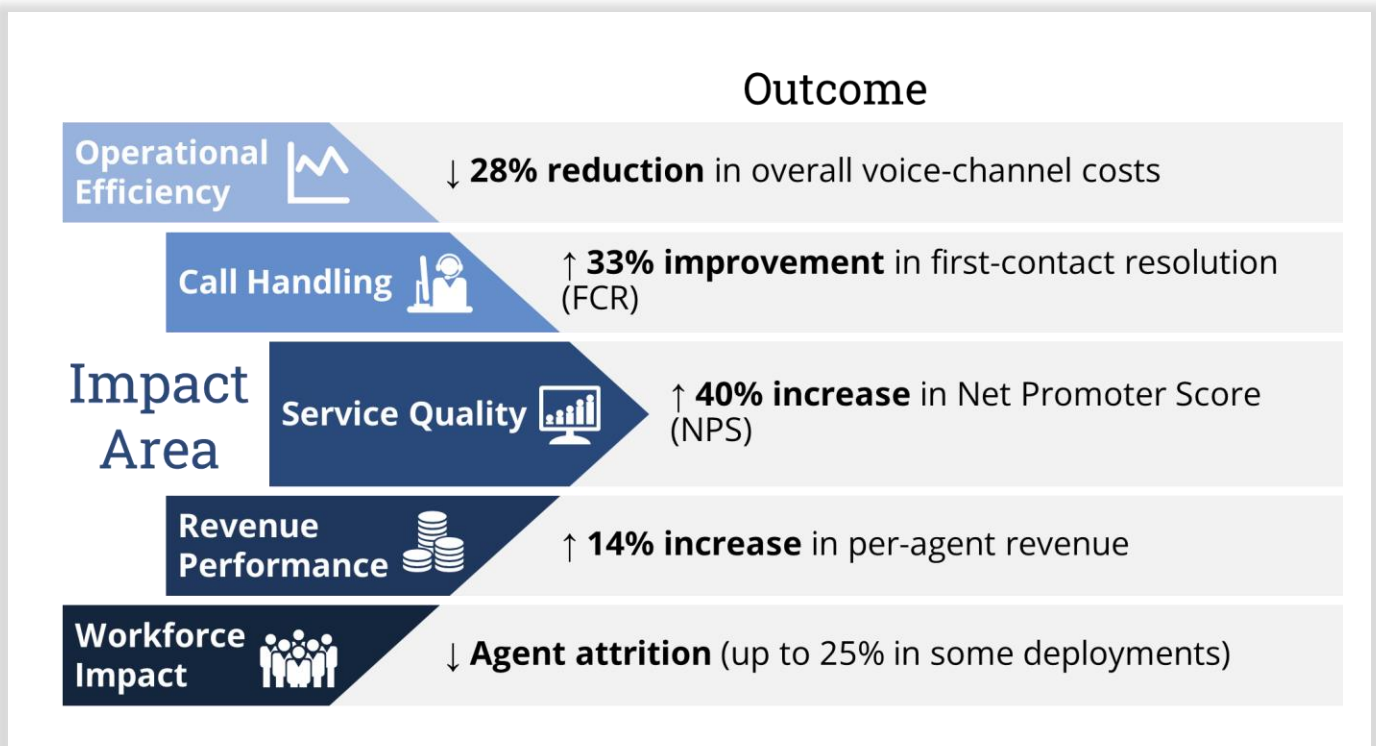
Sanas' speech understanding platform applies real-time accent and language translation to ensure intelligibility across accents, environments, and geographies. The **platform operates without requiring individuals to alter their natural speech patterns**, making it particularly effective in high-volume, multilingual, and hybrid contact center environments.

Unlike many AI solutions that take weeks or months to show value, **Sanas integrates with existing infrastructure and starts delivering impact immediately**. The result is fast ROI, reduced agent strain, higher resolution rates, and more consistent customer experiences.

Business Impact: Measurable Gains across Frontline and AI Systems

Organizations deploying Sanas have reported consistent, quantifiable improvements across customer service and workforce performance domains. These include:

Exhibit 5: Business Outcomes from Sanas Deployments



These outcomes are not theoretical. The following examples illustrate how enterprises are translating speech clarity

into measurable improvements in customer experience, agent performance, and operational efficiency.

Solution in Focus: Sanas

Sanas in Action: Results from Global Deployments

1 A multinational financial services organization sought to improve service outcomes in offshore teams where accent variation and background noise were contributing to longer call durations, reduced customer satisfaction, and increased compliance risk.

After deploying Sanas' speech understanding platform across its customer support operations, the enterprise reported:

- 38% of agents reported significantly better clarity
- 81% reported greater confidence and reduced effort
- Resolution times decreased and customer satisfaction improved

"Sanas didn't just improve communication – it transformed our service delivery."

**- Head of Customer Experience,
Global FinServ Leader**

2 A leading telecom company serving U.S. customers was facing CSAT erosion and increased call transfers-driven by accent-related comprehension issues in BPO locations across the Philippines and India.

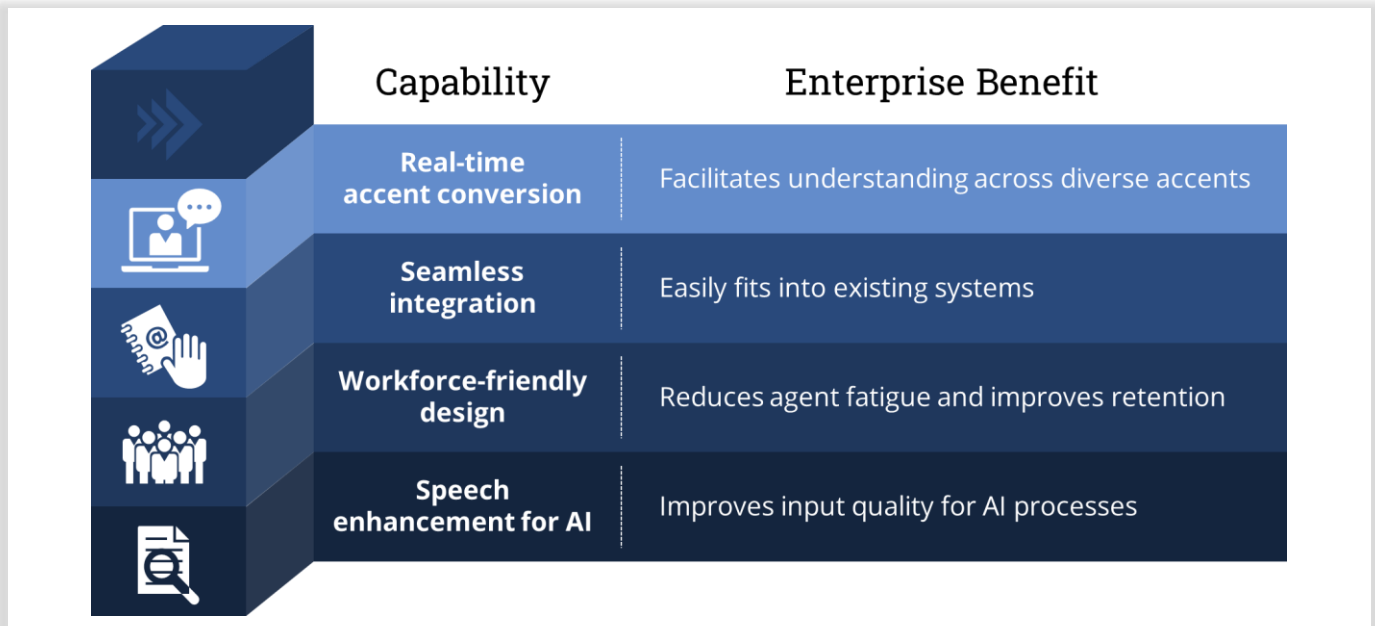
On implementing Sanas across four contact center sites, the telecom company observed that the platform preserved natural speech quality while improving intelligibility in real time. The company also reported:

- +8.8-point increase in Net Promoter Score (NPS)
- +38.4% improvement in Ease of Understanding Score
- Over 90% utilization rate, validating frontline value and ROI

"Sanas bridged our communication gaps without compromising voice quality or efficiency."

**- VP of Global
Contact Centers**

Exhibit 6: Sanas Capabilities Driving Enterprise Value



Solution in Focus: Sanas

Human Impact: Empowering the People Behind the Performance

While performance metrics provide one lens into the value of speech clarity, its impact is often most immediately felt by agents on the front line. In voice-intensive environments, particularly those that are hybrid, offshore, or multilingual, unclear audio contributes to higher cognitive load, greater fatigue, and reduced job satisfaction.

Exhibit 7 illustrates the human impact of Sanas' deployment, showing how improved clarity supports higher agent confidence, reduced fatigue, and better frontline performance across high-volume call operations.



"Before Sanas, customers kept saying 'Pardon?' and dropping calls. Now they understand me clearly – and we hit our targets."

**– Arsalan,
Support Agent, India**



"Customers used to ask for someone local. Now they trust me. I feel more confident and less stressed."

**– Nukholu,
Tech Support Agent, Philippines**

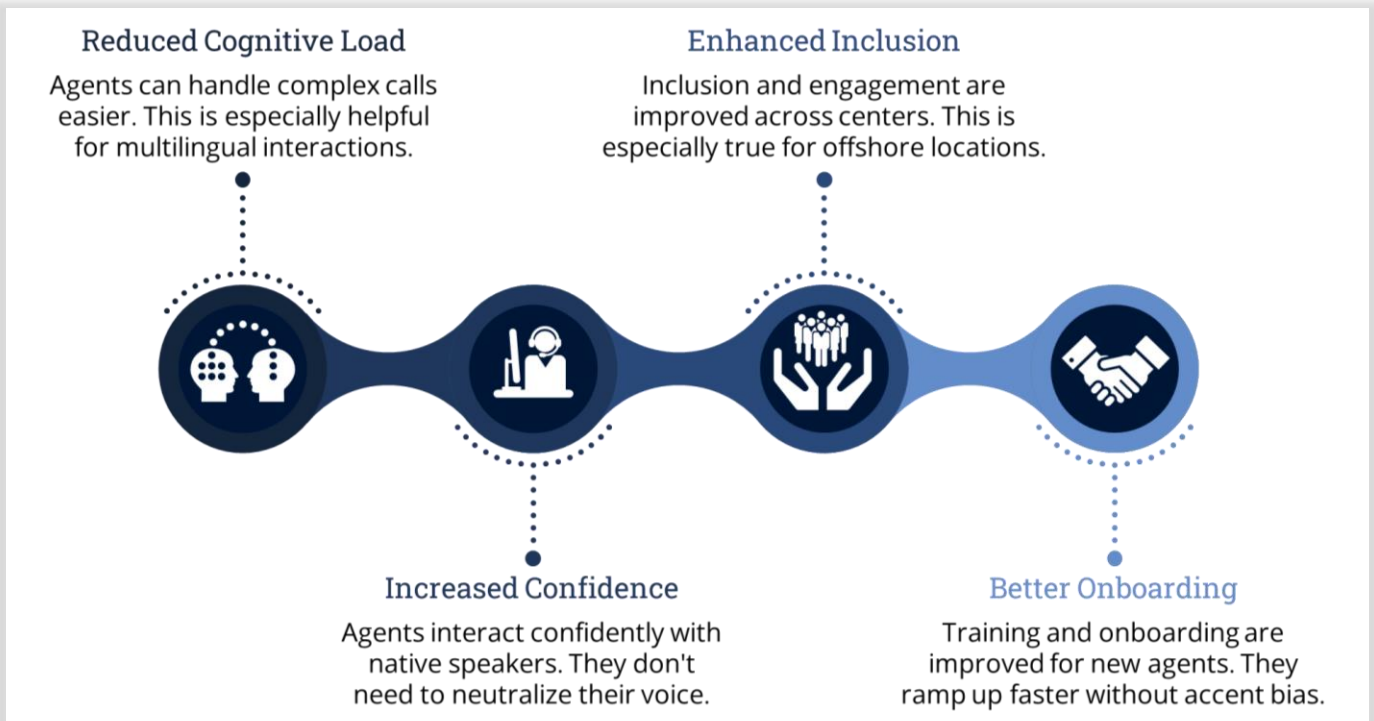


"I used to dread U.S. calls. Now I'm confident – and less drained after every shift."

**– Wendy,
CS Specialist, Mexico**



Exhibit 7: Human Impact at Glance



The Speech Clarity Maturity Framework

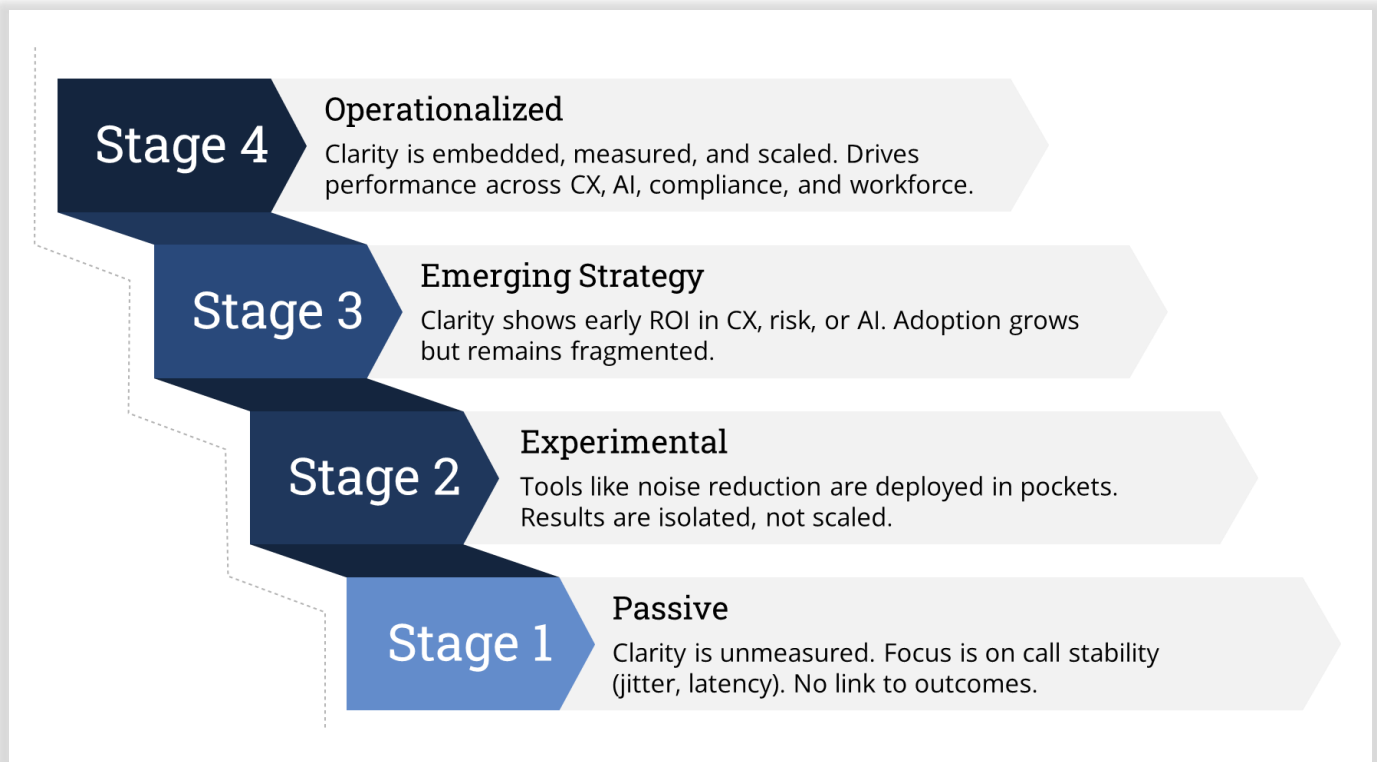
As more enterprises recognize the business impact of speech clarity, the question isn't whether to invest, but how to scale, govern, and measure progress.

To support this assessment, ISG has developed the **Speech Clarity Maturity**

Framework – a four-stage model for evaluating enterprise readiness across people, processes, and technology infrastructure.

Exhibit 8 outlines the core characteristics and capabilities across all four stages.

Exhibit 8: Speech Clarity Maturity Framework



Enterprises operating at Stage 4 typically demonstrate:

- Higher CSAT and NPS through clearer conversations
- Lower agent attrition and training time
- Improved AI performance from cleaner speech inputs
- Better compliance outcomes and reduced risk exposure

Most organizations today are still in Stage 1 or 2, where clarity is reactive, fragmented, or unmeasured. Stage 3 reflects progress towards modernization, but without system-level integration, value remains capped.

Understanding current-state maturity is only the first step. Progressing further requires thoughtful investment in clarity tools, employee support, and enterprise governance.

The Speech Clarity Maturity Framework

Enterprise Priorities for Advancing Speech Clarity

Advancing from awareness to action: 3 strategic moves for revenue impact

Enterprises seeking to scale speech clarity as infrastructure should concentrate their efforts around three strategic imperatives:

1. Embed clarity into transformation programs

Clarity doesn't belong on the margins. It should be embedded into CX transformation, compliance strategy, and AI planning, right alongside customer journeys, agent tooling, and automation priorities.

2. Link clarity to business outcomes that move the needle

Clarity should be measured by its impact on the metrics that matter such as resolution speed, CSAT, agent retention, and compliance assurance. Leading organizations are treating clarity as a lever for revenue growth, operational efficiency, and reputational trust.

3. Use maturity as a blueprint, not a benchmark

The Speech Clarity Maturity Framework should guide how enterprises assess current-state readiness and prioritize investments in platforms, processes, and practices that enable scale.



The Future of Speech: From Channel to Cognitive Layer

ISG believes the next era of enterprise speech will be defined not by volume or automation, but by clarity. Speech is beginning to extend beyond its traditional role in service delivery, with growing signs that it may serve as a strategic input into areas such as customer experience, compliance, AI enablement, and workforce operations.

As it evolves into a cognitive layer, speech will carry more than words; it will deliver understanding, intent, emotion, and trust in real time. And clarity serves as the foundation for this evolution.

Based on ISG's view of market trends, speech clarity will unlock the following enterprise capabilities:

1. Real-Time Multilingual Translation

Speech-to-speech translation will move beyond proof-of-concept, enabling seamless service delivery across languages without agent handoffs or interpretation layers.

Impact: Broader market access, reduced translation costs, and better customer connection across languages.

2. Accent-Adaptive Communication for Global Workforce Enablement

Speech adaptation will enable clearer conversations across offshore and multilingual environments, reducing friction without erasing identity.

Impact: Expanded offshore/nearshore hiring pools, faster onboarding, and improved workforce diversity without compromising quality.

3. Cleaner Speech Signals Powering Enterprise AI

High-fidelity speech inputs will improve the accuracy of transcription, intent detection, and LLM-based copilots. This will drive more reliable agent assist, smarter routing, and faster automation across channels.

Impact: Higher AI ROI, fewer failed automations, and faster resolution with human + machine orchestration.

4. Built-In Empathy and Conversation Intelligence

Speech systems will no longer just capture content, they'll detect emotion, tone, and hesitation in real time. Enterprises will be able to adapt live interactions, escalate support, or coach agents based on conversational signals.

Impact: Higher CSAT/NPS, reduced escalation, and more human-centric customer experience at scale.

5. Speech as a Control Layer for Compliance and Security

Clarity will become a prerequisite for real-time fraud detection, authentication, and disclosure verification. In sectors like healthcare and financial services, regulatory adherence will increasingly depend on the audibility and auditability of every spoken word.

Impact: Stronger governance, reduced exposure to compliance failure, and safer digital trust environments.

Conclusion

Speech has long been a critical mode of customer engagement. What is beginning to change is the way enterprises position their role within broader operating models.

As organizations scale intelligent systems, support globally distributed teams, and respond to increasing customer expectations, clarity is emerging as a foundational requirement, not just for effective communication, but for resolution, compliance, and automation readiness.

Speech clarity is becoming essential to ensuring that interactions are intelligible, actionable, and aligned with enterprise performance objectives.

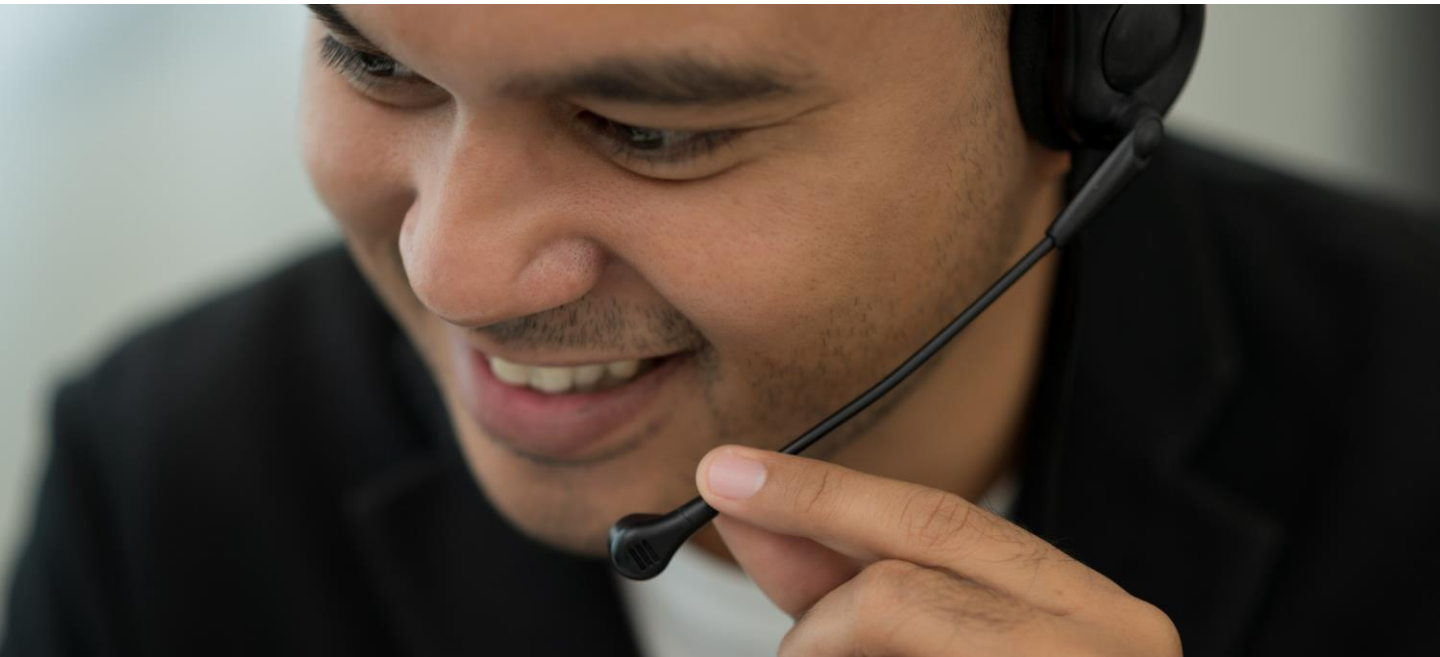
This paper has examined how clarity limitations, when left unaddressed, can quietly undermine performance across CX, regulatory operations, workforce productivity, and AI systems. It also highlights how some organizations are beginning to reframe clarity not as a peripheral issue, but as infrastructure that supports measurable business outcomes.

One example is Sanas, the world's first speech understanding platform that helps enterprises reduce communication friction at the point of interaction. Deployed in high-volume, multilingual environments, Sanas has been used to support improvements in customer resolution, agent experience, and consistency of service delivery.

While clarity-enabling technologies represent a key piece of the solution, outcomes are ultimately shaped by how organizations integrate these capabilities into service design, workforce models, and intelligent automation strategies.

ISG anticipates that **enterprises that take a structured approach to speech clarity, aligning it with business priorities and systems, will be better positioned to drive sustainable improvements in performance, risk mitigation, and customer trust.**

To explore how Sanas can help your organization accelerate speech clarity maturity and business impact, visit sanas.ai.



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Sakshi Takkar is a Principal Analyst at ISG. She brings over 15 years of experience in strategy research, with a specialization in emerging technologies and global sourcing trends. She has a strong track record of delivering high-quality projects, including in-depth research reports, thought leadership papers, market analysis, go-to-market strategy development, competitive benchmarking, and opportunity assessments. At ISG, Sakshi leads research efforts for service provider intelligence, focusing on digital transformation with an emphasis on artificial intelligence, intelligent automation and business process optimization.



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About ISG



ISG (Nasdaq: III) is a global *AI-centered* technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

About Sanas



Sanas provides the world's first Real-Time Speech Understanding Platform powered by its patented AI technologies. Born from a mission to power a kinder, more compassionate world, Sanas is pioneering a revolution in human connection by making global, real-time communication more inclusive. Today, Sanas offers Real-Time Accent Translation and Noise Cancellation with omni-directional capabilities and speech enhancement. Founded in 2020, Sanas is led by a team of exceptional co-founders, including CEO Sharath Keshava Narayana and CTO Shawn Zhang. To learn more, visit Sanas.ai