QSTORY

2025 ENABLING TECHNOLOGY LEADER

Leveraging Vital Technology to Enhance Products and Applications

RECOGNIZED FOR BEST PRACTICES IN THE EUROPEAN WORKFORCE MANAGEMENT INDUSTRY

FROST & SULLIVAN

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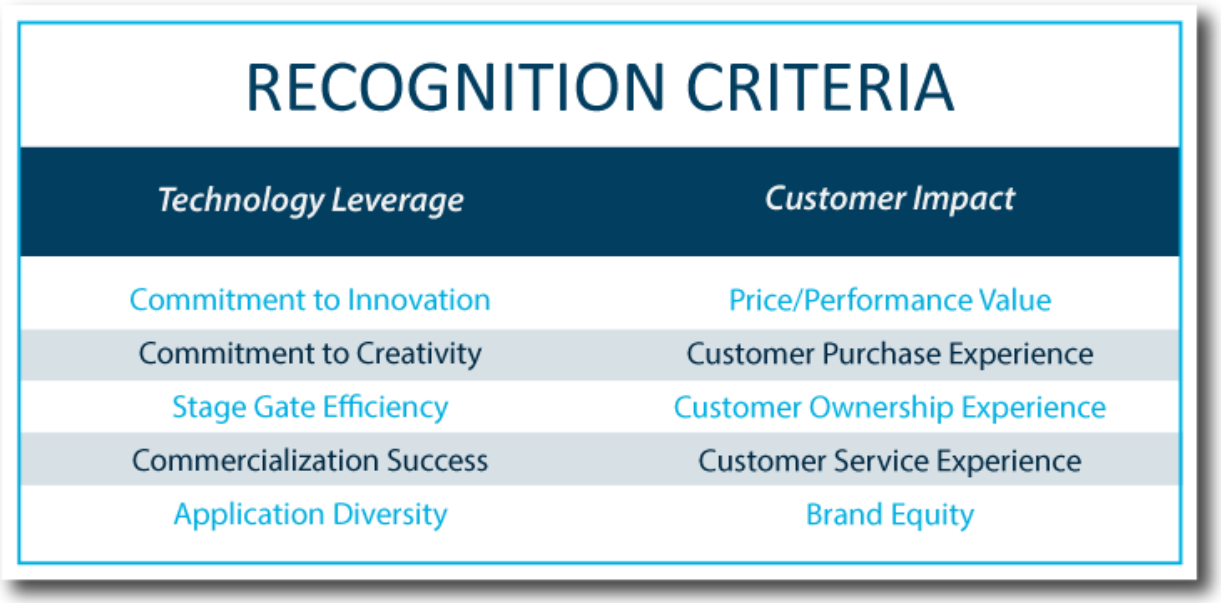
Best Practices Criteria for World-class Performance

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. QStory excels in many of the criteria in the workforce management space.



RECOGNITION CRITERIA

Technology Leverage	*Customer Impact*
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

The Transformation of the Workforce Management Industry

Frost & Sullivan's workforce management (WFM) research reveals that three strong trends are transforming WFM applications in 2025: artificial intelligence, flexibility, and employee-centric functionality. Whereas WFM used to be confined to frontline customer service functions, WFM functionality is increasingly finding its way into the back office, as organizations seek to increase operational quality by breaking down traditional silos between departments. Front and back-office employees become more efficient and adaptable to unforeseen situations, and their motivation levels increase thanks to widening career paths.

Organizations are beginning to embrace flexible, AI-supported, demand-based scheduling that responds to real-time needs and preferences. It boosts accuracy, reduces manual workloads, and eliminates the perception of bias inherent in decisions made by humans. As AI becomes a core architectural component of WFM systems, organizations endorse transparency and explainable decisions aligned with business priorities and values. Finally, given the very personal nature of the data handled by WFM platforms, a strong security posture and compliance culture are essential.

Innovation in Action: Driving Product Excellence and Market Success

Founded in 2016, QStory defines its mission as creating a better everyday life for customer service professionals in a happier, more productive environment. From its roots in intraday automation, QStory

has evolved significantly into a full-service WFM provider under the stewardship of its new CEO, Fiona Coleman.

QStory has a proud record of building cutting-edge technology. However, like so many other innovative technology providers, business realities have compelled it to focus more narrowly on the commercial prospects of the technology it takes to market. QStory has matured from a technology-driven to a solution-driven company, refocusing its product strategy on standardized modules aligned with clearly articulated market needs. Consequently, its approach to innovation has shifted to identifying clear customer problems first, then solving them with solutions that apply broadly to customer use cases and reflect market trends.

This is why QStory is broadening its appeal to the wider WFM market while reaffirming its dedication to real-time management, employee engagement, optimization, scheduling and forecasting as the core pillars of its solution roadmap. In this spirit, QStory has introduced Agent Flex, a powerful innovation born from a customer request for a fairer scheduling solution that would offer more equitable flexibility.

To the detriment of hard-working agents who cover many shifts during the busiest times, conventional WFM logic only allows agents to switch shifts when their scheduled time slots are not marked as “red”, meaning they are not understaffed. In response, the Agent Flex algorithm empowers agents to switch from one high-demand period to another of even higher demand. The system tracks and quantifies the benefits of this so-called “red-to-red” flexibility. It introduces a pioneering new metric, which predicts how many fewer customers will experience wait times, directly linking operational flexibility to improved service outcomes. Initial concerns that greater autonomy might harm service levels were quickly eased. With agents better able to manage personal commitments, clear gains in employee satisfaction followed, and service levels remained strong.

Versatility Engineered: Addressing Diverse Needs in Modern Organizations

Modern organizations face increasing complexity in meeting the needs of their diverse workforces and lines of business.

The work-life imbalances caused by the rigid policies and scheduling models traditionally applied to external-facing service delivery teams contribute to absenteeism, lower employee engagement, and diminished service performance. QStory’s innovations directly address these issues by giving employees greater control over their working patterns without compromising operational effectiveness.

Beyond scheduling, QStory has introduced modular functionality to suit different operational models, and organizations can adopt and scale features progressively as needed. In traditional back-office functions, where fixed hours render scheduling unnecessary, QStory instead optimizes task distribution and measures productivity by tracking time spent on specific work items. Integrated work tracker functions, which operate like a back-office ACD, ensure equitable task allocation and eliminate inefficiencies caused by selective task picking.

QStory boosts employee cross-qualification by allowing staff to operate across departments in front and back-office functions more easily. Organizations gain agility while offering employees more fulfilling, long-

term career pathways. This shift not only enhances resource utilization but also increases employee engagement by providing more development opportunities and professional variety.

The QStory platform embodies a fundamental shift in thinking: employee experience and business performance are not opposing forces but mutually reinforcing. By combining flexible technology with user-led innovation and cultural alignment, QStory delivers a workforce management solution that meets the complex demands of modern employers while empowering their teams to thrive.

Trusted Value: Delivering Superior ROI with Unmatched Brand Loyalty

QStory clients perceive the brand positively and exhibit high brand loyalty. One of its most striking endorsements has come from eBay, where an executive coined the term "radical autonomy" to describe the progress he hoped to achieve with the platform. QStory stepped up to his challenge and realized that outcome. Internal feedback shows that eBay employees now consider QStory one of their most valued workplace perks, and the functionality has become a primary benefit highlighted during customer service team member recruitment. This change has yielded higher employee satisfaction scores and supports eBay's wider goal of bringing scheduling freedom into the front-office environment. This kind of flexibility is often expected in office jobs but has long been limited in customer service roles.

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>
> ***– Alexander Michael, Vice President, ICT***

Customer loyalty remains a core QStory strength, with long-standing clients including Jet2, NatWest, and Nationwide exhibiting sustained commitment through multiple long-term renewals. Frost & Sullivan interprets this commitment as an indicator of trust and perceived value in sharp contrast to the shorter-term engagements Frost & Sullivan observes with many competing platforms.

In Europe, conversations around fairness and mental well-being are increasingly open, while in the United States, similar challenges are often framed through the lens of productivity and performance. Yet across all business cultures, enabling employees to perform at their best remains a universal imperative. Compelling evidence of QStory's strong ROI comes from NatWest, where attrition rates fell sharply from over 60% to around 25%, even before the launch of "red-to-red" scheduling.

Finally, a major deployment is underway with a South African business process outsourcer, involving ten client organizations. The initiative prioritizes agent engagement, with early outcomes suggesting enhanced agent tenure and improved retention of institutional knowledge.

Growth Aligned: Maximizing Value Through Customer-centric Evolution

QStory maintains a balance between innovation and commercial viability, positioning itself as agile, commercially driven, and mature with a focus on monetization as well as novelty.

Innovation efforts do not develop in isolation but stem directly from co-creation with clients facilitated by strategic client meetings twice a year. QStory brings senior stakeholders together in relaxed, collaborative settings to share challenges and shape the development roadmap. These sessions foster community, reinforce advocacy, and produce actionable insights that guide product evolution. QStory has expanded this model to include frontline users (e.g., planning managers, real-time analysts, team leaders, and agents) into breakout discussions and roundtables designed to surface practical feedback and user-driven innovation opportunities.

> *"As enterprises seek to simplify their technology stacks, QStory's main competitive differentiation lies in consolidating functions that would otherwise be spread across separate agent engagement, WFM, and real-time automation platforms. This integrated approach not only offers a pricing advantage but also reduces procurement and support complexity as well as inconsistency between departments."*
>
> ***– Alexander Michael,***
> ***Vice President, ICT***

This bottom-up approach reveals that clients derive distinct value from the QStory platform based on their business goals and cultural priorities. Some emphasize team leader empowerment, others champion employee autonomy, while many focus on regulatory compliance. These varied use cases fuel innovation and strengthen the core QStory value proposition.

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Conclusion

In a market long dominated by fragmented legacy providers, the unified nature of QStory's platform is a clear differentiator. Evolving from its roots in intraday automation, QStory now offers a comprehensive, adaptive WFM solution that competes on value and simplicity. It offers sophistication without unnecessary complexity, aligning strategy, execution, and employee experience. For modern organizations seeking greater agility, inclusivity, and operational excellence, such integration is essential. As flexibility becomes the new currency of workforce value, and businesses aim to optimize both human and operational capital, QStory is well placed to thrive.

QStory earns Frost & Sullivan's 2025 European Enabling Technology Leadership Recognition for its strong overall performance in the workforce management industry.

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What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and 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 harnesses 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 Effect

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

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

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

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

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

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

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

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

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

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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 harnesses over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

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

Learn more.

Key Effects:

- **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)

