BPO BULLHORN

Straight talk. Smart insight. No bull.

Thursday, January 8, 2026

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Hello there

Welcome to **Execution Season**.

The watching phase is over. Your 2026 budgets are live, your board wants AI ROI timelines, and your competitors are making footprint bets. The stories you clicked hardest on in 2025 revealed **what you're tracking**: AI's workforce impact, geographic scatter, consolidation pressure, and the gap between BPO promises and operating reality.

Now comes the harder part: turning signals into decisions and plans into delivery.

This edition picks up where **Jingle Bulls** left off. We're tracking what's already moving in 2026, the questions operators can't dodge in Q1, and the early signals worth watching before they become headlines.

Plus: See what your peers said about 2025's biggest resilience test in our **LinkedIn poll results here**.

Let's get moo-ving! 📣🐂

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BPO Bullhorn

Editorial Team

Bullseye: The Essentials 🎯

Your top clicks weren't about hype. You tracked where money moved, where shares dropped, and where workforce pressure surfaced.

→ **The AI Split You Saw Coming:**

Your 2025 clicks told us you were watching AI displacement with one eye and AI deployment costs with the other. **Microsoft is cutting call center jobs**. **Airbnb is deploying AI agents**. **Thoma Bravo is acquiring Verint**. The question nobody could answer: when does the investment pay back?

Early 2026 signals show operators splitting into two camps. Some are doubling down with aggressive automation roadmaps. Others are quietly pumping the brakes, repositioning AI as augmentation rather than replacement. The gap between these strategies will define competitive positioning by mid-year.

What to watch: Q4 earnings calls in January. Listen for how operators discuss AI investment pace and workforce planning in the same sentence. The companies that can't connect these dots will struggle.

→ **Geographic Bets Getting Stress-Tested**

TP is expanding in Ghana to employ 5,000, **Alorica tripling in India**, **Egypt is investing LE 13 billion** in ICT, **Fusion CX is expanding outside Metro Manila**, and **Concentrix is launching the Bacolod AIU site**. Heavy expansion into emerging markets dominated your 2025 link activity.

January hiring data will tell part of the story. Attrition rates in new hubs will tell more. The markets that can't solve talent retention will see operators pivot by Q2.

What to watch: hiring velocity announcements versus quiet workforce churn. If expansion slows in markets that were hot six months ago, that's your signal.

→ **Consolidation Accelerating Faster Than Expected**

You clicked every major M&A story in 2025. **Thoma Bravo's Verint play**, **iQor acquiring JumpCrew**, and **CCI's European entry**. But you also clicked on what came before: **Concentrix shares plummeting 16%** and **Teleperformance is losing its CAC 40 spot**. The pattern was clear: when margins compress and shares drop, consolidation follows.

Early 2026 is already showing more activity. Buyers are hunting for capability plays and efficiency at scale. Sellers are testing valuations before market conditions worsen. Mid-market operators without differentiation or scale are in the squeeze zone.

What to watch: who's raising capital versus who's cutting costs. The companies raising are positioning to buy. The companies being cut are trying to avoid being bought.

→ **Regulatory Pressure Finding Its Footing**

The U.S. legislation protecting call center jobs from AI and offshoring was your most debated story in 2025. It signaled something bigger: governments are watching workforce displacement, and they're willing to intervene.

Early 2026 will show whether that legislation gains traction or stalls. But even if it stalls, the regulatory conversation is spreading. Other markets are testing similar interventions. Operators who treat this as a U.S.-only issue will get caught off guard.

What to watch: state-level action if federal legislation slows. Regulatory risk is becoming a delivery strategy question, not just a compliance checkbox.

Media Field Guide 📝

Podcast

Challenging 'Upper Right Quadrant' Thinking: AI CX Innovators - Spotify
Tyler Orrell, VP of Contact Center Operations at QuinStreet, discusses ROI measurement discipline for AI tools, vendor selection frameworks that test business needs over sales pitches, and implementation best practices requiring buy-in from executives and frontline agents. Recorded June 2024.

Why listen: An operator talking about measuring AI impact after deployment, not before. The Q1 reality check your audience needs.

Report

2026 CX Trends: The Backlash & the Bounce Back - Glance
Customer survey data validates what you tracked in 2025: 87% say they're unlikely to stay loyal when human support disappears, and 75% report fast responses that still left them frustrated. The numbers behind AI deployment consequences operators face now - **Download**

Why read: Customer-side data showing why the AI deployment decisions from 2025 are creating retention risks in 2026.

Got any recommendations? **Hit reply** and let us know. We'll give you a shoutout if we include it.

Resource Spotlight 🤠

Looking for frameworks to guide Q1 decisions? Here's a resource worth bookmarking:

AI + Human Maturity Model - Glance
Evaluate organizational readiness across people, processes, and technology for AI-human collaboration. Helps leaders plan scalable implementations rather than rushed deployments - **Take a look**

Continue the conversation

Toro's Timetable 📆

January

21 - **Customer Contact Week Orlando** | Orlando, FL

February

10 - **Medallia Experience '26** - Las Vegas, NV

23 - **Customer Contact Week Berlin** | Berlin

March

4 - **CX Alliance Workshop** | London

18 - **CCW Digital** | Sydney, AU

The Tail End 🐃

New here? We publish on Thursdays.

Missed an edition? Browse the **Bulletin archive**.

If BPO Bullhorn helps you cut through the noise, **subscribe here**.

Execution season is here. The signals you tracked last year are now the decisions you can't avoid. Make them count.

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