IIElevenLabs

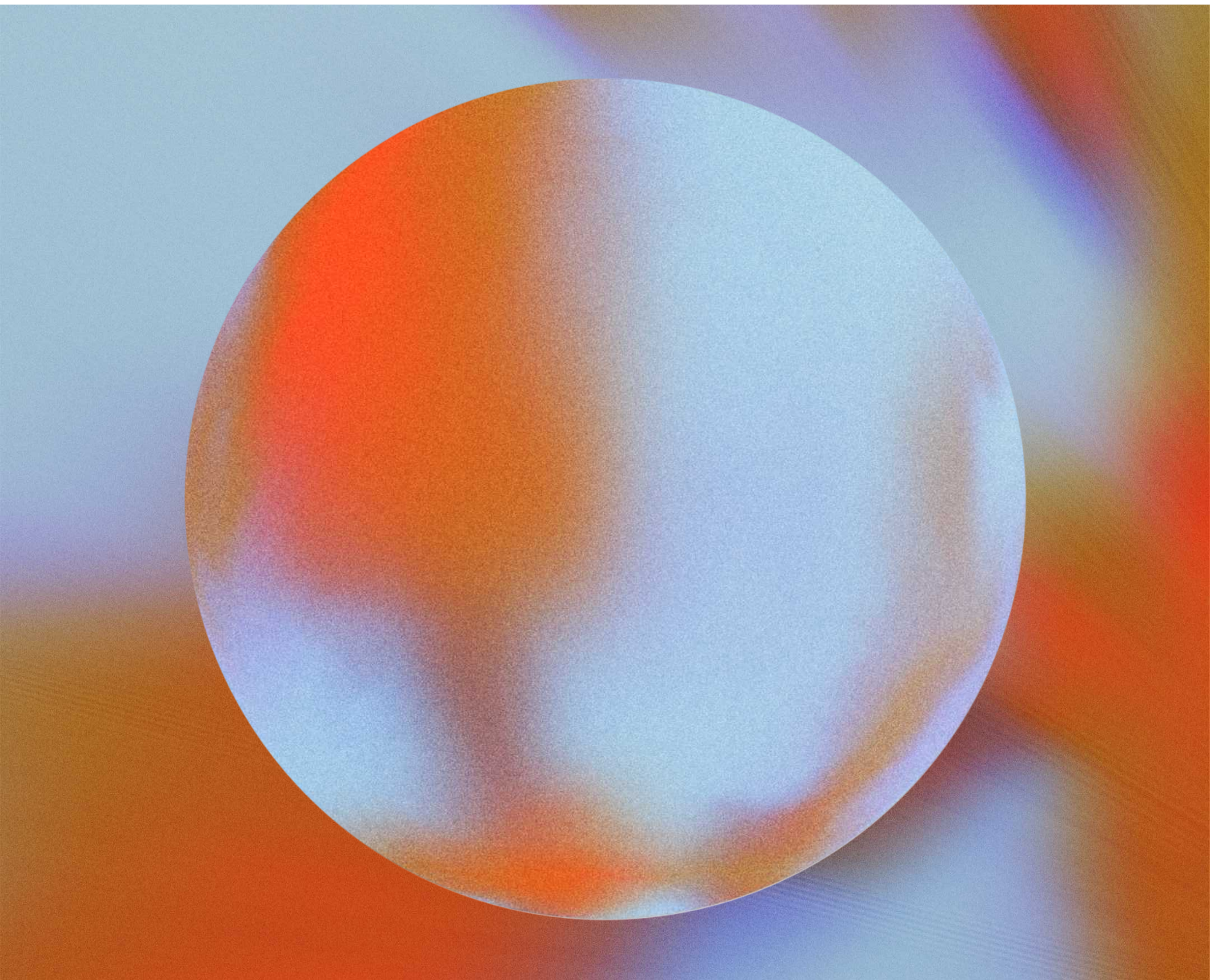
TELECOMMUNICATIONS · PERSPECTIVE

Voice AI in Telecom: Beyond cost savings



Aghasaf Jabrayilov
Author · ElevenLabs

Five use cases outside the contact center that turn voice AI into new ARPU, plan mix and add-on service revenue



The cost case for voice AI in customer care is well understood. Gartner puts the median cost of a human-assisted contact at $13.50, against $1.80 for one resolved through self-service channels including voice AI agents and has forecast that conversational AI will cut contact center agent labor costs by $80 billion. Deutsche Telekom's chief AI officer said in September 2026 that the share of the company's customer calls resolved without a human is rising by one to two percentage points a month. These figures are credible, and they describe a cost line rather than a revenue line.

$13.50 vs $1.80

median cost of a human-assisted contact vs one resolved via self-service

$80B

forecast cut to contact center agent labor costs from conversational AI

Ask most telecom executives why they are evaluating voice AI and the answer is usually cost per contact: fewer human agents, shorter handle times, cheaper resolution. That story holds up, and it has a side benefit: faster resolution makes customers happier. It is also a case about serving volume the operator already has at a lower cost. It is the smaller part of the opportunity.

A set of use cases outside the contact center creates new volume instead: services and plans customers pay for, and revenue that would otherwise be lost. They show up in ARPU, plan mix and new revenue lines. Real-time translation, AI assistants inside the phone call, synthetic voice and fraud detection, AI receptionists resold to small businesses and outbound agent campaigns are already running in production, beta or proof of concept at operators today. Few of these use cases have been modeled with the rigor the industry applies to the cost case. That gap affects how seriously these use cases get evaluated, and how much of the technology's full potential value operators end up capturing. This piece looks at five of those use cases: what they are, where they already run and how to think about the revenue each one creates. The next page shows where each one lands in an operator's P&L.

Two ways to measure voice AI

The cost case

Well understood. Serves existing volume at lower cost.

- Fewer human agents
- Shorter handle times
- Cheaper resolution per contact
- Higher satisfaction from faster resolution

SHOWS UP IN

cost per contact, agent labor, satisfaction scores

The revenue case

Less modeled, the focus of this piece. Creates new volume.

- Add-on services customers pay for
- Premium plans customers step up to
- Churn avoided through new services, and leads converted
- A new B2B line sold on the existing bill

SHOWS UP IN

ARPU, plan mix, retained and new revenue

Where voice AI shows up in a telco P&L

ElevenLabs offerings touch most lines of an operator's income statement. The cost case sits in operating costs: it serves existing volume at a lower cost. The revenue case sits in service revenue: it creates new volume. This piece models the five use cases marked 1 to 5. The rest of the map shows where the other offerings fit.

Service revenue

Consumer and business: mobile, broadband, TV, connectivity, managed services and add-ons

Network-embedded services

Sold to consumer and business lines

1. Realtime Translation
2. In-call AI Assistant
3. Synthetic voice & fraud detection

Operator-run agents

For business and consumer customers

4. Whitelabel SMB Receptionist
5. Agent Outbound Campaigns

Other offerings

- ElevenLabs plans bundled into tariffs
- ElevenReader sponsored access
- Smart voicemail
- Call transcription and summaries
- Personal AI assistant
- ElevenAPI in operator apps

Device and other revenue

Handsets, connected TV, wholesale

Other offerings

- Voice AI for devices
- Voice AI for connected TV

Total revenue

Service revenue + device and other

Network operations

Staff, maintenance, sites, power

- Appointment reminders
- Field technician briefings

Customer support

Contact centers, tech and billing support

- Voice and chat agents
- Proactive outbound servicing
- Real-time agent assist
- Agent training simulations

Sales and marketing

Advertising, sales staff, campaigns

- ElevenCreative for campaigns
- Outbound sales agents
- Brand voice
- Dubbing for localization

Overhead

Finance, HR, legal, internal IT

- IT and HR helpdesk agents
- Scribe meeting notes
- L&D agents
- Workspaces for internal builders

EBITDA

Total revenue less operating costs

Figure 1 · Where voice AI shows up in a telco P&L

Illustrative mapping. Availability varies by market.

Five use cases in two groups

The five use cases fall into two groups. They differ in where the technology sits and in what it does for the end customer.

Three services run inside the phone call on the operator's network. Two run on the operator's customer and business relationships.

Network-embedded services — inside the phone call, on any device

01

Realtime Translation

Translates both sides of a live call inside the network, on any phone and with no app. A Spanish speaker can book with an English-speaking clinic.

THE VALUE

Serves multilingual and traveling customers on every call, and anchors a premium tier.

02

In-call AI Assistant

Joins a live call on a wake word or keypad tone, answers questions and handles small tasks. Can also send a summary when the call ends; call transcription and summaries are also available as a separate service.

THE VALUE

A daily-use feature on the operator's own network that lifts ARPU and reduces churn.

03

Synthetic voice & fraud detection

Tells the customer when the voice on the line is synthetic, and spots scam patterns from AI and human callers alike, in real time during the call. The customer is warned before any money or data changes hands.

THE VALUE

Scam exposure is a stated reason to switch. Protection sells as an add-on or a tier, and the same detection will be needed to route legitimate AI callers.

Operator-run agents — outside the call path

04

Whitelabel SMB Receptionist

An operator-branded AI receptionist that answers calls around the clock for small businesses, books appointments and takes messages, billed on the existing invoice. The first of several agents an operator can offer its business base.

THE VALUE

A new B2B revenue line sold into the existing business base on the existing bill.

05

Agent Outbound Campaigns

AI agents calling customers and leads who asked to hear from the operator: welcome calls, callbacks on abandoned orders, renewals and upgrade offers.

THE VALUE

Protects early-life revenue and converts leads that go cold today, with no extra headcount.

Figure 2 · Five revenue use cases in two groups

Network-embedded services run inside the phone call. The operator's voice core routes call audio to the AI layer, so the service works on any phone, including basic handsets and landlines, and the other party does not need an app. Realtime Translation, the In-call AI Assistant and Synthetic voice & fraud detection sit here. Call transcription and summaries runs on the same integration and is available as a service of its own. For the end customer, the value is help that arrives inside the call, at the moment it is needed: a conversation across two languages, a question answered without leaving the call, a warning before a scammer gets what they want.

Leading operators are already enabling network-embedded AI services for their customers. In partnership with ElevenLabs, Deutsche Telekom unveiled its network-embedded Magenta AI Call Assistant, with live translation and an in-call assistant, at MWC 2026.[4] KPN launched Mobiel AI for its small business mobile customers on 1 October 2026: automatic call summaries, transcripts and voicemail-to-text, built by KPN on ElevenLabs technology, with an AI assistant to follow.[20] T-Mobile US, which built its own service, has Live Translation in beta on its network in more than 80 languages.[5] LG Uplus in Korea offers ixi-O, an AI call service that summarizes calls, lets users bring AI into a live call and warns them about voice phishing and AI-generated voices.[14] During MWC 2026, its CEO announced that churn has fallen significantly since launch.

Operator-run agents sit outside the call path. They leverage the operator's relationships with business customers and consumers. The Whitelabel SMB Receptionist and Agent Outbound Campaigns sit here. For end customers, the benefit is responsiveness: a small business whose phone is answered even when the owner is on a job, and a new customer who gets a call explaining their first bill before they have to call the contact center. Operators have started here too. Verizon sells a text-based AI assistant to small businesses, built in-house,[8] and TELUS has tested AI welcome calls for new home internet customers, built on ElevenLabs.[10]

How to read the ROI models

Each use case detailed below ends with an illustrative revenue model for a hypothetical operator with 10 million consumer mobile lines, 1 million business lines, $25 monthly ARPU and 10% annual consumer churn, or about $3.3 billion of annual service revenue. A large US carrier such as T-Mobile US operates at more than 20 times that revenue scale, so the absolute figures would scale up materially for the largest operators. Figures are Year 5 run-rates and gross revenue, and they exclude integration, vendor, platform and channel cost. Where an assumption is shown as a range, it runs from Year 1 to Year 5 and reflects adoption ramping up as awareness grows and the technology improves. The assumptions are round and deliberately conservative. They are placeholders for an operator's own numbers, and each one is set out in the accompanying workbook.

1. Realtime Translation

Translation of a live phone call inside the operator's network. Each person speaks and hears their own language, and the translated voice is played back into the call in close to real time. Deutsche Telekom unveiled its Magenta AI Call Assistant, built with ElevenLabs, at MWC Barcelona in March 2026, with a German launch planned for this year and support for up to 50 languages over the following 12 months.[4] T-Mobile US, which is not an ElevenLabs customer, opened a beta of its own Live Translation service in spring 2026 and now lists more than 80 languages.[5] It has said general availability is planned for later in 2026, with pricing not yet set.

How network-embedded translation works

Illustrative flow. The subscriber turns translation on for the call; the other party needs no app, plan or specific phone.

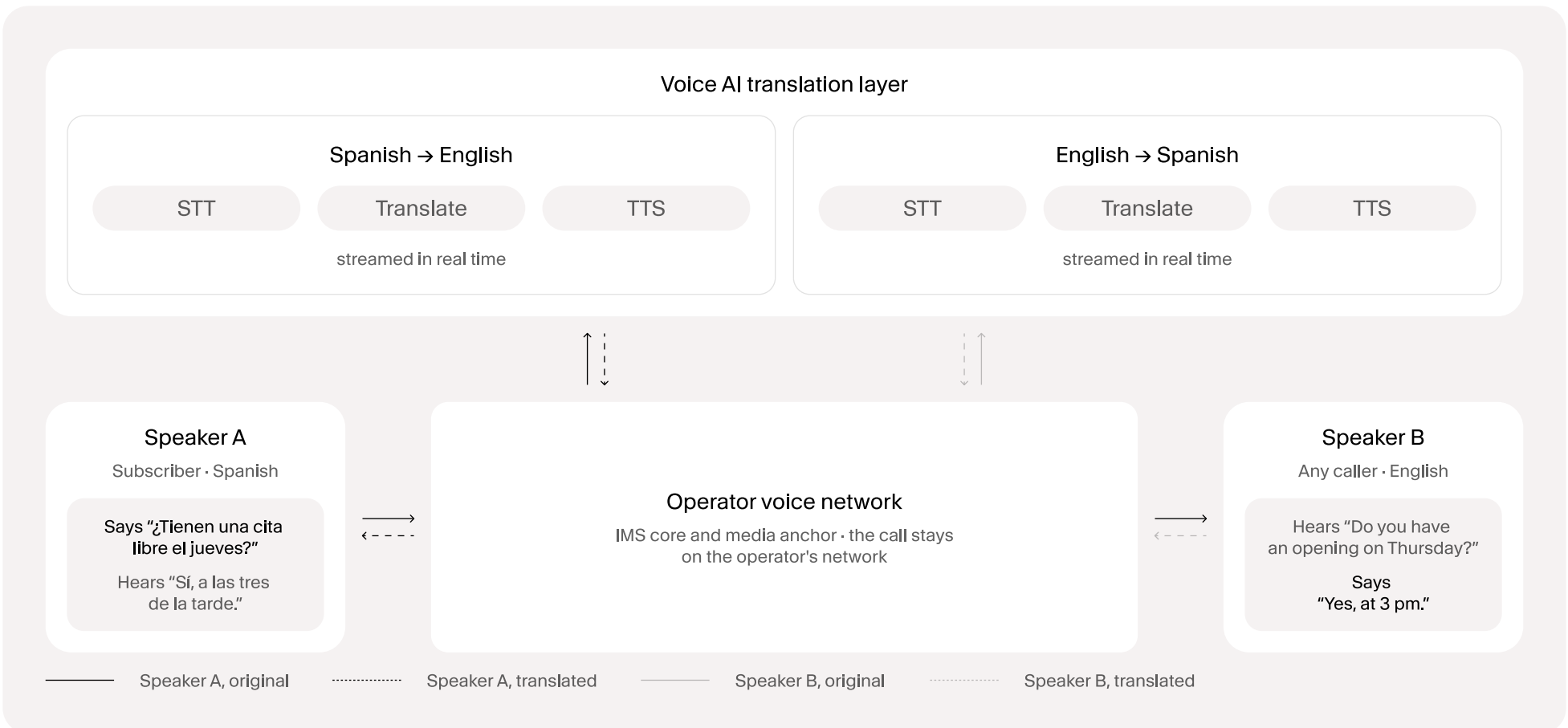


Figure 3 · How network-embedded translation works

Why end customers care

Language barriers turn up in ordinary calls: a parent calling a grandparent abroad, a traveler booking a clinic appointment in a new country, a plumber taking a call from a customer who speaks Spanish. T-Mobile cites more than 60 million Americans living in multilingual households, more than 6 billion international calls a year from its own customers, and nearly 40% of its customers traveling abroad each year.[5] Translation apps exist, but both people usually need the same app, or need to be in the same room passing one phone between them. A service in the network needs none of that. The customer turns it on, and the person on the other end simply hears their own language.

Why telcos need it

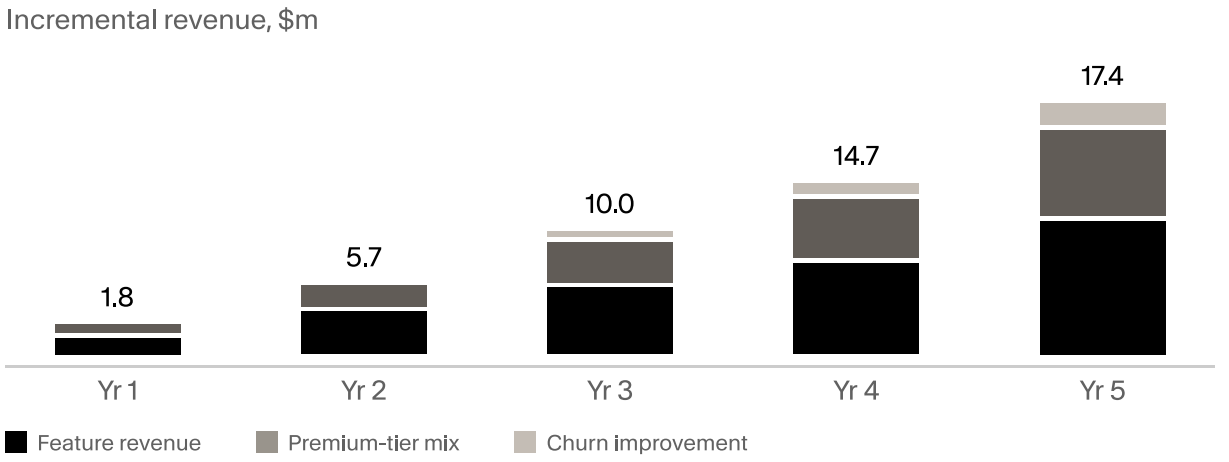
Handset makers already offer call translation on their newest premium phones, so the question for an operator is what it can own. The answer is reach. A service in the network works on every handset on the network and for callers on other networks, which no device feature can match. That makes translation one of the few consumer features an operator can own outright, and a natural anchor for plans it already sells, such as international roaming and family bundles. It also shares its network integration with the other network-embedded services, so the first build carries the next two. If device makers make translation a free default, the value does not disappear. It moves from direct fees to tier mix and churn.

Realtime Translation: value drivers

Hypothetical operator with 10M consumer lines at $25 ARPU. Add-on revenue, a premium-tier halo and a churn halo. Values are Year 5 and illustrative; ranges show Year 1 → Year 5, ramping up as awareness grows and the technology improves.

$17.4m

incremental revenue in Year 5; $49.7m cumulative from Year 1 to Year 5



$9.6m Feature revenue

Consumer mobile lines	10m	Hypothetical operator base
× Addressable cohort	40%	Multilingual households, families, travelers
× Attach on cohort	0.5% (Yr 1) → 2.0% (Yr 5)	Ramps as awareness and quality grow
× Price per line	$10/mo	Between security add-ons ($4 to $7) and apps ($13)

$7.2m Premium-tier mix

Lines stepping up a tier	0.2% (Yr 1) → 1.2% (Yr 5)	Included in premium plans rather than sold
× ARPU step per line	$5/mo	One step on the plan ladder at $25 ARPU

$0.6m Churn improvement

Saved lines accumulate; ~2k lines retained by Yr 5

Active users saved	1% (Yr 1) → 5% (Yr 5)	10% annual churn × relative improvement among users
× ARPU per line	$25/mo	Revenue retained on a line that stays

Figure 4 · Realtime Translation: value drivers

The ROI model

For the hypothetical operator, 40% of lines, or 4 million, fall into the addressable cohort of multilingual households, families and frequent travelers. If attach on that cohort grows from 0.5% in Year 1 to 2.0% in Year 5 at $10 a month, the operator has about 80,000 paying subscribers and $9.6 million of add-on revenue in Year 5. The ramp reflects awareness building over time and the technology getting better. A second effect comes from including the feature in premium plans: if the share of lines stepping up one tier rises from 0.2% to 1.2% at $5 a month, that adds $7.2 million. Among active users, a relative churn improvement rising from 1% to 5% retains another $0.6 million a year. Total incremental annual revenue is about $17 million by Year 5, a little over half a percent of consumer service revenue at this operator's scale.

While evidence from voice AI deployments is still early, these assumptions are based on our experience with premium feature adoption and benefits at tier 1 operators.

In-call AI Assistant

The same network integration can do more than translate. A subscriber says a wake word or presses a key during a call, and an AI assistant joins to answer a question, check information or help with a small task. It can also send a summary with next steps to the operator's app or by text when the call ends. Call transcription and summaries are available as a separate service as well, with or without the assistant. Deutsche Telekom's assistant, built on ElevenLabs, activates on "Hey Magenta".[4] It runs in Telekom's network rather than in an app, so it works on any phone, and DT plans to launch it for customers in Germany later in 2026, alongside live translation. It is opt-in, every participant is told when it is active, and no call content is stored or analyzed unless it is activated. DT has said later versions will book restaurants, schedule appointments and fill in forms during the call. KPN launched Mobiel AI for its small business mobile customers on 1 October 2026: automatic call summaries, transcripts and voicemail-to-text, built by KPN on ElevenLabs technology, with an AI assistant to follow.[20]

How the In-call AI Assistant works

Illustrative flow. Same network integration as translation. Nothing is forwarded to the assistant until the subscriber activates it. Summaries are optional and can be enabled as a separate service.

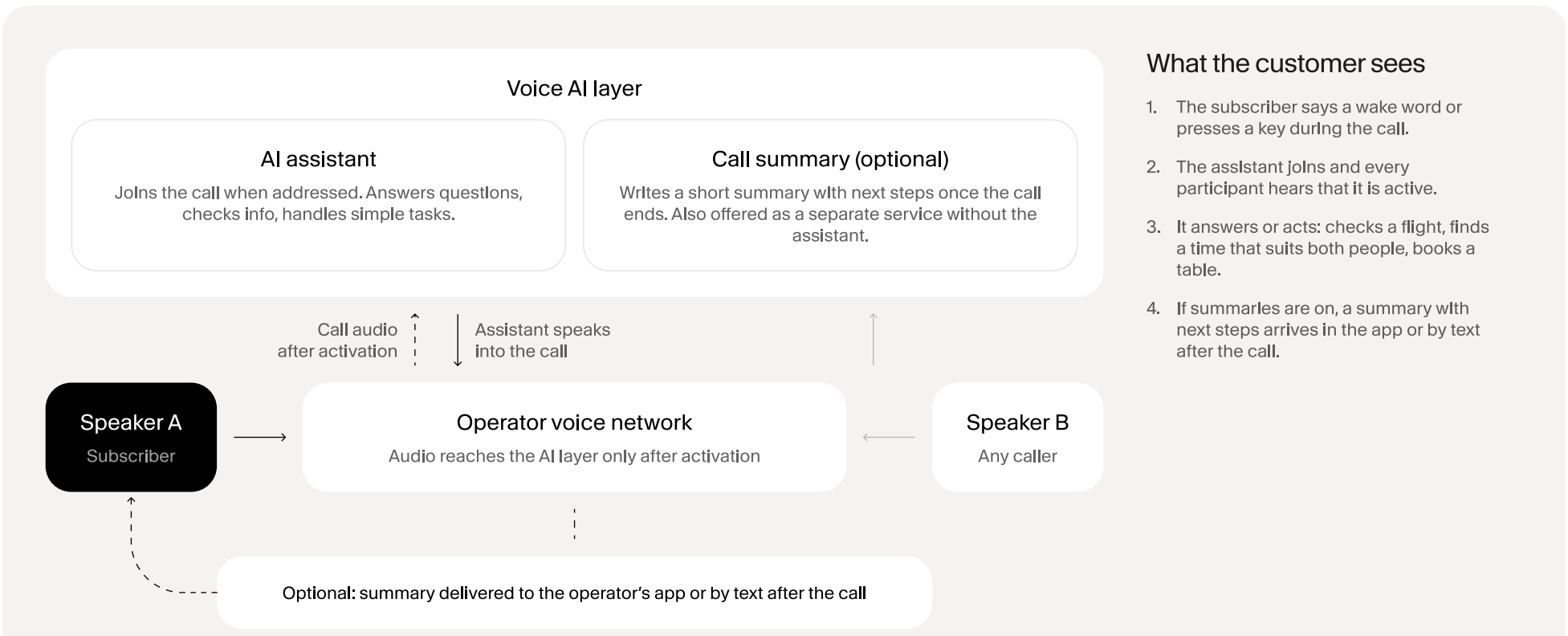


Figure 5 · How the In-call AI Assistant works

Why end customers care

People already do these things during calls, with a pen or a second screen. Two friends pick a restaurant, a customer and a contractor agree on a date, a patient takes instructions from a doctor's office. An assistant on the call handles the lookup, and a written summary means nobody has to remember what was agreed.

Why telcos need it

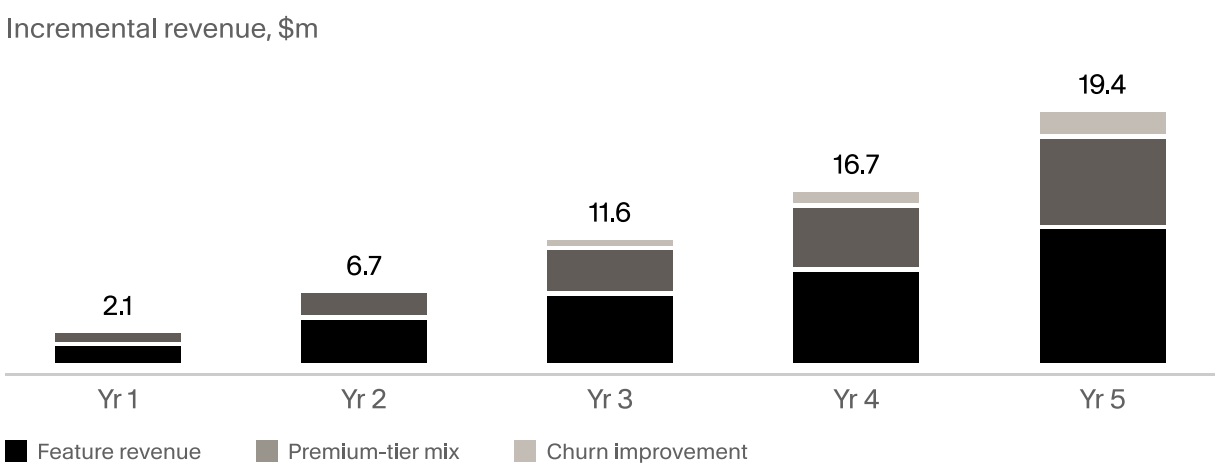
A second service on the same network build improves the return on the initial one-time investment. Most of the integration work done for translation, such as routing, media handling, charging and lawful intercept, is reused, so each additional service costs far less than the first. It also gives the operator a feature people can use every day, where translation may be used a few times a month. The risk is similar to translation: device-makers are adding call recording and summaries to premium phones, so the operator should price for reach and convenience rather than novelty.

In-call AI Assistant: value drivers

Same tree as translation with a lower price and a broader cohort. Values are Year 5 and illustrative; ranges show Year 1 → Year 5, ramping up as awareness grows and the technology improves.

$19.4m

incremental revenue in Year 5; $56.5m cumulative from Year 1 to Year 5



$14.4m — Feature revenue

Consumer mobile lines	10m	Hypothetical operator base
× Addressable cohort	60%	Note-takers, planners, sole traders
× Attach on cohort	1% (Yr 1) → 4% (Yr 5)	Daily use supports higher attach than translation
× Price per line	$5/mo	Convenience feature priced below translation. KPN lists call summaries at €15 a month, €7.50 at launch.[20]

$4.2m — Premium-tier mix

Lines stepping up a tier	0.1% (Yr 1) → 0.7% (Yr 5)	Weaker tier pull than translation
× ARPU step per line	$5/mo	One step on the plan ladder at $25 ARPU

$0.8m — Churn improvement

Saved lines accumulate; ~2.7k lines retained by Yr 5

Active users saved	1% (Yr 1) → 4% (Yr 5)	10% annual churn × relative improvement among users
× ARPU per line	$25/mo	Revenue retained on a line that stays

Figure 6 · In-call AI Assistant: value drivers

Year 5 total of $19.4m = $14.4m add-on revenue + $4.2m tier mix + $0.8m churn improvement. Gross revenue; integration and vendor cost not charged. Figures from the accompanying ROI model.

The ROI model

The tree mirrors translation, with a lower price and a broader cohort. Here 60% of lines are treated as addressable, because note-taking and lookups during calls are common well beyond multilingual households. Attach rises from 1% in Year 1 to 4% in Year 5 at $5 a month, giving about 240,000 subscribers and $14.4 million in Year 5. The pull into higher tiers is weaker than for translation, rising from 0.1% to 0.7% of lines and adding $4.2 million, and churn improvement among active users adds $0.8 million. Total incremental annual revenue is about $19 million by Year 5. Since the network integration is shared with translation, the extra cost of this service should be small, which is the main reason to plan the two together.

3. Synthetic voice & fraud detection

The network listens for two things during a live call. The first is whether the voice on the line is synthetic. An AI-generated voice is not a scam in itself, and a growing share of legitimate calls will come from AI agents, so the first job is to tell the customer, or the business, what they are talking to. The second is signs of fraud from AI and human callers alike: scam scripts, pressure tactics, impersonation. The customer is warned before any money or data changes hands.

Most call protection today works before the phone rings, by labeling or blocking numbers. A call from a clean, spoofed or compromised number passes those checks, and a convincing voice, synthetic or human, makes it far more persuasive than an old-style robocall. Detection during the call adds a second layer of defense against the scams that get through, and those are the ones that do the most damage. Only a check that listens to the conversation itself, in real time, can catch them.

Why end customers care

A 2026 survey of more than 12,000 consumers in six countries found that one in four Americans had received a deepfake voice call in the past year, and that Americans think scammers are beating their mobile operators by nearly two to one.[7] Almost 40% of those surveyed said they had considered switching provider because of weak spam and fraud protection.[7]

1 in 4
Americans received a deepfake voice call in the past year

≈ 2 : 1
Americans think scammers are beating their mobile operators

~ 40%
considered switching provider over weak spam and fraud protection

Why telcos need it

Scam exposure drives churn, and it is increasingly a regulatory and reputational issue as well. It is also something customers already pay to be protected from, either as an add-on or as part of a higher tier. Those protections are not designed to tell a synthetic voice from a human one on a call from a legitimate number. Detecting synthetic speech well requires knowing how it is made, and ElevenLabs brings that expertise from the generation side. Its AI Speech Classifier identifies audio generated by ElevenLabs models with more than 90% accuracy even after compression.[18] ElevenLabs also shares its models and data with deepfake detection specialists such as Reality Defender, so their detectors keep pace with new synthetic voices across languages and accents. The same expertise can power synthetic voice detection inside the operator's network.

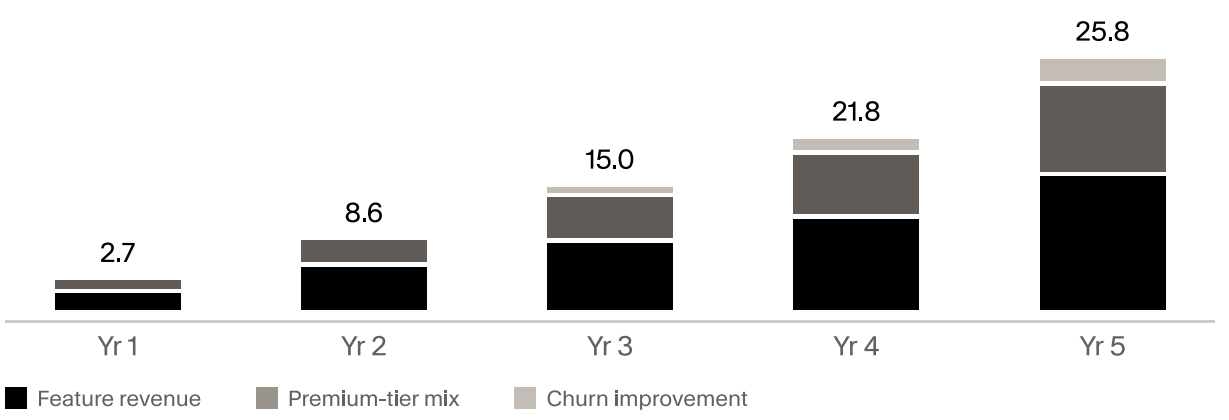
A related shift is coming quickly. Consumers are starting to let personal AI agents place calls for them, to book an appointment, cancel a service or dispute a charge. Operators and their business customers will need to tell a human caller from an AI agent, and a trusted agent from a malicious one, and route each call accordingly. ElevenLabs is building detection and routing for AI callers on the same foundation.

Synthetic voice & fraud detection: value drivers

In-call synthetic voice and fraud detection sold as a protection add-on and a premium-tier anchor. Values are Year 5 and illustrative; ranges show Year 1 → Year 5, ramping up as awareness grows and the technology improves.

$25.8m

incremental revenue in Year 5; $74.0m cumulative from Year 1 to Year 5



$19.2m Feature revenue

Consumer mobile lines	10m	Hypothetical operator base
× Addressable cohort	50%	Most exposed to scams, incl. older customers
× Attach on cohort	2% (Yr 1) → 8% (Yr 5)	Protection is a stated purchase driver
× Price per line	$4/mo	In line with carrier protection add-ons

$4.2m Premium-tier mix

Lines stepping up a tier	0.1% (Yr 1) → 0.7% (Yr 5)	Some operators bundle protection into tiers
× ARPU step per line	$5/mo	One step on the plan ladder at $25 ARPU

$2.4m Churn improvement

Saved lines accumulate; 8k lines retained by Yr 5

Active users saved	2% (Yr 1) → 8% (Yr 5)	10% annual churn × improvement; scams drive switching
× ARPU per line	$25/mo	Revenue retained on a line that stays

Figure 7 · Synthetic voice & fraud detection: value drivers

The ROI model

Half of lines, or 5 million, are treated as addressable: the customers most exposed to scam calls and most likely to pay for protection. Attach rises from 2% in Year 1 to 8% in Year 5 at $4 a month, reaching about 400,000 protected subscribers and $19.2 million of add-on revenue. Protection bundled into higher tiers adds $4.2 million, and a relative churn improvement rising from 2% to 8% among protected users adds $2.4 million. That is the largest churn effect of the five use cases, because scam exposure is a stated reason to switch. Total incremental annual revenue is about $26 million by Year 5.

Fraud detection also saves cost, through fewer scam-related care calls and goodwill credits, but the model counts only the revenue it creates.

4. Whitelabel SMB Receptionist

The operator sells AI agents under its own brand to its small and mid-sized business customers and bills them on the connectivity invoice they already pay. The most common version is an AI receptionist that answers calls around the clock, books appointments, takes messages and routes urgent calls.

Carrier offers in this space have so far been mostly text-based. Verizon's Business Assistant, launched in 2025 and built in-house, answers customer questions by text message.[8] Voice agents take the next step. The receptionist comes first because every small business needs its phone answered. The same build can carry more agents over time: one that calls back missed leads, one that confirms tomorrow's appointments, one that covers after-hours support. The operator ends up selling a small digital workforce on one bill, and the receptionist is the way in.

Why end customers care

Small businesses miss a large share of their calls because the owner is busy doing the work. A widely cited 411 Locals study of small businesses found that only about 38% of calls were answered by a person, and each missed call can be a lost job. Small businesses are also adopting AI quickly. Verizon's 2025 State of Small Business survey found that 38% were actively using AI across several business functions.

Why telcos need it

Small businesses tend to buy technology from providers they already trust and pay. The operator already holds the number, the line and the bill, which is a distribution advantage a standalone AI receptionist company does not have. The service also makes the connectivity relationship stickier, since the agent runs on the business's own numbers purchased from the carrier. The receptionist also sits where the AI-caller shift lands. When a customer's own AI agent calls a business, the receptionist can recognize it and complete the booking agent to agent, and screen a scam call before it reaches the owner.

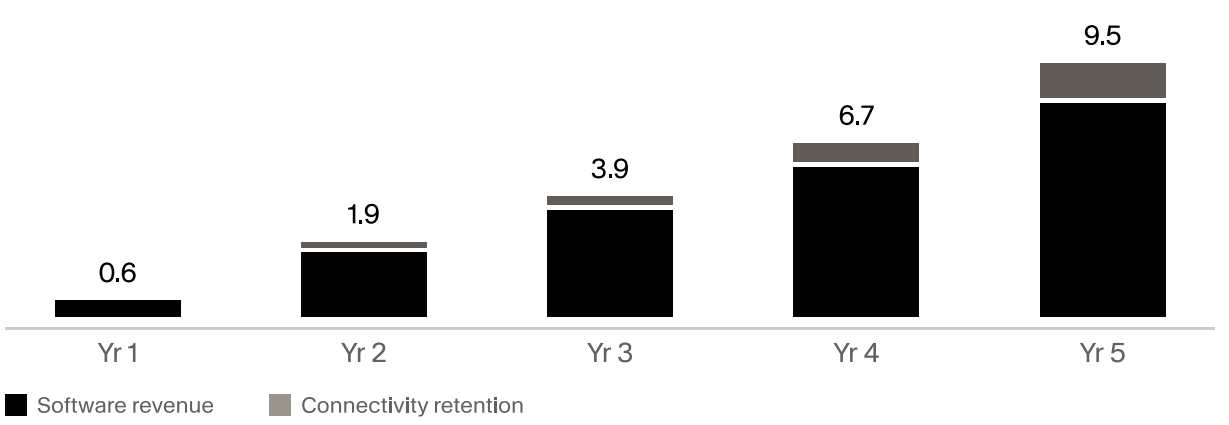
What makes this work is integration with the tools small businesses already run on. A receptionist is only useful if it can write a booking into a salon's scheduling tool, log a new inquiry in a contractor's CRM, check availability in a hotel's property management system or find an open slot in a dental practice's software. In practice that means calendars such as Google Calendar and Outlook, booking tools such as Calendly and Square Appointments, CRMs such as HubSpot and Salesforce, and trade and practice systems such as Jobber, ServiceTitan and Mindbody. Small businesses will not pay for custom integration work, so the operator needs a product that connects to these off the shelf. It also needs to scale: one white-label build has to serve thousands of businesses under the operator's brand, each with its own number, knowledge and settings, without turning every new customer into a small services project.

Whitelabel SMB Receptionist: value drivers

An operator-branded AI receptionist on the SMB bill: software revenue plus connectivity revenue retained on attached accounts. Values are Year 5 and illustrative; ranges show Year 1 → Year 5, ramping up as awareness grows and the technology improves.

$9.5m

incremental revenue in Year 5; $22.7m cumulative from Year 1 to Year 5



$8.2m Software revenue

$1.3m Connectivity retention

Saved accounts accumulate; ~1k accounts retained by Yr 5

Business accounts	200k	1m business lines at 5 lines per account
× Attach rate	1% (Yr 1) → 8% (Yr 5)	Over a third of US SMBs already use AI
× Price per business	$49/mo	Between text-only bots and AI receptionists
Accounts saved	15% × 20%	Tenants × SMB churn × improvement
× SMB ARPA	$125/mo	Five lines at $25, retained on an account that stays

Figure 8 · Whitelabel SMB Receptionist: value drivers

Year 5 total of $9.5m = $8.2m software revenue + $1.3m connectivity revenue retained. Gross revenue; platform, channel and build cost not charged. Figures from the accompanying ROI model.

The ROI model

The hypothetical operator's 1 million business lines equal about 200,000 accounts at five lines each. If attach grows from 1% in Year 1 to 8% in Year 5 at $49 a month, the operator has about 16,000 live tenants and $8.2 million of software revenue in Year 5. Attached accounts also churn less: a 20% relative improvement on 15% annual SMB churn retains another $1.3 million of connectivity revenue. Total incremental annual revenue is about $9.5 million by Year 5. As with the other models, this is a revenue view, and platform, channel and build costs are not included.

5. Agent Outbound Campaigns

Operator-run AI agents that call people the operator already has a relationship with, or who have consented to be contacted. Examples include welcome calls in the first 90 days of a new service, callbacks on abandoned online orders and coverage checks, renewal conversations, payment reminders and consented upgrade offers.

Case study

New customers who got an AI welcome call were less than half as likely to cancel.

TELUS ran a proof of concept, designed by TELUS Digital and built on ElevenLabs, in which an AI agent called newly activated home internet customers during their first 90 days.[10] The agent confirmed setup, walked customers through their first bill and passed account changes and troubleshooting to human agents.

TELUS Digital × ElevenLabs

< ½ as likely to cancel in the first 30 days as the average new internet customer

8.5/10 average customer rating of the welcome calls

100% of calls opened with the agent identifying itself as AI

Why end customers care

Leads often wait. A household that checks whether fiber is available at its address, or asks to be called back about a plan, can go days without hearing from anyone because no agent is free or the lead was never assigned. By then many have signed up elsewhere. Speed changes the outcome: a Harvard Business Review study of 1.25 million sales leads found that firms contacting a lead within an hour were nearly seven times as likely to qualify it as firms that waited even one hour longer. An AI agent can call back within minutes, at any hour. The first bill and the first few weeks of a new service are where confusion builds. A short call that explains the bill and checks the setup solves problems before the customer has to call in. For someone who abandoned an online order, a quick callback while they are still interested is useful rather than intrusive.

Why telcos need it

Early-life churn is expensive because the acquisition cost has already been spent, and a lead that goes cold is revenue the operator already paid to generate. AI agents can reach every new customer and every fresh lead, at any hour, without adding headcount.

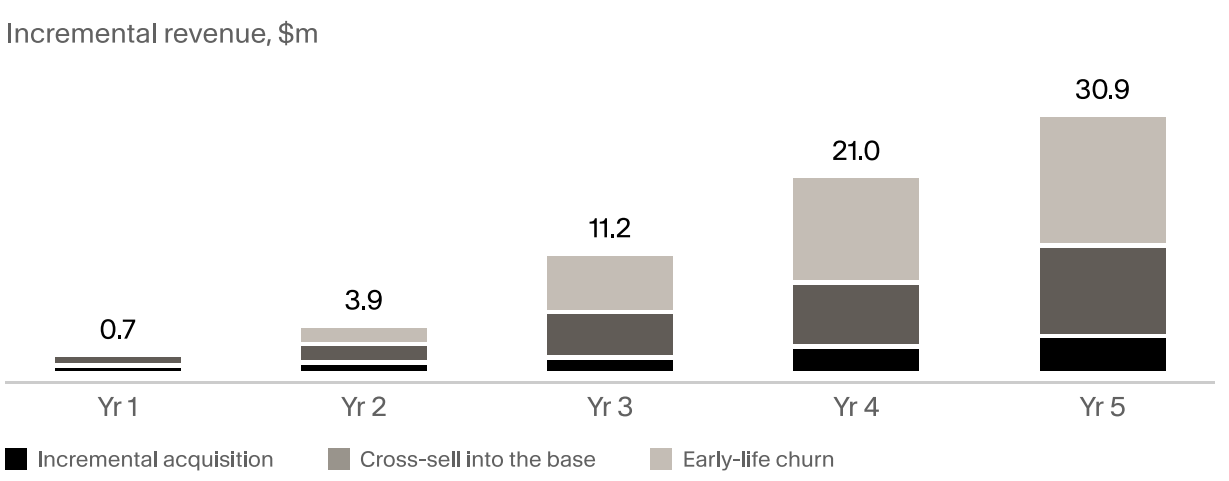
This is also where regulation matters most. In the US, the FCC ruled in February 2024 that AI-generated voices count as artificial under the TCPA, which brings AI calls under existing robocall consent rules. A Fifth Circuit ruling in February 2026 relaxed the written-consent requirement, but only in three states, and a federal rule requiring AI disclosure at the start of calls is still pending. The sensible approach is to stay within clearly consented lanes, such as existing customers, service calls and requested callbacks, and to keep general cold marketing out of scope.

Agent Outbound Campaigns: value drivers

Speed to lead on the inbound funnel, consented cross-sell into the base and welcome calls for new customers. Values are Year 5 and illustrative; ranges show Year 1 → Year 5, ramping up as awareness grows and the technology improves.

$30.9m

incremental revenue in Year 5; $67.7m cumulative from Year 1 to Year 5



$3.5m Incremental acquisition

Inbound leads	1.0m/yr	Abandoned checkouts, coverage checks, callbacks
× Share AI-contacted	30% (Yr 1) → 90% (Yr 5)	Starts with the cleanest consent case
× Conversion	0.5% (Yr 1) → 1.0% (Yr 5)	Fast follow-up doubles a slow baseline
× ARPU	$25/mo	Revenue on a new line

$11.4m Cross-sell into the base

Lines contacted	10% (Yr 1) → 30% (Yr 5)	Consented, operator-authorized contacts only
× Uptake	1.0% (Yr 1) → 2.5% (Yr 5)	At a $5 ARPU step: tier upgrade, added service

$16.0m Early-life churn

New customers welcomed	30% (Yr 1) → 90% (Yr 5)	Of about 1m gross adds a year
× Early churn reduction	5% (Yr 1) → 15% (Yr 5)	Of 15% first-year churn; a PoC halved early cancels

Figure 9 · Agent Outbound Campaigns: value drivers

Year 5 total of $30.9m = $3.5m acquisition + $11.4m cross-sell + $16.0m early-life churn improvement. Gross revenue; campaign and vendor cost not charged. Figures from the accompanying ROI model.

The ROI model

The model has three levers, each ramping from Year 1 to Year 5. The first is speed to lead: if AI agents contact from 30% rising to 90% of the operator's 1 million annual inbound leads and lift conversion from 0.5% to 1.0%, the extra lines bring in $3.5 million in Year 5. ElevenAgents have already proved their effectiveness by doubling the conversion rates of inbound leads at MyPlanAdvocate. The second lever is consented cross-sell: contacting 30% of the base each year, with 2.5% taking a $5 upgrade, adds $11.4 million. The third lever is churn reduction from welcome calls: reaching 90% of roughly 1 million gross adds and cutting first-year churn by 15% in relative terms retains $16.0 million. Total incremental annual revenue is about $31 million by Year 5.

Adding all the value up

Taken together, the five models add about $103 million a year by Year 5 for the hypothetical operator with 10 million consumer lines and 1 million business lines, about 3% of its $3.3 billion annual service revenue. All of the new revenue potential is newly billed or retained revenue rather than avoided cost, which gives carriers a more attractive top-line growth narrative for adopting AI in their business. For a sense of the profit impact: if roughly half of the new revenue flowed through to EBITDA after vendor, integration and channel costs, an operator running at a 35% EBITDA margin would see EBITDA rise by about 4.5%. Both of those inputs are illustrative. Each use case is modeled on its own. How an operator bundles and prices them is its decision, and it will change the combined figure.

	Use case	Year 5 revenue	Largest lever	Share of service revenue
1.	Realtime Translation	$17.4m	Add-on revenue	0.5%
2.	In-call AI Assistant	$19.4m	Add-on revenue	0.6%
3.	Synthetic voice & fraud detection	$25.8m	Add-on revenue	0.8%
4.	Whitelabel SMB Receptionist	$9.5m	Software revenue	0.3%
5.	Agent Outbound Campaigns	$30.9m	Early-life churn	0.9%
	Total	$103.1m		3.1%

Why ElevenLabs

Operators looking at these use cases tend to ask the same first question: has this been done at a real operator? For ElevenLabs, the answer is yes in several places.

15M+
conversations a week handled by ElevenLabs agents

90+
languages on one platform

10×
faster resolutions at Klarna

8×
faster time to resolution at Revolut

Network-embedded services at a tier 1 operator

Deutsche Telekom chose ElevenLabs for the Magenta AI Call Assistant, the network-embedded translation and in-call assistant it unveiled at MWC 2026.[4] DT also works with ElevenLabs on voice agents for customer service.

Trusted by operators

Deutsche Telekom and KPN are ElevenLabs customers. DT is bringing live translation and an in-call assistant to its network. KPN launched call summaries and transcripts for its small business mobile customers in October 2026, with an AI assistant to follow.[20] Both also run AI customer service agents on ElevenLabs.

An implementation partner that runs care at scale

TELUS Digital became a preferred implementation partner for ElevenAgents in June 2026, after the TELUS welcome-call proof of concept and an agent training program that cut new-hire onboarding time by 20%.

Proven at scale in adjacent industries

Klarna runs ElevenLabs voice agents as the first line of phone support for its 35 million US customers, with resolutions up to 10 times faster. Revolut cut time to resolution by more than eight times for over 4 million customers across more than 30 languages. Faster resolution lowers cost per contact, and it shows up in satisfaction and retention, which is where the cost case and the revenue case meet.[13] ElevenLabs agents now handle more than 15 million conversations a week.

One platform for all use cases, inside and outside the call path

The same speech models, turn-taking and agent platform serve network-embedded services and operator-run agents, in more than 90 languages. ElevenLabs develops and owns its speech models and the research behind them, so the roadmap operators build on is its own. Operators can use the full agent platform, keep their own LLM and orchestration and use only the voice layer, or call the speech models directly. Deployment options include ElevenLabs cloud, the operator's own virtual private cloud, and on-premises for the speech models. Data storage residency is available in the US, the EU and India, and Zero Retention Mode is available for sensitive traffic. The platform holds SOC 2 Type II, ISO 27001, PCI DSS Level 1 and HIPAA attestations and has been independently assessed for GDPR.

Reception by ElevenAgents, the first agent operators can white-label

ElevenLabs launched Reception by ElevenAgents in September 2026, an AI receptionist for small businesses built on ElevenAgents. It answers calls around the clock in more than 90 languages, answers questions about the business, books appointments and sends call summaries, and it can pick up only when staff are busy or after hours. It connects to the calendars small businesses already use, starting with Google Calendar, and can be white-labeled for operators to sell under their own brand to their business base on the same connectivity bill, as the first of several agents on that bill.

Learn more about Reception by ElevenAgents

Built to sit alongside what operators already run

Agents connect to existing CRM, OSS/BSS platforms, IMS core through SIP telephony and standard tool integrations, so voice AI is added next to the incumbent carrier stack rather than replacing it. Forward deployed engineers work inside the operator's team on the first deployment, and call-path work is scoped with the operator's network and security teams from the start.

For most operators, the next step is not a large program. It is choosing one use case from each group, sizing it with their own base, ARPU and churn, and agreeing up front on the result that would scale or stop the project.

A model built on someone else's numbers is a hypothesis. A model built on your own is a business case.

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