



# Content Moderation

- Trust & Safety
- AdOps
- SalesOps

**Vertical / Horizontal Overview**

# Content Services Overview

## PRACTICE OVERVIEW

- ▶ Over **two decades of experience** in Research & Content Management
- ▶ **15+ years of industry-leading Content Moderation and Trust and Safety practice**
- ▶ **4,750 specialists 16 sites, 20+ languages**
- ▶ **Client Segments:** Social Media, E-Commerce, Gaming, Online Travel, Financial Markets, Media & Telecom
- ▶ **Client Base:** 30+ Programs

## ANALYST RECOGNITIONS

- ▶ Placed in **Leadership Category** @ NelsonHall Vendor Evaluation & Assessment Tool (NEAT) evaluation (2021) matrix for Content Moderation, T&S Segment
- ▶ Placed in '**Major Contenders**' category in its PEAK Matrix Assessment (2022) for T&S – Content Moderation



## KEY CLIENTELE



Google



amazon



MARS

StubHub

AVAYA

Bloomberg

lyft

## CONTENT SERVICES PORTFOLIO

### CONTENT MODERATION

- ▶ Screening and moderating UGC content – including image, video, and speech moderation
- ▶ Ensuring compliance with community/platform guidelines
- ▶ Labelling and tagging data assets (including harmful content) for strengthening of AI/ML models
- ▶ Online community management (moderating user/member forums)

### TRUST & SAFETY

- ▶ **Identity Ops:** ID and KYC validation; AML Screening; Account Takeover Resolutions & Response;
- ▶ **Fraud & Payment Ops:** Charge Backs Validation Processing; Friendly Fraud / Concession Abuse prevention
- ▶ **Regulatory and Legal Compliance:** Defending IP through blockchain based verification; Copyright Infringement Screening

### CONTENT OPS

- ▶ **Ad Ops:** Ad Pre-sales, Ad Campaign Set Up, AD Como, Trafficking, Campaign optimization
- ▶ **Sales Ops:** Enablement Support (Market Intelligence, and sales content creation – website, blogs, emails, etc.)
- ▶ **SMB Support:** Digital Campaigns, Consultative sales/ solutions, etc.



# Content Services are not limited to only Content Moderation

Content Moderation is one of the sub-segments of our CONTENT SERVICES



## CONTENT MODERATION (COMO)

Content Moderation is an activity of screening and monitoring user-generated content (UGC) to determine its compliance with platform-specific community guidelines and moderation policies

- ▶ Involves screening and moderating various type of content – including image, video, and speech
- ▶ Also involves moderation of conversations on online communities (user forums, chat groups, Q&A sections, etc.)



## TRUST & SAFETY (T&S)

The mandate for Trust & Safety (T&S) practice is to build TRUST on the Platform & ensure Safety of the users

T&S teams work to protect the brand, the users, and ensure compliance with complex and dynamic regulations

- ▶ T&S covers wide areas including Payment Fraud, Identity theft, Account takeovers, Copyright issues, Validation against misinformation information (e.g., on ecommerce marketplaces), etc.
- ▶ Unlike traditional “IT security,” T&S tends to be policy- driven and industry specific.



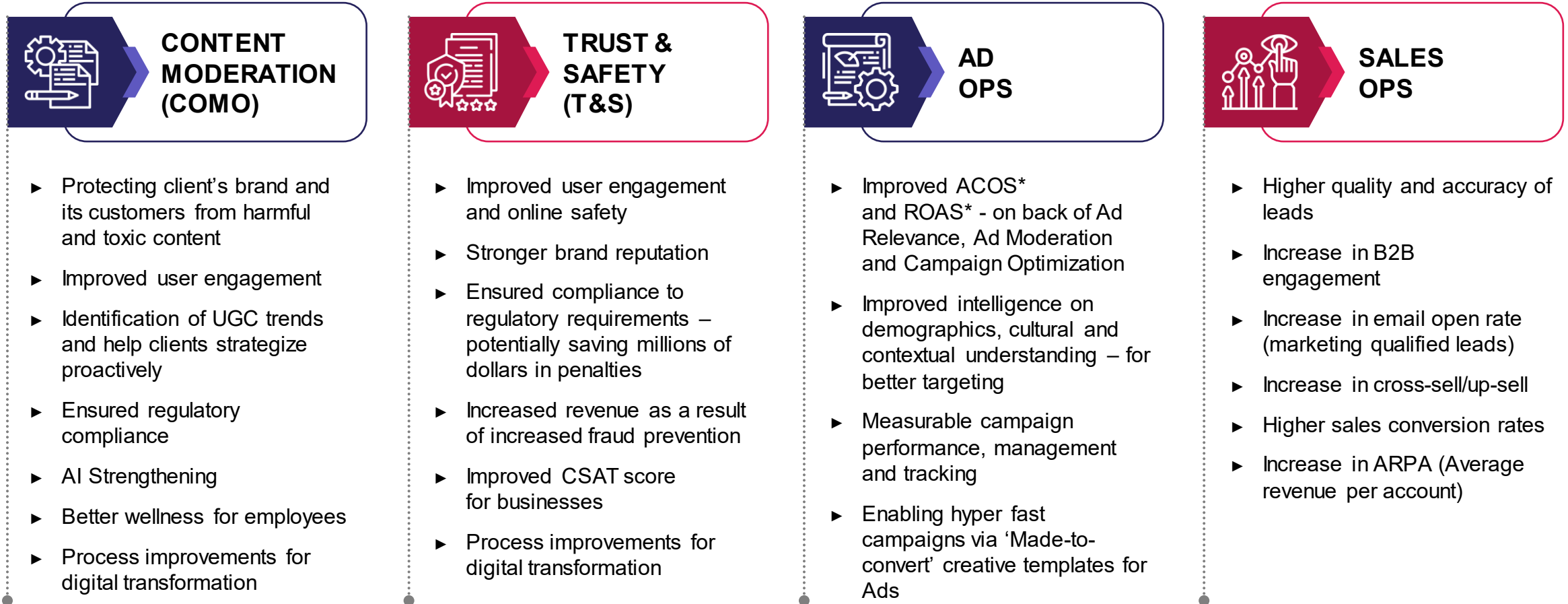
## CONTENT OPS – AD OPS & SALESOPS

Comprises of content support services for Advertising Operations (Ad Ops) and Sales Operations (Sales Ops)

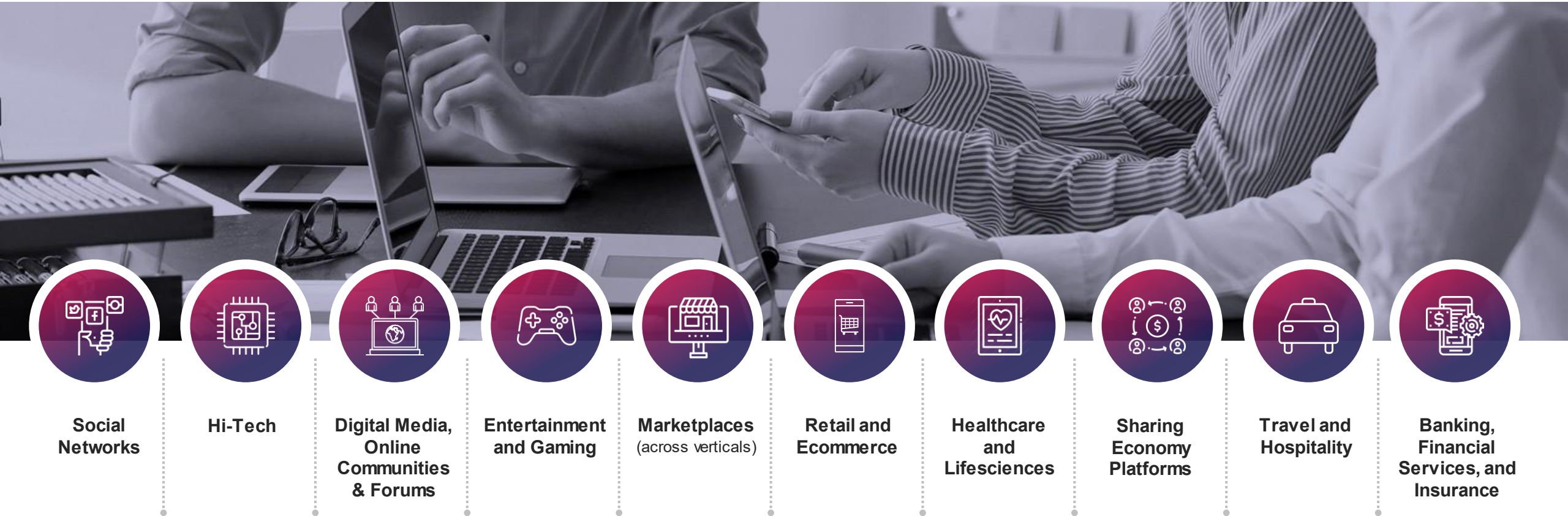
- ▶ **Advertising Operations** support across advertising campaign planning & setup, campaign management & optimization, trafficking and creative implementation
- ▶ **Sales Operations** support (including Content Creation and Data Enrichment) for SMBs and Enterprises across Sales Lifecycle



# Our Content Services deliver core value drivers for brands, across business lifecycle



# Our Key Target Markets





# Market Intelligence

# Market Growth Drivers

Wide-spread penetration of social media and other digital platforms, driving the race for engagement while ensuring user safety



## GROWTH DRIVERS



Social Media giants launching **new product/features and new social platforms** emerging each day



**82% of global consumers played games and watched gaming content** amid stay-at-home measures induced by the pandemic



The **rise in global eCommerce sales** (25.7% in 2020) and the need to build a reputable presence online



**Substantial boost in government spending** on handling individual privacy issues safely



Content will take a new meaning on back of emerging Immersive experiences (E.g., Metaverses)



## Fact 1: Social channels are critical



In 2022,

**44%**

of marketers plan to leverage  
YouTube for the first time

*(HubSpot, 2022)*



**80%**

of Instagrammers are  
Engaging with Businesses

*(Nealschaffer)*



Almost

**7 hr**

World's internet users  
spend online each day

*(Clickz)*





## Fact 2:

# Content is important to businesses



# 63%

indicated that content strategy should be owned by someone in the C-Suite

*AI Global Content Survey*



# 92%

of marketers reported that their company views content as a business asset

*Content Marketing Institute 2020*



# More than half

of companies surveyed reported creating enormous amounts of content

*Hubspot*



# Industry View and Challenges

# Content Moderation: Market View

Large amounts of User Generated Content (UGC) generated per day is the key driver for the increasing Content Moderation requirements

**1Billion+**

Hours of Videos  
Watched on YouTube

**5.6Bn+**

Google searches  
conducted

**210Mn+**

Snaps shared on  
Snapchat

**500Mn+**

Tweets sent  
on Twitter

**12.8Mn+**

Posts published  
on Tumblr

**95Mn+**

Photos posted  
on Instagram



# Market Challenges – Content Moderation

We are Entering a New Era of Social Media Regulation



**Countries are creating specific policies for content sharing on social media platforms**

- 40 new social media laws have been adopted worldwide in the last two years.
- Another 30 are under consideration.
- Germany's **NetzDG law**
- Australia passed the **Sharing of Abhorrent Violent Material Act**



**Focus on Content types vary from country to country**

- Most of the Countries focus on Hate Speech
- EU has focus on Terror videos
- Australian law has focus on harassing or abusive posts
- India has mandated Social Media platforms to appoint a point of contact in the country, to escalate the Take down requests



**Aren't limited to only Users Government / NGO' / law enforcement can report content**

New laws allow Government / Law enforcement agencies to demand to social media companies for take down of specific content



**Stringent timelines to act upon the report; failing to which can lead to huge penalties**

- Timelines to act are very steep and vary from 24 to 72 hours
- Non-compliance can attract steep fines. E.g., up to €50 Mn for non-compliance to Germany's **NetzDG law**)



# Content Moderation: Services Overview



## PRACTICE OVERVIEW

- ▶ Screening and moderating UGC content (image, video, text and speech) – ensuring compliance with community/platform guidelines, and regulatory policies
- ▶ Moderation of posts for (e.g.):
  - Hate speech
  - Abuse/Harassment
  - Violent Threats
  - Non-consensual Nudity
  - Self-harm
  - Child Safety
- ▶ Online community management (moderating user/member forums) – to enhance trust, reduce toxicity and improve engagement
- ▶ Labelling and tagging data assets (including harmful content) for strengthening of AI/ML models



### SOCIAL MEDIA

Photos, Videos,  
Ephemeral Content,  
Text, Reviews, Blogs

Detection and moderation for Social Media posts around violence, hate speech, sexual exploitation, harassment, etc.



### Networking/ Dating/ Gaming

Detection and moderation for cyberbullying, abuse & harassment, hate speech, extremism. Other moderation includes chat, rumors, fact checking.



### E-COMMERCE

Moderating product catalog content, moderate/validate product descriptions, storefront images & videos, reviews, chats, Q&A



### BUSINESS LISTINGS

Business Identity,  
Photos, Products &  
Services

Ensure user-submitted multimedia content adheres to platform-specific guidelines; flag & remove inappropriate content



# Differentiators



# Our Differentiators – Innovative Approaches

Staffing, Operations and Wellness Initiatives Drive our Investment Strategy Across T&S and CoMo (1/2)

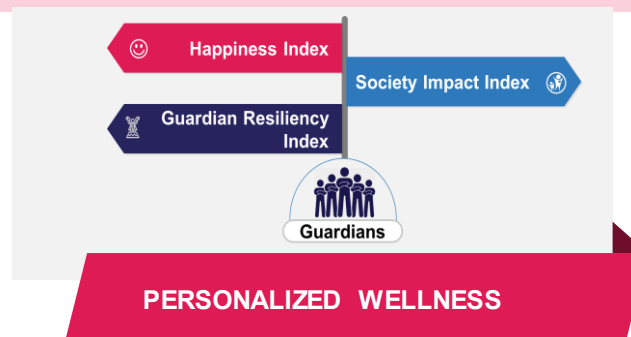
## CONTENT CENTRE OF EXCELLENCE



### BUILDING EXPERTISE ACROSS

- **Established excellence across the triage of leadership, delivery, and wellness**
- **Strategic investments in**
  - Leadership roles/SMEs across content and T&S sub-categories
  - AI and Platform experts
  - Experienced delivery Leadership
  - Wellness professionals

## INNOVATIVE AND TECHNOLOGY DRIVEN WELLNESS PRACTICES



### PERSONALIZED WELLNESS

- **Individual Persona mapping** for personalized attention and support
- **Continuous wellness and stress level tracking** with the help of Technology and regular assessments
  - proprietary AI-enabled Wellness Indices: **Happiness Index, Societal Impact Index and Resiliency Index**
- Wellness support through **Sutherland wellness micro-site** with skill enhancement content

## RESEARCH-BACKED TRENDS IDENTIFICATION AND POLICY DEVELOPMENT



### RESEARCH BASED INSIGHTS

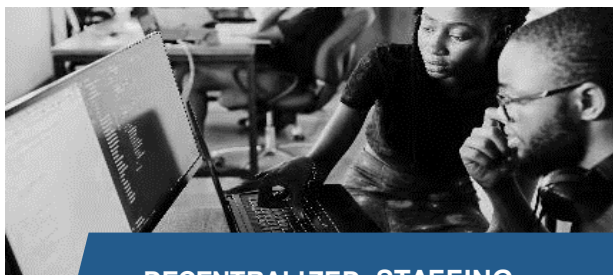
- **Ongoing Research insights and tracking** of global T&S and Content Moderation regulations and trends
- **Trends identification** by guardians on back of closed-feedback-loop and flagging of trends, slangs (e.g., Bledina - slang name for Russian aircraft during Ukraine war) and preempting any disruptions (e.g, political unrest, etc.)
- **Geo specific Policy and contextual insights** to suggest most relevant and effective policy updates



# Our Differentiators – Innovative Approaches

Staffing, Operations and Wellness Initiatives Drive our Investment Strategy Across T&S and CoMo (2/2)

## OPTIMIZED STAFFING FOR PRICING ADVANTAGES



### DECENTRALIZED STAFFING

- **Multi Geo approach**, with Front line staff in near shore/ on shore and support and analytics team in offshore location for price optimization,
- **Hub And Spoke model** for diversified and scaled operations

## ENABLING PLATFORMS FOR COMO



### HARNESSING AI CAPABILITIES

- **Translate.ai** – proprietary language translation tool to enable optimum delivery across different languages and have lesser dependence on language-specific resources.
- AI-enabled **Modern Hire Platform** - to screen, assess and interview that allows Sutherland hiring managers to predict best fit and future job performance
- Significant investments (underway) in **Sutherland MINDSTREAM platform** – a proprietary AI-enabled flexi-work platform.

## DIFFERENTIATED OPERATIONAL EXCELLENCE



### PRODUCTIVITY AND QUALITY ENHANCEMENT

- **Sutherland Anywhere** enabled Productivity and engagement tools for live tracking of the Program productivity, efficiency and workforce management
- In-house poka-yoke techniques to preempt quality issue and resolve early
- Efficient work-location mapping and workforce planning to optimize TCO
- Ergonomically designed workplace layouts – ensuring vibrant & happy work environment



# Industry View & Challenges

# T&S Need

- ▶ Billions of people around the world learn, work, transact, connect, and express themselves online
- ▶ Brands and platforms can thrive only when they make their Platforms safe and safeguard their users
- ▶ Policies and decisions by companies have real-world consequences, whether it is the safety of an individual or political repercussions for a nation

## Fraudulent Transactions Value Growth 2020-21 vs. 2021-22



**695%**

Travel &  
Hospitality



**244%**

Retail



**128%**

On-demand  
Services



**39%**

Marketplaces

*(Digital Trust & Safety Index - SIFT)*



### Fake Reviews / Misinformation

**62%**

of respondents believe they saw  
at least one fake review in 2021

*(Brightlocal Local Consumer Review Survey 2022)*



### Rise in Copyright Infringement Claims

**1,000 claims/week**

on Twitch Platform since May 2020

(vs. 50 claims/year previously)

*(Twitch)*



# T&S Hub: Sutherland's Fire Safety Station

Fires are rare.  
(Hopefully.)

But to not have fire  
stations always ready to  
go would be a mistake.

## EXISTING CLIENT LOGOS



## VOICE



## NON-VOICE



ACCOUNT & IDENTITY



PAYMENTS & CHARGEBACKS



CONTENT INTEGRITY (Fake Reviews / Misinformation, etc.)



FRAUD, RISK & COMPLIANCE



T&S HUB

FIRE STATION COVERAGE



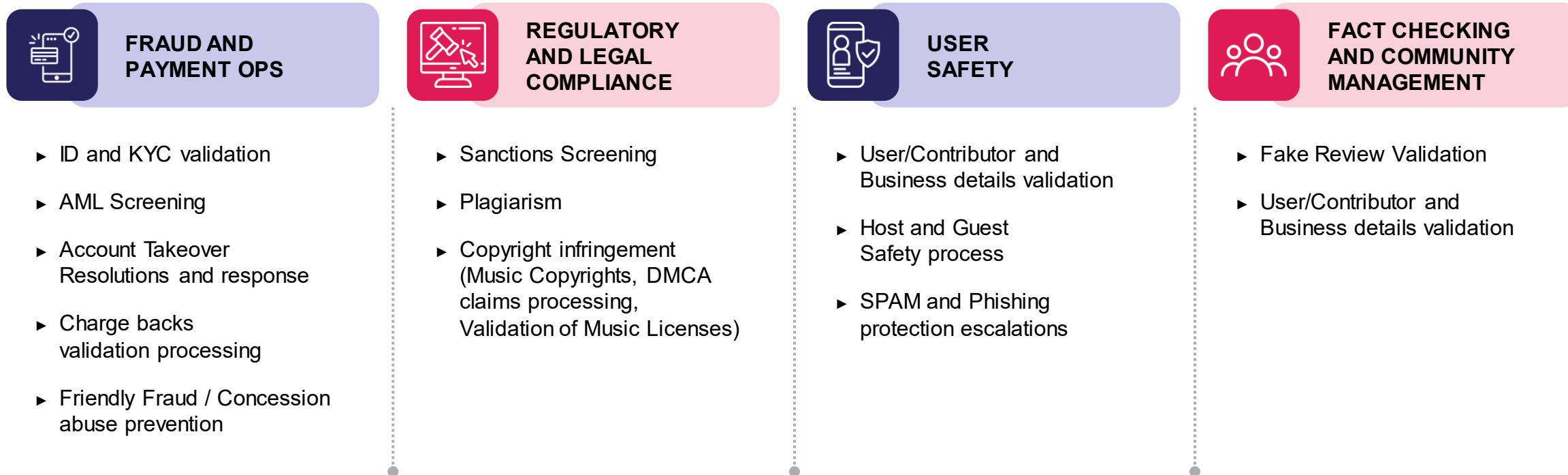
CRISIS  
IDENTIFIED



# Trust & Safety Services Overview



# Trust & Safety (T&S): Services Overview



**Ensuring overall trust on platforms, and safety of users  
(Compliance and Fraud related services are sub-components of T&S)**



# Trust & Safety (T&S): Support for Complete Digital Ecosystem



## RETAIL AND ECOMMERCE

- User and Supplier details Validation
- Account Takeover Protection
- Payment & chargeback protection
- Friendly Fraud / Concession abuse prevention
- Fake Review Validation
- SPAM and Phishing protection



## TRAVEL INDUSTRY

- User and Business details Validation
- Account Takeover Protection
- Sanctions Screening
- Payment Protection and chargeback reduction
- Fake Review Validation
- SPAM and Phishing protection



## BROADCASTING & ONLINE STREAMING

- Artist Details Validation
- Music Copywrite details validation
- DMCA claims processing
- Validation of Music Licenses
- Artist content and cover image moderation



## SOCIAL MEDIA

- Validation of Profiles and restricting bot or automated accounts
- Complying with regulatory requirement and responding to escalation by government organization, law enforcement , NGO's etc.



## DIGITAL HOSTING & NETWORKING

- Abuse and Fraud Compliance program
- Investigation and mitigation of reported client resources
- Comparing and confirming the copywrite violations
- Validate claims for DMCA, Non-Copyright
- Phishing and Malware, Botnet, Intrusion Attempts, Email Spam, Spam Website



## GAMING INDUSTRY

- Gamer Profile and Bio Validation
- In Gaming Bullying, Child safety and grooming protection
- Annotation of game audio transcripts
- Community Management: Listening and Response



## FINTECH & PAYMENT PROVIDERS

- Customer ID and KYC validation
- Payment Protection
- OFAC and sanctions screening
- Anti Money Laundering Process
- Preventing Credit card and Friendly Fraud



## NEW AGE TECHNOLOGY COMPANIES

- Supporting T&S Solutions for EdTech, Job Portals, Review aggregators etc.
- Supporting in Ad Operation through Moderation, Ad compliance, Localization and translations services
- Supporting in AI Training through annotation, labeling, segmenting and tagging the content in image, audio and video



# Industry View and Challenges

# Market Challenges – Ad Ops

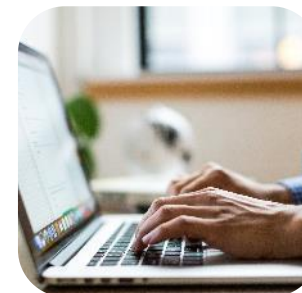
Digital ad platforms are facing challenging times



**Slowdown in advertising revenue** in the face of economic pressures. Ad revenues (and in turn the overall revenue) witnessed a decline for all platforms during Q1 2022



**Slowing user growth** as social media companies vie to attract new customers to target ads in an already saturated market. Negative to sub-6% growth in active users across leading platforms (exception TikTok)



**Identifier for Advertisers (IDFA)** Apple and Google's decision to ditch cross-app tracking has made retargeting harder and is driving down ad revenues



**Growing competition** from newer platforms such as TikTok with strong engagement and rapid monetization growth are impacting social media giants



**High employee costs** as the great resignation had resulted in filling open positions more expensive



**Stringent policy and regulations**  
Countries are creating specific policies and stricter regulations for content sharing on social media platforms. They are setting stringent timelines to address reports, failing which can lead to huge penalties for social media companies



# Nuances of Digital ADs



Nearly **half of internet users** (42.7% globally) use ad blockers because 'there are too many ads,' 'too many ads are annoying or irrelevant' and 'ads are too intrusive'



**Nearly half** (49%) of respondents say when they see an ad alongside offensive content, it negatively impacts how they view the advertiser



Low-quality and scam ads **prevent people from wanting to engage** with genuine advertisers



# AdOps Services Overview



# Sutherland Ad Operations and Advertiser Support

## 01 | PRE-SALES

- ▶ Lead Generation
- ▶ SMB Customer Profiling
- ▶ Market Research
- ▶ Sector Insights & Trend Analysis
- ▶ Ad Best Practices – by geography, sector and target segment
- ▶ Differentiated Sales Propositions (specific regions, industries or objectives)
- ▶ Call Scripts & Email Templates
- ▶ Competitive Battlecards
- ▶ Sales Presentation & Marketing Collaterals

## 02 | SALES & ENABLEMENT

### Sales

- ▶ Digital Acquisition (Marketing Campaigns)
- ▶ Consultative sales and solutions
- ▶ Virtual Sales - Multi-media digital asset library

### Onboarding & Enablement Support

- ▶ Educational and Informative Emails
- ▶ User Guides
- ▶ Help Center Articles, Knowledge Management, FAQ
- ▶ Media content & Creatives Templates
- ▶ Demo/Webinars

## 03 | OPERATIONS

- ▶ Ad Trafficking and Scheduling
- ▶ Ad Approvals
  - Policy Adherence
  - Review Ad Content – Quality & Accuracy (content guidelines)
  - Creative Specs QA
- ▶ Content Moderation
- ▶ Screenshots, Reporting & Analytics
- ▶ Troubleshooting and query resolution
- ▶ Ad Optimization
- ▶ **Sutherland COSMOS** - Multi-asset library including industry and geo specific 'made-to-convert' creatives templates for Ads

## 04 | ACCOUNT MANAGEMENT

- ▶ Key Account Management (KAM)
- ▶ Campaign Optimization & Keyword Recommendation
- ▶ Ads Recommendations (format, objective etc.)
- ▶ Competitive Intelligence
- ▶ Customer Surveys (customer pulse) and other support resources

## 05 | RETENTION AND RESURRECTION

- ▶ Differentiated sales propositions (resurrection)
- ▶ Customer Surveys (customer pulse and feedback)
- ▶ Call Scripts & Email Templates
- ▶ Personalized Emails and other support resources



# Industry View and Challenges

**A greater portion of SMB workforce is increasingly Gen-Z and millennials. These digital natives have different baseline expectations.**

- ▶ A **mobile first** experience
- ▶ **Control, visibility and frictionless** interactions
- ▶ **Quick access to knowledge** and expertise
- ▶ **Digital experiences** (from quote to contract)
- ▶ High **personalization**
- ▶ Trust & simplification in pricing
- ▶ **On demand** digital and assisted **support**
- ▶ Ready to switch; **low brand loyalty**
- ▶ **Rely on Social Media** feedback – a big influencer



# SalesOps Services Overview

# Sutherland's Extensive Capabilities Across Sales Operations



## UNMANAGED SALES - OUTREACH/ACQUISITION

Convert high potential prospects to new business

- ▶ **Prospecting & lead generation** (equip team with customer profiles, sector insights)
- ▶ **Consultative selling** based on geography, target segment best practices and cultural nuances'
- ▶ **Virtual sales** (customized sales with multi-media digital asset library)
- ▶ **Content to drive sales** covering personalized content – call and email scripts, battlecards, sales presentation, video content, GIFs etc



## UNMANAGED SALES - RETENTION AND RESURRECTION PROGRAMS

Nurture new advertisers to start spending on the platform:

- ▶ **Sales Team Enablement:** On-boarding, enablement, troubleshooting and coaching, feedback, Knowledge management (help-center)
- ▶ **Retention support:** Customer pulse surveys, campaign optimization recommendations, informative emailers and resources
- ▶ **Resurrection Support:** Feedback surveys, personalized emails based on customer interests, 'What's New' emailers, hands-on support



## ACCOUNT MANAGEMENT AND SUPPORT

Develop relationships with advertisers with a focus on maintaining or increasing advertiser's willingness to spend:

- ▶ Create **differentiated sales propositions** using internal and external data for clients in specific regions, industries or objectives
- ▶ **Customer pulse surveys, campaign optimization recommendations, informative emailers** and resources
- ▶ Maintain **customer interaction history, Key Account Management (KAM), competitive intelligence**

## ENABLERS

- **AI based propensity scoring** to prioritize leads
- **PERFORM.AI**- Sales agent quality feedback

- **Elevate.ai** – Conversational AI led chat conversations
- **CAFÉ.ai** - CSAT, feedback

- **CKE- Knowledge Management Platform**
- **CAFÉ.ai** - CSAT, feedback



# Engagement / Delivery Models





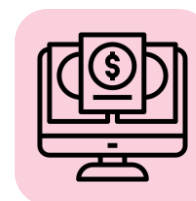
# PRICING MODELS

**Most predominant pricing model observed across the Content Services is Hourly-based, and FTE based rates**

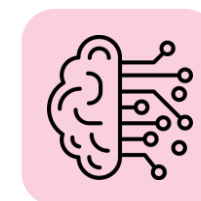
Sutherland offers Unique Value-added services \*to address client specific need and requirements such as



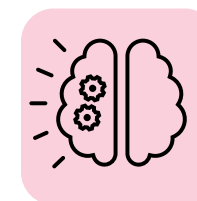
Co-Invest in  
Training &  
Transition



Paying separately for  
Psychologist support /  
Engagement hours



Support in  
strengthening AI,  
Policy strengthening  
and Quality  
strengthening



Leveraging  
Translate.ai for  
lower language  
volumes

**Pricing Models are Evolving**



**PROJECT  
BASED**



**OUTCOME  
BASED**

