FROST & SULLIVAN

TeleMate.Net®
SOFTWARE

2017 North American Unified Communications and Collaboration Analytics Product Line Strategy Leadership Award

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Background and Company Performance

Industry Challenges

Organizations of all sizes and industries are implementing unified communications & collaboration (UC&C) solutions in order to increase operational efficiency and workforce productivity. Specifically, converged voice, video and data networks as well as centralized management over a broad, tightly integrated applications set promise to alleviate a heavy burden from IT departments charged with maintaining their organizations' communications & collaborations solutions. At the same time, multi-media conferencing, advanced mobility, instant messaging and presence, multi-channel contact center, and other applications in the UC&C stack promise to improve employee engagement, responsiveness and accountability.

The benefits of UC&C can address many of the challenges enterprises experience with their legacy communications solutions. However, few organizations implement UC&C as an end-to-end solution across their environment from the outset. Implementations are often phased in order to limit potential disruption to existing workflows and operations, prolong the life of existing investments, accommodate budgets and better assess return on investment (ROI) before rolling out UC&C holistically. Thus, UC&C implementations may take place over the course of many months or years.

In order to move forward with their implementations, many enterprises require better visibility into their technology environments than they have had in the past. They need data illustrating the effect high-bandwidth applications, more devices, remote access and other factors have on their networks and IT support resources. Stakeholders also need reliable metrics on employee adoption and utilization of applications provisioned to them. As a whole, enterprise stakeholders must justify a business case for further investments based upon meaningful and actionable data that allow them to accurately calculate network, business and employee performance, and cost.

Yet another point of deliberation, a product line strategy leader must support multiple UC&C manufactures to maximize delivered value in such a dynamic ecosystem. One of the questions that enterprises struggle in answering is, how and when to deploy and consume UC&C functionality. Organizations with the available budgets and support resources continue to prefer to own their solutions for security and control. At the same time, the potential expense and complexity of customer-owned hardware and software is driving enterprises to evaluate cloud-based UC-as-a-Service (UCaaS). Further, leveraging the useful life of existing on-premises assets and requirements for multi-vendor solutions is increasing demand for hybrid solutions comprised of on-premises and cloud-based elements. Although potentially a better fit for business requirements, cloud and hybrid solutions may restrict IT's direct and full visibility into their environments.

Innovative solution providers assemble comprehensive product lines that address all aspects of enterprise concerns. A UC&C analytics product line strategy leader goes beyond the

traditional assessment, monitoring and reporting long used to measure enterprise local access network (LAN) and on-premises communications & collaborations deployments. While still supporting continued requirements for such tools, a vendor with a well-rounded product line that delivers a universal approach empowers enterprises to take the next steps in their UC&C implementations, whether on-premises, UCaaS or hybrid. By delivering a full set of UC&C analytics, a product line strategy leader provides enterprise stakeholders with necessary data about UC&C applications adoption, utilization, performance and trouble-shooting, as well as the impact on networks and operations, which enables companies to build the business case for roll-out to additional sites and user groups, thereby expanding the benefits to more parts of their organization. A product line strategy leader is, therefore, well positioned to earn long-term trust from enterprises that seek an expert partner to help create the UC&C implementation roadmaps they need to move forward.

Product Line Strength and Customer Impact

Frost & Sullivan recognizes TeleMate.Net Software's *Predictive UC Analytics*^{TM} for outstanding performance in UC&C analytics based on the following criteria: product line breadth, scalability, features, customer purchase experience, and brand equity.

Breadth

TeleMate.Net Software maintains and continually advances a universal and comprehensive portfolio capable of supporting both current and future enterprise requirements. The solution collects, normalizes, models, reports and monitors essential data as customers evolve their communication environments on an ongoing basis.

A number of vendors and service providers offer network and applications assessment, monitoring and reporting tools. However, most support a limited set of platforms, typically their own or the most popular solutions deployed by enterprises, or a select set of applications in the UC&C stack (i.e., voice, video, mobility). Although the above capabilities satisfy some customer requirements today, they do not address the majority of enterprise infrastructures.

TeleMate.Net's *Predictive UC Analytics*^{TM} portfolio differentiates strongly in several areas. The company's solutions support multi-vendor IT, network and UC&C solutions to address the heterogeneous nature that characterizes most enterprise technology environments. As enterprises and service providers migrate to IP-centric solutions they often create mixed-vendor or best-of-breed environments for platform performance, vendor/service provider relationship, cost and other reasons. TeleMate.Net's *Predictive UC Analytics*^{TM} platform supports both enterprises and service providers throughout these transitions and over the long term creating a "single pane of glass" approach for delivering visibility into the entire UC&C ecosystem.

The company's Predictive UC&C Analytics suite supports voice, instant messaging and presence, video, collaboration, email, contact center, mobility, gateways, expressways and border elements in a single, manufacturer-independent solution. TeleMate.Net *Predictive UC Analytics*[TM] provide users with access to historical and real-time communication session activity, as well as statistical modeling of traffic patterns with long- and short-term forecasts that enable enterprises to plan for usage, capacity and network impact of on-premises, UCaaS and hybrid UC&C deployments. The solution set is clearly distinct in the market with its range of vendor brands, breadth of applications and deployment types supported.

Although TeleMate.Net has deep heritage in the UC space, its breath of experience in the Web Security realm has proven to be an invaluable asset in capitalizing on delivering solutions during the transition to IP from legacy based communications infrastructure and applications.

TeleMate.Net provides a number of tools that help enterprises gain improved insight that is essential to understand what has happened, what is currently happening and what is likely to happen in their environments. Such tools are a necessity for enterprises to strategize and monitor their UC&C implementations and employee adoption, and ultimately achieve higher ROI.

Scalability

In contrast to a number of alternative providers, TeleMate.Net supports the full gamut of UC&C deployment models—UCaaS, on-premises and hybrid. Among others, TeleMate.Net's *Predictive UC Analytics*[TM] platform's universal nature seamlessly supports voice, video, collaboration, contact center and application sharing technologies from manufacturer including, but not limited to, Cisco, Microsoft, Avaya/Nortel, NEC, Unify, NEC, Shoretel, Asterisk, Genesys, Oracle/Acme, Polycom, Vidyo and many more. The portfolio offers service provider-class scale, and is deployed by numerous service providers that deliver UC&C analytics to federal, state, and local governments, healthcare and Fortune 1000 organizations worldwide.

Although typically employed by service providers and large end-user institutions, TeleMate.Net's *Predictive UC Analytics*[TM] can effectively scale from 250 to an unlimited number of users, enabling the company and its partners to meet virtually any organization's needs.

TeleMate.Net's *Predictive UC Analytics*[TM] solutions are also modular; each suite carries a single license. Enterprises deploy only what they need and can easily right-size solutions according to their individual requirements as well as outsource certain capabilities while keeping other functional responsibilities in-house.

Features

TeleMate.Net's *Predictive UC Analytics*^{TM} products offer a comprehensive suite of features to serve SMB, enterprise and large service provider customers at multiple levels of functionality, ease of use, and applications.

Line-of-business leaders are increasingly important stakeholders and influencers in UC&C purchase decisions. As such, TeleMate.Net supports role-based access to its Predictive UC&C Analytics suite. Not only can system-wide visibility into traffic, usage and configurations be granted to IT and other central support groups, but more granular access can be provisioned to line-of-business, site, departmental and other managers who can view historical, real-time and predictive analysis around usage, configuration and performance for their user groups. *Predictive UC Analytics*^{TM} delivers valuable insight into utilization and can be used to correlate usage with employee performance to determine how the tools are impacting business outcomes, as well as identify best practices and areas in need of improvement.

TeleMate.Net's *Predictive UC Analytics*^{TM} empowers key line-of-business, departmental and other stakeholders through granular visibility of how their networks, applications and employees are performing using specific components of the UC&C applications stack. *Predictive UC Analytics*^{TM} helps them to more accurately plan for capacity and further UC&C roll-out in their organizations.

Customer Ownership Experience

TeleMate.Net is one of few UC&C analytics providers of scale with a single toolset supporting multi-vendor, multi-protocol environments. Because TeleMate.Net solutions support on-premises, UCaaS, and hybrid, as well as multi-vendor and best-of-breed environments, enterprises are free to build and implement their UC&C roadmaps and take next steps at their own pace while still relying on the company.

TeleMate.Net tools help enterprises to fuel and validate business transformation within their organization. The company ranks among even fewer vendors helping enterprises truly map UC&C performance to business outcomes. While other providers remain focused on network and device speeds and feeds, TeleMate.Net goes the extra mile to expose the impact of UC&C on the business side of enterprise operations and workflows. As more and more providers evangelize the need to leverage UC&C for improved business outcomes, TeleMate.Net stands out in its ability to deliver metrics that matter in this regard. The company enables and encourages enterprises to correlate UC&C applications usage with business metrics such as revenue gain/loss, sales pipeline, customer satisfaction and churn, and other data to directly assess the effect of UC&C utilization on business results.

To further ensure success TeleMate.Net extends a range of support, training and consulting services to help speed deployment as well as administrator efficiency and productivity. On-

site and remote training are provided as needed. Tier 2 and 3 support is provided 24x7x365.

Brand Equity

Since 1986, TeleMate.Net has evolved its solutions in tune with enterprise technology adoption trends, from on-premises communications systems, traditional hosted solutions, converged IP/TDM platforms, to today's fully integrated software-based cloud and on-premises unified communications & collaborations suites.

As a company with a proven track record, TeleMate.Net has thrived and grown while establishing a strong presence in the market. Today the company has over 18,000 installations worldwide. The company has assisted enterprises and services providers catering to them throughout each era of communications & collaborations solution evolution. TeleMate.Net has no doubt been an influential force with respect to enterprises demanding more from their investments and, more recently, in driving communications & collaborations into the digital transformational initiatives that many enterprises are implementing.

Conclusion

TeleMate.Net solutions are instrumental in helping enterprises determine ROI for their unified communications & collaborations investments. More recently the company has become a critical partner in helping enterprises determine the impact communications technology have on business outcomes. Accordingly, enterprises are looking to the company for meaningful and actionable metrics to help plan further investments and implementations.

With its strong overall performance, TeleMate.Net Software has earned Frost & Sullivan's 2017 Product Line Strategy Award.

Significance of Product Line Strategy

Ultimately, growth in any organization depends upon customers purchasing from a company and then making the decision to return time and again. A full, comprehensive product line that addresses numerous customer needs and preferences is, therefore, a critical ingredient to any company's long-term retention efforts. To achieve these dual goals (customer value and product line strength), an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.

Understanding Product Line Strategy Leadership

As discussed above, driving demand, strengthening brand, and differentiating from the competition all play a critical role in delivering unique value to customers. This three-fold focus, however, must ideally be complemented by an equally rigorous focus on building a superior and comprehensive product line.

Key Benchmarking Criteria

For the Product Line Strategy Leadership Award, Frost & Sullivan analysts independently evaluated two key factors—Product Line Strength and Customer Impact—according to the criteria identified below.

Product Line Strength

Criterion 1: Breadth
Criterion 2: Scalability
Criterion 3: Technology Leverage
Criterion 4: Features
Criterion 5: Supply Chain Reliability

Customer Impact

Criterion 1: Price/Performance Value
Criterion 2: Customer Purchase Experience
Criterion 3: Customer Ownership Experience
Criterion 4: Customer Service Experience
Criterion 5: Brand Equity

Best Practices Award Analysis for TeleMate.Net Software

Decision Support Scorecard

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation. Ratings guidelines are illustrated below.

RATINGS GUIDELINES
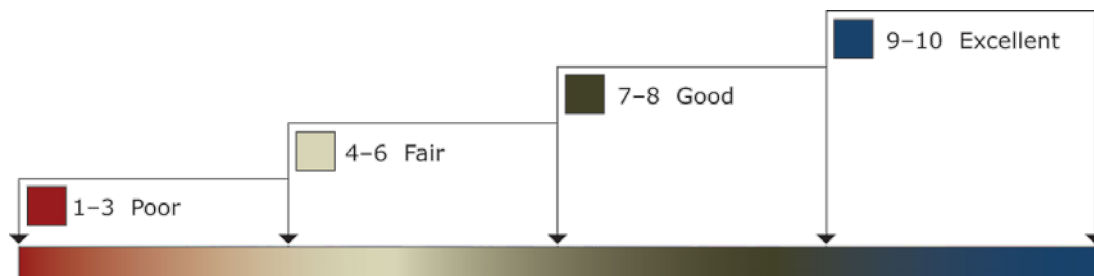
The Decision Support Scorecard is organized by Product Line Strength and Customer Impact (i.e., These are the overarching categories for all 10 benchmarking criteria; the definitions for each criterion are provided beneath the scorecard.). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.

The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, we have chosen to refer to the other key participants as Competitor 2 and Competitor 3.

Measurement of 1–10 (1 = poor; 10 = excellent)		
Product Line Strategy	Product Line Strength	Customer Impact	**Average Rating**
TeleMate.Net Software	**9.0**	**9.0**	**9.0**
Competitor 2	8.0	7.0	7.5
Competitor 3	6.0	6.0	6.0

Product Line Strength

Criterion 1: Breadth
Requirement: Product line addresses the full range of customer needs and applications.

Criterion 2: Scalability
Requirement: Product line offers products at a variety of price points and functionality levels.

Criterion 3: Technology Leverage
Requirement: Demonstrated commitment to incorporating leading-edge technologies into product offerings results in greater product performance and value.

Criterion 4: Features
Requirement: Products offer a comprehensive suite of features to serve customers at multiple levels of functionality, ease of use, and applications.

Criterion 5: Supply Chain Reliability
Requirement: There is sufficient control over the supply chain to ensure availability of key components and thereby the availability of products in the product line.

Customer Impact

Criterion 1: Price/Performance Value
Requirement: Products or services offer the best value for the price, compared to similar offerings in the market.

Criterion 2: Customer Purchase Experience
Requirement: Customers feel they are buying the most optimal solution that addresses both their unique needs and their unique constraints.

Criterion 3: Customer Ownership Experience
Requirement: Customers are proud to own the company's product or service and have a positive experience throughout the life of the product or service.

Criterion 4: Customer Service Experience
Requirement: Customer service is accessible, fast, stress-free, and of high quality.

Criterion 5: Brand Equity
Requirement: Customers have a positive view of the brand and exhibit high brand loyalty.

Decision Support Matrix

Once all companies have been evaluated according to the Decision Support Scorecard, analysts then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.
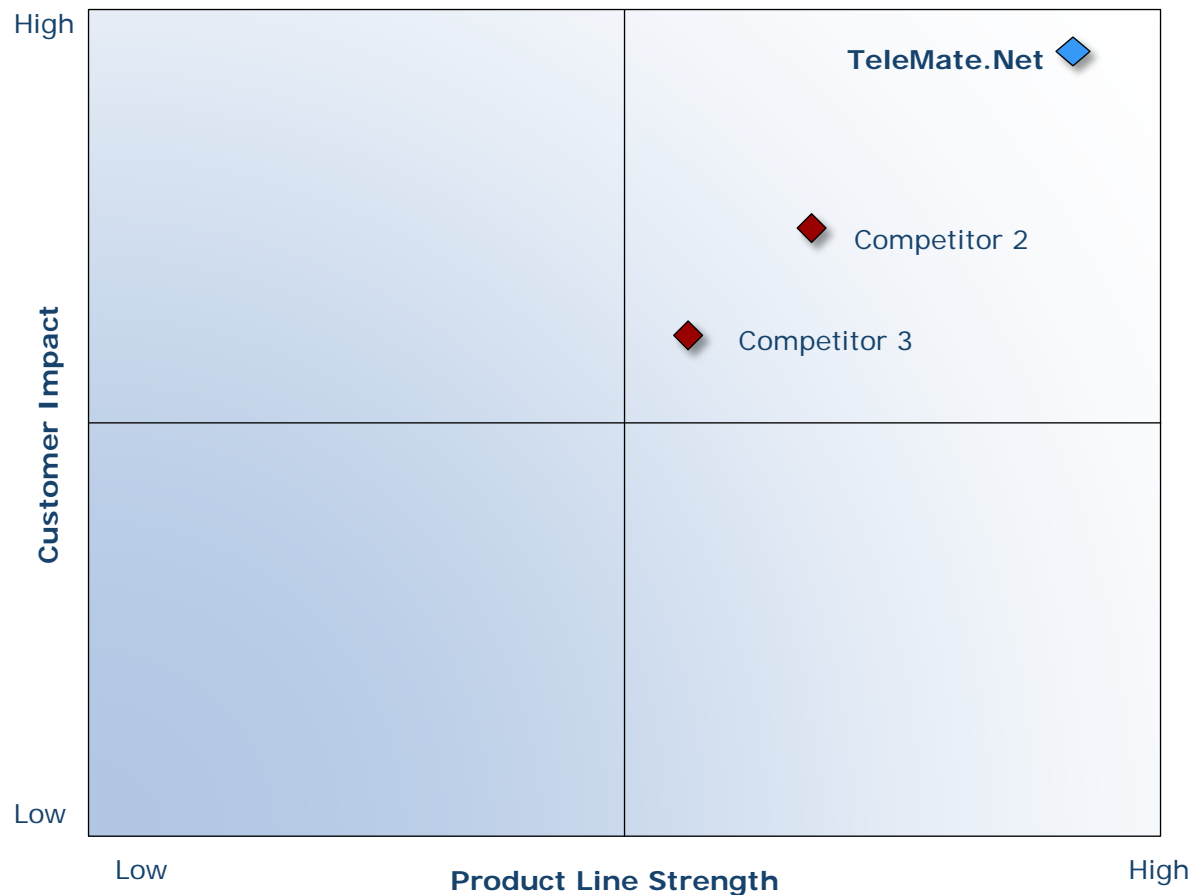
Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan analysts follow a 10-step process to evaluate Award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP		OBJECTIVE	KEY ACTIVITIES	OUTPUT
1	**Monitor, target, and screen**	Identify Award recipient candidates from around the globe	• Conduct in-depth industry research • Identify emerging sectors • Scan multiple geographies	Pipeline of candidates who potentially meet all best-practice criteria
2	**Perform 360-degree research**	Perform comprehensive, 360-degree research on all candidates in the pipeline	• Interview thought leaders and industry practitioners • Assess candidates' fit with best-practice criteria • Rank all candidates	Matrix positioning of all candidates' performance relative to one another
3	**Invite thought leadership in best practices**	Perform in-depth examination of all candidates	• Confirm best-practice criteria • Examine eligibility of all candidates • Identify any information gaps	Detailed profiles of all ranked candidates
4	**Initiate research director review**	Conduct an unbiased evaluation of all candidate profiles	• Brainstorm ranking options • Invite multiple perspectives on candidates' performance • Update candidate profiles	Final prioritization of all eligible candidates and companion best-practice positioning paper
5	**Assemble panel of industry experts**	Present findings to an expert panel of industry thought leaders	• Share findings • Strengthen cases for candidate eligibility • Prioritize candidates	Refined list of prioritized Award candidates
6	**Conduct global industry review**	Build consensus on Award candidates' eligibility	• Hold global team meeting to review all candidates • Pressure-test fit with criteria • Confirm inclusion of all eligible candidates	Final list of eligible Award candidates, representing success stories worldwide
7	**Perform quality check**	Develop official Award consideration materials	• Perform final performance benchmarking activities • Write nominations • Perform quality review	High-quality, accurate, and creative presentation of nominees' successes
8	**Reconnect with panel of industry experts**	Finalize the selection of the best-practice Award recipient	• Review analysis with panel • Build consensus • Select recipient	Decision on which company performs best against all best-practice criteria
9	**Communicate recognition**	Inform Award recipient of Award recognition	• Present Award to the CEO • Inspire the organization for continued success • Celebrate the recipient's performance	Announcement of Award and plan for how recipient can use the Award to enhance the brand
10	**Take strategic action**	Upon licensing, company is able to share Award news with stakeholders and customers	• Coordinate media outreach • Design a marketing plan • Assess Award's role in future strategic planning	Widespread awareness of recipient's Award status among investors, media personnel, and employees

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry participants and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS

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Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation, and implementation of powerful growth strategies. Frost & Sullivan leverages more than 50 years of experience in partnering with Global 1000 companies, emerging, businesses and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.