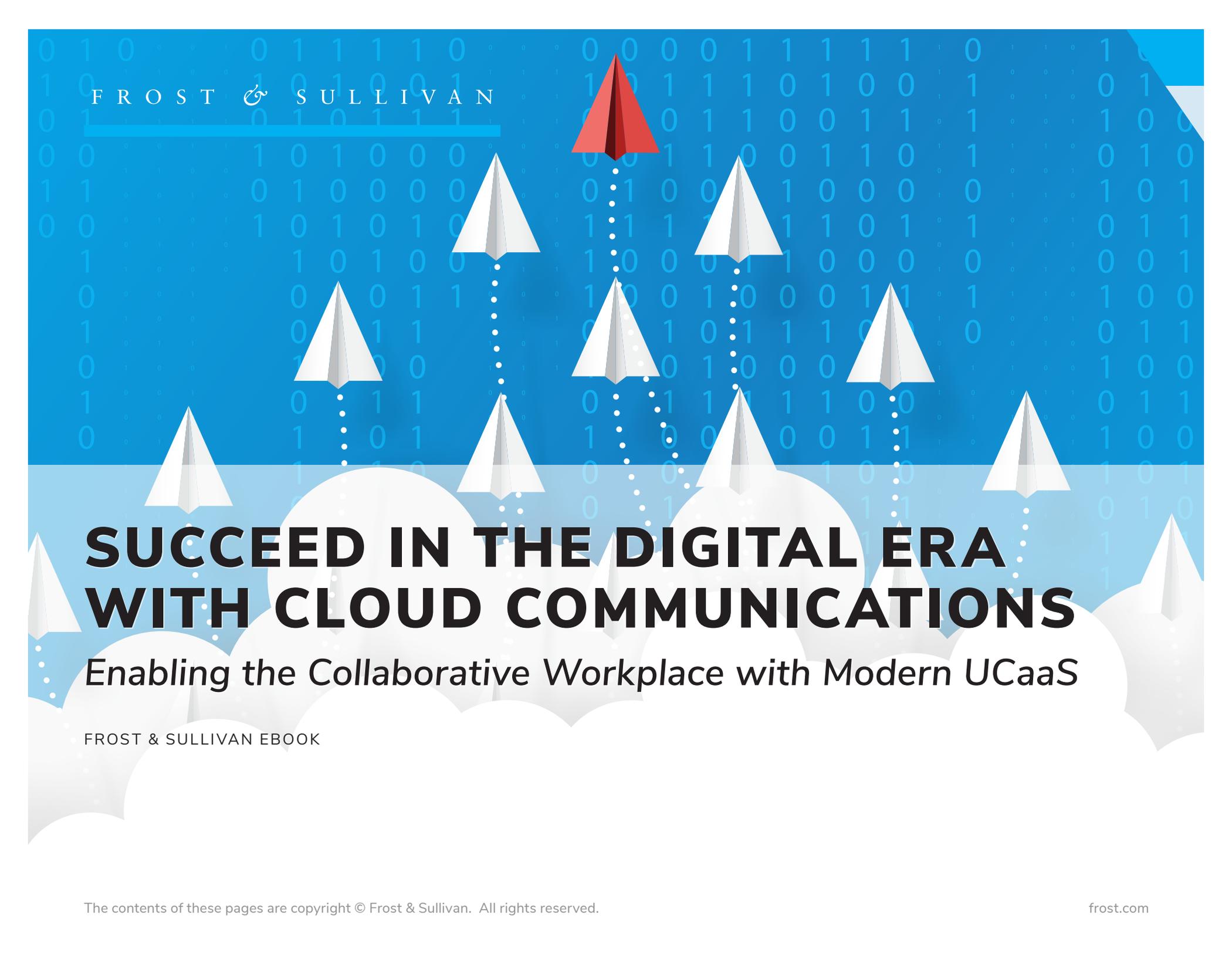


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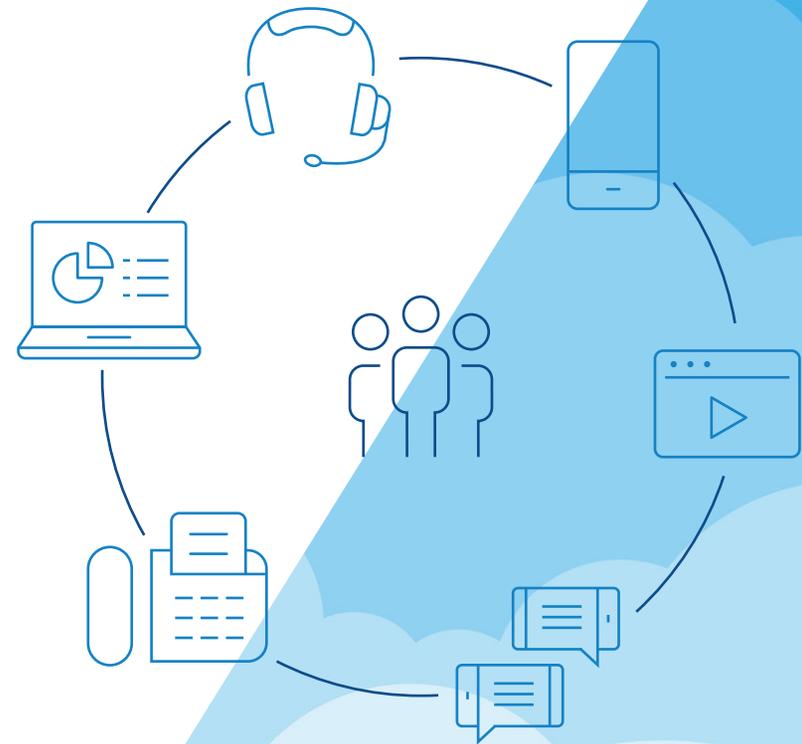
SUCCEED IN THE DIGITAL ERA WITH CLOUD COMMUNICATIONS

Enabling the Collaborative Workplace with Modern UCaaS

FROST & SULLIVAN EBOOK

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DIGITAL TECHNOLOGIES CREATE DISRUPTION AND OPPORTUNITIES IN THE GLOBAL MARKETPLACE

Globalization of the economy is intensifying competition in all industries—it is compelling businesses to find new value propositions to compete more effectively and thrive.

Rising customer expectations due to the abundant choices of product and services is pressuring businesses to continually reinvent themselves and differentiate from their competitors.

Businesses are adopting digital technologies to gain operational efficiencies, become more agile and responsive, and enhance customer value.

Companies at the forefront of digital transformation report **HIGHER REVENUE GROWTH RATES AND GREATER CUSTOMER SATISFACTION.**

Digital Transformation is Well on its Way



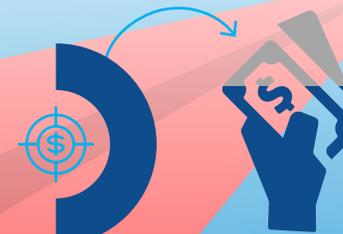
of IT/telecom decision makers report their organizations are **ahead or on track with others in their industry** in terms of digital transformation



of IT/telecom decision makers identify their organizations as **early adopters or early majority** in terms of digital transformation

Digital Technology Investments Boost Revenue Growth Rates

Almost **half** of respondents that achieved **high** (more than 30%) revenue growth



report **investing 66% more** in their **IT budgets** than their peers, on average

COMMUNICATIONS UPGRADES ARE AN ESSENTIAL PART OF DIGITAL TRANSFORMATION

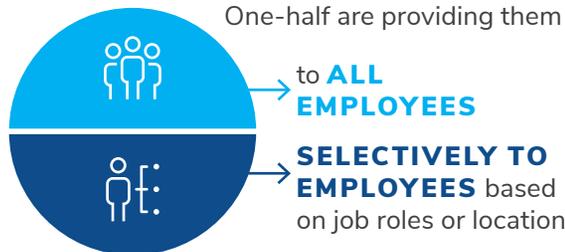
Communications and collaboration solutions are the lifeblood of an organization which can greatly impact a company's competitiveness in a highly dynamic marketplace. As part of or alongside digital transformation initiatives, forward-looking businesses are adopting advanced communications and collaboration tools to enhance productivity, boost innovation, accelerate decision making, and more effectively respond to shifting customer requirements.



GREATEST BENEFIT of implementing Internet Protocol (IP) telephony, desktop/mobile voice and UCC soft clients, desktop video and web conferencing, and team collaboration solutions

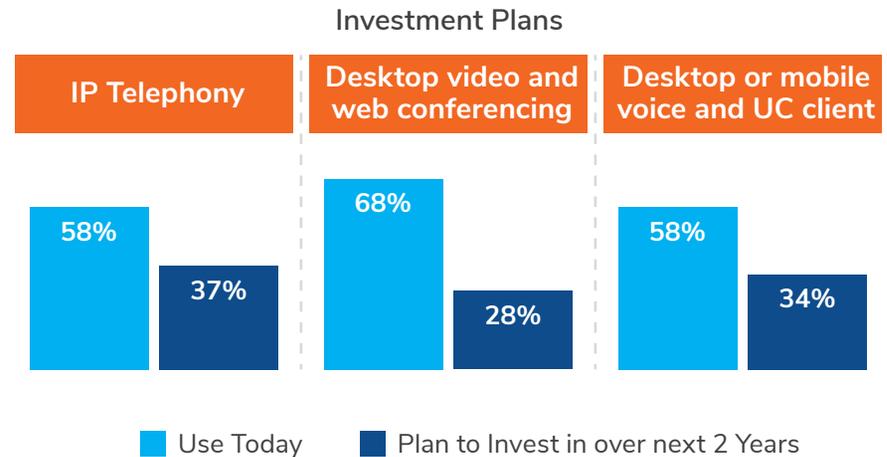
Customer-centric organizations aspire to fully leverage internal resources to enable an end-to-end customer journey and a superior customer experience. This mission-critical objective requires businesses to build collaborative workplaces wherein customer value creation is driven by the joint effort of multiple stakeholders—executives, sales, marketing, technical support, frontline workers, customer service, and even back-office staff.

Businesses currently deploying IP telephony, desktop/mobile voice and UCC soft clients, desktop video and web conferencing, and team collaboration solutions



To maximize the technology return on investment (ROI), businesses are integrating multiple tools into unified communications and collaboration (UCC) solutions, whereby a single user interface (UI) provides employees with real-time presence information and convenient access to voice, video, meetings, and chat applications.

Frost & Sullivan data prove that **ADOPTION OF ADVANCED UCC SOLUTIONS IS ON THE RISE** as businesses increasingly acknowledge the considerable benefits.



Digital transformation requires significant resources and expertise in a variety of technology areas, including communications and collaboration. This is driving demand for cloud services and more flexible deployment models.

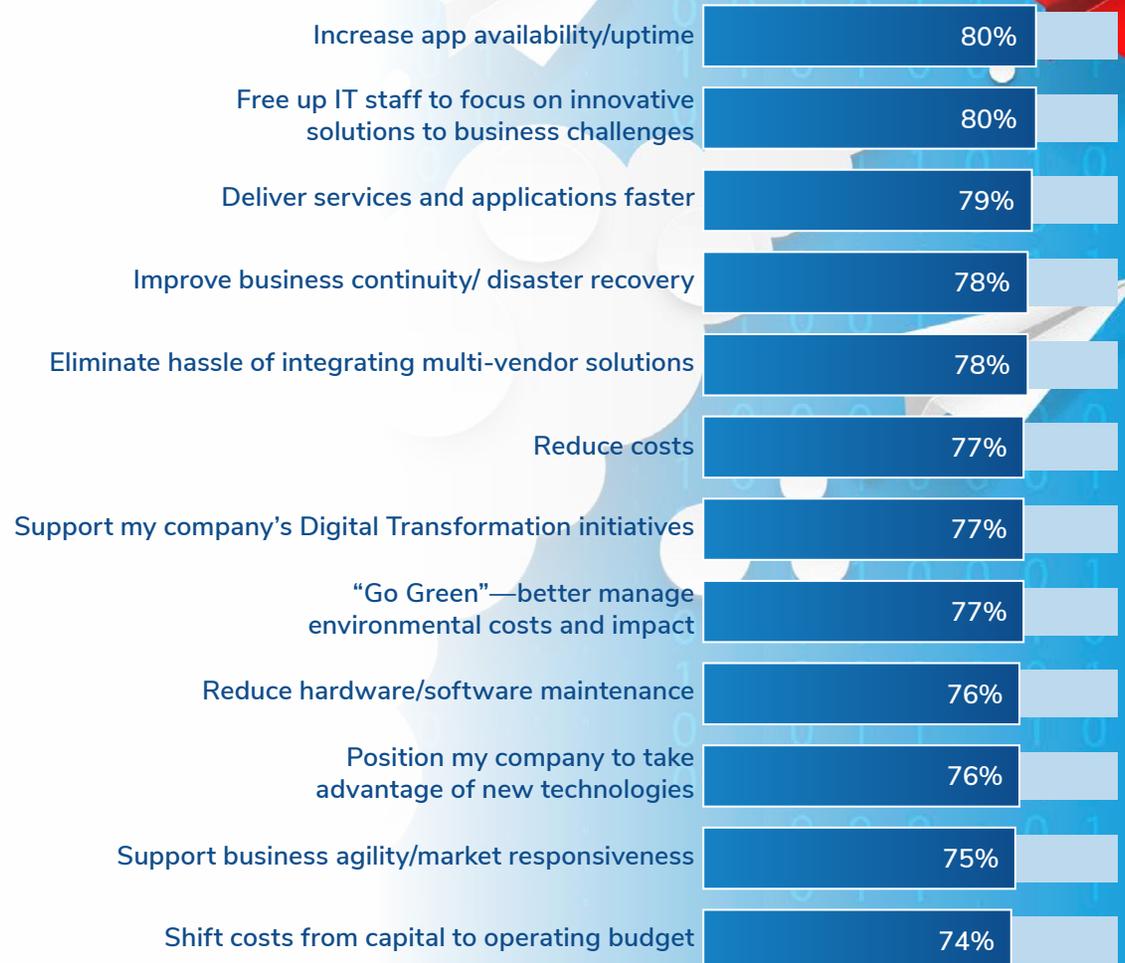
CLOUD COMMUNICATIONS EMPOWER FASTER TRANSFORMATION

For enhanced flexibility, agility and access to advanced functionality, businesses are increasingly leveraging cloud services consumption models. Cloud services provide fast, cost-effective access to new features, as well as opportunities to outsource routine operational tasks in order to focus on strategic priorities. Additional factors driving cloud services adoption include:

- Reduced upfront costs (CAPEX)
- Predictable monthly charges (OPEX)
- Rapid and flexible capacity adjustments
- Agile development with continuous delivery of enhancements
- Reduced risk of technology obsolescence
- Access to comprehensive, pre-integrated applications suites
- Greater business continuity

The combination of UCC and cloud services is proving to be **THE BEST PATH FORWARD** for many Digital Transformation initiatives.

Business Drivers for Implementing Cloud Solutions, Global, 2019



CLOUD COMMUNICATIONS ADOPTION IS ON THE RISE

Frost & Sullivan data show that businesses are moving various software workloads to the cloud. Chief among these are enterprise IP telephony and other UCC services such as audio, web and video conferencing, instant messaging (IM) and presence, and customer experience management.

Compelling benefits are steering the rapid adoption of pre-integrated UC as-a-service (UCaaS) bundles across businesses of varying size, industry, geographic region and technology requirements.

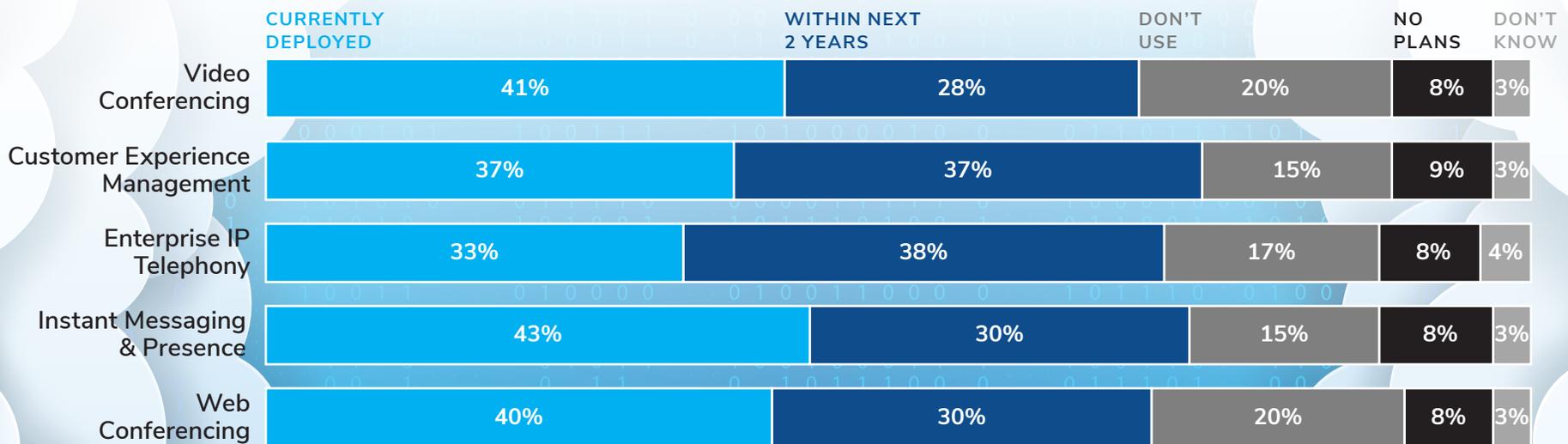
Frost & Sullivan expects the global UCaaS user base to expand at a double-digit compound annual growth rate (CAGR) until 2025

driven by proliferating service options, improving service security and reliability, continually expanding functionality, and ever-greater user experiences.

Businesses adopting UCaaS will out-manuever and out-perform competitors as they become more nimble and more promptly respond to evolving market conditions.

THE TIME TO ACT IS NOW.
Businesses must launch cloud communications adoption strategies today or get left behind.

Workloads Businesses are Deploying in the Cloud, Global, 2019



SUSTAINING COMPETITIVE ADVANTAGES WITH THE RIGHT UCaaS SOLUTION

Business communications are considered strategic, mission-critical investments that provide competitive advantages. In order to sustain competitive advantages, companies must ensure their investments are future-proof. Therefore, businesses apply great scrutiny when selecting their UCaaS solution.

To capitalize on growing customer demand, a plethora of cloud communications offerings are now available. From essential IP telephony to comprehensive UCaaS applications suites, these solutions vary in functionality, pricing, reliability, and user experience. Prospective business buyers must evaluate deeply.

Businesses adopting UCaaS as part of their business transformation projects must ensure that the new solutions strongly **FIT CURRENT PREREQUISITES AS WELL AS EVOLVE TO MEET FUTURE REQUIREMENTS.**

To future-proof their cloud communications investments and more effectively transform into highly collaborative workplaces, visionary organizations are focusing on the following criteria when adopting UCaaS:

- **Innovative, collaboration-centric UCaaS** solutions offering rich, yet intuitive user experiences (UX) to ensure broader adoption within the company and greater user benefits
- **Cloud-native** platforms enabling rapid innovation to more nimbly respond to fast-evolving worker and customer needs
- **Video-first** solutions, designed with the performance requirements of high-quality video conferencing services in mind, to address growing demand for visual and/or blended multi-modal communications, particularly among younger worker generations
- **Architectural extensibility** to enable providers, third-party developers and businesses to easily and cost-effectively custom-tailor functionality or flexibly integrate with third-party software
- **Flexible deployment options** such as the option to use the provider's or third-party SIP trunking connectivity services and calling plans to right-fit solutions to meet specific requirements

SELECTING THE RIGHT PARTNER IS A CRITICAL SUCCESS FACTOR

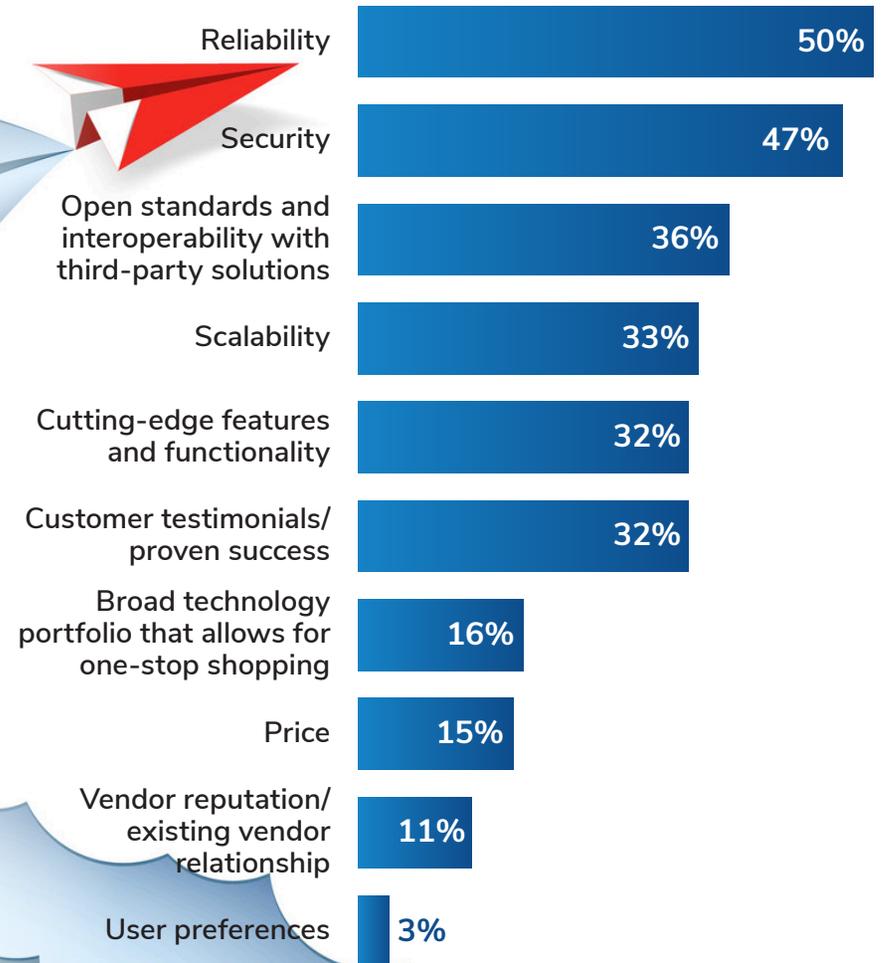
As businesses move their communications workloads to the cloud, they must carefully evaluate their options to select a UCaaS provider that will best support their journey.

Providers of various backgrounds and skill sets have launched UCaaS as they vie for customer attention. Providers vary in terms of technology vision, customer focus, innovation speed, financial stability, and overall ability to execute.

To deliver the right capabilities for the next-gen workforce and the future workplace, businesses must choose partners with the following attributes:

- Market disruptor that is always ahead of the curve leveraging blue-ocean strategies
- Strong expertise in advanced real-time communications and collaboration services
- Entrepreneurial culture that nurtures innovation
- Keen attention to customer business objectives
- Willingness to provide flexible deployment options (regarding endpoints, connectivity, calling plans, etc.)
- Laser focus on UX to maximize user benefits and organizational ROI
- Ease of use and simplicity as key parts of provider vision and technology foundation
- Proven market success as evidenced by rapid adoption and diverse customer base

Cloud Communications Provider Selection Criteria, Global, 2019



VENDOR SPOTLIGHT: ZOOM

A well-known innovator and leader in cloud video conferencing, Zoom took the market by storm with the launch of Zoom Phone—a modern, collaboration-centric UCaaS solution.

User experience

Leveraging Zoom's cloud-native platform, Zoom Phone is architected to deliver a tightly integrated voice, video, chat, and collaboration toolset. The video-first Zoom Phone experience utilizes a single pane of glass or UI for convenient user access to multiple communications and collaboration functionalities.



UCaaS suite

In addition to a highly competitive cloud PBX, Zoom Phone delivers important additional capabilities, such as video and web conferencing, chat, intelligent call routing, voicemail, voicemail transcription, call history, auto attendant, interactive voice response (IVR), and call recording.



Technology evolution

Zoom continually enhances its already robust UCaaS offering. A full-stack engineering team oversees each layer of Zoom's architecture and each supported device.



Collaboration endpoints

Native desktop and mobile apps for Windows, Mac, iOS and Android devices support seamless user interactions over WIFI and cellular networks. Businesses can also deploy Zoom Phone with standards-based Poly or Yealink desk phones to support familiar workflows while leveraging the performance and reliability of desktop devices.



Solution usage and management

Users can easily change their outbound phone number or persona to represent the type of calls (i.e., personal or business) they make from mobile devices. A centralized management portal empowers IT/telecom admins to monitor service performance and easily manage users and features as needs change. Service performance data—including both historical and real-time statistics—are presented on the Zoom Phone call diagnostic dashboard to enable intuitive service management.



Service performance

With built-in redundancy and resiliency, Zoom's cloud platform ensures excellent service performance, including high-quality HD voice and high service availability, security and scalability.

13 REASONS BUSINESSES ARE CHOOSING ZOOM PHONE

Businesses adopting UCaaS for the first time or looking to upgrade their cloud communications solutions must consider Zoom Phone as an option. Zoom Phone value points include:

Proprietary, extensible, cloud-native platform

Enables Zoom to innovate rapidly, scale cost-effectively and flexibly integrate with third-party software.

Proven architecture

Global footprint, geographic redundancy and active failover capabilities ensure high service availability and business continuity.

Rich, collaboration-centric UCaaS

A video-first UI provides access to a comprehensive feature set, including voice, video, messaging, and collaboration tools to enable effective collaboration. Partner-provided contact center capabilities are available via direct network peering or automatic call routing.

Excellent UX

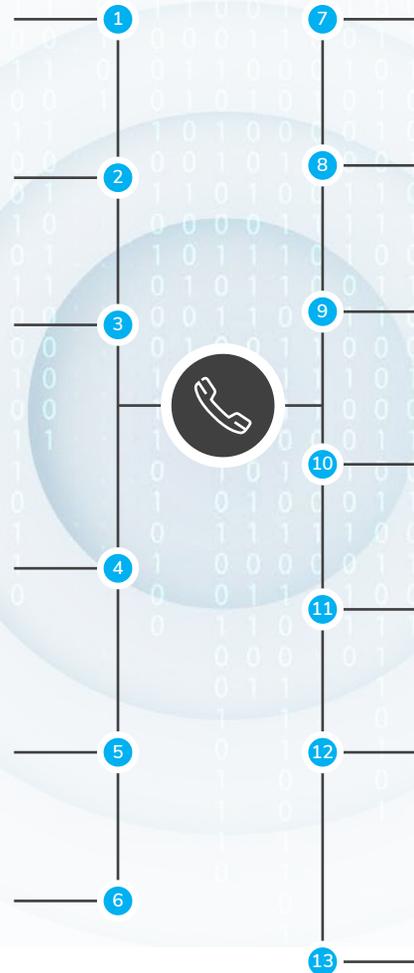
With simplicity and ease of use as its core values, Zoom Phone extends an intuitive, pleasant user experience that requires minimal training for new users.

Robust service performance

Architected for video-first communications, Zoom Phone delivers business-grade HD audio and video quality and security.

Flexible deployment models

Options to use Zoom end-to-end or third-party SIP trunking and calling plans, as well as port existing numbers or receive new ones from Zoom, allow businesses to use Zoom Phone in more geographic areas and leverage existing providers.



Rapid innovation

Agile technology development and entrepreneurial organizational culture drive frequent technology iteration and rapid feature releases.

Communications endpoints choices

Businesses can choose among desktop phones, computer and mobile soft clients for different communications and collaboration purposes.

Competitive pricing

Zoom Phone is available in competitively priced solution bundles that add to the ease of comparison, purchasing and deployment.

Manageability

Zoom Phone dashboards visually display service performance metrics which enable IT staff to quickly identify and remedy potential issues.

Trusted brand

As the leader in cloud video conferencing and well-known for its “happy user experience”, Zoom is trusted to continually deliver excellent customer value.

Ecosystem

Established partnerships, standards-based interoperability, flexible APIs and mobile/desktop software development kits (SDKs) enable customers and third-party developers to custom-tailor the user experience and integrate with mission-critical business workflows for greater user benefits.

Broad portfolio

With Zoom Rooms, conference room connector, digital signage, and scheduling display solutions, Zoom offers businesses a one-stop shop for a broad solutions set.

CALL TO ACTION FOR SUCCESSFUL UCaaS DEPLOYMENT



ADOPT FLEXIBLE CLOUD

communications and collaboration solutions to transform into a more agile digital organization with sustainable competitive advantages.



CAREFULLY EVALUATE UCaaS solutions and providers to identify the right fit for your business needs and objectives.



FUTURE-PROOF YOUR COMMUNICATIONS

investments and empower your workforce to deliver greater customer value by selecting a collaboration-centric UCaaS solution that provides a rich, yet intuitive user experience.



CONSIDER ZOOM PHONE as an option for its contemporary, video-first user experience, flexible architecture, broad portfolio, robust performance, and rapid evolution.





Frost & Sullivan, the Growth Partnership Company, works in collaboration with clients to leverage visionary innovation that addresses the global challenges and related growth opportunities that will make or break today's market participants. For more than 50 years, we have been developing growth strategies for the Global 1000, emerging businesses, the public sector and the investment community. Is your organization prepared for the next profound wave of industry convergence, disruptive technologies, increasing competitive intensity, Mega Trends, breakthrough best practices, changing customer dynamics and emerging economies?

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