

F R O S T & S U L L I V A N

# BEST PRACTICES

AWARDS

F R O S T & S U L L I V A N

2020 BEST PRACTICES AWARD

**AVAYA**

**SOUTHEAST ASIA CONTACT CENTER APPLICATIONS MARKET LEADERSHIP AWARD**

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## Letter of Congratulations

I am proud to present you with this year's award for Market Leadership in the contact center application industry.

Frost & Sullivan's global teams of analysts and consultants research a wide range of markets across multiple industries and regions. A core aspect of the research is to determine the leaders in each market, or, to be precise, the market share leaders. This is a rigorous exercise that involves analyzing revenue and shipments for each company, and cross-verifying this analysis through primary and secondary research, ultimately resulting in a clear determination of the market leader. As such, Frost & Sullivan is pleased to recognize Avaya as the Market Leader in the contact center application industry.

Achieving market leadership is never an easy task, and is made even more difficult considering today's competitive intensity, customer volatility, and economic uncertainty, not to mention the difficulty of innovating in an environment of escalating challenges to intellectual property. In this context, your receipt of this award signifies an even greater accomplishment.

Frost & Sullivan recognizes that this accomplishment is the result of many employees, customers, and investors making daily choices to support your organization and contribute in a meaningful way to its future.

I enthusiastically acknowledge and celebrate these achievements, and wish you great success in the future. Frost & Sullivan is here to support you on any future endeavor.

Sincerely yours,



David Frigstad  
*Chairman*  
Frost & Sullivan

## Background and Company Performance

### *Industry Challenges*

Customer engagement and management are crucial for brands as exceptional customer experience is an essential factor in differentiating themselves from competitors. Contact centers are becoming the first point of connection with customers. With changing customer preferences, the contact center industry is registering changes in the last few years. As a result, contact centers are incorporating digital transformation within their customer experience space. They offer a seamless omnichannel experience that leverages artificial intelligence (AI), machine learning (ML), self-service automation, chatbots, robotic process automation (RPA), and real-time analytics solutions.

Contact centers are using a suite of comprehensive customer experience solutions that allow them to increase the first-call resolution and improve customer satisfaction, customer loyalty, and operational efficiency. Amid the rapid introduction and implementation of new digital channels like virtual assistants, chatbots, messaging applications, and speech-enabled connected home devices, human interaction remains a crucial element in delivering outstanding customer experience. Organizations are looking to leverage an ideal set of tools and agents to find the right balance in their human and digital strength.

System vendors are revising their strategy to meet different business needs for contact centers with varying levels of maturity. Business leaders seek to enhance business efficiency and reduce costs by combining the right technology and best practices, thus moving from traditional customer contact to fully-featured, modern omnichannel service delivery.

### *Market Leadership of Avaya*

Avaya is one of the top contact center solution vendors in Southeast Asia, delivering innovative, intelligent, and secure customer experiences. Headquartered in California, United States, the company provides contact center applications, unified communications and digital transformation products, and services to global businesses.

### **Growth Strategy Excellence**

Avaya has maintained a significant market share in the Asia-Pacific contact center application market with its feature-rich product portfolio. Focusing on building long-term partnerships with organizations through its comprehensive contact center solutions enables the company to gain a deeper understanding of its customers' needs and provide experiences that matter. Frost & Sullivan believes that Avaya stands out from competitors for its comprehensive Avaya Intelligent Xperiences (IX) Contact Center portfolio. The company designed the portfolio to improve customer experiences through omnichannel engagement, desktop augmentation for the contact center agents, and advanced workforce engagement for contact center managers. Avaya continues to transform its contact center solutions by infusing AI and automation capabilities to provide seamless and context-driven customer experiences.

Avaya found success with major BFSI, consumer electronics, e-commerce, outsourcing, utilities, and government clients in the region. The company registered strong growth in Southeast Asia in 2019, with some of its core products, including Oceana. This growth resulted from notable customer wins, especially in Malaysia, Philippines, and Vietnam. In 2019, Oceana recorded a spike in uptake due to some major update releases, which enhanced digital capabilities. The company was able to sell some of the products to the prospects by revealing new pilot programs so that they can enjoy new features once Avaya launches the updates.

### **Technology Leverage**

Avaya's vision relies on offering a robust portfolio of intelligent contact center solutions that encompass the experience customers have while interacting with organizations and that of employees while assisting customers in the workplace. The solution provider's smart customer experience approach uses the best of human and technology expertise, facilitating real people to provide personalized services augmented by advanced technologies like AI, ML, and automation. This drives effective collaboration, information sharing, and decision-making.

The following are Avaya's key contact center solutions and new enhanced features.

Avaya OneCloud Intelligent Xperiences (IX) Contact Center is a solution designed for the customer experience needs of large, medium, and small enterprises, as well as business process outsourcing companies. It offers a comprehensive, integrated, and open contact center-as-a-service (CCaaS) architecture with scalability, security, and in-depth analytics, delivering a simplified and flexible delivery model.

Avaya Oceana Solution enables organizations to deliver omnichannel customer engagement with complete integration and management of voice and digital channels. This enhances customer service by linking the customer to the right agent based on history, agent training, and required service levels.

Avaya Agent Scripting solution guides agents in navigating both inbound and outbound using an intelligent scripting capability. Agents are empowered to handle interactions, from collecting customer information to determining the next step during communication and decision-making.

Avaya Teamspace widget provides an open, rich media chat messaging capability that enables real-time communication and collaboration between service agents, customers, and back-office functions.

### **Product Differentiation**

Frost & Sullivan believes Avaya focuses on a strategy to invest in people, technology, and staying committed to its customers. The company continues to enhance its inbound solutions' capability through extensive investments in AI. It developed three key AI contact center applications, agent assistance and productivity, conversational self-service, and smart routing and behavioral pairing. One of Avaya's recent developments is the AI-based virtual agent Ava, which provides immediate answers online.

Its inbound speech recognition applications help contact centers automate repetitive tasks and offer personalized services to customers. The solutions monitor, record, and analyze calls to ensure the interactions are managed correctly. The dashboards turn conversations to real-time insights, enabling supervisors and agents to make correct decisions.

Avaya launched several new products and solutions in 2018 to use advanced technologies, including analytics, AI, and speech technologies, in its applications. These functionalities resulted in more sales and provided recognition to Avaya over the next two years.

For example, Avaya acquired CCaaS and customer experience management applications player Spoken Communications and partnered with Afinity, a contact center AI development vendor, in 2018. The company has integrated Google's Dialogflow for quick and easy deployment of intelligent chatbots and virtual assistants. The company also partnered with Cogito to utilize emotional intelligence in its solutions. Avaya is focusing on building automation into natively integrated software instead of customizing them case-by-case. The company is targeting markets in Southeast Asia with these automation platforms.

In 2018, the company launched Avaya Ava™, a cloud-based messaging solution built on AI architecture, including NLP, machine learning, and analytics. It integrates easily into social media, chats, and messaging channels to deliver immediate self-service support and redirects to the agent in case of complex situations. These new offerings generated interest in adoption among existing customers in the region and drove conversations with new prospects.

### **Customer Purchase Experience**

With decades of development and testing, Avaya has fine-tuned its contact center applications suite, which exceeds customers' expectations. The company continues to focus on enhancing its Edge Channel Partner Program, designed to fuel its growth globally. By integrating partner feedback, the company created this program to offer equal growth opportunities for partners of all sizes and help introduce both them and itself to additional business opportunities.

Avaya and its channel partners offer hybrid and private cloud, managed services, and on-premise deployment options to customers. The company relies on channel partners to deploy cloud-based solutions. Through training, conferences, and workshops, the company is preparing its partners for this role. Avaya's wide range of cloud-based services with offerings for the SMB, mid-market, and enterprise customers continue to expand, expected to provide significant growth opportunities for all channel partners.

### **Brand Strength**

Avaya has a history of innovation in the contact center and unified communications space with a large customer base worldwide. This has made the company one of the well-established brands in the industry. The company supports global brands in their digital transformation process and addresses changing market trends. By partnering with Avaya, businesses can add new interaction channels, focus on the emerging needs of changing

customers' and agents' landscape, and optimize contact center performance and efficiency.

Avaya continues to deliver simplified solutions to support its customers' evolving contact center requirements. The products are customizable and can be deployed on-premise, cloud-based, and hybrid contact center solutions. This has attracted contact centers in the region to adopt Avaya as their core vendor. Additionally, Avaya has maintained a robust long-term partnership model with its mid and large-sized clients in the area. The company is well respected as a principal vendor among its reliable channel partner and system integrator network. The company's substantial brand value and investments in R&D have attracted some of the prominent wins in Southeast Asia, including two large telecommunications operators and a few commercial banks.

### **Customer Ownership experience**

Avaya's customers in the region have seen new products, feature introduction that focuses on ease-of-use, business outcomes, and improvements in employee and customer experience over the years as part of its natural development process.

The company offers innovative service delivery approaches for clients in the region. One delivery model is through provisioning end-to-end contact center solutions, including direct support from Avaya to manage and maintain the customer's system. This includes upgrades, whether delivering minor patches or complete hardware and operating systems. Avaya also introduced its subscription license model by offering communication systems on package pricing. The model allows businesses the freedom to lower business risk, control upgrade cycles, better manage budgeting and purchasing processes, and increase flexibility when adding new services and users.

Avaya focuses on helping the client understand the optimum value they can derive from implementing the right contact center solutions. It achieves this by organizing a two-to-three day workshop based on interactions and interviews with multiple people in the client's organization, from business heads to contact center managers and even C-level leadership teams to understand the ins and outs of their current operations.

It also employs consultants to work with some clients to help them move up their scale of operations. The expert consultants design, seamlessly implement and integrate, and optimize processes as well as train clients on the contact center applications deployed. These hands-on interactive workshops have been successful in Southeast Asian markets, enabling Avaya to gain mindshare among potential clients.

### *Conclusion*

Avaya maintains a leadership position in the contact center industry through its extensive product portfolio in Southeast Asia. The company's strategic focus on building long-term partnerships, product innovation, and strong brand recognition has secured a top position in the market.

With its strong overall performance, Avaya has earned Frost & Sullivan's 2020 Market Leadership Award in the contact center application industry in Southeast Asia.

## Significance of Market Leadership

Ultimately, growth in any organization depends on customers purchasing from a company, and then making the decision to return time and again. Loyal customers become brand advocates, brand advocates recruit new customers, and the company grows, and then attains market leadership. To achieve and maintain market leadership, an organization must strive to be best in class in 3 key areas: understanding demand, nurturing the brand, and differentiating from the competition.



## Understanding Market Leadership

Driving demand, strengthening the brand, and differentiating from the competition all play critical roles in a company's path to market leadership. This three-fold focus, however, is only the beginning of the journey and must be complemented by an equally rigorous focus on the customer experience. Organizations that demonstrate best practices, therefore, commit to the customer at each stage of the buying cycle and continue to nurture the relationship once the customer has made a purchase. In this way, they build a loyal, ever-growing customer base and methodically add to their market share.



## Key Performance Criteria

For the Market Leadership Award, Frost & Sullivan Analysts focused on specific criteria to determine the areas of performance excellence that led to the company's leadership position. The criteria include (although are not limited to) the following:

Criterion	Requirement
Growth Strategy Excellence	There is a demonstrated ability to consistently identify, prioritize, and pursue emerging growth opportunities.
Implementation Excellence	Processes support the efficient and consistent implementation of tactics designed to support the strategy.
Brand Strength	The brand is respected, recognized, and remembered.
Product Quality	The product or service receives high marks for performance, functionality, and reliability at every stage of the life cycle.
Product Differentiation	The product or service has carved out a market niche, whether based on price, quality, or uniqueness of offering (or some combination of the three) that another company cannot easily duplicate.
Technology Leverage	There is a commitment to incorporating leading-edge technologies into product offerings for greater product performance and value.
Price/Performance Value	Products or services offer the best value for the price, compared to similar offerings in the market.
Customer Purchase Experience	Customers feel they are buying the optimal solution that addresses both their unique needs and their unique constraints.
Customer Ownership Experience	Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service.
Customer Service Experience	Customer service is accessible, fast, stress-free, and of high quality.

## 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 best practices criteria. The reputation and integrity of the awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 <b>Monitor, target, and screen</b>	Identify award recipient candidates from around the world	<ul style="list-style-type: none"> <li>• Conduct in-depth industry research</li> <li>• Identify emerging industries</li> <li>• Scan multiple regions</li> </ul>	Pipeline of candidates that potentially meet all best practices criteria
2 <b>Perform 360-degree research</b>	Perform comprehensive, 360-degree research on all candidates in the pipeline	<ul style="list-style-type: none"> <li>• Interview thought leaders and industry practitioners</li> <li>• Assess candidates' fit with best practices criteria</li> <li>• Rank all candidates</li> </ul>	Matrix positioning of all candidates' performance relative to one another
3 <b>Invite thought leadership in best practices</b>	Perform in-depth examination of all candidates	<ul style="list-style-type: none"> <li>• Confirm best practices criteria</li> <li>• Examine eligibility of all candidates</li> <li>• Identify any information gaps</li> </ul>	Detailed profiles of all ranked candidates
4 <b>Initiate research director review</b>	Conduct an unbiased evaluation of all candidate profiles	<ul style="list-style-type: none"> <li>• Brainstorm ranking options</li> <li>• Invite multiple perspectives on candidates' performance</li> <li>• Update candidate profiles</li> </ul>	Final prioritization of all eligible candidates and companion best practices positioning paper
5 <b>Assemble panel of industry experts</b>	Present findings to an expert panel of industry thought leaders	<ul style="list-style-type: none"> <li>• Share findings</li> <li>• Strengthen cases for candidate eligibility</li> <li>• Prioritize candidates</li> </ul>	Refined list of prioritized award candidates
6 <b>Conduct global industry review</b>	Build consensus on award candidates' eligibility	<ul style="list-style-type: none"> <li>• Hold global team meeting to review all candidates</li> <li>• Pressure-test fit with criteria</li> <li>• Confirm inclusion of all eligible candidates</li> </ul>	Final list of eligible award candidates, representing success stories worldwide
7 <b>Perform quality check</b>	Develop official award consideration materials	<ul style="list-style-type: none"> <li>• Perform final performance benchmarking activities</li> <li>• Write nominations</li> <li>• Perform quality review</li> </ul>	High-quality, accurate, and creative presentation of nominees' successes
8 <b>Reconnect with panel of industry experts</b>	Finalize the selection of the best practices award recipient	<ul style="list-style-type: none"> <li>• Review analysis with panel</li> <li>• Build consensus</li> <li>• Select recipient</li> </ul>	Decision on which company performs best against all best practices criteria
9 <b>Communicate recognition</b>	Inform award recipient of award recognition	<ul style="list-style-type: none"> <li>• Announce award to the CEO</li> <li>• Inspire the organization for continued success</li> <li>• Celebrate the recipient's performance</li> </ul>	Announcement of award and plan for how recipient can use the award to enhance the brand
10 <b>Take strategic action</b>	Upon licensing, company is able to share award news with stakeholders and customers	<ul style="list-style-type: none"> <li>• Coordinate media outreach</li> <li>• Design a marketing plan</li> <li>• Assess award's role in strategic planning</li> </ul>	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 the 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, resulting in 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



## About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, helps clients 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 practices models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on 6 continents. To join Frost & Sullivan's Growth Partnership, visit <http://www.frost.com>.

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