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FROST & SULLIVAN BEST PRACTICES AWARD

CLOUD CONTACT CENTER - NORTH AMERICA

Product Line Strategy Leadership 2019

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2019 BEST PRACTICES AWARD

talkdesk

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Industry Challenges

Following the lead of software-as-a-service (SaaS) vendors in the customer relationship management (CRM) space, cloud contact center solution providers began to emerge more than a decade ago as an answer to some of the knotty challenges faced within the on-premise contact center market. The contact center market had rapidly evolved, moving from silo-based applications on servers, such as outbound dialing systems and interactive voice response (IVR) systems, to more cohesive yet expanding product sets. Additional customer interaction channels were added, along with analytics capabilities to better manage both the contact center and customer experience (CX).

As the contact center market grew increasingly complex, the cloud provided answers for numerous issues plaguing the contact center systems. Amongst these were:

- The need to rapidly scale to handle peaks and valleys in call volumes, and allow companies to grow agent resources

- The ability to more quickly add new capabilities and channels as they emerge yet stay within budgetary constraints

- The need to easily and quickly make changes to applications or add functionality as enhancements or upgrades became available, rather than having to wait for periodic software releases

- The demand for new pricing models, along with the ability to use operational expenditure (OPEX) rather than capital expenditure (CAPEX) funds

The development of cloud contact centers did not occur without its hiccups. Early cloud contact center providers encountered numerous challenges themselves; issues concerning reliability, scalability, and security had to be overcome. These same providers had to prove their worth by launching solutions that were not always initially on par with the feature-rich offerings that had been developed over decades in the contact center systems space.

Over the past decade, as the cloud market rapidly gained momentum, new market entrants have emerged across the spectrum, from startups offering full solution suites to those offering specialized adjunct applications. For instance, there are a plethora of companies in areas such as virtual assistants and bots, artificial intelligence (AI), and analytics solutions. Additionally, contact center system providers have answered the cloud call as well with cloud solutions of their own.

As such, the cloud market has continued to swell in ranks. In 2017, the overall cloud market grew 12.7% to $2.47 billion and is forecast to have an 11.4% compound annual growth rate (CAGR) from 2017 to 2022. Hosted/cloud automatic call distributor (ACD) and

analytics, in particular, are the fastest moving segments in the forecast with expected CAGRs of 16.8% and 18.9%, respectively.

To be a leader in the cloud contact center market is a complex undertaking. Leaders must have solid solution sets, yet allow the ease and flexibility of adding on functionality either from third-party suppliers or as their own enhancements become available. They have to offer a platform that scales, is flexible and simple to use, and available through flexible pricing models to suit changing business needs.

Product Line Strength and Customer Impact of Talkdesk

Headquartered in San Francisco, CA, Talkdesk is one of the fastest-moving cloud providers in the contact center market, growing from zero to 1400 customers in 4.5 years. This strong performance is exemplified in the following key areas.

Fully-Featured Out-of-the-Box Deployment

Talkdesk Enterprise Cloud Contact Center is an omnichannel contact center solution built on microservices architecture. It is designed with the scalability, reliability, and security required to support large, dynamic global organizations. The platform runs on US-based Amazon Web Services (AWS) data centers, with a main site that is supported by a disaster recovery site in a separate geographic region. Agents are connected to the closest media server in their global region to reduce latency as well as increase reliability of the service. This feature-rich contact center solution is delivered out of the box, supported by in-depth analytics and reporting solutions.

The company designed its platform and future roadmap to reflect the core belief that each customer interaction should be fueled with information and context up front, taking as much of the burden as possible off of the customer for identifying and explaining themselves. As such, Talkdesk designed the supervisor and agent user interface to be user-friendly, complete, and enriched with the ability to integrate with any third-party application provider and pull data from anywhere, arming the user with the content and context needed to better serve customers. This includes real-time context (data collection from mobile, web, social, and even Internet of Things (IoT) sources) and deep integrations with CRM and service platforms.

Keeping with the strategy of anticipating that additional digital channels will come on line, and new technologies, such as AI, machine learning (ML), and others, will continue to infuse customer contact, the Talkdesk Enterprise Cloud Contact Center is designed to be quickly modified as new channels and technologies become available. Having a cloud-native architecture also allows Talkdesk to provide the flexibility that customers need with integration far simpler than what is possible from legacy contact center solutions.

The recently announced $10 million Talkdesk Innovation Fund is intended to further stimulate industry innovation. It Provides forward-thinking companies, many of them early startups, the resources they need from Talkdesk to bring more solutions to the market

faster. Access to new industry innovations with a shorter development timeline, is a key competitive advantage for Talkdesk customers to win in the CX economy. Additionally, Talkdesk announced TDX, a new innovation lab in Coimbra, Portugal. TDX will be focused on artificial intelligence and other advanced technologies as it applies to the contact center.

Flexible and Scalable

Talkdesk offers a solution that scales in both seats and capabilities, and does so in a manner that is blazingly fast compared to most products in the market. The platform is built using true, cloud-native microservices architecture, and each microservice can be scaled independently using pools, clusters, and grids. The deployment characteristics make microservices a great match for the elasticity of the cloud. Essentially, software built as microservices, like Talkdesk, can be broken down into multiple component services so that each one can be deployed and then redeployed independently without compromising the integrity of an application. For example, each microservice can be implemented in a different programming language on a different platform.

This flexibility provides customers with high reliability, so if one microservice fails, the others will continue to work and enable zero-downtime maintenance because Talkdesk can focus maintenance on a single service rather than on the whole monolith.

Talkdesk believes that while agent scalability is important, the platform should also be able to easily scale geographically. As such, the company continues to expand its global footprint as well. By the end of 2017, it had 52,000 users, with a presence in 60 countries served by nine global data centers. The company has shown particular acceleration in EMEA, with three times year-over-year growth.

In addition, using Talkdesk's communication-platform-as-a-service (CPaaS) offering, customers are able to scale carrier communications globally, without having to directly connect to hundreds of carriers worldwide. Talkdesk has a supernetwork of telecom providers around the globe and the largest selection of phone numbers available for instant provisioning in over 100 countries and 50,000 specific localities. This breadth gives Talkdesk customers the ability to run one logical contact center regardless of where its agents are located around world.

This strategy has gained the company attention and healthy adoption by companies across the spectrum, from small and medium-sized businesses (SMBs) to large established enterprises. In one instance, Talkdesk displaced a long-term competitor at a large software company that had been experiencing reliability issues. Talkdesk very quickly set up a pilot and was able to test global call quality in less than 24 hours. Talkdesk won the deal by proving its ability to get the center up and running extremely quickly, guarantying global call quality in any country and giving the company security and comfort in being able to rely on Talkdesk for supporting a global team.

Technology Leverage

Talkdesk employs a modern software design philosophy and user interface. Its "clicks, not code" approach is reflected in both agent and supervisor user interfaces. For instance, it provides an extremely fast and easy setup, as well as ongoing manageability. A basic implementation can be done in days, and new users added in seconds, which few competitors can match. Correspondingly, enterprise customers can be set up in weeks, not months. Supervisors also can make a wide variety of changes to the solution without the involvement of IT, such as modifications to IVR or the creation of complex routing flows using Talkdesk Studio, the company's visual routing flow designer. The platform includes desktop call control, intelligent routing, outbound dialing, automated workflows, workforce management (WFM), quality management (QM), and analytics; some natively built and others through partnerships.

Highlights of platform capabilities include Talkdesk IQ, Callbar, Mobile, Omnichannel, Analytics, Studio, and Self-Service.

Talkdesk **IQ** is a layer of artificial intelligence built into the Talkdesk platform that simplifies the complexities of data, machine learning, and gives everyone the power of AI, even if they don't have their own data scientist.

IQ learns from all the billions of interactions data already available in Talkdesk across all the channels and makes AI-based discoveries, predictions, recommendations, and insights. These insights are then seamlessly surfaced in Talkdesk products to help employees and businesses make smarter decisions, engage smarter with customers and ensure smarter operations.

Talkdesk **Callbar** is a freestanding app that allows agents to make and receive phone calls anywhere on the desktop, without requiring them to search through tabs. It provides single-sign-on capabilities and an intuitive user interface for agents using Callbar CTI, deep integration with Salesforce, Zendesk, and others. The app allows for screen pops and continues to log calls and notes directly into a company's CRM or helpdesk solution, even when agents are working elsewhere.

Talkdesk **Mobile** is a new mobile version of Callbar that allows field sales and service representatives to engage with customers anytime, anywhere, using any iOS- or Android-compatible device. It supports inbound and outbound call handling, and all browser-based functionality, including click-to-call, agent state management and disposition. Talkdesk iQ provides automatic customer mood detection so agents are empowered to appropriately and empathetically handle interactions.

Talkdesk **Omnichannel** provides integrated customer support through SMS, live chat, email, and dozens of social media and messaging apps, including Facebook Messenger, Twitter, WhatsApp and more. Agents have quick access to customer profile information, ensuring a responsive, personalized experience. Omnichannel also delivers broad social

listening capabilities and an intuitive Chatbot builder that enables non-technical users to instantly build chatbots, powered by Talkdesk iQ.

Talkdesk **Analytics** is a complete reporting and analytics suite designed to optimize every aspect of contact center operations. It consists of:

- Talkdesk **Live** - an API-based, customizable dashboard that lets supervisors display what matters most. Talkdesk iQ clusters and reveals trending topics, while configurable threshold settings provide instant alerts of potential problems.

- Talkdesk **Explore** - a historical reporting and business analytics tool that provides quick access to large volumes of data. Features flexible filtering, scheduling, and customization options, as well as agent coaching recommendations, powered by Talkdesk iQ.

- Talkdesk **Benchmark -** a benchmarking tool that allows customers to compare performance to industry peers by industry, region, employee or agent size, and identify areas of improvement to positively impact agent performance and customer satisfaction.

Talkdesk **Studio** is an intuitive and powerful routing flow designer that allows companies to visually design customer journeys without code or expensive IT resources. Studio improves contact center average hold and handle times by using Talkdesk IQ and context to route the right interaction to the right agent. Talkdesk iQ can even recommend optimal flows to streamline routing, reducing cost and improving CX.

Talkdesk **Self-Service** is a set of Android and iOS SDKs that enable customers to build a powerful Visual IVR solution with clicks, not code. Self-Service SDKs preserve context captured through mobile interactions for seamless agent transitions, can offer callback requests, and provide direct access to knowledge base articles and information. Talkdesk iQ displays estimated wait time and presents best-fit channel recommendations to streamline self-service.

In addition, the platform is completely open, enabling customers to very easily acquire new capabilities. To support this design philosophy, Talkdesk developed the first enterprise-grade AppConnect Innovation Ecosystem; currently populated with over 50 applications in core contact center areas including WFM, workforce optimization, outbound dialer, voice analytics, collaboration, and others. In addition to AppConnect partners, Talkdesk has partnerships/integrations with over 30 other business tool, CRM, and software providers, including Salesforce, ServiceNow, Microsoft Dynamics, Zendesk and Slack.

A particularly strong example of how the company leverages other technology is its integration with Salesforce. Salesforce is both a partner and financial backer of Talkdesk, which is third-party validation of the company's mission. Talkdesk Enterprise Cloud Contact Center is deeply integrated with Salesforce. This includes deep level, channels,

context, data, reports and dashboards, and status of calls and recording; it also provides bi-directional data sync so both platforms are up to date in real-time. The company's Talkdesk Live real-time reporting solution is integrated with Salesforce and enables administrators to manage their teams from anywhere as well as create custom dashboards, thresholds, and alerts tailored to business needs.

In addition, the company provides offerings geared specifically to sales and service.

Talkdesk for **Sales** is for inside sales teams to drive more productive prospect conversations. The Talkdesk for Sales product suite includes power dialing, voicemail drop, local presence, Salesforce Sales Cloud integration, and a new Mobile option.

Talkdesk for Service enables service teams to elevate the experience they provide to customers through intelligent routing, contextual customer information, actionable reporting, and CSAT measurements (including sentiment). Built on the Talkdesk Enterprise Cloud Contact Center, it offers an intuitive user interface, along with the "floating" Callbar app and one-click integrations through AppConnect.

Superior Price-Performance

Talkdesk provides superior price-performance value due to a number of factors. First and foremost, because the Talkdesk Enterprise Cloud Contact Center is built on a multi-tenant CPaaS foundation and modern microservices architecture, customers benefit from the modular construction of their contact centers. A second major value is that the Talkdesk interaction orchestration engine Studio provides routing, skills matching, a presence engine, context process, and an intuitive flow designer. Since Studio was designed with ease-of-use in mind, it enables customers to quickly create the service environment they need without heavy customization, professional services, or IT, thus curtailing excess costs. Another major benefit of Talkdesk's platform approach is its AppConnect Innovation Ecosystem, which enables customers to deploy best-in-class solutions and quickly trial applications to see if they suit their business needs, without a deep upfront investment.

All integrations are powered by a suite of REST APIs, Webhook-enabled eventing, and mobile SDKs that are available and documented through Talkdesk's developer portal. APIs are pre-built so they do not require professional service fees. Currently, the company supports four types of APIs:

- AppConnect Partner APIs – A series of event and action APIs that allow AppConnect partners to manage their applications in AppConnect and be notified of customer actions during installation and deployment

- Reporting APIs – A set of APIs that allows a customer to schedule, run, and retrieve results from reports that include calls and user state information for their account

- Client APIs – APIs that can be called from public-facing applications and web pages to initiate and support interactions on the Talkdesk platform, such as callback

- Agent APIs – APIs that can be used to manage the interactions and state of an agent in the Talkdesk platform, such as presence management

As previously mentioned, Talkdesk also offers natively-built Self-Service SDKs for callback, context, knowledgebase and visual IVR capability for Android and iOS applications, as well as flexible Webhook event management for access to event-triggered automations with 50+ external partners.

Moreover, Talkdesk provides additional services for free whereas many competitors charge. For instance, it provides a dedicated Client Success Manager and 24/7 support included in the license in addition to free storage, indefinitely, for all call recordings.

Customer Purchase Experience

While the company is certainly gaining its fair share of competitive displacements of established enterprise companies, a testament to the breadth of its capabilities is that Talkdesk is attracting a wide variety of young companies and startups that were launched embracing the more digital aspects of customer service. The latter is important as companies like to do business with like-minded companies, which shows that Talkdesk's messaging is resonating with young and old clients alike. And in this age of digital disruption, companies that think out of the box like to utilize technology that takes a fresh approach to common problems. Yet those same companies cannot afford to make technological missteps any more than established competitors can, so they look to their partners to provide a stable foundation. Many of these clients are from the ranks of digital upstarts. For example, Square, Blue Apron, Peloton, TaskRabbit, Tile, OpenTable, Stitch Fix, and Evernote all trust Talkdesk's platform to help run their businesses. Well established companies do as well. For instance, IBM, PBS, and Showtime use Talkdesk solutions.

One of the key components of its success is Talkdesk's customer-centric approach to selling. Despite the fact that Talkdesk's AppConnect store provides a plethora of choices for customers, the sales teams assess and recommend, rather than just present the customer with a smorgasbord of options.

The company also offers SLAs for uptime and call quality. To emphasize their confidence in reliability, Talkdesk recently announced an industry-first 100% Uptime SLA.

While the company has a professional services team for implementation and custom integrations, the platform was designed for ease of use, with free online training and numerous self-service and educational tools. In addition to 24/7 phone support, it also offers dedicated customer service people for each account and an internal customer satisfaction rating of over 98%.

Customer Ownership Experience

Talkdesk continues to deliver on its vision to make CX a competitive advantage for its

clients, and is increasing its spend to continue on a healthy pace of innovation. Talkdesk customers enjoy three feature-rich seasonal releases each year, which should continue as the company fosters its commitment to innovate in areas such as AI and self-service. In 2017, Talkdesk had over 50% of its resources dedicated to engineering, and by mid-2018, it was staffed with 250 engineers with plans to double that number in the next year and have 1,000 engineers by 2020. This promise is backed by the recent announcement that the company had secured $100 million in Series B funding led by Viking Global Investors, with participation from existing investor DFJ. This win represents the largest round ever raised for a private company in the contact center industry, further validating the company's current performance and future potential.

With these added resources, Talkdesk will increase research and development investment in key technology areas, such as intelligent context-sensitive routing of voice and digital interactions, actionable analytics, machine learning, and AI. Talkdesk will also expand its unique AppConnect Innovation Ecosystem, which has already net a 4.8 out of 5 customer satisfaction score.

In addition to features and scalability, Talkdesk provides solid security and customer support, adhering to over 20 certifications and standards. Customer's data is protected with Talkdesk security adherence to NIST, ISO27001, CSA, OWASP, and HIPAA best practices and guidelines. Also, the company is SOC2 Type 2 certified and GDPR compliant.

Conclusion

The contact center industry has entered an age in which consumers are driving the need for an increasing number of interaction channels, more intelligent self-service options, and flexible work environments. Talkdesk answers the call of the modern customer contact center with a platform designed to prioritize flexibility, scalability, and ease of use. It enables customers to trial and add new applications more quickly and easily than legacy providers can, and through its AppConnect Innovation Ecosystem, customers are able to flexibly add on complimentary applications of their choice quickly and cost-effectively from a broad range of third-party suppliers, expanding the native capabilities of the Talkdesk platform. The company has a demonstrated impressive commitment to R&D, which fuels its continual innovation. For its rapid innovation and strong overall growth, Talkdesk has earned Frost & Sullivan's 2019 Product Line Strategy Award for Cloud Contact Centers.

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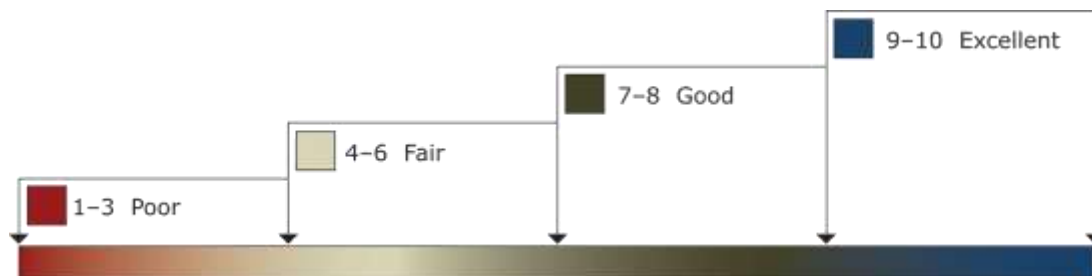
    Criterion 1: Price/Performance Value
    Criterion 2: Customer Purchase Experience
    Criterion 3: Customer Ownership Experience
    Criterion 4: Customer Service Experience
    Criterion 5: Brand Equity

Best Practices Award Analysis for Talkdesk

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**
Talkdesk	**8**	**8.5**	**8.25**
Competitor 2	8	7.5	7.75
Competitor 3	7	7	7

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.