FROST & SULLIVAN

Vyopta

2022
TECHNOLOGY
INNOVATION
LEADER

*Global Workplace
and Collaboration
Insights Industry*

FROST & SULLIVAN

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Vyopta excels in many of the criteria in the workplace and collaboration insights market.

AWARD CRITERIA

Technology Leverage	Customer Impact
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

Rethinking Workplace and Workspace Optimization

With the dramatic shift to hybrid work, businesses today are rethinking the role of the office and the workplace from the ground up. As many employees choose to work remotely, either on a part-time or a full-time basis, there is a growing emphasis on technology and space optimization to better align with the changing needs of the hybrid workforce. As a result, ensuring maximum utilization of spaces and technology has become critical. Founded in 2007, Vyopta is an industry leader in collaboration and workplace optimization software and services for collaboration that allow its customers to effectively monitor and manage user experience and engagement, technology performance and space usage in multi-vendor environments.

Collaboration technologies have been pivotal in connecting dispersed work teams. While the primary focus during the pandemic was to quickly and effectively connect employees for remote work, the emphasis going forward is to enable better quality of experiences and to tap into the full value of investments in communications and collaboration technologies.

As organizations migrate to new communications and collaboration tools and re-optimize their office space, Vyopta's market leading solutions portfolio enables them to make smart decisions for hybrid work. Through its unique multi-modal platform, that helps businesses understand voice and video collaboration usage and quality of experience, the company provides an end-to-end view across technology, spaces and users to manage user experience and engagement, UC system performance and meeting space efficiently.

A Comprehensive Portfolio to Ensure Customer Success

In a 2022 Frost & Sullivan global survey, business leaders and IT decision-makers indicate they are taking concrete measures to prepare for hybrid work:

- 73% expect at least a quarter or more of their employees in the future to work from home part-time or full-time

- 26% plan to reduce office real estate as a result of the shift to hybrid work

- 38% will have more geographically dispersed offices

- 48% are building additional meeting spaces to accommodate the need for more meetings between a dispersed workforce.

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- Roopam Jain,
VP of Research, Information and Communications Technology

These massive shifts to hybrid work are not without challenges. It is a journey that requires careful planning, implementation, measurement, and constant adjustments that accommodate the shifting needs of the workforce. Businesses are struggling to find the right balance between in-office and remote work and optimize their office space and technology investments in a way that promotes teamwork, innovation, productivity and well-being. Vyopta provides 360-degree visibility across the workplace collaboration environments helping organizations reduce blind spots and make data-driven decisions to efficiently plan and manage their communications systems and meeting spaces.

Its solutions are helping thousands of customers globally to measure and improve the efficacy of their collaboration experiences through actionable insights that improve user experiences, employee engagement, and business outcomes.

Vyopta' **Technology Insights** platform addresses two key areas.

- Real-Time Monitoring – Vyopta's sophisticated intelligent monitoring engine allows IT admins to stay ahead of UC issues before users report them. This includes the unification of all UC data across voice and video calls in one place to monitor live and recent calls, quickly track problems across the UC environment, get deep quality and health metrics, see status of endpoints and peripherals, view intelligent CDR/CMR reports, generate alerts and notifications, and integrate with Service Desk ticketing platforms.

- Advanced Analytics– Vyopta's Technology Insights platform generates actionable insights from performance trends and utilization data in order to enhance user experience, grow adoption, improve operational planning, and optimize CAPEX and OPEX investments. By analyzing user

behavior, technology adoption, and fine-tuning usability, IT can intelligently adjust capacity and licensing, and optimize collaboration spend.

- Vyopta **Space Insights** provides efficient and timely insights into conference rooms and huddle space usage to free up resources, stop inefficient room usage, optimize real estate and technology deployments, and intelligently plan for future build-outs and deployments. Vyopta leverages sensors and calendar data to create actionable insights on when and how meeting areas are being used, and whether wasteful bookings are happening including if high-capacity rooms are being inefficiently used by small groups. It helps create a better alignment with the collaboration needs of work teams and available spaces to ensure that the company's real estate assets are being put to their best use.

In May 2022, at its annual conference Vyoptaverse, Vyopta announced several enhancements to its platform. These include:

- Integration with IT service management (ITSM) platforms and collaborative platforms, including ServiceNow, Microsoft Teams, Slack, and Webex for more seamless support ticket and issue management.
- An improved ability to export data and insights to business intelligence decision support tools, including Power BI and Tableau.
- New enhancements to its monitoring and alerting systems, such as a new historical view of monitor statuses; and new monitor types including systemic, simple, and advanced.

Vyopta also launched a new Administration as a Service product allowing customers to leverage Vyopta's expert resources for professional services. This enables customers to manage and optimize UC/collaboration technologies across devices, room systems, infrastructure, cloud services to get the best performance and user experience. The service helps support change management, custom reporting, and decision support, as well as workflow automation such as integrations between UC/collaboration technology and other IT systems.

Flexible Deployment Options and Licensing

Vyopta Technology Insights is primarily a SaaS-based platform. However, it also offers on-premises and hybrid options to address varied deployment scenarios. By offering a single-pane-of-glass view on analytics and monitoring across varied UC environments, Vyopta works with each customers' unique needs. Its flexible licensing plans allows organizations to scale their licensing to match the UC environment they have invested in as well as to fit their usage patterns. Customers can pay by the number of users, number of video endpoints, or meeting rooms they want to be covered with no base software costs. This allows them to easily plan and budget based on the size of their deployment.

Exhibit 1: Vyopta's Flexible Licensing Scales to Fit Customer Needs
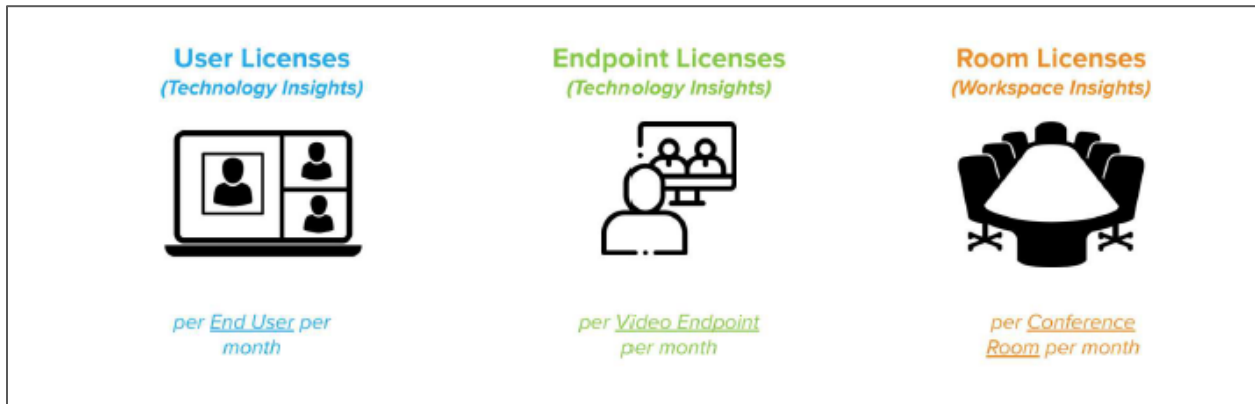
Source: Vyopta

Continued Sales Momentum and Customer Acquisition

Vyopta's commercial success is illustrated by its impressive growth metrics, customer acquisition, and a fast expanding technology and partner ecosystem. Since its inception Vyopta has grown at a rapid pace due to its differentiated solutions and positioning.

Last year the company saw significant growth and momentum in adoption. 2021 was a record year for Vyopta with many impressive success metrics:

- The number of UC user licenses purchased in 2021 nearly doubled over the prior year.
- Vyopta is on track to grow its user license count 3.4X by H2 2022, compared to 2 years ago.
- Vyopta is on track to grow its endpoint licenses 1.3X by H2 2022, compared to 2 years ago. This is impressive growth as customers are just starting to accelerate their return to office plans.
- Vyopta doubled the number of UCaaS users that are managed by its platform to 40 million in 2021.
- Vyopta's platform monitored more than 20 billion meeting minutes in 2021.
- The Programmatic Support solution for managed service providers (MSPs) led to a 200% rise in the company's number of MSP partners.

The significant growth momentum is an outcome of Vyopta's continued innovation, strategic partnerships, and enhancements to its product roadmap to align with the changing landscape of todays' workplace and workforce. More than 75% of Vyopta's customers are in the technology, healthcare, financial services, and federal government sectors. Clients range from the US Department of Veterans Affairs to Visa and Astra Zeneca. In 2021, Vyopta achieved FedRAMP authority to better serve Federal Agencies in the US alongside regulated enterprise companies. Some of Vyopta's U.S. federal government customers include the General Services Administration (GSA), the Centers for Medicare and Medicaid Services, Department of Veterans Affairs, Drug Enforcement Agency (DEA), the Federal Reserve System, U.S. Senate and U.S. Courts.

Succeeding through Leading Technology Partnerships

Vyopta provides a holistic view of video and voice-based collaboration experiences as well as meeting room usage, easing the management of multi-vendor UC environments and capturing insights and data from endpoints, cloud meeting platforms, edge devices, calendar systems, and UC software clients. Vyopta partners with industry-leading cloud service platforms from Microsoft, Cisco, Zoom, Ringcentral, Google, Pexip and BlueJeans, among others, to provide its customers the flexibility to simplify the management of single and multi-vendor UC environments. By monitoring UC deployments of any size and complexity, Vyopta's platform allows customers to build, support, and manage a collaboration technology environment that improves the user experience, grows adoption, optimizes utilization, and scales efficiently. The company offers a seamless procurement experience for all services provided under one umbrella, assuring customers that they are buying the optimal solution for addressing their unique needs.

Exhibit 2: Single Pane of Glass Visibility across Collaboration Platforms
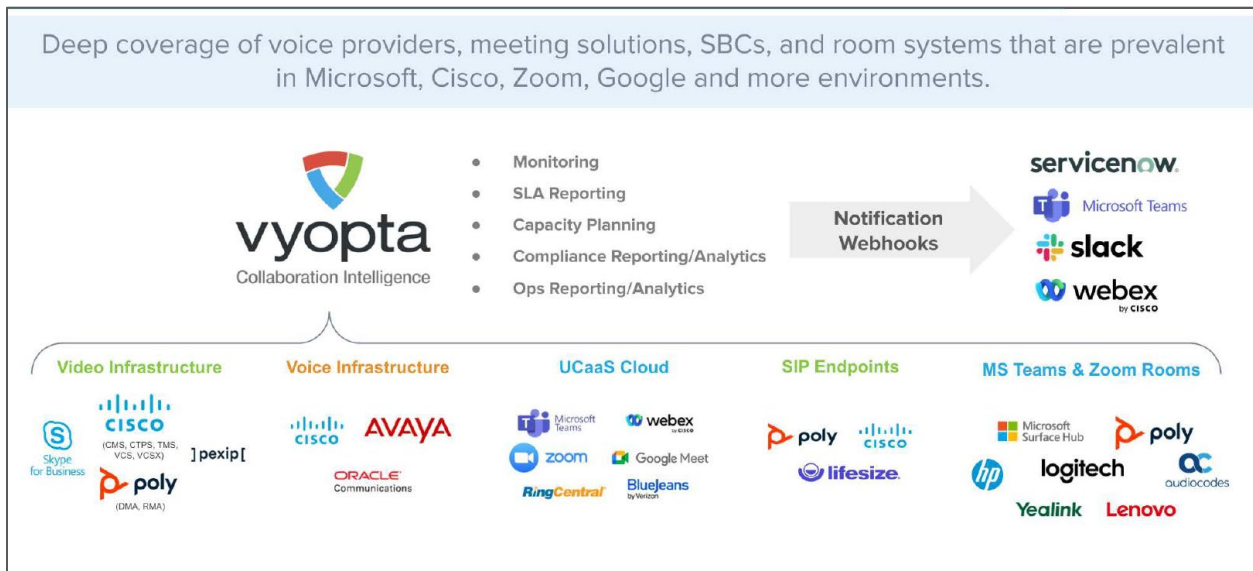
Source: Vyopta

The company also works with leading UC device and infrastructure partners such as Cisco, Logitech, Poly/HP, and Oracle supporting the latest generation of systems to provide detailed real-time data including coverage that extends to external cameras, touch panels, displays, and microphones, along with call quality data from endpoints and infrastructure such as call control, bridges and edge gateways and UC cloud services.

Unlike many of its competitors, Vyopta has the unique ability to extract insightful data for the host as well as participants of a meeting, helping IT teams quickly identify the root cause of a problem related to any endpoint and resolve issues.

Conclusion

Organizations of all sizes are looking for actionable insights that support their ongoing re-alignment of the workforce, real-estate, and technologies for hybrid work. Vyopta provides the data around UC and collaboration that IT decision makers and business leaders need for succeeding in the new environment. By putting an emphasis on vendor-agnostic, AI-driven, high quality, secure, open, and interoperable solutions that can be deployed at scale, the company has become a valuable technology partner for its customers in the fast growing enterprise communications and collaboration industry. For its differentiated value and strong overall performance Vyopta earns Frost & Sullivan's 2022 Customer Global Enabling Technology Leadership Award in the workplace and collaboration insights market.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Award recognizes the company that applies its technology in new ways to improve existing products and services and elevate the customer experience.

Best Practices Award Analysis

For the Enabling Technology Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization Success: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly 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 high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

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The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Mega Trend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)