FROST & SULLIVAN

NEXTHINK

2022
COMPANY OF THE YEAR

GLOBAL DIGITAL EMPLOYEE
EXPERIENCE PLATFORM INDUSTRY

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. Nexthink excels in the criteria in the digital employee experience platform space, enabling them to be awarded with the most prestigious Company of the Year Award.

AWARD CRITERIA

Visionary Innovation & Performance	Customer Impact
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

Changing Workforce Expectations Requires New Digital Experience

"The Nexthink platform spans the widest variety of assets supported among providers, from the network, to endpoint user devices, to applications, whether deployed on the premises, in the cloud, or even Software-as-a-Service (SaaS), which few if any other DEX providers can monitor."

- Karyn Price,
Industry Principal, ICT, Frost & Sullivan

Over the last two years of the Covid-19 pandemic, the way employees work has changed in many businesses. Work-at-home became commonplace in 2020, and both employees and businesses had to learn to make the most of a challenging situation. Among businesses surveyed by Frost & Sullivan in 2021, 91% said that desk-based staff would work remotely part or full-time for the next year, and 74% said at least on quarter of their staff would work remotely part or full-time in 2032. For many employees, remote work means sharing limited home internet bandwidth with a spouse and children, sometimes via a personal device in place of a company-issued PC.

Businesses have re-evaluated their strategies, considering how to embrace a hybrid work scenario without sacrificing productivity. This means leveraging a variety of technologies to help employees access information and get their work done.

One key to both productivity and satisfaction is employees' ability to effectively interact with the technology solutions that enable their work from any device, in any location. But in a hybrid or remote work situation, an on-site IT service team is not immediately available to help in the case of a technical problem. Further, remote site bandwidth issues can significantly impact application performance and make productivity a challenge. Network bandwidth or capacity issues for remote workers are the responsibility of the local broadband provider, out of the control of the enterprise. If hardware, software, app, or service is not working optimally, remote employees can experience not only decreased productivity, but job frustration. Unresolved, what seem like minor IT hassles can become significant issues that create job dissatisfaction.

This situation has increased demand for platforms that manage and help improve digital employee experience (DEX). These platforms, which first started gaining market prominence in 2019, monitor employees' interactions with corporate IT. DEX management software platforms enable businesses to identify patterns in employees' usage of technology, particularly issues that create frustration and reduce productivity.

For businesses, use of such platforms can dramatically increase the satisfaction of their internal "customers"–the employees. Nexthink, a market-leading, third-party DEX management provider with dual headquarters in Lausanne, Switzerland and Boston, Massachusetts, helps its customers provide better employee digital experiences to more than 15 million employees around the world.

Nexthink Platform Addresses a Mounting Business Need with Robust DEX Platform

Recognizing that traditional IT tools are siloed, therefore only providing partial views of each segment of IT (network, data center, cloud, etc.), the Nexthink Infinity DEX platform was designed to offer a single view of the environment and uses powerful machine learning, advanced analytics, and automation to help remediate end-user issues and proactively enhance the employee experience. The Nexthink platform spans the widest variety of assets supported among providers, from the network to endpoint user devices—whether corporate or personal—to applications, whether deployed on the premises or in the cloud. It can also monitor Software-as-a-Service (SaaS), which few if any other DEX providers can monitor. Nexthink says it strives to help customers give end-user employees a delightful experience, a personalized workspace, and optimum productivity at work. It also helps the business attract and retain talent and drive productivity.

Another interesting benefit of the Nexthink Infinity DEX platform is that it can help businesses create a sustainable workplace. Businesses can monitor things like infrastructure usage versus carbon footprint, and make decisions about infrastructure changes, right-sizing, or lifecycles, in favor of newer, greener technologies or a smaller overall footprint. This ensures that not only is the employee experience excellent, but that the experience is delivered in the most sustainable way possible, should the business choose to make that a focus.

Data-Driven Automation Platform Makes End User Experience "Delightful"

The Nexthink Infinity platform delivers enhanced experience and green IT benefits by monitoring and automating remediation of IT issues and enhancement of the end-user IT experience to provide customers an excellent IT experience for end users. It does this by focusing on three key pillars:

1. Continuous improvement of the employee digital experience
2. Rapidly solving the IT issues that impact the employee experience
3. Flexibly enabling employees with the right IT solutions at the right time.

The Nexthink Infinity platform uses data gathering, analysis, and automated, policy-triggered processes to improve the end-user IT experience. The platform gathers and provides real-time data across multiple IT components, including:

- Networks
- Virtual infrastructure
- Virtual operating systems
- Virtual applications
- Cloud applications
- User sessions
- Browsers
- APIs
- Users (human sentiment)

The software uses a lightweight software agent on the endpoint, together with an extension within the user's browser, to report network connections, program executions, web requests, and many other activities and properties from employee devices on which it runs. Installation of the agent is remote and automated, with little-to-no impact on the performance of local desktops or network traffic.

Once gathered, the platform visualizes the data for monitoring, and it provides a score to represent the overall health of employee interactions with diverse types of IT. The platform creates both domain-specific and extensible data models that can be queried using a unified query language. Insights from these models can be queried by data lakes, IT service management (ITSM) software, configuration management databases, AI operations services, chat bots, and similar services; the platform also uses these data models to create recommendations for experience improvement, or in some cases, automate execution of optimization and end user experience improvements.

In addition to providing insights to improve the employee IT experience, the platform visualizes the data it collects, to show what employees experience regarding the specific applications, devices, and even the network speeds and throughput that they are using. This allows IT technicians to easily see and remediate problems quickly, often before the employee experiences an issue. The platform combines real-time data with employee sentiment gathered through two-way feedback during service and impromptu surveys. It then correlates the information and presents it to platform users as an easy-to-read-and-understand dashboard. Such data can also be used to help IT, by giving information needed to plan device end-of-life and new technology rollouts, and to understand which hardware and software may be underused or unnecessary and can therefore be retired without replacement.

The Nexthink Infinity platform also enables automatic remediation of issues using pre-configured policies to trigger automatic changes to the IT environment. Changes are made based on pre-configured policies that can offer benefits like:

> *"The Nexthink Infinity platform also helps IT organizations provide better services to the employees they serve. The platform has an Experience Optimization feature that uses the collected data to identify the most critical IT issues or challenges that impact the most employees, prioritizes them to make the biggest positive impacts for employees, and offers a step-by-step plan for solving those challenges to improve the overall employee experience."*
>
> *- Karyn Price,*
> *Industry Principal, ICT, Frost & Sullivan*

- Automatically enhance the employee experience by remediating common issues in real time
- Improve employee productivity by reducing crashes, freezes, delays due to inappropriate computing or network bandwidth allocation, thereby making the workday more about work, and less about IT issues
- Streamline operations by handling many common help desk functions automatically
- Save the company money on un- or under-utilized or aging infrastructure that could be replaced by more elastic cloud resources

The new Infinity platform is also highly scalable, with ability to manage millions of workplaces, thousands of SaaS and locally based applications, and even billions of telemetry points. It does this using application programming interfaces (APIs), Nexthink Query Language (NQL), and visual editors.

The Nexthink Infinity platform can also help IT organizations provide better services to the employees they serve. The platform has a new Experience Central feature and a patented "Moments of Experience" algorithm that uses the collected data to identify the most critical IT issues or challenges that impact the most employees, prioritizes them to make the biggest positive impacts for employees, and offers a step-by-step plan for solving those challenges to improve the overall employee experience. All of these measures can ensure that end users have the best possible IT experience, even when they require IT help desk services.

Specialized Platform "Packs" Offer Additional Value, Meet Specialized Customer Needs to Create an Industry-Leading Platform

The Nexthink Infinity DEX platform has a library of more than 100 preconfigured dashboards and content that makes gathering, processing and visualizing data for specific customer use cases faster. Nexthink states that it also offers more than double the pre-configured, use case-specific solutions than its closest competitor offers. These packs ensure that the most common customer IT issues can be solved using pre-defined, repeatable processes that have been proven to provide a smooth experience with the solution being deployed. Most popular among the 100 library packs are:

- Windows 10
- Windows 11 migration
- Office 365
- Microsoft Teams
- Google G Suite
- Service Desk (Level 1 and 2 support)
- Device compliance
- Geolocation

- Desktop virtualization

Nexthink Focus on Driving Green IT

Nexthink is also keenly focused on the business mega trend of sustainability and green IT. The company's DEX platform can be used to support a company's sustainable IT policies. By showing where infrastructures or services go unused, or where devices are redundant—as in the case of an employee having both a laptop and a tablet device where only one or the other is used a majority of the time—the DEX platform can also make recommendations on IT changes that can improve sustainability metrics, or even create policy-triggered automated changes that achieve the same result. Additionally, by exposing platform data to end users, businesses can educate and influence behavior toward green practices.

Nexthink Reports Strong Financial Performance Compared to Closest Competitors

Nexthink also has shown strong financial performance, reporting 2.5 times greater annual recurring revenue than its closest competitor. The privately held company has numerous investors, with its latest round of funding raising US$180 million. The company boasts a research & development budget that they report is four times that of the average competitor, and the result is a robust platform that is helping customers deliver excellence in digital end user experiences. Nexthink has 15 million endpoints under management, and a strong trajectory for growth through the partner channel, with 8 out of 10 managed service partners choosing to partner with Nexthink, proving the strength of the company's product and brand. The company also leads with a robust user group and the first market conference that businesses turn to for the best information on digital employee experience management.

Conclusion

Nexthink is truly an industry leader that drives the market in terms of both core DEX platforms and platform feature enhancements. The company offers a comprehensive platform that monitors all aspects of the employee experiences that, when mapped against analytics and sentiment, can provide improvement in the employee experience, in business operations, and even business sustainability practices. For its strong overall performance, Nexthink earns Frost & Sullivan's 2022 Global Company of the Year Award in the digital employee experience platform industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

Visionary Scenarios Through Mega Trends: Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

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

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

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)**