FROST & SULLIVAN

SOFTLINE

2022
PRODUCT
LEADER

LATIN AMERICAN
COLLABORATION SERVICES 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. Softline excels in many of the criteria in the collaboration services space.

AWARD CRITERIA

Product Portfolio Attributes	Business Impact
Match to Needs	Financial Performance
Reliability and Quality	Customer Acquisition
Product/Service Value	Operational Efficiency
Positioning	Growth Potential
Design	Human Capital

Optimized Collaboration Tools Drive Growth in the Hybrid Work Era

The collaboration services landscape exhibited strong growth in 2021, driven by the rise of hybrid and remote work environments and the need of organizations in the Caribbean and Latin America region to support unified communications and collaboration among their employees. Organizations require optimized collaboration tools (including unified communications as a service [UCaaS] suites, cloud meetings solutions, video conferencing devices, headsets, interactive displays, and adjacent technologies) that are paramount for a successful digital transformation and key to success in the hybrid work era. As a result, the uptake of affordable and agile UCaaS solutions, from packaging and pricing to provisioning and management, accelerated during the pandemic. Plug-and-play solutions available for purchase and provisioning via digital channels provided a lifeline for many small to medium-sized businesses and (temporary) remote teams.

"Frost & Sullivan recognizes that Softline's purpose-built unified collaboration and communication platform sets it apart from its competitors, with superior design and cost savings as its central pillars."

- Riana Barnard,
Best Practices Research Analyst

Product Portfolio and Business Impact of Softline

Softline Global, founded in 1993 and headquartered in London, United Kingdom, developed a cross-functional solution to help organizations address these needs and make the most of their Microsoft Teams deployments. Introducing its TOTAL VOICE solution to the market, this software-as-a-service bundle includes Azure consumption built-in and outfits customers with metrics

and interfaces they recognize. The TOTAL VOICE package from Softline carries Microsoft approval globally, and the two companies co-sell the product together worldwide. With approximately 8,200 employees in 60 countries throughout Asia, Latin America, Eastern Europe, and Africa, Softline is one of the largest Microsoft resellers across the globe. In 2021, Frost & Sullivan applauded Softline for empowering customers in developing economies to measure and manage voice with the specificity and granular detail they desire and remains impressed with the company's continuing innovation and sustained leadership.

Setting New Standards

Softline's TOTAL VOICE addresses the challenge of cloud communications by helping organizations move their voice networks to the cloud while adhering to a limited budget. Hosted by Microsoft Azure, TOTAL VOICE uses a single, centralized telecommunications infrastructure to facilitate significant cost savings while delivering latency and reliability. TOTAL VOICE uses Web real-time communication protocols for customer-facing and back-end connections. The solution is compatible with digital, analog, or IP telephony and embraces any system that combines these outdated technologies. Furthermore, it supports operations with any blend of trunking devices (such as network border controllers and gateways from manufacturers), enabling routing and cost tracking across any company's network. It allows organizations to make automated routing decisions on voice networks based on carriers, tariffs, minute rates, or congestion. The solution also enables customers to add advanced capabilities (such as click-to-call and click-to-video features) to existing websites, portals, and applications. The application covers four modules: billing, adopting, calling, and engaging.

TOTAL VOICE's **billing module** contains expense and carrier management capabilities, advancing visibility. It allows organizations to track and assign expenses to cost centers or individual users, setting up cost controls, reminders, and alerts, and restricting external calls. By connecting to the user's legacy system, the application integrates with call detail record software of numerous telecommunication brands to offer an array of features (e.g., user/subscriber categories, minute allocation, and exchange rates) that focuses on accountability. Control options include summary reports (territories, departments, cost centers, users, offices, countries, regions) rounded off by detailed reviews and feedback on the highest values (longest or most expensive calls, most frequently dialed numbers, and most common errors).

> *"By displaying and selling the inventory of the carriers via an application programming interface and provisioning it through the Azure marketplace, Softline acts as a voice broker. When a user selects a choice, it automatically supplies and invoices the product. With this flexible configuration that combines immediate access to inventory with seamless execution enabled, Softline differentiates itself by offering unprecedented speed and agility."*
>
> *- Sebastian Menutti,*
> *Industry Principal, ICT-CX-Connected Work*

TOTAL VOICE's **calling module** supplies local and international numbers (including toll-free lines) and consumption plans without any capital expenditure on the front end. As a virtual network operator, it sells the same services as a traditional carrier. It provisions the desired lines (type, location, channels) and handles the pre-negotiated resources and fixed tariffs for these lines across the globe.

Secured by triple signaling, media, and controller layers in a high availability data center, TOTAL VOICE guarantees reliability and uptime for connection to each

carrier. Its straightforward and intuitive interface supersedes a previously complex process that required customers to buy gateways, recorders, or hardware.

TOTAL VOICE's **adopting module** provides real-time usage analytics, allowing companies to supervise employees and optimize deployments. It empowers organizations to create differentiated baselines on any intention or action (e.g., encouraging voice or video, screen sharing, or discouraging calls to certain external domains), addressing their unique business needs. Furthermore, enterprises can track usage across various filters and against targeted metrics (e.g., usage in voice, video, conferencing, bridges). The data populates within hours and retains back a full fiscal year, offering customers granular insights to help them assess and adjust deployments to fit their actual needs.

TOTAL VOICE's **engaging module** operates as a contact center solution based on top of Microsoft Teams, serving as a console for generating services queues for incoming voice campaigns and an easy-to-use attendant interface for seamless switching. Along with its professional call recording capabilities, this module allows users to leverage click-to-call, click-to-chat, and click-to-video features.

Frost & Sullivan recognizes that Softline's purpose-built unified collaboration and communication platform sets it apart from its competitors, with superior design and cost savings as its central pillars.

Positioned to Block the Competition

Softline demonstrates high-growth potential. The company is well-positioned in the market, with an industry-leading product that provides tremendous value in high-demand sectors. For instance, Softline recently deployed its TOTAL VOICE solution at a large global oil corporation, operating in five countries across the globe, using Microsoft Teams to help its 2,300 employees collaborate. As a result, the company reduced its telephony costs by 45%.

TOTAL VOICE users can trust the product's performance and operation because Microsoft certified the automation processes and security levels. Software introduces the solution to its vast customer base, bundling a 30-day free trial to complement each licensing contract. A global demo platform allows potential customers to test the features by choosing any mix of traffic, numbering, and plans. By displaying and selling the inventory of the carriers via an application programming interface and provisioning it through the Azure marketplace, Softline acts as a voice broker. When a user selects a choice, it automatically supplies and invoices the product. With this flexible configuration that combines immediate access to inventory with seamless execution enabled, Softline differentiates itself by offering unprecedented speed and agility.

Three attributes underpin the seamless execution that takes TOTAL VOICE one step further than any competing solution. Firstly, Softline has eight switching nodes with transcoding and signaling capabilities, allowing the company to save costs via floating licenses. Secondly, the company uses a third-party software solution, Spearline, to test and monitor the lines' performance and audio quality. By testing the numbers regularly, Softline ensures end-to-end network visibility and ensures that there are no obstacles that might impact customers. Lastly, Azure Maps provides geographic context to web and mobile applications, which helps Softline to choose the lowest delay route.

Following an interdisciplinary development process, Softline brought together team members from traditional telephony, collaboration tools process automation, front and back end application developers, and Azure experts to complement the existing capabilities in Microsoft Teams. Leveraging the global scope of the company's reach (across Europe, Asia, Africa, the Middle East, and the Americas), Softline incorporated extensive customer feedback in designing the product to ensure it meets tangible needs and bridges existing gaps. Softline provides change management support to guarantee seamless execution; experienced Prosci practitioners form part of the deployment team. Also, customers have access to dashboards that enhance visibility and bring autonomy to decision-making by providing multiple thresholds and alerts.

Conclusion

To be a product leader, a company needs to understand the market's needs and deliver a solid solution designed and embedded with high-quality and reliable performance. Frost & Sullivan finds that Softline embodies this concept and exemplifies it with best practice implementation. Hosted by Microsoft Azure, TOTAL VOICE is a purpose-built unified collaboration and communication solution that delivers latency and reliability while saving costs. By incorporating extensive customer feedback in its product design and comprehensive change management support to guarantee seamless deployment, TOTAL VOICE helps organizations move their voice network frictionless to the cloud while adhering to a limited budget.

With its strong overall performance, Softline earns Frost & Sullivan's 2022 Latin American Product Leadership Award in the collaboration services industry.

What You Need to Know about the Product Leadership Recognition

Frost & Sullivan's Product Leadership Award recognizes the company that offers a product or solution with attributes that deliver the best quality, reliability, and performance in the industry.

Best Practices Award Analysis

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

Product Portfolio Attributes

Match to Needs: Customer needs directly influence and inspire the product portfolio's design and positioning

Reliability and Quality: Products consistently meet or exceed customer expectations for performance and length of service

Product/Service Value: Products or services offer the best value for the price compared to similar market offerings

Positioning: Products serve a unique, unmet need that competitors cannot easily replicate

Design: Products feature innovative designs, enhancing both visual appeal and ease of use

Business Impact

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

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

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™.

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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)