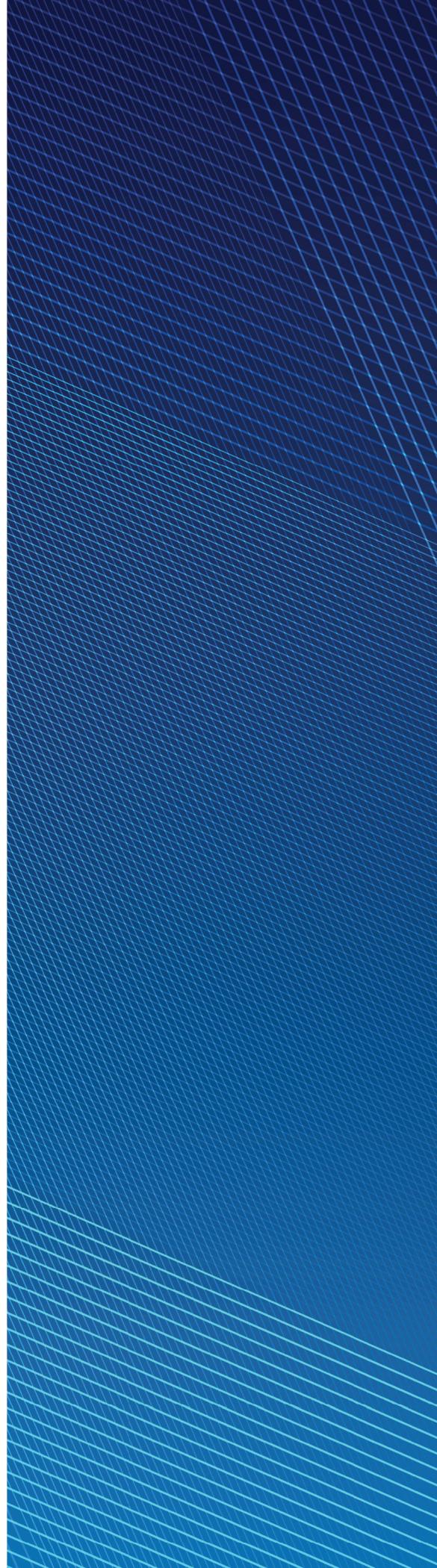# FROST & SULLIVAN

POLY-HP
RECEIVES THE 2023
ENABLING TECHNOLOGY
LEADERSHIP AWARD

Identified as best in class in the Indian video conferencing 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. Poly excels in many of the criteria in the video conferencing space.

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

Commitment to Innovation: Cutting-Edge Products and Offerings

Poly, founded in 1990, and is headquartered in California, is at the forefront of technological innovation in the audio and video (AV) conferencing industry. The company is committed to creating premium, cutting-edge end-to-end AV conferencing products. Poly's headsets, desk phones, and analytics software are designed to provide complete conferencing solutions to all the customer's needs, with a special focus on ergonomic design and ease of use. Innovative functions such as acoustic fences, active noise cancellation (ANC), mic-based noise cancellation, group framing, noise block, dynamic mute indicator, speaker framing, conversation framing, or people framing all enable organizations and their workforce to experience best-in-class video conferencing experience. Background noise cancellation and responsive cameras are the two most critical parts of any conferencing solutions. While most of the players in the market claim to have features that completely nullify background noise, there are few conferencing solutions that deliver. With the acoustic fence, ANC, and similar capabilities, Poly's VC products are successful in providing these key capabilities. The designs of these devices are carefully developed with a continuous customer feedback mechanism. These key areas which make Poly stand

> *"Poly continues to be one of the leaders in the video conferencing space globally. Poly continuously innovates in both products and services to bring new features and capabilities that enhance the video conferencing experience of users irrespective of their physical location."*
>
> *- Nithin Ramesh,*
> *Senior Consulting Analyst*

out from its competition, especially in the Indian market where user experience is often neglected.

Application Success, Commercialization Success, and Price Performance Value – A Gamut of Product Offerings Serving Every Business
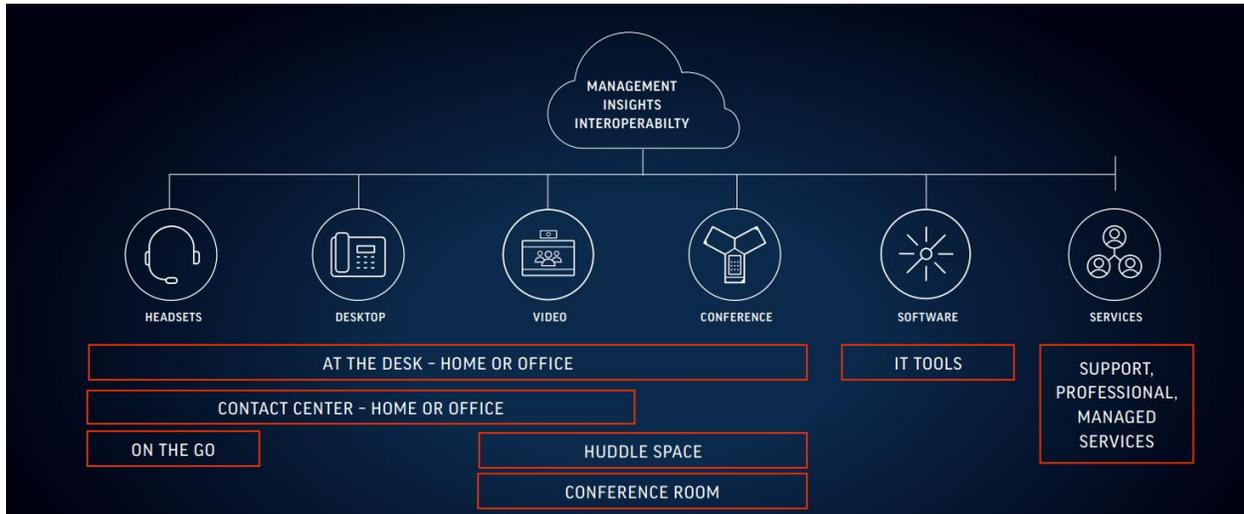

Exhibit 1: Poly's Product Offering Grouping

Poly's long experience and expertise in video conferencing have allowed it to experiment with different products. Poly categorizes most of its products and services in the groups represented in Exhibit 1. "At the desk – Home or Office" solutions consist of headsets, desktop phones, and video, among others. Products like the CCX series, Poly Edge, Blackwire, Poly Studio, Savi, Voyager, and VVX offer users a complete AV conferencing solution that enables connection and effective collaboration irrespective of the employees' physical location.

These products enhance the experience of individual users whilst they also cater to the diverse requirements of large groups of people simultaneously holding video conferences in a single room. Leveraging its strong network of direct and indirect selling, Poly has achieved commercialization success among large enterprises as well as home-based independent professionals. The user community in India proves highly satisfied with Poly's VC solutions, and the same sentiment is echoed by the IT decision-makers of organizations using Poly's products during interviews with Frost & Sullivan. The ability to create a product portfolio that can cater to a variety of businesses helps Poly strengthen its presence and create its own unique space in the Indian VC industry.

> *"Poly offers seamless integration with various platforms providing video and web conferencing services: its devices are certified to work with Microsoft Teams, Zoom, Google Meet, Cisco, and other leading web conferencing service provider platforms."*
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Interoperability is one of the most important areas where Poly continuously focuses, as it realizes that businesses using video conferencing services invest substantially in this type of infrastructure. Building upon

existing infrastructure or implementing new infrastructure are cost-intensive propositions that most organizations do not prefer. Poly offers seamless integration with various platforms providing video and web conferencing services: its devices are certified to work with Microsoft Teams, Zoom, Google Meet, Cisco, and other leading web conferencing service provider platforms. Poly stands out compared to its competitors in terms of offering interoperability and compatibility. This is a major advantage for businesses with limited IT budgets.

Customer Ownership Experience

Poly products are widely adopted across businesses in India, where it is one of the top 3 market shareholders. Poly offers cost-effective solutions which helps its customers achieve the expected return on investments. The CIOs interviewed by Frost & Sullivan are long-time customers of Poly and assert that, even as technology evolves, they continue to use Poly's products without major restructuring or additional investments. The USB-enabled video conferencing systems introduced by Poly have seen wide adoption among leadership teams that work from home. The easy-to-setup feature of Poly's VC offerings is perceived as a boon for individuals who otherwise struggle to have a VC setup at home. Top managers have expressed their willingness to stick with Poly's VC solutions even after returning to offices.

Customer Service Experience

Poly has developed carefully crafted support functions that are both elaborate and unique. In any video conferencing solution selling process, after-sales services play a critical role. 4 out of 5 organizations globally that use VC setups switch to a different vendor due to a lack of adherence to SLAs.

As a company with a long experience in the video conferencing field, Poly adopts a four-stage customer experience mechanism to provide best-in-class services. In the first stage, known as the *discovery phase*, Poly assists potential customers by understanding their exact requirements and providing information about the solutions available. In the second, *exploratory phase*, Poly partners with the customer to understand the customizations required to satisfy specific needs and draws a roadmap as to how Poly will be able to assist in implementing these customizations. In the third phase, known as the *implementation phase*, Poly implements these solutions within the customer's environment and provides end-to-end integration and implementation assistance. In the fourth, the *after-sales service phase*, enterprise customers are granted around-the-clock access to Poly's support team which directly addresses customer queries or issues. In addition, Poly also offers the Poly Lens App—a cloud-based device management software meant to monitor and manage the device through automatic software updates and device availability information while also providing detailed analytics on the health of the devices and usage data.

Conclusion

Poly continues to be one of the leaders in the video conferencing space globally. In India, the company has garnered wide acceptance as its products and services suit both large and small businesses. From a technological point of view, Poly demonstrates its capacity to cater to evolving needs of business customers. In the current workplace scenario where hybrid work is quickly becoming the norm, businesses expect optimized solutions that deliver the best experience to their employees. Poly's strong product portfolio can cater to many types of businesses while offering value for money. Moreover, Poly continuously innovates in both products and services to bring new features and capabilities that enhance the video conferencing experience of users irrespective of their physical location.

To be an enabling technology leader, a company needs to demonstrate its commitment to innovation and enhance overall customer experience by understanding the market's needs and delivering a solid, high-quality, reliably performing solution. Frost & Sullivan finds that Poly embodies this concept and exemplifies it with best practice implementation. Poly's video conferencing solutions are built using state-of-the-art technologies that can simplify user experience and deliver quality video conferencing to its users. With its strong overall performance, Poly earns Frost & Sullivan's 2023 Indian Enabling Technology Leadership Award in the video conferencing industry.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Award recognizes the company that offers innovative products that are technology led, offer best experience to users with attributes that deliver the best quality, reliability, and performance in the industry.

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

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)**