

2025 COMPETITIVE STRATEGY LEADER

Transforming Innovation Into High-Growth Performance and Competitiveness

RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL COMPLIANCE RECORDING AND ANALYTICS INDUSTRY

FROST & SULLIVAN

Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. ASC excels in many of the criteria in the compliance recording and analytics space.

RECOGNITION CRITERIA	
Strategy Innovation	*Customer Impact*
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

The Strategic Imperative 8: Factors Creating Pressure on Growth



- **Innovative Business Models**: A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning
- **Customer Value Chain Compression**: Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables the reduction of friction and the number of steps in customer journeys
- **Transformative Megatrends**: Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives
- **Disruptive Technologies:** New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate
- **Internal Challenges**: The internal organizational behaviors that prevent a company from making required changes

- **Competitive Intensity**: A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance
- **Geopolitical Chaos**: Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security
- **Industry Convergence**: Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

The Transformation of the Business Communications and Collaboration Industry

Advanced technologies, including artificial intelligence (AI), mobility, programmability, and cloud-based services are driving profound transformation in the global business communications and collaboration industry. Next-generation solutions powered by these transformative technologies are providing organizations considerable benefits such as enhanced productivity, reduced costs, and improved customer engagement. Growing awareness of these benefits is driving rapid adoption of cloud-based video meetings and group chat; cloud, hosted or mobile private branch exchange (PBX); unified communications as a service (UCaaS), and contact center as a service (CCaaS). Organizations at the forefront of adopting modern communications and collaboration solutions are gaining competitive advantages over their peers.

However, communications transformation is not without challenges. The most common concerns among organizations adopting new technologies and upgrading their communications capabilities include: aligning information technologies (IT), communications, and collaboration investments with business strategies, 66%; dealing with security concerns, 66%; managing the migration of their IT/telecom capabilities to the cloud, 63%; and dealing with privacy/compliance concerns, 62%.

To assess the impact of communications and collaboration investments on business performance, many organizations are implementing reporting and analytics software that delivers valuable insights into both workforce efficiency and customer interactions. And to enhance compliance capabilities in their communications environments, many organizations are investing in call recording and archiving solutions.

In a 2024 global Frost & Sullivan survey of IT and telecom decision-makers (ITDMs):

- 36% had adopted analytics software and another 67% planned to do so by the end of 2026.
- 34% had adopted cloud call recording and archiving services, and another 60% planned to do so by the end of 2026.

As technologies evolve ever-more rapidly, it is increasingly important for organizations to future-proof their investments. Owing to impressive advancements in communication and collaboration technology, organizations are often distracted by ‘bells and whistles’ such as new features with relatively less critical value. It is paramount, however, to remain focused on the foundational aspects of communications technologies—e.g., security, reliability, scalability, privacy, and compliance. Inherent to this approach, business leaders must position AI-enhanced communications solutions as digital assets that provide powerful insights about their organization and their customers, partners, and suppliers. With clear visibility into key trends and patterns

captured through conversation recordings and analytics, organizations can continually right-size and adapt their communications investments and business processes to evolving workforce and customer needs.

While most leading cloud communications and collaboration platforms include essential call recording and analytics capabilities, they often lack compliance recording functionalities that capture information from both internal and external communications sessions across channels—calling, messaging, meetings, and screen share. As a result, siloed recording and analytics services increase compliance risks and prevent organizations from gaining deep, comprehensive insights with transformational impacts on the organization's performance. Third-party providers have stepped in to address this market with purpose-built compliance recording and analytics tools.

Strategy Effectiveness and Execution

ASC recognizes the growing need for stronger compliance capabilities in regulated sectors such as government, financial services, and healthcare, as well as in contact centers across various industries. To meet regulatory requirements, many organizations relying on existing tools that fall short must manually screen small, randomly selected samples of recorded conversations for compliance. This method is inefficient, prone to human error, and exposes organizations to significant compliance risks. It also fails to provide insights into communication effectiveness, business patterns, or other trends that may inform crucial business decisions. ASC Recording Insights solution bridges the compliance gap for organizations in regulated industries while also delivering deep conversational insights that help organizations drive operational efficiencies and growth. Recording Insights supports legal recording in full compliance with the General Data Protection Regulation (GDPR), capturing data across voice, video meetings, screen sharing, and chat communication sessions.

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>
> ***- Elka Popova***
> ***VP of Connected Work***

Unlike the 'convenience' recording offered by many providers, ASC's compliance recording is automatic, uses secure infrastructure, and employs a dual-bot system to ensure redundancy and high availability. When a recording session is initiated, two recording bots are invited to the session, capturing the communication in duplicate. These bots manage the recording process and transfer the data in encrypted form to the final storage, where it remains securely encrypted. Additionally, ASC Recording Insights is compliant with Payment Card Industry Data Security Standard (PCI DSS)—when sensitive information is shared, the recording either halts or confidential portions can be deleted later. Hosted in Microsoft Azure, ASC Recording Insights harnesses Azure AI Services to enable transcription and translation, and generate communication summaries, while Azure OpenAI provides sentiment analysis for business purposes.

ASC's broad partnership network encompasses a variety of telephony and unified communications (UC) solutions. Recording Insights enhances the capabilities of:

- cloud communications and collaboration providers such as 8x8, Cisco, Microsoft, NFON, RingCentral, Zoom and others
- contact center and customer experience management (CX) providers like Genesys
- premises-based telephony systems from companies like Alcatel-Lucent Enterprise, Avaya, and Mitel

ASC's strong execution is reflected in its rapidly expanding partnership network and impressive double-digit annual growth. Recording Insights often displaces competitor offerings due to its multi-vendor interoperability, cost efficiency, flexible deployment models, and differentiated AI capabilities. Going forward, ASC's growth in the compliance recording and analytics space will likely be fueled by:

- Increasing regulatory pressures across industries and regions
- Rising demand in industries with previously lower compliance recording adoption
- The shift of communications and collaboration to the cloud
- Opportunities to replace more rigid or expensive competitor solutions
- Expansion into regions where ASC's presence is still growing

Additionally, ASC has opportunities to upsell customers with new analytics modules, access to Microsoft Copilot via a plug-in, and other AI-powered capabilities, as well as recording and analytics across additional communication modalities.

Competitive Differentiation

> *"ASC stands out among compliance recording and analytics providers due to its ease of use, the flexibility of its fully cloud-based approach, and its robust, enterprise-grade platform. With integrated compliance recording and secure storage, ASC enables organizations to effectively manage communications, particularly in regulated industries."*
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ASC stands out among compliance recording and analytics providers due to its ease of use, the flexibility of its fully cloud-based approach, and its robust, enterprise-grade platform. With integrated compliance recording and secure storage, ASC enables organizations to effectively manage communications, particularly in regulated industries. Hosted in Microsoft Azure, ASC's multi-tenant platform offers a significant advantage over competitors that need to deploy in various locations and adjust configurations to serve a broader range of customers. Recorded data is stored securely in Azure, offering encrypted, tamper-proof storage with configurable retention periods to meet specific regulatory requirements.

Additionally, ASC's advanced and continually evolving AI-powered analytics capabilities, particularly the AI Policy Engine, based on Microsoft Azure AI Services, Azure OpenAI, and Copilot, are key differentiators. The AI Policy Engine stores, secures, and processes conversation data in Azure, enabling organizations to identify and track trends that impact business performance, including employee efficiency and customer engagement quality. It automates compliance with key financial-services regulations in the US, UK, and the European Union, such as Dodd-Frank, Financial Conduct Authority (FCA), and MiFID II by using AI Policy Templates and predefined rules and policies. These templates automatically recognize compliance violations, thereby reducing risks and costs, and are continuously updated to ensure adherence to evolving regulations.

ASC's AI Policy Engine sophistication is evident in its:

- ability to interpret information in the appropriate context
- preconfigured templates that automate workflows to save time and costs
- continuous security feature updates to comply with the latest legal requirements
- flexible adaptability to specific requirements on demand

ASC is particularly well positioned to deliver value in Microsoft Teams environments. ASC Recording Insights is a certified, native Microsoft Teams application, ensuring seamless integration and a streamlined user experience for compliant recording of Teams audio (internal and external), chats, meetings, video calls, and shared content interactions. ASC also stands as the only vendor providing compliance recording for all public switched telephone network (PSTN) connectivity options for Teams Phone—Direct Routing, Operator Connect, and Teams Phone Mobile. Integration with Dynamics 365 and Microsoft FSI Cloud provides added value for customers using these platforms, including centralized customer interaction management, comprehensive customer history, and enhanced compliance monitoring and management.

Going forward, ASC Recording Insights' advanced AI data analytics, compliance with global regulations, and native Microsoft Teams integration are likely to drive strong consideration among Teams-centric organizations across industries and geographies.

Price/Performance Value, Customer Purchase and Ownership Experiences

ASC charges a per-user, per-month fee for access to Recording Insights, ensuring organizations only pay for the users who require compliance recording. Pricing for ASC's AI capabilities and storage is consumption-based. This approach enables customers to deploy compliance recording and analytics cost-effectively while adjusting costs flexibly to meet changing demands.

Organizations can purchase ASC Recording Insights directly from technology partners such as Mitel, which OEMs ASC technology, or through partner portals and marketplaces in a co-sell model, as with Microsoft. Leading telecom operators and service providers, including AT&T and Verizon, resell ASC, expanding its reach further.

In contrast to more complex and rigid competitor solutions, customer onboarding with Recording Insights typically requires just a few hours. The solution is available as a native app within Microsoft Teams and as a web-based app for RingCentral, Zoom, Cisco Webex, and Genesys, eliminating additional hardware or software costs often associated with competitor solutions.

Unlike most competitors that offer compliance recording and analytics as part of their proprietary solutions, ASC Recording Insights integrates with most major telephony and unified communications (UC) platforms, making it suitable for diverse customer needs, including organizations with multi-vendor communication environments. With ASC, all recordings are stored and accessed within one system across different premises-based and/or cloud-hosted UC and contact center platforms. Its geo-redundant architecture, designed with no single point of failure, ensures high service availability, minimizing customer risks and costs. ASC also allows customers to bring their own keys and storage, offering more flexibility than many competitor solutions.

Key benefits of the ASC customer ownership experience include the ability to:

- define the call recording retention time by corporate and regulatory policies; provide a full audit trail
- automate the risk management processes with artificial intelligence
- store data in a tamper-proof manner in any Azure location to ensure data governance

Overall, ASC offers compelling price/performance value and an excellent customer experience, making it a highly attractive option for mission-critical compliance recording and analytics.

Conclusion

ASC Recording Insights automates compliance recording across multiple communication channels, leveraging Azure AI for transcription, translation, and sentiment analysis, offering deep insights that drive operational efficiencies. ASC's flexible, cloud-based approach and seamless integration with major telephony and UC platforms enable the vendor to provide secure, reliable, and cost-effective solutions in diverse communications environment. ASC Recording Insights is best suited for organizations fully invested in Microsoft Teams and Azure, companies requiring multi-channel compliance recording and/or global compliance coverage, and/or businesses prioritizing fast deployment and lower IT overhead.

For its strong overall performance, ASC is presented with Frost & Sullivan's 2025 Global Competitive Strategy Leadership Recognition in the compliance recording and analytics industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Competitive Strategy Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes best practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

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 Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled 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:

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

