

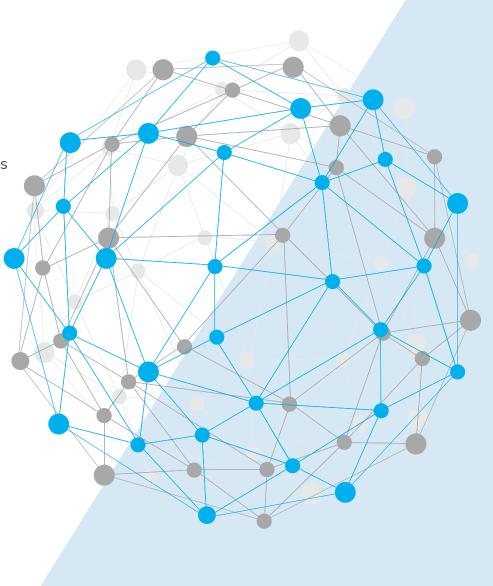
PREPARING YOUR BUSINESS FOR THE FUTURE OF COLLABORATION

Flexible Solutions that Empower Better Work

FROST & SULLIVAN EBOOK SPONSORED BY POLY

CONTENTS

- 3 Why Collaborate? Why Now?
- 4 Get Ready for the Digital Workplace
- 5 Overcoming the Challenges
- 6 Choose Your Own Path to Modern Communications
- 7 Robust Cloud Services Paired with Intelligent Devices are Leading the Way
- 9 Best-of-Breed Technology Across Workspaces and Workflows Maximizes Productivity
- 10 Key Criteria for Selecting Best-in-Class Endpoints—All Solutions Are Not Created Equal
- 11 Vendor Spotlight: Poly
- 12 The Customer Perspective



WHY COLLABORATE? WHY NOW?

Better collaboration across teams is the heartbeat of any successful organization. Modern businesses are making huge leaps toward digital transformation that enhances communications in a more **CONNECTED**, **DIGITIZED** and **EFFICIENT** workplace.







Bring Teams Together

The digital enterprise is distributed and virtual. Next-generation collaboration builds trust and engagement, allowing teams to work in tandem.

Catalyze Productivity

Modern collaboration, enabled by smart endpoints, cloud services and intelligent software, brings together the right people with the right information at the right time to create unprecedented agility.

Align with the Workforce of Tomorrow

In a world where the gig economy is reshaping traditional employment and the workforce is increasingly democratized, decision-making must be fluid, allowing workers to choose how, when, and with whom they collaborate for better business outcomes.

GET READY FOR THE DIGITAL WORKPLACE

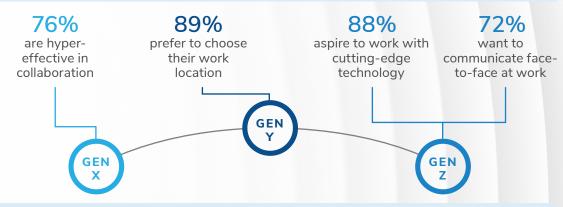
Increasing globalization and the accelerating speed of business require work to be done in new ways that boost innovation and enhance customer value. Artificial intelligence and machine learning are uncovering deeper analytics, leading to better diagnostics, enhanced collaboration experiences and better application and resource management. The possibilities are limitless.

As the workforce and workplace undergo massive disruption, businesses must stay ahead by investing in next-generation communication devices and cloud services that are **multi-modal**, **flexible and customizable** to address a range of work styles and use cases.

A majority of businesses today are adopting flexible, collaborative workspaces and multi-dimensional offices including: cubicles, phone booths, private offices, huddle spaces and mid to large conference rooms. These varied work spaces must be equipped with cutting-edge communications and collaboration that empower digital workers to work better and smarter.

Digital collaboration tools—audio, video, web conferencing; messaging; and content sharing—are ENABLING NEW WAYS OF WORKING

THE MODERN WORKFORCE COLLABORATES DIFFERENTLY



THE MULTIPURPOSE AND MULTIDIMENSIONAL OFFICE OF THE FUTURE IS HERE

Percent of Businesses Planning to Increase Investments in



GROWING NEED FOR VIDEO-FIRST EXPERIENCES

Users want simple, affordable and instant video meetings and content sharing in huddle rooms



Huddle room meetings as a % of all video meetings

OVERCOMING THE CHALLENGES

Despite the plethora of collaboration tools that are available to users today, effective collaboration remains a challenge for many organizations.

Simply investing in new technology is not enough to create differentiation or sustainable success. A recent Frost & Sullivan survey of IT decision makers found that high costs, complexity and prevalence of BYOD alternatives were the top challenges to greater adoption of business-grade video and web conferencing.

Technology can often get in the way rather than making work easier. The user experience in meetings can be sub-par if the approach is based on loosely glued together BYOD components. Users walking into meeting rooms with a laptop to connect to a meeting run into several challenges—the user experience is broken, the compute engine can not be centrally managed, and issues such as network connectivity, a bad driver, or a security update causing conflicts will not be known until the meeting has begun and the failure is experienced. In addition, the evolution of the multidimensional modern office means a "one-size-device-fits-all" approach does not offer the best experience and also lacks flexibility to support a multitude of work styles.

The bottom line—mediocre collaboration experiences are no longer acceptable to today's digital workers.

The **FULL VALUE OF TECHNOLOGY INVESTMENTS** is only reached when world-class devices are paired with leading cloud services to leverage functionality, security, analytics, management and scalability for un-compromised organizational agility.



CHOOSE YOUR OWN PATH TO MODERN COMMUNICATIONS

The shift to digital, physical and virtual workspaces is catalyzing best-of-breed preferences. Users do not want to be tied into proprietary hardware and software—they have a choice of interaction modalities and communication applications that best fit their needs—regardless of the platform, devices and collaboration software used.

Modern communications software and cloud services are changing the game. Smart endpoints that natively pair with any communications cloud service consistently deliver best-in-class user experiences with respect to features, performance, flexibility and reliability.

Diverse user requirements must be addressed through a variety of right-fit communications applications and endpoints.

An "Any-to-Any" approach, combined with pay-as-yougo cloud services, offers unprecedented opportunities to combine the latest devices and any number of cloud communications services without sacrificing the ability to standardize deployment and support.

To avoid vendor lock-in, business stakeholders must prioritize on **FLEXIBLE COLLABORATION TOOLS** that enable them to work with an array of providers for the best audio and video devices, cloud unified communications (UC) services, management, analytics and support.



ROBUST CLOUD SERVICES PAIRED WITH INTELLIGENT DEVICES ARE LEADING THE WAY

Businesses are rapidly embracing the on-demand, software-as-a-service (SaaS) consumption model for advanced functionality and operational efficiencies. They are transitioning from the outmoded hardware-centric on-premises approach, that is tied into a single vendor solution, to agile cloud services integrated with best-of-breed headsets, endpoints and meeting room systems.

TURNKEY APPLIANCES, THAT
ARE TIGHTLY INTEGRATED AND
CONFIGURED FOR LEADING CLOUD
SERVICES, DELIVER A SIGNIFICANTLY
BETTER EXPERIENCE THAN
PIECED-TOGETHER OFF-THE-SHELF
MULTI-VENDOR SOLUTIONS THAT
REQUIRE IT DEPARTMENTS TO INSTALL
AND SELF-MANAGE DISJOINTED
COMPONENTS.

Tightly integrated application suites delivered from the cloud allow businesses to selectively adopt communications capabilities that best meet their needs across: IM/chat, presence, voice and video calling, content sharing, mobility and more from a single user interface. By bringing together all the hardware, software and a natively integrated cloud service, businesses can experience high quality audio video communications that is easier to deploy, use and manage.

CLOUD ADOPTION IS WELL UNDERWAY





SIMPLIFICATION THROUGH INTEGRATION

A majority of businesses will opt for best-of-breed communication environments, allowing the best in software, hardware and cloud services to come together

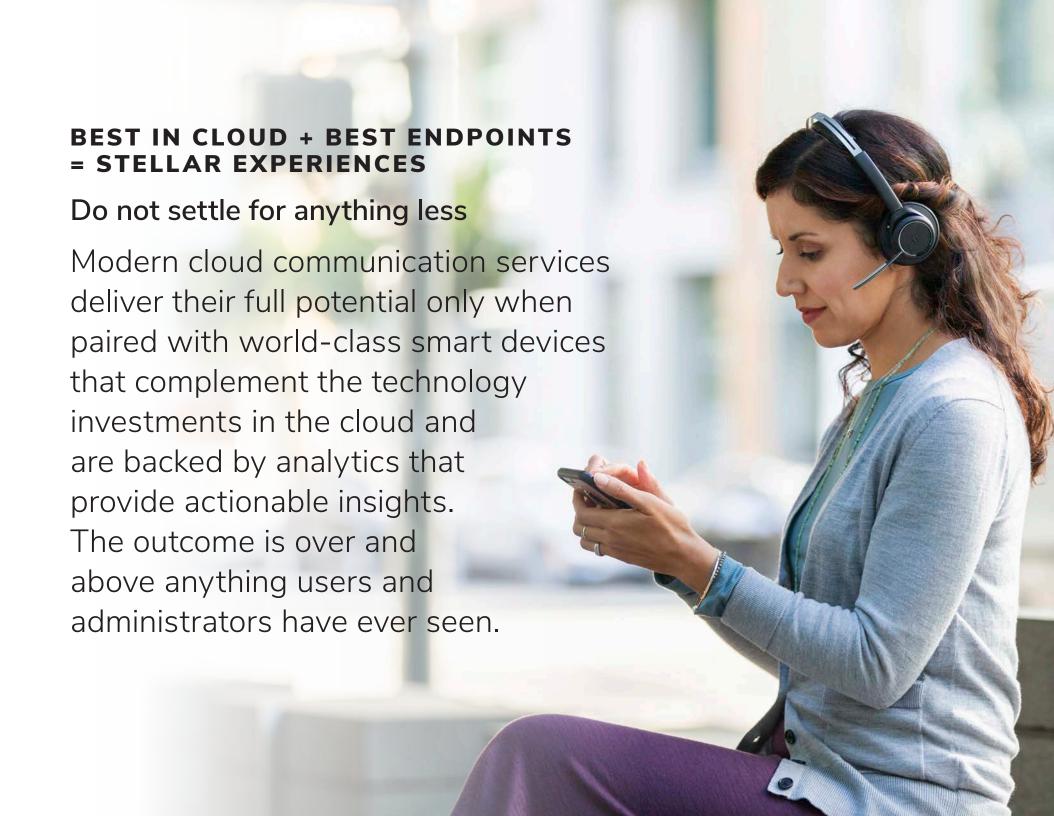
Business Preferences

End-to-end single-vendor solution

To%

Multi-vendor best-of-breed technology solutions

UCaaS = Unified Communications-as-a-Service CAGR = Compound annual growth rate



BEST-OF-BREED TECHNOLOGY ACROSS WORKSPACES AND WORKFLOWS MAXIMIZES PRODUCTIVITY

Your cloud communications services require future-proof devices. Do not invest in collaboration hardware and peripherals unless they work with all the potential cloud services you may use in the future to bring the best experiences together—regardless of the device, software, cloud communications service and user environment.



Smart meeting room appliances

Tightly integrated and configured for leading cloud services, these purpose-built appliances run a dedicated client for partner cloud services to facilitate hassle-free and affordable smart audio/video meetings and seamless content sharing.

EFFECTIVE, EFFICIENT BUSINESS CONVERSATIONS ARE RELIANT UPON SEAMLESS TECHNOLOGY. IT SIMPLY NEEDS TO WORK



Flexible headsets

Options include PC and mobile headsets (corded and cordless) that empower all workers: cubicle, road warrior, executive, open office, contact center, campus and remote staff.



Media and SIP phones

Standards-based devices that integrate natively with leading cloud services to offer auto-provisioning for robust call handling and an extended feature set delivered to the desktop.



Cloud management and analytics services

A single pane of glass to assess real estate and technology utilization, as well as to monitor, manage and resolve potential issues across all room, desktop, headset and BYO devices.



Cloud video interoperability services

Rich inter- and intra-company collaboration for heterogeneous services to support existing investments and best-of-breed preferences that expand utilization and use cases.

KEY CRITERIA FOR SELECTING BEST-IN-CLASS ENDPOINTS— ALL SOLUTIONS ARE NOT CREATED EQUAL

A best-in-class endpoint provider addresses the diverse needs of digital users and modern workplaces with the standardization necessary for consistent user experiences, streamlined management and unified provider support.

COMPLETE ENDPOINTS PORTFOLIO

Invest in a comprehensive audio and video portfolio and a wide range of hardware with leading-edge capabilities



Video Desk



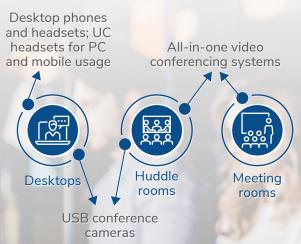
Soft

clients

headsets

A consistent user experience across differing environments and use cases with full BYO support

phones



MANAGEMENT AND ANALYTICS

Simplify and standardize IT support with unified management across all devices and office spaces

Ensure seamless integration of the management suite with leading cloud services and collaboration platforms for customization and greater control in best-of-breed environments.

Actionable analytics and reports



INTEROPERABILITY AND FLEXIBILITY

Ensure robust performance by investing in endpoints that support multiple cloud communications services

> Certification and native integration Ensure a broader and deeper feature set than off-the-shelf endpoints



Cloud-based services Facilitate interoperability between otherwise siloed communications platforms

Endpoint support of multiple services

Make it simple to seamlessly ioin any internal or external session

INTELLIGENT AND FLEXIBLE audio and video communication devices that empower businesses to choose or switch to any cloud provider in the future with minimal or no disruption will extend the useful life and value of existing investments.

VENDOR SPOTLIGHT: POLY

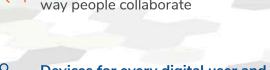
Driving human connection and collaboration with flexible solutions

Poly's innovative endpoints are tightly integrated and configured for leading cloud services to deliver a **better together** experience. Combined with a comprehensive set of services, unified management and next-gen analytics, Poly's best-in-class devices address deployment challenges and usage complexities.

POLY IS BREAKING THE STATUS QUO IN COMMUNICATIONS WITH ONE OF THE MOST COMPREHENSIVE ENDPOINT PORTFOLIOS IN THE MARKET



Easy-to-use video, voice and content sharing solutions that transform the way people collaborate





Devices for every digital user and use case spanning business phones and headsets to video conferencing and content sharing, backed by actionable analytics and support services



Technology partner ecosystem strength that empowers businesses to choose the provider of their choice, including tight integration and partnerships with Zoom, Microsoft, RingCentral and 8x8







Unified management and analytics to optimize resources and capacity

Device Insights

A comprehensive view across all devices to ensure the best UX and make data-informed real estate and technology decisions

Room Insights

A single toolset to monitor space and real estate utilization including ghost meetings, zombie meetings, room squatters and underutilized rooms

Management Insights

Cloud-based insights and management that are complementary to cloud platforms—support for mixed cloud environments, and easy access to actionable data from both smart endpoints and intelligent cloud from a single portal at any time

THE CUSTOMER PERSPECTIVE



The quality of Poly products and the caliber of its service have made it a trusted company of ours for over 20 years.

—The BARBRI Group



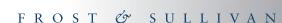
It is greatly appreciated that Poly has transformed itself in the last 3-6 months and is providing the next-generation UC solutions that address the flexibility our company requires now and where we need to get to in the future.

—Kimberly-Clark Corporation



The reason for choosing Poly solutions was simple and easy. The range and functionality of their solutions are suitable for each of our staff members' working environment, whether they are in council offices, on travel, on sites or at home.

—Salford City Council





Frost & Sullivan, the Growth Partnership Company, works in collaboration with clients to leverage visionary innovation that addresses the global challenges and related growth opportunities that will make or break today's market participants. For more than 50 years, we have been developing growth strategies for the Global 1000, emerging businesses, the public sector and the investment community. Is your organization prepared for the next profound wave of industry convergence, disruptive technologies, increasing competitive intensity, Mega Trends, breakthrough best practices, changing customer dynamics and emerging economies?

For information regarding permission, write: Frost & Sullivan 3211 Scott Blvd Santa Clara, CA 95054

SILICON VALLEY

3211 Scott Blvd Santa Clara, CA 95054 Tel +1 650.475.4500

SAN ANTONIO

7550 West Interstate 10 Suite 400 San Antonio, TX 78229 Tel +1 210.348.1000

LONDON

566 Chiswick High Road London W4 5YF Tel +44 (0)20 8996 8500