nemertes RESEARCH 2014 *Avaya*
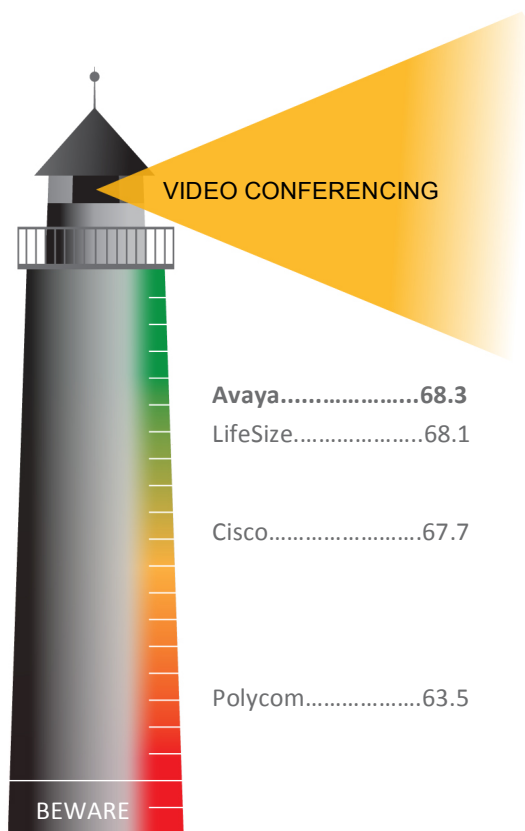## PilotHouse
TOP PROVIDER

Video Conferencing: These solutions help workers visually collaborate within the company, and with partners, suppliers, and customers across a variety of endpoints including desktop computers, mobile devices, standalone room systems, and immersive suites. Major trends include more cloud offerings; growing integration across room, desktop and mobile; and capabilities such as streaming/video distribution and user-generated video capture.

OVERALL ENTERPRISE RATING — Avaya

- Value and technology boost Avaya to the Top Provider for Video Conferencing for the enterprise segment.
- IT decision-makers cite pricing/licensing clarity and actual cost as high scores for Avaya.
- In terms of customer loyalty, enterprise Avaya customers are relatively loyal. The vast majority has no plans of leaving Avaya in the next two years.
- Of Avaya's enterprise customers, about 15% of the employees use its video conferencing products.
- Among scorecard metrics, those using Avaya weight technology and value as most important; Avaya aligns with customer requirements.

VIDEO CONFERENCING

Avaya.....................**68.3**
LifeSize.....................68.1

Cisco.........................67.7
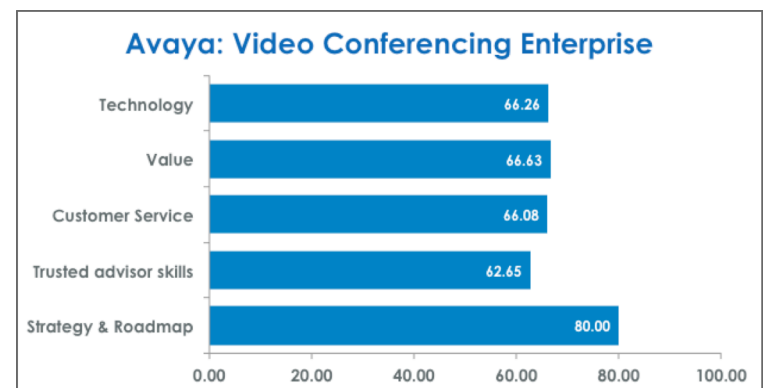
Polycom...................63.5

BEWARE

- These providers should be part of every evaluation of this technology, based on detailed feedback from IT decision-makers and Nemertes' analysis.

- These providers may be part of an analysis after factoring in your key requirements, existing architecture, and future planning. Requires deeper analysis of gaps, alignment with vendor, and explicit feedback from IT decision-makers already using these vendors.

- Exercise caution with these providers. They did not score comparatively well with their customers, and/or Nemertes analysis may indicate concerns with strategy, roadmap, or financial viability.

The Weighted Scorecard

Avaya: Video Conferencing Enterprise

Metric	Score
Technology	66.26
Value	66.63
Customer Service	66.08
Trusted advisor skills	62.65
Strategy & Roadmap	80.00

(Scale: 0.00 – 100.00)

- <u>Technology:</u> Includes product features, reliability, interoperability, management capabilities, and technology roadmap.
- <u>Value:</u> Includes clarity of pricing structure, licensing flexibility, actual cost, and value (ie, bang for the buck).
- <u>Customer Service:</u> Covers pre- and post-sales responsiveness, break-fix responsiveness, accuracy and timeliness of invoices.
- <u>Trusted Advisor Skills:</u> Includes provider's ability to be a trusted advisor, rating expertise, credibility, enlightenment, character, and contact management.
- <u>Strategy & Roadmap:</u> Nemertes analysis on core attributes of provider's overall technology strategy and roadmap.

nemertes RESEARCH
Independence. Integrity. Insight.

CUSTOMER LOYALTY BAROMETER

-2.6   Mean   +8.5
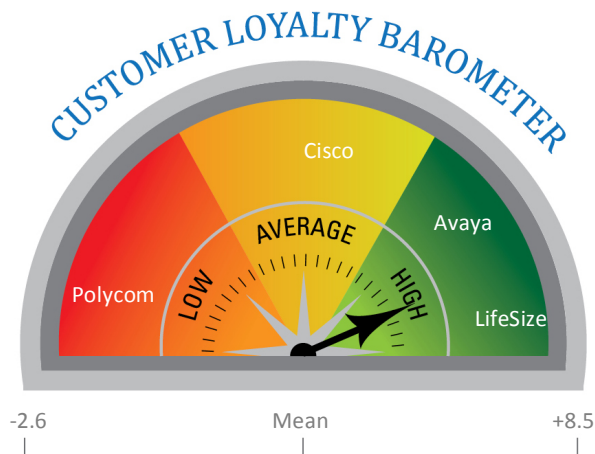
Nemertes asked IT decision-makers if they planned to stay with their provider for the next two years. We then calculated the mean percentage of companies planning to stay with their provider, and compared vendors against one another and against the mean.

■ **High:** These providers have a relatively high percentage of organizations planning to stay with them for two years, and a low percentage planning to leave or are unsure.

■ **Average:** These providers align with the mean and have an average percentage of customers planning to stay and an average percentage planning to leave or are unsure.

■ **Low:** These providers have a relatively low percentage of customers planning to stay, and a high percentage planning to leave.

PILOTHOUSE METHODOLOGY

Nemertes conducted a research study in the spring of 2014 with 500 IT decision-makers and influencers. We asked them to identify their primary providers in the following technology areas: IP telephony, integrated unified communications, video conferencing, document collaboration, and social software.

We asked research participants if they planned to stay with their providers for the next two years. (Please see Customer Loyalty Barometer, left). We also asked them to rate the relative importance in their vendor selections of each scorecard area. (Please see page 1). In addition, they rated their providers on a 1-to-10 scale on 20 questions regarding technology, value, customer service, and ability to serve as a trusted advisor. We also asked them to identify value added resellers they use (if applicable), and to rate those providers. Research participants provided open-ended comments about what they liked most and least about each provider.

In addition to the participant ratings, Nemertes also included two assessments: Provider strategy and financial viability. In each technology area, Nemertes identified key features, functions, and practices, then assessed each provider's strategy and roadmap against those criteria. We see financial viability as a key concern when making a provider selection. To judge it, we relied on Standard & Poor's long-term debt rating and other metrics; we included an alert in the analysis for any vendor S&P rates D or below.

To generate each vendor's final score, we combined the weightings and ratings provided by IT leaders, a measure of variation in the ratings to reward those with very consistent scores, and our score of provider strategy. We segmented the results by midmarket (<2,500 employees) and enterprise (2,500+ employees), to provide a ranking of providers.

Selection Criteria for Those Considering This Technology:

• <u>Cloud and On-Premise Offerings</u>: Evaluates whether the vendor offers the solution on-premises, through a hosted/managed model, and/or Software as a Service (SaaS), and the strength of its delivery model.

• <u>Integration with Microsoft Office Apps</u>: Describes whether the solution integrates with popular Microsoft Office applications, including SharePoint and Lync.

• <u>Broad Support for Popular Mobile Devices/Operating Systems</u>: Examines which operating systems and mobile devices each video solution supports, how extensive the support is for each OS, and how well it aligns with midmarket and enterprise requirements.

• <u>Channels Breadth/Service and Support</u>: Evaluates the vendor's channel composition, reach, and service.

• <u>Software-Centric</u>: Assesses whether the vendor offers hardware/appliance only, or fully virtualized software—and how that aligns with mid-market and enterprise requirements.