

F R O S T  S U L L I V A N



Market
Insight

Adding Value and Managing Change in Today's Contact Center

Innovative Solution Integrators (SIs) Key to Cloud,
Omnichannel, and IT Management Strategies

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Introduction

Customer contact systems integrators and value-added resellers, or “solution integrators” (SIs) are the linchpins in the contact center supply chain. Companies call on SIs to map out solutions strategies and recommend and implement new and upgraded hardware and software and services. In turn, original equipment manufacturers (OEMs) and hosting providers depend on SIs as channel partners to sell, support, install and connect technologies to customer companies.

At the same time SIs are vulnerable to the stresses of anticipating and responding to the evolving demands of OEMs, hosting providers, and other companies. The future of SIs depends on how well they meet the evolving needs of companies and suppliers in a changing contact center marketplace.

Industry Trends

SIs are impacted by the trends that are changing the contact center industry. Here are the key developments that SIs benefit from:

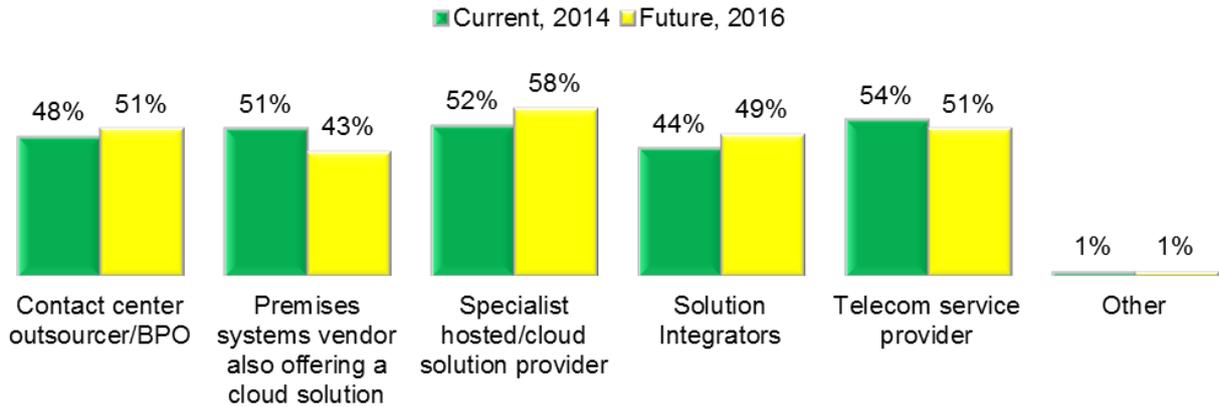
The Cloud/Hosted Shift: Companies are lifting more contact center applications to the cloud. Frost & Sullivan research forecasts that North American hosted solution annual revenues will climb from \$2 billion in 2013 to \$3.4 billion in 2018, at an 11.4 percent compound annual growth rate. Revenues from hosted/cloud solutions have already exceeded on-premise contact center product sales (excluding maintenance) in terms of annual spending. That trend will continue for the rest of the forecast period.

But the ascent of companies' contact center solutions to the cloud is slow and uneven; most companies that have gone to the cloud have “hybrid-hosted” cloud and on-premise software environments. Hybrid-hosted environments take several forms. Companies have been faster to move inbound routing and dialing applications to the cloud than analytics, call recording, and workforce optimization, or agent performance optimization (APO) solutions. At the same time, some companies may keep customer data and/or voice paths on-premise, but shift the applications to the cloud. Also, companies may move some departments' solutions in the cloud, such as billing, while other solutions, such as finance, stay on-premise.

In essence, companies are calling on SIs to manage their move to the cloud, to help with customization, vendor selection, the integration of cloud solutions with on-premise and other cloud solutions, and hosting private clouds.

Exhibit 1 shows that more companies will be turning to SIs to provide hosted contact center solutions in North America from 2014 to 2016.

Exhibit 1: Current and Future Hosted/Cloud Contact Center Providers, North America, 2014 and 2016



Base: Filtered respondents: those who currently use hosted/cloud solutions (n=160); those, who use or plan to use hosted/cloud solutions (n=284).

Qa. Who are your current hosted/cloud contact center providers? Select all that apply.

Qb. Which hosted/cloud contact center providers are you likely to use in the next two years? Select all that apply.

Source: Frost & Sullivan

Companies also want SIs to integrate cloud and on-premise contact center solutions with CRM, back office, and unified communications (UC) applications. In turn, cloud revenues provide a consistent revenue stream over a longer period for SIs, though at the expense of losing immediate “big ticket” upfront sales, supplemented by maintenance contracts.

Growing Demand for Omnichannel-driven Advanced Features: Prices for basic contact center solution functions have been declining, resulting in lower profits per sale for SIs. But a growing demand for more feature-rich and advanced applications will outweigh the impacts. Companies’ adoption of omnichannel strategies is becoming a source of demand for sophisticated applications. Companies have been adding new channels, and integrating them with existing channels, retail outlets and kiosks, and social media. Companies also have had to employ analytics applications to gain insights from customer data.

Unfortunately, many companies are some ways away from offering that true omnichannel Customer Experience. The reasons vary. Often there is an absence of channel integration as many companies design and develop their mobile applications outside of the contact center technology arena. And the retail, social, and Web channels are typically the responsibility of departments other than the customer service department, thereby requiring cross-departmental cooperation and planning.

Within the contact center, companies may find that some of the applications' features work fine while other features do not. But if these applications are part of multiple-application suites companies may have to discard entire packages, which they may be reluctant to do to avoid wasted investment. Also, many companies purchase "best-of-breed" solutions, but these applications may require considerable integration with other applications.

SIs can help companies prepare roadmaps for omnichannel implementation, identify and remove obstacles, and recommend and execute solutions. And SIs can facilitate the resolution of operational and technical issues with the various departments, including IT. SIs also can integrate omnichannel contact center solutions with CRM, back office, and UC applications. Finally, SIs can implement mobile solutions, including in-store wireless networking, and integrate them with other solutions.

Obsolete Legacy Solutions Replacement and Enhancement: Many companies' contact center solutions have or will shortly reach end of life and will therefore be unable to support new channels or applications. Not a few contact centers that made large investments in ACD, IVR, and outbound dialing hardware and software in the late 1990s during the "dot-com boom", found they could not afford to replace them when the economy plummeted in 2007-2008. Meanwhile newer products' lifespans or "refresh cycles" have shortened from 5 to 7 years to 3 to 5 years. As more legacy applications fail or become unsupportable, as solutions become outmoded, and as companies embark on omnichannel strategies, the greater the urgency to buy new solutions.

SIs help companies select and implement advanced new cloud and on-premise applications, and also life-extend existing solutions by adding new channels and features. But legacy solution replacement over the next few years is a limited window of opportunity for SIs to establish and develop relationships with companies.

IP/SIP Migration: Companies are moving their telephony networks from PSTN/TDM to IP and SIP to lower call handling costs, easily add or subtract capacity, and to support UC applications. Frost & Sullivan forecasts that the number of North American corporate users of IP access and SIP trunking will climb from 19.9 million in 2013 to 77 million in 2019.

Many companies have completed the shift to IP, with IP ACDs and IP PBXes and IP telephony to the desktop, but have not yet converted to SIP. The key restraints appear to be additional hardware and software investments to support SIP, lingering reliability and security concerns, and corporate conservatism.

The SIP conversion market also presents a business opportunity for SIs through the sale and installation of call recording, CTI, IVR, middleware, and mobile applications. But many small- and mid-sized companies are shifting their applications to the cloud, while adopting IP/SIP and asking SIs to perform both moves.

New Tools and Processes. New packaged adapters and connectors have been developed that remove the need for SIs and customers to create customized applications. Examples include linking ACD queues with third-party chat queues, basic screen pops, data integration from multiple sources, and call routing optimization. As contact center solutions become more data driven, tasks like data integration may be beyond some companies' and SIs' toolkits.

Packaged adapters and connectors enable SIs to integrate solutions in less time, which allows SIs to focus on strategic and complex tasks, including optimizing blended queue logic, enhancing reporting capability, and designing advanced screen pop workflows. In return, these tools may allow SIs to make more profits on their projects.

More Mergers and Acquisitions (M&As). The slowly growing North American economy provides the ideal climate for M&As, and M&As allow companies to increase market share and revenues faster than what they could achieve with organic growth alone. M&As often lead companies to strip out legacy applications, and implement new solutions, in order to quickly reduce costs and boost shareholder value. SIs can guide companies through the process in order to generate greater results in a shorter period of time.

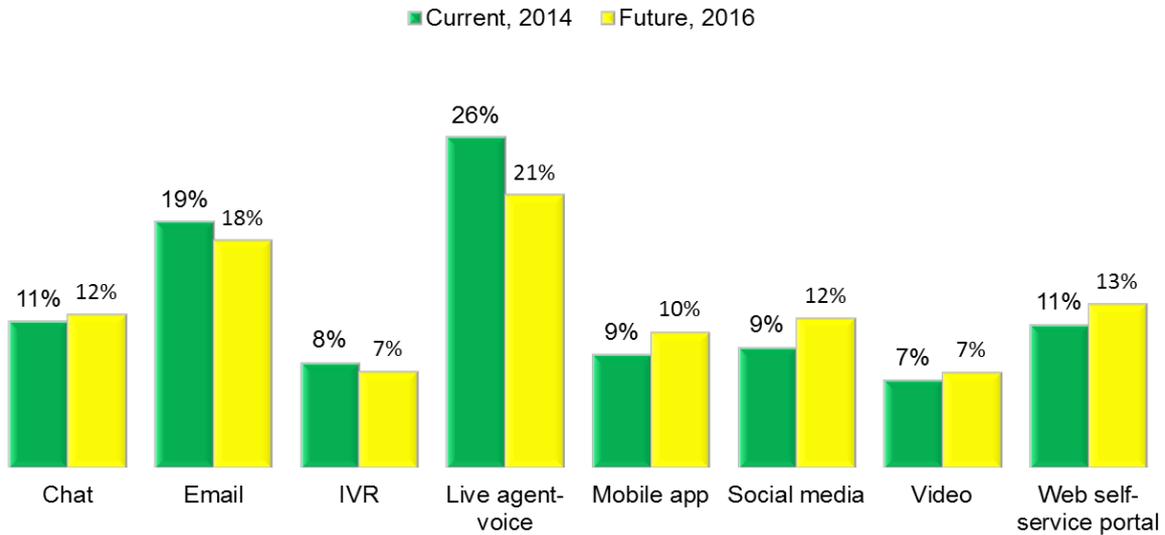
Industry Challenges

SIs are facing several challenges in the contact center market. Key among them is a declining North American install base. Frost & Sullivan forecasts that the number of contact center seats will shrink from 4.1 million in 2013 to 4 million by 2018. New seats created by domestic market demand, and by the return of some higher-valued programs from offshore may not offset losses caused by automation, improved agent productivity, and by offshoring low-value programs.

Consider too that the Frost & Sullivan forecast may be conservative. Technology-savvy GenYers and Millennials prefer automated and text-based automated interactive customer contact (AICC) solutions, and social media peer support, over calling contact centers. Exhibit 2 show a 2014 Frost & Sullivan survey which reports that IVR, live agent, and email use will decline, while chat, mobile app, social, video, and Web channel use will increase. SIs that do not have a strong foothold in rising channels risk losing out to those firms that have built their core business on Web implementation.

Lastly, more M&As will likely mean fewer contact center installations, projects, and project hours. As a result there will be stiffer competition between SIs for a shrinking market. Companies will be able to exert more pressure on SIs to lower prices and meet more demanding project requirements.

Exhibit 2: Current Versus Future Customer Interaction Channel Usage (Mean Percents), North America, 2014 and 2016



Base: All respondents (n=305).

Qa. What proportion of your customer interactions currently take place in each of the following channels? - Mean scores

Qb: Thinking about your contact centers two years from now, what proportion of your customer interactions do you expect will take place in each of the following channels? - Mean scores

Source: Frost & Sullivan

Here are several other critical contact center market issues affecting SIs:

Cost and Convenience over Functionality: Companies may select all-in-one suites from single vendors, even though some of the solutions' components may be less satisfactory than "best-of-breed" choices from several vendors. Companies also may accept standard APIs and off-the-shelf integrations, instead of value-added customizations, in order to cut costs and speed up implementations.

The Dark Side of the Cloud: The availability of sophisticated solutions in the cloud has made it easier for users to source and install software without the knowledge and participation of IT departments. Many users are going to this practice, known as "shadow IT", to avoid the lengthy and not often guaranteed internal IT approval processes. Frost & Sullivan research reports that 15 percent of employees admitted to using business productivity, 12 percent to using social media, and 11 percent to using file sharing, storage, and backup applications without IT organization consent.

The cloud can hurt the SIs business in several ways, including less customization, users cutting them out of the supply chain by sidestepping SIs' traditional relationships with IT departments, and fewer on-premise projects that have been the SIs' business mainstay. And it is doubtful that new business from the cloud will be strong enough to fully offset the losses.

Fewer and More Aggressive OEMs: Contact center OEM and hosted provider M&As have resulted in fewer, but more powerful vendors, less competition, and consequently less need for SIs to create solutions that bridge different vendors' products. The OEMs are expanding into the SIs' core market of solution services, such as the cloud and professional services, through both internal R&D and acquisitions. In response, SIs have had to seek more customized projects than they had in the past. OEMs are also selling downloadable applications, like email-to-fax solutions and templates. These products help SIs by enabling them to focus on more value-add tasks. But more core contact center applications may migrate to this "plug-and-play" model, just as they have done to the cloud, resulting in even less need for SI services.

Managing More Business Capabilities and Relationships: Companies are seeing technology purchasing decisions expand from the IT departments to lines of business (LoBs), where the departments' focus is on meeting their specific business goals and deadlines. LoBs are less interested in the mechanics and are more concerned in having solutions meet their immediate needs reliably, simply, with user-friendliness. But many SIs may not have the expertise and the business culture to make the shift to this new class of buyers.

The net result of the market trends and challenges is that the SI industry is at the cusp of a major round of consolidation. SI vendors are figuring out their market niches, the stronger and weaker competitors, and where they fit on that continuum. In turn, some SIs have been buying independent professional services agencies with specific talents, such as building cloud applications, in order to bolster their capabilities.

Summary and Recommendations

The North American customer contact market is in a period of evolution. Companies are adopting increasingly cloud-delivered omnichannel and APO solutions, stepping-up their use of Web, mobile, AICC, and social solutions, and are considering retail and SME staff to supplement or supplant agents. SIs must either adapt, or their contact center business will perish at the hands of competitors, including their OEM partners.

Still, SIs can capitalize on many of the trends faced by their contact center clientele. Consider the following opportunities for SIs:

Fill the Solution Gaps: The uneven ascent of contact center solutions to the cloud has left other gaps for SIs to fill, such as managing responsibility for the cloud transition and for hybrid hosting, including unified reporting and IT support. SIs also can test cloud applications for smaller or internal contact centers (such as with accounting, billing and collections, and HR) and help migrate all centers to a cloud platform.

SIs also can help contact centers manage agent desktop applications. These solutions are sourced from many different vendors, but they may not work well together, resulting in longer call times and lower availability, higher supplier costs and higher cost of management. SIs can identify problems and recommend and implement solutions.

Finally, SIs can identify and close process and usage gaps, such as with IVR systems by increasing completion rates. SIs can help companies determine where and why customers are “zeroing out”.

Connect Bricks-and-Mortar and SMEs: Many companies are now looking at having personnel outside of the contact center, such as field and retail staff, and subject matter experts (SMEs) handle multichannel customer contacts. If a customer calls, texts, or Tweets from their GPS-equipped mobile device, and are in that company's store, their contacts and comments may be routed to in-store personnel. And as Web, mobile, and AICC solutions become more powerful, those customer inquiries that automated applications cannot manage may be too complex for contact center agents to handle. In that case, SMEs will have to be tapped and engaged to resolve customers' matters.

SIs can help companies connect contact centers with SMEs through deploying their expertise also in business communications systems and UC to enable contact center to UC connectivity. SIs also can advise and help companies implement connectivity between customers and brick-and-mortar employees.

Offer Global Support: When companies expand their customer contact operations into other countries it opens a new and complex set of issues, including carrier environments and government regulations (customer data privacy and workforce management, for example). Companies often have separate platforms for different markets for these reasons. SIs can migrate disparate business practices across global locations into a single business practice and global platform, with customization for compliance in different countries.

Address Security Concerns: SIs can probe and identify for security weak-points in the customer interaction chain, from customers to contact centers and data centers. SIs offer services such as data and IP video and encryption and facial and voice biometrics to ID and verify customers.

Business Continuity/Disaster Recovery (BC/DR) Management: SIs can devise customized BC/DR solutions that enable companies to provide information and service to customers, and also information to contact center agents, often through outbound notifications. SIs also can offer a cloud hosting platform to support companies in the event companies' on-premise contact center applications are at risk of being lost or have been lost as a result of a particular disaster.

Become the Company Expert and Solutions Manager: Finally, SIs should reposition themselves as trusted independent technology experts and solutions managers for both LoBs and IT departments. Companies are seeking to reduce IT outlays and contact centers present an alluring target because they present a complex niche set of solutions. But companies realize that they must have highly functional and reliable contact center solutions in order to retain and attract customers.

SIs must facilitate stakeholder discussion, in order to clarify strategy, build technology roadmaps, ascertain business requirements, propose options, define budgets, and set time-lines. SIs can offer their expertise to manage, maintain, support, and upgrade companies' contact center solutions, review issues, and suggest improvements. SIs also could leverage their OEM channel partnerships to execute complex projects or fix major technical issues. As a result of this strategy, SIs would be able to move up the value chain, and get better at selling on value, achieving a more profitable business over the long-term.

Vendors at a Glance

Aceyus

Aceyus provides an integrated set of solutions for Avaya and Cisco contact center environments. The company delivers software applications and associated services that optimize call routing functions, consolidate contact center data from multiple disparate systems, and provide integrated reports and dashboards. Aceyus focuses on large-scale, multi-vendor contact centers that have complex data analysis and reporting requirements.

Adtech Global

Adtech Global provides contact center solution consulting, training, and implementation services, with a focus on workforce optimization (WFO) applications. Adtech Global also offers Verint WFO in the cloud, which can communicate with any on-premise ACD. To ensure quality, Adtech Global also provides "Global Monitor", an application-specific monitoring service for Avaya and Verint contact center products.

AT&T

AT&T provides design, deployment, and management of hosted and dedicated contact center solutions. It supports Avaya, Cisco, and Genesys platforms, along with several contact center features and professional services vendors.

Among its many capabilities, AT&T can provide contact center services, as well as professional services contracts with multiple third party vendors on its Global MPLS network. With 38 Internet data centers and service in over 182 countries, AT&T can assist customers with most of their global needs, such as helping companies bring their solutions from concept to deployment. As AT&T provides network solutions in addition to contact center solutions, it can assist companies with developing their IP implementation plans and migrate their telephony environments to IP.

Arrow S3

Arrow S3 has expertise in designing and implementing contact center systems to meet specific operations and performance requirements, and in devising and implementing Customer Experience enhancement programs, including multichannel and mobile solution and analytics application integration. Arrow S3 also enables companies to incorporate enterprise UC into the contact center in order to support subject matter experts. It can help companies transition their customer contact networks from TDM to SIP.

Arrow S3 has OEM partnerships and works with internal developers to create customized applications. Its consultants work with companies to determine needs, requirements and obstacles, and then devise and recommend solutions.

BT

BT has an extensive onsite consulting and SI practice. It represents leading suppliers for multichannel customer service, outbound contacts, social media, and video projects.

BT also offers cloud/hosting solutions that support from 25 to over 1,000 contact center agents across the globe. The company has a network of globally-located data centers and nodes in 42 countries. Its cloud services encompass multichannel inbound and outbound contact handling, self-service, APO, and unified agent desktops. BT can integrate its cloud/hosted applications with companies' CRM solutions or companies can use BT's contact management solution.

BT also can connect companies' front and back offices through its BT One UC portfolio to help companies connect their customers directly to subject matter experts, regardless of location. The company has partnerships with solutions providers such as Avaya, Cisco, and Microsoft.

Carousel Industries

Carousel Industries has an integrated customer contact data solutions practice covering call management, headsets, multichannel inbound routing and outbound dialing, and workforce management. Carousel also offers unified communications and collaboration services built around Microsoft Lync and integrated into voice, video, and data applications. The company also has a suite of cloud solutions, including hosted public clouds and private managed clouds that are built on a customizable best of breed application stack. Its data solution practice provides BC/DR, IT security, and wireless networking services, including for home agent support.

Carousel Industries offers an integrated set of supplier-and-solution-agnostic pre-sales services, professional services, and business consulting services. The Carousel contact center pre-sales practice provides a complimentary analysis and set of recommendations. The company's professional services team then puts together and implements "building block" solutions that address their clients immediate needs and medium to longer-term objectives. Finally, the Carousel business consulting services practice ties together the pre-sales and professional services programs. It developed and formalized its "4C" methodology that uses data discovery and return on investment calculations. Carousel maps companies' existing solutions to business goals, examines the alignments, identifies any gaps, and demonstrates the ROI from new solution investments.

CenturyLink

CenturyLink offers both cloud and on-premise solutions, with a focus on cloud solution hosting and integration with companies' existing on-premise ACD, CRM, and IVR applications. CenturyLink carries both cloud/hosted and dedicated customer premises solutions that are located in CenturyLink data center or network locations.

The company's hosted ACD and IVR services permit companies to develop their IVR applications internally or use CenturyLink Professional Services. There also is a customer-facing user interface to configure menu routing. CenturyLink's hosted, outbound notification service provides multi-modal options for sending mass notifications through voice, email, SMS or fax. Companies can use a customer self service portal or via an automated API solution configured by professional services. The carrier uses system management tools that provide end-to-end monitoring that includes Internet backbone and voice communications links.

ConvergeOne

ConvergeOne offers contact center and enterprise-wide communication and collaboration solutions, including consulting and implementation and professional services. ConvergeOne's services cover multichannel contact management, mobility, analytics, social media, workforce optimization, UC, and PSTN/TDM to IP/SIP migration. The company has subscription-based cloud connectors that integrate contact center systems with leading vendors' CRM applications. It also offers data management services including BC/DR, security, virtualization, and application and data server and storage consolidation.

ConvergeOne supplies contact center, UC solution integration services, and VoIP deployment services through its NACR division. NACR has strategic partnerships with Avaya, Interactive Intelligence, Microsoft, and Unify. NACR has considerable expertise in back-end systems and multichannel integration, and in workforce optimization. NACR also develops companies' customer experience management (CEM) strategies through integrating analytics and business intelligence into their contact centers.

Dimension Data

Dimension Data is a global information and communications technologies services and solutions provider with a local presence in over 50 countries across five continents, and reaches 114 countries with its "Preferred Partner Programme".

Dimension Data combines domain expertise in networking, converged communications, security, Microsoft, data center, and contact center technologies, with complementary capabilities in consulting, integration, ITO, and managed services. The company also offers a full range of customer contact services around contact center integration, self-service, interaction management, workforce optimization, and operation. It delivers contact center solutions across multiple communications channels, including social media, CRM, and outbound. In addition, Dimension Data's Unified Communications and Collaboration offerings include hosted, managed, and cloud-based communications services; video; and telepresence.

Dimension Data enables over seven billion customer interactions every year and manages 76,000 seats through its "Managed Service for Contact Centres" offering. It also publishes a comprehensive annual "Contact Centre Benchmarking Report".

Open Methods

OpenMethods offers Harmony, an "Integration-as-a-Service platform" that connects and blends features on existing individual contact center solutions. The platform has "out-of-the-box integration" between Oracle RightNow CX and cloud and on-premise installed ACDs. It has an embedded multimedia bar that enables screen-pops, call controls, and information flow into the CRM window, as well as enabling the ACD's universal queue to route all media types. Harmony allows users to control interactions from within the CRM application workflow by clicking a button.

Servion

Servion specializes in delivering multichannel customer interaction management (CIM) solutions and contact center applications. It is a global company with more than 600 customers and over 1,000 installations spread across sixty-plus countries, and its products and solutions handle more than seven billion interactions per year.

Servion takes a consulting-led approach to optimize customer interaction for its clients, drawing from a combination of deep contact optimization experience and broad contact center technology knowledge. This structured approach allows the company to understand and map customer interaction strategies of all stakeholders across client organizations. Servion identifies people, process, and technology gaps, diagnoses their causes, and designs and executes solutions accordingly.

Servion also offers solutions across eight CIM segments, including self-service, computer telephony integration, multichannel interaction management, and APO. These solutions are offered to a wide range of verticals such as banking and finance, telecommunications, business process outsourcing, hospitality, retail, and transportation. It delivers its solutions through its consulting, professional services, product engineering, support services, and managed services divisions.

Softel

SOFTEL Communications provides a deep and wide range of contact center and enterprise services including consulting, systems integration and implementation, private cloud hosting, and managed services. It also has a UC practice integrating instant messaging, presence, telephony (including IP telephony), video conferencing, data sharing (including electronic whiteboards), call control and speech recognition with non-real-time communications, such as unified messaging. SOFTEL Communications' expertise also includes implementing technologies like application infrastructure monitoring, CRM, data center virtualization, mobility services, data and IP video and voice encryption, and facial and voice biometrics. Also, it was co-developed a fully featured enterprise grade native Microsoft Lync contact center solution that integrates and enhances most of the notable contact center manufacturer's platforms.

While SOFTEL Communications represents several vendor product lines, including those from Aspect, Avaya, Cisco, Genesys Telecommunications Laboratories, Microsoft, NICE, and Verint, it is vendor-agnostic. The company will source, install, and integrate any vendor's products with those of other suppliers for its clients.

Spanlink

Spanlink provides a full range of contact center services, including consulting, roadmapping, and implementation services, built on and around the Cisco platform. Spanlink's signature offerings are OnGuard, which provides managed services and support, and Spanlink Cloud Services. OnGuard monitors and maintains Cisco solutions and third-party software that integrate with Cisco applications. Spanlink offers both contact center as a service (CCaaS) and unified communications as a service (UCaaS). The CCaaS offering includes multichannel inbound and outbound contact handling, speech analytics, and workforce management. The UCaaS solution has presence, messaging, collaboration, conferencing, and desktop video and mobility solutions.

Strategic Products and Services (SPS)

SPS is a global, multi-vendor systems integrator of business communication solutions, including contact center, cloud, mobility, unified communications, video conferencing and collaboration, and managed services. It assists in every stage and aspect of projects ranging from Customer Experience to strategic planning, in any size and complexity of contact center. SPS offers consulting services, contact center assessment, design and implementation services, defined support, managed solutions and "Enterprise Contact Center as a Service (ECCaaS)". A full-service SPS engagement methodology provides a consistent project approach from discovery through design, implementation, and support.

Verizon Enterprise

Verizon Enterprise supplies on-premise contact center solution installation, systems integration, and professional services. It implements new and upgrades existing on-premise IVR, ACD, dialing, quality monitoring, and workforce management solutions.

Verizon also provides hosted contact center solutions. It has hosted IVR for contact routing, hosted speech services, and a hosted virtual contact center with chat, social media, UC, and video. Verizon can support on-premise and hosted contact centers on its global network. It can migrate contact center call transport from PSTN/TDM to IP and install IP-ready or enabled solutions.

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