2015 North American Web Conferencing Customer Value Leadership Award
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Background and Company Performance

Industry Challenges

The global web conferencing market is going through a combination of maturation and reinvention, dynamics which are providing several growth drivers. Application convergence, cloud, mobility, and social technologies are transforming the landscape, resulting in groundbreaking technology shifts that are empowering users with greater productivity benefits than ever before. As the collaboration landscape gets increasingly complex, Frost & Sullivan points out that there is a greater focus on simplification and application convergence. Furthermore, consumerization of IT and a growing need for simpler and faster collaboration - regardless of location or device - is prompting landmark shifts and leading to a prominent mobile-first and cloud-first focus.

According to Frost & Sullivan independent research, the global web conferencing market, which includes SaaS and on-premises solutions, grew at a healthy 10.5 percent in 2013 to reach $2.0 billion in revenue. Web conferencing software and services are forecast to grow at a compound annual growth rate (CAGR) of 8.8 percent from 2013 to 2018 to reach $3.05 billion by 2018. User demand is growing rapidly, with several vendors reporting greater than 25 to 30 percent growth in usage. There is clearly a rapid growth in adoption, as the value of web collaboration is well understood - both as a productivity enabler and a tool to cutback travel.

While user demand is growing rapidly, revenue growth in web conferencing is starting to slow down from increased market maturity and impact of declining prices. Concerns about ease-of-use and simplicity, along with lack of a strong use case for mainstream communication, have kept web conferencing adoption quite restrained. Promoting awareness about the solutions, use cases, and implementation continues to be a challenge. Competition is emerging from new quarters. There is a growing impact of alternatives, including basic screen sharing tools as well as affordable cloud video conferencing services that are beefing up content sharing features, in addition to video communications. The battle to grab users is certainly in play.

Frost & Sullivan believes that holding a customer value leadership position puts a vendor in a favorable position to increase its footprint and share in the market. Customer value leadership demonstrates leadership and excellence in implementing strategies that proactively create value, with a focus on improving the return on the investment for customers. The Frost & Sullivan Customer Value Leadership Award recognizes a specific company’s focus on enhancing the value that its customers receive (beyond simply good customer service). This is earned by proven dedication to not just respond to changing market conditions and customer demands, but also by helping to drive the overall market. Such validation helps a vendor to protect and grow both its installed customer base and partner ecosystem.
Customer Impact and Business Impact

Criterion 1: Solution Simplicity and Usability

join.me by LogMeIn is a freemium service that started as a screen sharing tool and has evolved into a robust meeting tool that has created strong recognition in the market. In addition to a free option that allows up to 10 participants to join a web conference, the Pro and Enterprise versions of join.me include additional features for meetings up to 250 participants at industry disruptive prices. Requiring no download for participants, join.me meetings offer a simple and intuitive user experience, which has led to a growing installed base of millions of users. The premium services include unlimited audio, presenter swap, annotation, and recording.

Frost & Sullivan feels that join.me has clearly and consistently focused on the core principles of simplicity and usability, while offering relevant functionality, to address the growing user demand for more user friendly and faster collaboration. As a result, it has successfully disrupted the market and seen strong adoption from millions of users, particularly SMBs that have limited IT support and look for products that are simpler to deploy and use.

join.me is built from the bottom up to be intuitive when compared to competitive solutions that are now stripping away bells and whistles for cleaner and simpler UIs. The Pro version gives users additional functionality, like the ability to choose the window being shared, to swap presenters for tag-team meetings, and to personalize their online meeting space, to name just a few. Mobile professionals are adopting join.me in droves, many starting with join.me's free version, and then driving adoption for join.me in their workplace.

join.me has established itself as a leading provider for web conferencing services in the SMB space. By continuing to offer an ever growing set of functionality while keeping its eyes on simplicity and usability, Frost & Sullivan believes that join.me is now better positioned than ever before to make an impact.

Criterion 2: join.me’s Performance in the Web Conferencing Market

Frost & Sullivan research shows that in 2014 join.me grew at a rapid pace and increased its market share significantly.

join.me has reported strong growth momentum:

- Over 100 percent Y/Y revenue growth in 2014, making it the fastest growing web conferencing product.
- 150 percent increase in customer accounts in last 12 months, with over 1.5 million new presenters each month.
Over 27 million join.me meetings in 2013.

Join.me’s strategy of building a large base of users to establish its brand has worked very well. It has successfully entrenched itself in the SMB segment. Join.me entered 2015 with a strong pipeline and expects its growth momentum to continue at an accelerated pace. The accelerated growth is positioning join.me well to continue leading and growing in the SMB sector while starting to see greater traction among enterprise users.

**Criterion 3: Smart Workflow Integration**

Businesses are increasingly converging their communication and collaboration applications with workflows to enhance the context within which information is shared. A growing focus on business outcomes and workflow enablement is leading to integration with applications such as customer relationship management (CRM). By embedding collaboration in other applications, including line-of-business software and services, web conferencing can deliver significant ROI and streamline the workflows to ensure rich collaboration for maximum efficiency.

Join.me has been successful in addressing this trend. During the third quarter of 2014, Join.me introduced integration between join.me and Google apps. Included in join.me Pro and join.me Enterprise offerings, this integration makes it easy to schedule and start join.me meetings directly from Google Calendar. More than 5 million businesses have adopted Google Apps as a cloud-based alternative to traditional productivity suites. And this integration has been well received by join.me base and new users alike.

Another key workflow integration offered by join.me is with Salesforce. Sales teams have been strong adopters of join.me to use the product for ad hoc meetings and product demos to prospective buyers. This new integration give sales teams the ability to start a join.me session directly from within Salesforce and automatically add related session information as an activity on that lead. In essence, it brings together two popular and effective sales tools through seamless integration.

**Criterion 4: Price/Performance Value**

Join.me’s core value proposition of ease of use and simple pricing has appealed to SMB users, although adoption is taking place organically in larger organizations as well. Simple per-user pricing makes it possible to spread join.me throughout the organization, without hidden fees or additional costs per minute. Plus, unlimited audio is included, so users don’t have to put a cap on usage.

Frost & Sullivan analysis suggest that join.me offers an impressive fit with the emerging user trends and offer customers a high performance low priced approach to collaboration, eliminating the traditional hurdles to adoption that include high costs and complex solutions. The dominant theme for Join.me and its conferencing solutions has been focused on delivering user-friendly and superior services at attractive price points.
Moreover, join.me has innovated at a rapid pace and in recent months has introduced several user enhancements to continually evolve its product for a more productive and meaningful collaboration experience.

**Conclusion**

Today, collaboration is becoming a critical business enablement tool. Web conferencing applications have evolved as a means for employees, customers, partners, and vendors to work better together to promote rapid innovation internally as well as externally. join.me has effectively leveraged its expertise in the enterprise communications market and has enhanced customer value through innovation and sound execution. Its rapidly expanding customer base is a serious testament to the strength of its portfolio and the overall value of its services. For these reasons, Frost & Sullivan is proud to present the 2015 Customer Value Leadership Award to join.me.
Significance of Customer Value Leadership

Ultimately, growth in any organization depends upon customers purchasing from a company, and then making the decision to return time and again. Delighting customers is therefore the cornerstone of any successful growth strategy. To achieve these dual goals (growth and customer delight), an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.

Understanding Customer Value Leadership

Customer Value Leadership is defined and measured by two macro-level categories: customer impact and business impact. These two sides work together to make customers feel both valued and confident in their products’ quality and long shelf life. This dual satisfaction translates into repeat purchases and a high lifetime customer value.
Key Benchmarking Criteria
For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated two key factors — Customer Impact and Business Impact — according to the criteria identified below.

Customer Impact
Criterion 1: Price/Performance Value
Criterion 2: Customer Purchase Experience
Criterion 3: Customer Ownership Experience
Criterion 4: Customer Service Experience
Criterion 5: Brand Equity

Business Impact
Criterion 1: Financial Performance
Criterion 2: Customer Acquisition
Criterion 3: Operational Efficiency
Criterion 4: Growth Potential
Criterion 5: Human Capital

Best Practice Award Analysis for join.me
Decision Support Scorecard
To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation; ratings guidelines are illustrated below.

RATINGS GUIDELINES

The Decision Support Scorecard is organized by Customer Impact and Business Impact (i.e., the overarching categories for all 10 benchmarking criteria; the definitions for each criterion are provided beneath the scorecard). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.
The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, we have chosen to refer to the other key players in as Company 2 and Company 3.

**Decision Support Scorecard for Customer Value Leadership Award**

<table>
<thead>
<tr>
<th>Measurement of 1–10 (1 = poor; 10 = excellent)</th>
<th>Customer Impact</th>
<th>Business Impact</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Value Leadership</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Join.me</td>
<td>9.3</td>
<td>9.0</td>
<td>9.2</td>
</tr>
<tr>
<td>Competitor 2</td>
<td>8.4</td>
<td>8.8</td>
<td>8.6</td>
</tr>
<tr>
<td>Competitor 3</td>
<td>7.9</td>
<td>8.1</td>
<td>8.0</td>
</tr>
</tbody>
</table>

**Customer Impact**

**Criterion 1: Price/Performance Value**
Requirement: Products or services offer the best value for the price, compared to similar offerings in the market

**Criterion 2: Customer Purchase Experience**
Requirement: Customers feel like they are buying the most optimal solution that addresses both their unique needs and their unique constraints

**Criterion 3: Customer Ownership Experience**
Requirement: Customers are proud to own the company’s product or service, and have a positive experience throughout the life of the product or service

**Criterion 4: Customer Service Experience**
Requirement: Customer service is accessible, fast, stress-free, and of high quality

**Criterion 5: Brand Equity**
Requirement: Customers have a positive view of the brand and exhibit high brand loyalty

**Business Impact**

**Criterion 1: Financial Performance**
Requirement: Strong overall financial performance in terms of revenues, revenue growth, operating margin and other key financial metrics

**Criterion 2: Customer Acquisition**
Requirement: Customer facing processes support the efficient and consistent acquisition of new customers, even as it enhances retention of current customers

**Criterion 3: Operational Efficiency**
Requirement: Staff is able to perform assigned tasks productively, quickly, and to a high quality standard
**Criterion 4: Growth Potential**
Requirements: Customer focus strengthens brand, reinforces customer loyalty and enhances growth potential

**Criterion 5: Human Capital**
Requirement: Company culture is characterized by a strong commitment to quality and customers, which in turn enhances employee morale and retention

**Decision Support Matrix**
Once all companies have been evaluated according to the Decision Support Scorecard, analysts can then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.

**DECISION SUPPORT MATRIX FOR CUSTOMER VALUE LEADERSHIP AWARD**
The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology
Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry players and for identifying those performing at best-in-class levels.
Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan Awards follow a 10-step process to evaluate Award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

<table>
<thead>
<tr>
<th>STEP</th>
<th>OBJECTIVE</th>
<th>KEY ACTIVITIES</th>
<th>OUTPUT</th>
</tr>
</thead>
</table>
| 1 Monitor, target, and screen | Identify Award recipient candidates from around the globe | • Conduct in-depth industry research  
• Identify emerging sectors  
• Scan multiple geographies | Pipeline of candidates who potentially meet all best-practice criteria |
| 2 Perform 360-degree research | Perform comprehensive, 360-degree research on all candidates in the pipeline | • Interview thought leaders and industry practitioners  
• Assess candidates’ fit with best-practice criteria  
• Rank all candidates | Matrix positioning all candidates’ performance relative to one another |
| 3 Invite thought leadership in best practices | Perform in-depth examination of all candidates | • Confirm best-practice criteria  
• Examine eligibility of all candidates  
• Identify any information gaps | Detailed profiles of all ranked candidates |
| 4 Initiate research director review | Conduct an unbiased evaluation of all candidate profiles | • Brainstorm ranking options  
• Invite multiple perspectives on candidates’ performance  
• Update candidate profiles | Final prioritization of all eligible candidates and companion best-practice positioning paper |
| 5 Assemble panel of industry experts | Present findings to an expert panel of industry thought leaders | • Share findings  
• Strengthen cases for candidate eligibility  
• Prioritize candidates | Refined list of prioritized Award candidates |
| 6 Conduct global industry review | Build consensus on Award candidates’ eligibility | • Hold global team meeting to review all candidates  
• Pressure-test fit with criteria  
• Confirm inclusion of all eligible candidates | Final list of eligible Award candidates, representing success stories worldwide |
| 7 Perform quality check | Develop official Award consideration materials | • Perform final performance benchmarking activities  
• Write nominations  
• Perform quality review | High-quality, accurate, and creative presentation of nominees’ successes |
| 8 Reconnect with panel of industry experts | Finalize the selection of the best-practice Award recipient | • Review analysis with panel  
• Build consensus  
• Select winner | Decision on which company performs best against all best-practice criteria |
| 9 Communicate recognition | Inform Award recipient of Award recognition | • Present Award to the CEO  
• Inspire the organization for continued success  
• Celebrate the recipient’s performance | Announcement of Award and plan for how recipient can use the Award to enhance the brand |
| 10 Take strategic action | Upon licensing, company may share Award news with stakeholders and customers | • Coordinate media outreach  
• Design a marketing plan  
• Assess Award’s role in future strategic planning | Widespread awareness of recipient’s Award status among investors, media personnel, and employees |
About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best in class positions in growth, innovation and leadership. The company’s Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages almost 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 31 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.