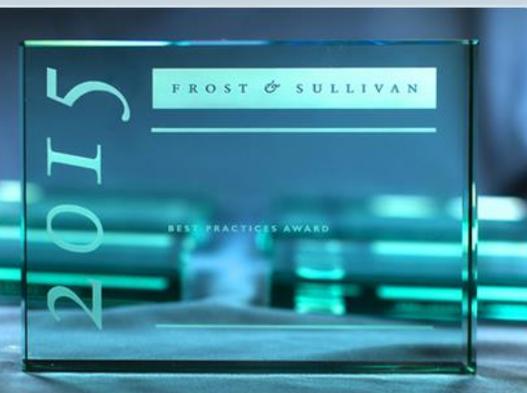




2015 Global VoLTE Network Monitoring Systems Product Line Strategy Leadership Award



FROST & SULLIVAN



50 Years of Growth, Innovation & Leadership

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Background and Company Performance

Industry Challenges

The VoLTE network is expected to revolutionize telecommunications considerably and help enhance the competitive edge of network operators against over-the-top vendors such as Skype or Facebook. However, the heterogeneous aspects of the network that will increase after implementation will deter the VoLTE network's deployment across a wide geographic region.

Such challenges will include the inefficient handover of mobile devices between different coverages and sectors, as well as the general latency problems associated with this handover. In addition, the network's overall complexity would mean enhanced networking dynamics, and as such, requires a solution that can effectively neutralize threats to the network in a shorter amount of time from when it has arisen.

Network taps can be used in conjunction with network monitoring and tools, which are predominantly used by network equipment manufacturers and network operators. These taps can help segregate network traffic to its most appropriate route, thereby reducing downtime on the network and other latency issues associated with it.

Product Line Strength and Customer Impact of Gigamon

Breadth of Product Line

Having been in operation for the past 10 years, Gigamon has gathered the necessary expertise to satisfy its broad elite customer base (comprising of service providers, enterprises, and data centers), with a proven legacy of robust product offerings. By leveraging its capabilities to provide intelligent traffic visibility networking solutions, the company has been the forerunner in this space, outperforming similar participants. The depth and extent of its product lines stand testimony to Gigamon's supreme skills in enabling infrastructure architects, managers, and operators to provide unmatched visibility into the traffic flowing through both physical and virtual networks. Identifying the evolving needs in the marketplace, the company stresses introducing better and advanced products, thereby equipping its end-users with ways to address impending challenges. For instance, the company's key GigaVUE product line, through its technologically advanced attributes, provides appropriate network traffic to security, monitoring, or management systems. Following this consistent, significant delivery of enhanced customer value, Gigamon chose to upgrade its GigaVUE product line and introduced GigaVUE-HB1 in June 2013 and the GigaVUE-HC2 in September 2014. These new products offer better performance and visibility in a customized manner. The GigaVUE-HB1 has helped end users gain clearer visibility across remote portions of the network, as well as across distributed processing centers. Considering the cost associated with deploying individual analysis tools at each site, the GigaVUE-HB1 helps collect data across the centers and aggregates them meaningfully.

Since its inception, Gigamon has been able to develop a wide range of high-density products that are apt for multiple network points. Additionally, the company also provides such services and solutions in a highly cost optimized manner, such that it is able to offer unmatched operational excellence.

Scalability Quotient

Gigamon's product lines are continuously evolving in sync with changing customer demand patterns. The company provides the best value for money in the VoLTE space through its comprehensive range of solutions, which is highly commendable. At every juncture, the company focuses on depicting the high scalability of its products, either by introducing new, advanced products or by incorporating value-added functionalities into its existing products. Such continuous evolution allows the operator to gauge the happenings in and around the network. To match this end-user demand, Gigamon has put an all-inclusive customer feedback mechanism into use. Aside from its direct communications with service providers, it also has an email mechanism in place that enables its customers to contact the service support team, in case of an emergency (with the chief executive officer marked in that same mail).

With its dedicated specialization into tapping an aggregation of VoLTE packet information from the infrastructure layer and sending it to a specific tool, Gigamon has ideally demonstrated high scalability through its varied offerings of VoLTE solutions. The company's service-delivery process is unique in itself, as the number of participants who actually perform such actions is quite limited. Considering its leadership acumen, Gigamon has made more carriers aware of the latest developments in the network packet program and visibility fabric space—which is expected to reap future benefits for all at large. Additionally, as the first-of-its-kind vendor in the VoLTE space, due to its noted technical expertise, Gigamon is able to extend the total benefits to its customers.

Technology Leverage

Gigamon is synonymous with technological supremacy over its similar market participants through its VoLTE capabilities. It encompasses a real-time protocol service that is distributed around the network whose operator is unaware of the network problems' origins—whether they are arising from the edges of the network, from the core, from the access points, or from the concentration points. Thus, by addressing these end-user concerns, Gigamon has successfully developed a wide breadth of products with a form factor, enabling them to sit at the network's edge. This translates into the company's successful ability to assist carriers with deploying VoLTE in the right manner, significantly as it has helped 50% of the four large carriers in the US effectively deploy their VoLTE.

Customer Purchase Experience

Gigamon has a strong team of globally spanning sales engineers, who guide customers seamlessly through the entire buying process. In tandem with its customers' needs,

Gigamon provides an architecture that is suitable for specific customers, which highlights its strong customizing capabilities. Additionally, the company also has a team of channel partners, through whom most of its sales are effectuated.

Customer Ownership Experience

Despite its small span of operation in the VoLTE space (unlike several of its noted competitors), Gigamon has been able to provide its customers an enriched experience. The company stresses the fact that the product has to work flawlessly, considering the highly sensitive monitoring space that it operates in. Here, the company identified its customers' embedded concerns pertaining to hardware framing and package probing, and thus decided to provide the industry's longest hardware guarantee (a 5-year hardware warranty) without any charges. Moreover, the superior quality of its services acts as a restraining factor for companies in renewing their service contracts, as Gigamon's products exude high quality, meet all service parameters, and show no signs of breaking down. To accentuate its ability to provide best-in-class experience, Gigamon employed a host of new employees to set up a professional services group, so that it can act proactively on a consistent basis while extending support services.

Brand Equity

Gigamon has enjoyed consistent prominence in the network monitoring space for its highly robust, scalable, and reliable VoLTE solutions. Due to the company's strong brand equity, it was able to go public in June 2013 and since then has built even more comprehensive solutions. Additionally, as no other company within this space has gone public, Gigamon is the undisputed vendor choice among customers.

Conclusion

Through its global presence and strong product portfolio, Gigamon has been able to acquire noted companies in different verticals as its clients. Consistent with its efforts to enhance customer value, the company has frequently introduced new products and also upgraded existing products with advanced attributes. In all, the company has demonstrated distinctive supremacy over other companies in addressing its customers' concerns with its wide array of solutions.

With its strong overall performance, Gigamon has earned Frost & Sullivan's 2015 Product Line Strategy Award.

Significance of Product Line Strategy

Ultimately, growth in any organization depends upon customers purchasing from your company, and then making the decision to return time and again. A full, comprehensive product line that addresses numerous customer needs and preferences is therefore a critical ingredient to any company's long-term retention efforts. To achieve these dual goals (customer value and product line strength), an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition. This three-fold approach to delivering Product Line Strategy Leadership is explored further below.



Understanding Product Line Strategy Leadership

As discussed above, driving demand, brand strength, and competitive differentiation all play a critical role in delivering unique value to customers. This three-fold focus, however, must ideally be complemented by an equally rigorous focus on building a superior and comprehensive product line.

Key Benchmarking Criteria

For the Product Line Strategy Leadership Award, we evaluated two key factors—Product Line Strength and Customer Impact—according to the criteria identified below.

Product Line Strength

- Criterion 1: Breadth
- Criterion 2: Scalability
- Criterion 3: Technology Leverage
- Criterion 4: Features
- Criterion 5: Supply Chain Reliability

Customer Impact

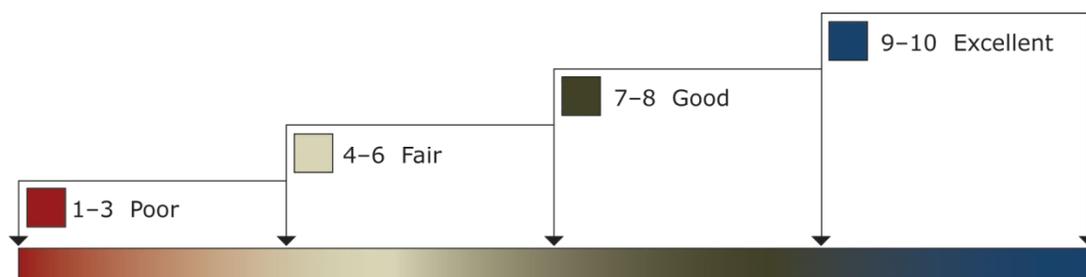
- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

Best Practice Award Analysis for Gigamon

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 Product Line Strength and Customer Impact (i.e., the overarching categories for all 10 benchmarking criteria; the definitions for each criteria 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 Competitor 2 and Competitor 3.

DECISION SUPPORT SCORECARD FOR PRODUCT LINE STRATEGY LEADERSHIP AWARD (ILLUSTRATIVE)

<i>Measurement of 1-10 (1 = poor; 10 = excellent)</i>			
Product Line Strategy	Product Line Strength	Customer Impact	Average Rating
Gigamon	9.5	9.7	9.6
Competitor 2	8.0	8.4	8.2
Competitor 3	7.0	7.2	7.1

Product Line Strength

Criterion 1: Breadth

Requirement: Product line addresses the full range of customer needs and applications

Criterion 2: Scalability

Requirement: Product line offers products at a variety of price points and functionality levels

Criterion 3: Technology Leverage

Requirement: Demonstrated commitment to incorporating leading edge technologies into product offerings, for greater product performance and value

Criterion 4: Features

Requirement: Products offer a comprehensive suite of features to serve customers at multiple levels of functionality, ease of use and applications

Criterion 5: Supply Chain Reliability

Requirement: There is sufficient control over the supply chain to ensure availability of key components and thereby the availability of products in the product line

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

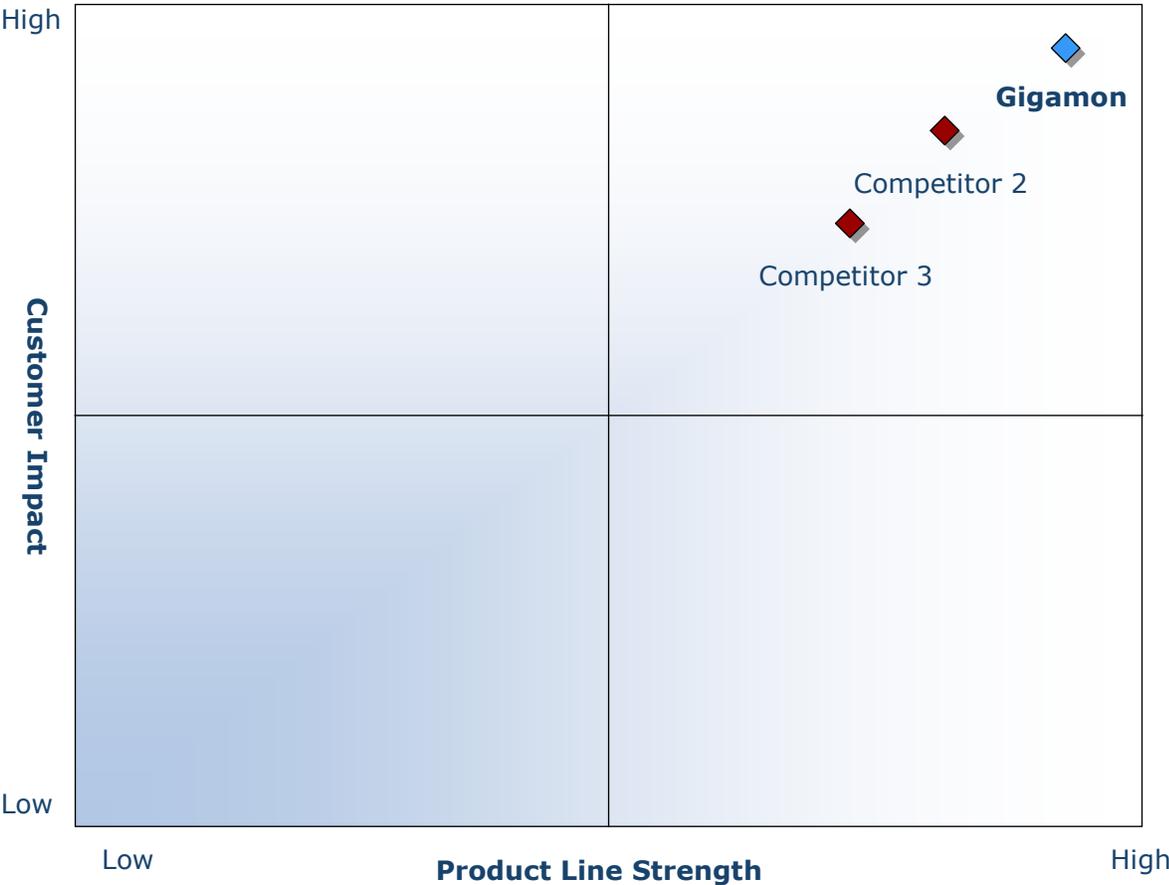
Criterion 5: Brand Equity

Requirement: Customers have a positive view of the brand and exhibit high brand loyalty

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 PRODUCT LINE STRATEGY LEADERSHIP AWARD (ILLUSTRATIVE)



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

Our awards team follows a 10-step process (illustrated below) to evaluate award candidates and assess their fit with our best practice criteria. The reputation and integrity of our awards process are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 Monitor, target, and screen	Identify award recipient candidates from around the globe	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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, share award news with stakeholders and customers	<ul style="list-style-type: none"> • 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>.