

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

BEST PRACTICES AWARDS

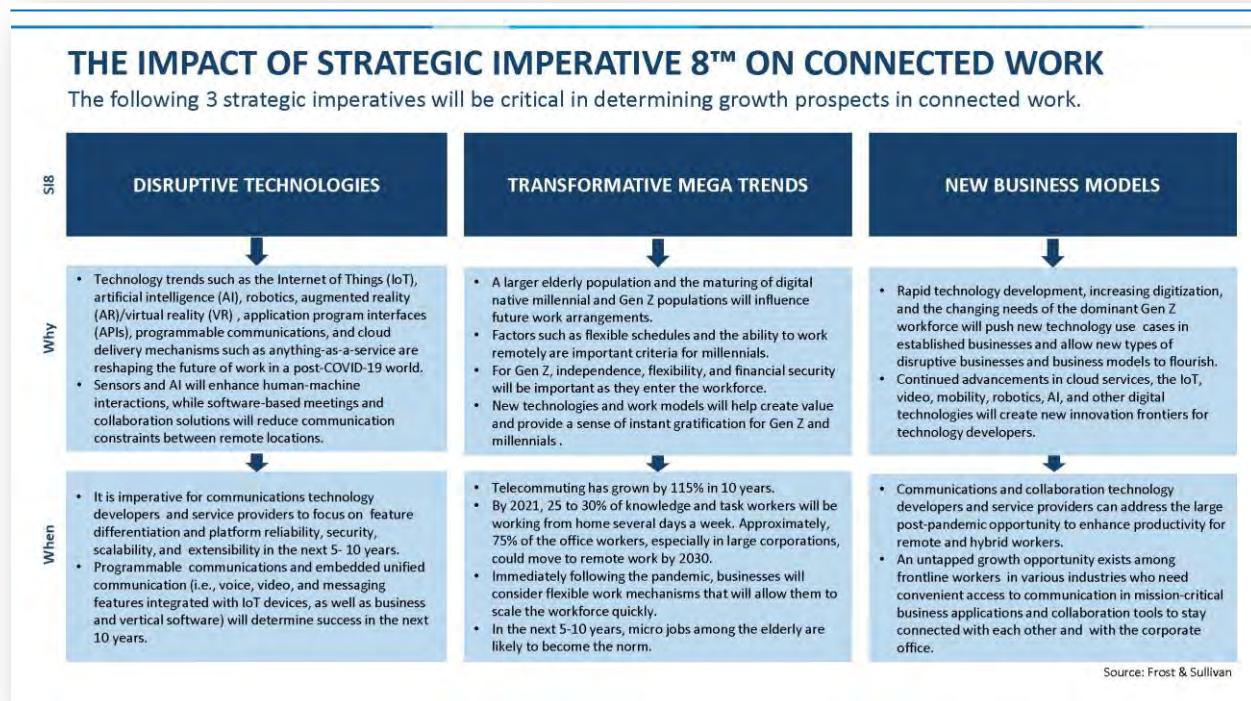


AVAYA

**2020 NORTH AMERICAN COMMUNICATIONS AND
COLLABORATION SOLUTIONS FOR HEALTHCARE
COMPETITIVE STRATEGY LEADERSHIP AWARD**

Strategic Imperatives

Frost & Sullivan identifies three key strategic imperatives that impact connected work: disruptive technologies, transformative Mega Trends, and new business models. Every company that is competing in the connected work space is obligated to address these imperatives proactively; failing to do so will almost certainly lead to stagnation or decline. Successful companies overcome the challenges posed by these imperatives and leverage them to drive innovation and growth. Frost & Sullivan's recognition of Avaya is a reflection of how well it is performing against the backdrop of these imperatives.



Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated companies. Avaya excels in many of the criteria for delivering excellent communications and collaboration experiences in the healthcare vertical industry.

AWARD CRITERIA

<i>Strategy Innovation</i>	<i>Customer Impact</i>
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

Competitive Differentiation through Excellent Customer Experiences

A stalwart of the business communications industry, Avaya possesses one of the most comprehensive portfolios comprising on-premises and cloud-based unified communications (UC), contact center, video meetings, team collaboration, communications platform as a service (CPaaS), infrastructure, endpoint devices, managed and professional services and more. Its extensive technology and services capabilities position Avaya to address a much broader spectrum of healthcare staff and patient communications, collaboration and workflow challenges than most other vendors and service providers can effectively cater to.

The company has organized its healthcare solutions around three main use cases: Care-Team Collaboration, Patient Access and Services, and Virtual Care, seeking in this way to coordinate resources, integrate systems, enable collaboration and boost innovation. Ultimately, Avaya's approach in the healthcare vertical aims to improve patient outcomes and practice efficiencies, with a focus on quality of care delivered, health services cost reduction improved patient experience.

Care Team Collaboration involves channeling multimedia—voice, video and chat—communications through phones, personal devices, pagers, overhead and bedside devices, allowing at the same time integration with clinical applications. This blends clinical communications, patient context, directory search, clinical workflows, and staff and patient assignments.

Patient Access and Services comprise solutions connecting the health-system resources to patients, through the interface of their choice. The idea behind this approach is that, whether it has to do with prescription management, triage, appointment scheduling, referrals, revenue cycle or other related matters, the patient is driven towards a self-service, automated, always-digital, integrated, artificial-intelligence (AI)-supported environment, with the necessary quality and analytics tools to ensure careful monitoring and continuous improvement of the patient journey. Avaya natively integrates with Electronic Health Records for patient access and revenue cycle workflows. Avaya is also encouraging

proactive engagement with patients through targeted campaigns, reminders, screenings, procedure follow-ups and referrals.

The third group of use cases addressed by the company is around Virtual Care. This use case grouping involves integrating and automating solutions that enable remote interactions between patients and healthcare staff, including virtual visits, support lines, video at bedside and collaboration among specialized personnel. The intention is to enhance the experiences related to patient-doctor virtual meetings and patient-nurse remote monitoring and communication (through audio, video, IoT devices

and wide analytics support), as well as harvest all the contact-center capabilities for any clinical processes that might demand a certain capacity and automation.

“Avaya stands out among communications technology providers with a long track record of delivering value to healthcare organizations and an impressive customer roster that trusts the vendor for mission-critical services in the highly-regulated healthcare sector. Its extensive technology and services capabilities position Avaya to address a much broader spectrum of healthcare staff and patient communications, collaboration and workflow challenges than most other vendors and service providers can effectively cater to.”

- Leonardo Sampieri, Industry Analyst

Avaya stands out with its strong focus on virtual-room scheduling, enabling secure, frictionless and multi-device-supported implementation. This approach provides a secure meeting space for patients and staff, preventing intrusions and room duplications, and allowing schedulers to easily manage spaces over different providers.

In addition to its remarkably broad portfolio of solutions and services that it leverages in the healthcare vertical, there are certain other differentiating factors that set Avaya apart from its competitors. For example, Avaya stands out with its extensive leverage of application

programming interfaces (APIs) throughout vertical use cases, seeking to avoid third-party integrators, promoting client-to-client integrations, harvesting from years of research in the field and a long track record in contact-center operations.

Strategy Execution

Avaya's strategies are based on its market diagnostic: a generalized perceived need of enterprises for a more mobile, multi-device, multi-channel, integrated approach in unified communications deployments and patient experience management.

This leads to the company being currently focused on four strategic axes:

- speed up growth
- concentrate innovation efforts in building artificial intelligence (AI), customer experience-based security and mobility solutions
- leverage of its partners to maximize monetization
- build global services offerings and convey different monetization schema

Avaya's go-to-market strategy is largely based on leveraging its channel partners, enabling a direct or indirect presence in approximately 175 countries. A significant portion of Avaya's revenues is generated by its well-developed partner network.

With regard to the healthcare vertical specifically, Avaya has performed an extensive diagnostic of the most important pain points in the sector—including ineffective communications, limited ability to scale resources, difficulties in assigning medical and operational staff to high-value tasks and need for improving remote patient monitoring. Also important, from a business, non-clinical point of view, Avaya acknowledges that decision making is shifting from IT to health departments, which requires an adapted sales and marketing approach, including educating new decision makers on technology capabilities and value. Avaya has also identified certain internal challenges—more specifically, the company realizes the need to deliver easily-consumable cloud-application packages in order to ease integration and implementation, and ultimately increase sales.

The company has addressed these various challenges by engaging new stakeholders, building entirely new relationships, creating new partnerships, and by moving fast when working on joint public-private projects, which is particularly important in a COVID-19 context. This is enabled by Avaya having a healthcare-focused consulting practice and a dedicated in-house management and application development team.

Avaya also recognizes the importance of the healthcare ecosystem, and has invested heavily in integrations with Electronic Health Records vendors, nurse call systems, fit-for-purpose healthcare devices, and clinical applications. More specifically, Avaya provides native integration with medical devices by Spectralink, Zebra, Ascom, Samsung and Apple; clinical apps by Ascom, Connexall, GE Healthcare, Vocera, Salesforce and others; and EMR systems such as Epic, Cerner, Meditech, Allscripts and McKesson. Furthermore, Avaya supports Ascom device integration with hundreds of different customer systems including:

- medical devices such as GE Healthcare and Dräger
- nurse call systems such as SimplexGrinnel and Rauland
- specialized apps such as Avizia, Medanets and Mobitrace
- RTLS such as AeroScout
- middleware such as Amcom Software, Vocera and Connexall
- a variety of EMR solutions such as Epic and Cerner
- Avaya mobility solutions

Strategy Effectiveness

The company has realized that mobility, communications-enabled business applications, AI, and ‘Digital Engagement Hubs’ (platforms that channel diverse media, as well as customer conversations) are key to assisting businesses in improving their customer experiences.

This is particularly true for healthcare. Avaya is delivering its solutions and services to a broad base of healthcare providers around the world, across a large variety of use cases, replacing legacy systems, reducing costs, maintaining useful functionalities, and automating low-value tasks and billing collection. Furthermore, Avaya is enabling healthcare organizations to improve profitability, reduce no-shows, take full advantage of automation to assist patient service representatives, and enhance regulatory compliance and reduce related penalties.

To achieve this, the company has been extensively investing in R&D and adjusting product design, aiming for mobile and cloud-based solutions that support flexible integrations, among others. Avaya OneCloud CCaaS [Contact Center] and Avaya OneCloud UCaaS (which includes Workplace) are industry-leading solution suites that have been deployed by multiple healthcare organizations to address a large variety of challenges and use cases.

Avaya’s ability to promptly address important market trends greatly contributes to its strategy execution effectiveness. Avaya must be commended for its rapid response to the challenges presented by COVID-19—including the rise in remote work and the need for advanced collaboration to support distributed teams, as well as the drastic increase in demand for digital customer engagement in all verticals, including healthcare, education and government. These include automated screening, contact tracing and dealing with the changes in policies, procedures and access due to the pandemic.

Shortly after the pandemic began, the company massively rolled out 60 and 90-day free services and discounted packages for several of its solutions—Avaya Spaces, Aura and IP Office, among others—to lend a helping hand to businesses and public-sector organizations in crisis. Avaya Spaces collaboration software was offered free to all education institutions including colleges and universities, as well as eligible non-profit organizations worldwide. Specifically for healthcare organizations, Avaya launched a complementary 90-day access to Avaya Cloud Notification Solution (ACNS), a cloud-based notification system with capabilities such as hotlines, auto forms, auto attendant, custom IVR and notifications, in addition to complimentary licenses to Spaces for remote agents and remote workers. To support customer business continuity, Avaya also provided short-term, pay-as-you-go offers for CPaaS cloud-based IVR and mass notifications.

As early as April 2020, the company had already assembled an impressive roster of healthcare organizations that were benefitting amid the pandemic from its communications and collaboration solutions, including public and private organizations of all sizes, from all over the Americas, Europe, MENA and APAC. One notable example is the joint deployment with Egypt’s Ministry of Communications & Information Technology (MCIT) and the United Nations Development Programme (UNDP), focused on providing an AI-powered diagnostic solution for people with disabilities. The solution is touted as the first to provide automatic testing for COVID-19 symptoms in sign language in the Middle East and Africa.

Avaya also helped move on-premises contact center agents to remote work for Mexico's WellMedic Health Centers leveraging Avaya OneCloud Contact Center. Avaya OneCloud Contact Center was also deployed by Red Crescent in Saudi Arabia (a provider that handles emergency calls), enabling the organization to handle the increased volume of calls caused by the pandemic.

In the following couple of months, Avaya OneCloud Contact Center was also deployed or expanded in a variety of healthcare and other organizations, including Cleveland Clinic (OH, US), Hospital for Special Surgery (NY, US), Southern Illinois University School of Medicine (IL, US) and San Jacinto Community College (TX, US), among others in various countries. All of these Avaya customer case studies were driven by COVID-19 and the need for continuity of operations.

Avaya Contact Center was enhanced in 2019 with new AI, insights and back-office capabilities that made the solution suitable for use by remote workers through a softphone or by on-premises employees both through either a hard phone or softphone.

Avaya Workplace integrates the whole Avaya portfolio, blending UC and collaboration, across Avaya and third-party apps (such as Slack, WhatsApp, Salesforce and dozens of others), harvesting the full power of voice, SMS, video, chat, email, integrated collaboration and multi-device, multi-environment meetings. Notable 2020 deployments include United Concordia Dental (PA, US), Alameda's University Healthcare Alliance (CA, US) and Weill Cornell Medical College (NY, US), among others.

Avaya Spaces was also adopted by a number of healthcare organizations in 2020, including Family Health Center of Worcester and St. Josef's Hospital in Wiesbaden, Germany. In addition, Avaya CPaaS IVR enabled Manitoba Shared Health Services in Canada, Nebraska Medicine and Harris County, TX, to handle an increased volume of hotline calls without expanding trunking capacity.

State of Mississippi and other health agencies leverage Avaya OneCloud agile notification services built on its CPaaS platform to more efficiently deliver COVID-19 test results, as well as instructions on next steps for affected parties. The Avaya notification service supporting COVID-19 campaigns with digital channel engagement for notification has increased call-back rates from an average of 20% prior to automation up to 70%, which has had significant implications in terms of controlling the spread of the virus and more effectively tracing contacts. The integration of the service with the health agencies' database has also helped improve turnaround time.

Other Avaya solutions must be highlighted as well for their role in enhancing healthcare experiences. For example, the Healthcare Chatbot is an AI-based vertical solution, aimed to assist patients and route patient calls or messages to agents when necessary. Automated outgoing messaging (critical for the healthcare sector), can be conducted from the Avaya Proactive Outreach Manager. This solution handles various contact channels, allows campaign creation and management, and permits healthcare staff to broadcast promotions, billings and collections, surveys, account alerts, notifications, announcements and reminders. It aims to improve the quality of service, relieve agents from low-value and repetitive tasks, and reduce patients' absenteeism.

Avaya reports improvements in important client performance indicators across various use-case scenarios and communications technology applications.

Patient Access and Services

- 50% reduction in level 1 billing that requires human resources
- 70% identification and validation automation against EPIC CRM with screen pop
- 5% reduction in no-shows for specialist practices
- Thousands of automated COVID-19 screenings
- Transfer of care center generates \$10M in 6 months

Care Coordination

- 20%+ reduction of time nurses coordinate care
- Address 67% of harm, falls, injuries, infections due to care-team coordination breakdowns
- Reduction of harm and liability due to ineffective codes and locating
- Reduction of EPHI exposure with secure communication

Virtual Care

- 20% reduction in ED visits through telehealth support
- Thousands of veterans supported every day on a crisis line
- Reduction in parental anxiety due to 24x7 video connection between NICU and parental ward
- Reduction of nursing efforts with patient monitoring and video consults bedside
- Reduction of EPHI exposure with secure communication

Brand Equity

Avaya has a 100-year history over which it has continuously demonstrated a strong commitment to innovation and customer growth. As of 2019, its customer base reached 175 countries around the world and 90% of the Fortune 100 organizations. It has already exceeded 4 million cloud UC seats, in addition to 120+ million installed seats of premises-based communications solutions.

The company addresses a broad range of verticals with the aid of its more than 4,000 active channel partners, and healthcare is one of its largest. Avaya has active contracts in 17 of the top-20 list of American Hospital Associations, two of the largest hospitals in Canada, and, in US and Canada alone, the company works with 5,500 healthcare entities. Notable Avaya healthcare service provider customers include: Suncoast Health, Spital-limmattal, Inova Health System, Helse Vest, VCA and Byram Healthcare, among many others around the world.

With an impressive customer roster that trusts Avaya for mission-critical services in the highly regulated healthcare sector, Avaya is strengthening its go-to-market strategy through its partner network to deploy its solutions to a broader customer base.

Conclusion

The combination of a global footprint, a strong brand and track record, an end-to-end portfolio of flexible solutions capable of being adapted to different verticals, the ability to assess healthcare industry's particular requirements as well as its competitive environment, and possession of the necessary know-how to quickly adapt to a rapidly-changing environment, places Avaya in a position that very few other organizations can claim. Across the board, it has managed to provide patients, medical staff and healthcare providers worldwide with a broad set of solutions that effectively address their diverse communication and collaboration needs.

With its strong overall performance, Avaya has earned Frost & Sullivan's 2020 Competitive Strategy Leadership Award.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Award recognizes the company with a stand-out approach to achieving top-line growth and a superior customer experience.

Best Practices Award Analysis

For the Competitive Strategy Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes Best Practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

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The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create on-going growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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Key Impacts:

- **Growth Pipeline:** Continuous flow of Growth opportunities
 - **Growth Strategies:** Proven Best Practices
 - **Innovation Culture:** Optimized Customer Experience
 - **ROI & Margin:** Implementation Excellence
 - **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our six analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Mega Trend (MT)
 - Business Model (B)
 - Technology (TE)
 - Industries (IN)
 - Customer (CU)
 - Geographies (GE)

