

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

BEST PRACTICES

AWARDS

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

2020 BEST PRACTICES AWARD



**Business
Services**

ASIA-PACIFIC CLOUD CONTACT CENTER
SERVICE PROVIDER OF THE YEAR

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Letter of Congratulations

I am proud to present you with this year's award for Company of the Year in the cloud contact center service provider for telecommunications industry.

Frost & Sullivan's global teams of analysts and consultants research a wide range of markets in multiple industries and regions, and identify companies that are true industry leaders, delivering best practices in growth, innovation, and leadership. These companies have a keen eye on the future and drive innovation that meets upcoming needs before they become commonly visible, often being first to market with new solutions. They focus on delivering the best products at optimal prices to maximize customer value and experience. Identifying these companies involves extensive primary and secondary research across the entire value chain of specific products and/or markets. Against the backdrop of this research, Frost & Sullivan is pleased to recognize Orange Business Services as the Company of the Year in the cloud contact center service provider for telecommunications industry.

Delivering excellence worthy of the Company of the Year recognition is never an easy task, and it is made even more difficult considering today's competitive intensity, customer volatility, and economic uncertainty, not to mention the difficulty of innovating in an environment of escalating challenges to intellectual property. In this context, your receipt of this award signifies an even greater accomplishment.

Moreover, Frost & Sullivan recognizes that this accomplishment is the result of many employees, customers, and investors making daily choices to support the organization and contribute in a meaningful way to its future.

I enthusiastically acknowledge and celebrate these achievements, and wish you great success in the future. Frost & Sullivan is here to support you on any future endeavor.

Sincerely yours,



David Frigstad
Chairman
Frost & Sullivan

Background and Company Performance

Industry Challenges

As customer experience (CX) takes a central role in differentiating companies from the competition, organizations are streamlining their existing contact center infrastructure and applications as well as deploying advanced technologies to deliver exceptional experiences. Increasingly, enterprises and organizations are adopting cloud solutions to deliver superior customer experiences while reducing capital expenditure and controlling operational costs. Cloud technology has become vital for organizations because it offers scalability, flexibility, reliability, and easy access to advanced solutions that enable an effective and efficient customer journey.

Organizations must remain agile, flexible, and scalable to respond quickly to the changing demands of modern customers and to best utilize their employees. Contact centers must be able to efficiently handle all communication channels, including phone lines, email, social media, and messaging services. However, organizations are struggling to implement and manage the entire life cycle of customer and employee experiences across various systems and geographies. Additionally, they are often unable to seamlessly integrate cloud applications with their existing legacy systems or customer relationship management (CRM) platforms.

Cloud contact centers enable organizations to connect with customers on any channel while delivering customized experiences. Cloud solutions provide access to the latest contact center technologies and features at zero infrastructure costs with the added benefit of allowing organizations to quickly deploy services and scale across geographies. In addition, cloud contact center solutions enable organizations to leverage application programming interfaces (APIs) to build, extend, and integrate contact center applications easily.

Visionary Innovation and Performance/Customer Impact

Orange Business Services (OBS) is the business services arm of the global telecommunications leader Orange. OBS delivers unified communications, collaboration, contact center, cloud, Internet of Things (IoT), artificial intelligence (AI), and analytics solutions to global enterprises. OBS' core business includes collaborative workspace and CRM solutions. The company delivers an end-to-end customer experience solution including CRM, flexible cloud-based contact center, managed contact center, customer experience enhancement, and security services. OBS maintains a strong footprint in Asia-Pacific through its global service availability, strong partner ecosystem, and reliable delivery and support capabilities.

Addressing Unmet Needs

OBS offers comprehensive communication and collaboration solutions that meet clients' evolving requirements. The company is making a name for itself in the industry as a technology systems integrator and value-added service provider. OBS enjoys a robust

global footprint of contact centers combined with its expertise in systems integration, continuous enhancement of its cloud services portfolio, and wide partner ecosystem. The company provides clients end-to-end life cycle management and unified customer experience solutions across multiple contact center locations. OBS manages the entire global network of unified experiences and contact centers. In keeping up with the market demand for greater visibility into customer needs, integration of voice and digital media, as well as integration with CRM systems, the company delivers consistent omni-channel experiences and seamlessly integrates CRM platforms across all CX engagement channels and data analytics platforms. Clients can choose a flexible cloud-based contact center platform fitted with services from different principal vendors that are fully managed by OBS. Today, OBS manages more than 90,000 contact center seats in 87 countries and has more than 330 cloud contact center customers.

Visionary Scenarios through Mega Trends

OBS invests in enhancing its customer experience and cloud contact center solutions portfolio. For instance, the company has dedicated more than 700 million euros to research and development (R&D) and approximately 8,000 people to R&D, including engineers, developers, designers, and marketers. It has set up 15 Orange Labs (R&D centers) across 4 continents to foster the development of innovative solutions. OBS aims to create value for its clients by combining its customer experience solution with advanced technologies including IoT, automation, data analytics, and AI. The company's cloud contact center solution is integrated with data analytics to monitor voice, analyze customer behavior, and detect abnormalities. This approach enables OBS to help its clients create a compelling story by offering predictive and personalized customer experiences that are well aligned to customer requirements.

OBS has several technology partners including Software AG for integration platform as a service (IPaaS), Nexmo for communications platform as a service (CPaaS), Genesys for customer experience platform, NICE inContact for cloud contact center software, and Cisco for collaboration, connectivity, and cybersecurity services. The company combines third-party solutions with self-service APIs to deliver feature-rich customer experience solutions.

Customer Purchase Experience

OBS offers its clients an all-in-one contact center service that combines voice and digital channels to create consistent experiences. This enables them to connect their own customers to skilled agents and provide fast and personalized resolutions, irrespective of the location or channel of communication. The Flexible Contact Center is a hosted contact center solution based on Orange Business Services' IP platform for unified contact management and workforce management. The solution is offered on a pay-as-you-go pricing model with easy upgradable services (as needed) and value-added services, including access to design and implementation experts, 24x7 incident management, and international call collect and regional voice routing for effective voice quality. Additionally,

OBS supports its customers across all regions with a high standard of service and availability.

The company meets its clients' requirements through its open lab approach. Orange Labs comprise 15 R&D centers across the globe where the company collaborates with its clients to test new ideas, working closely with business leaders to scope, design, implement, and validate innovative solutions. This co-innovation model streamlines processes, optimizes end-user apps, and improves process efficiency. Moreover, the company engages with its clients early on to understand their business needs as well as their technology and process evolution. OBS acts as a consultant that guides the clients through their customer experience journey to deploy and implement changes swiftly via a cloud-based omni-channel contact center. The company continually updates its customer experience portfolio and roadmap with enhanced services based on automation, analytics, and AI in packaged offers and bespoke solutions.

Customer Service Experience

Orange Business Services offers an industry-leading portfolio of cloud-native solutions that attracts multinational companies and large accounts. Additionally, the company focuses on enhancing its digital experience offerings by integrating AI and predictive analytics. In-depth data analytics and reporting features allow organizations to mine data and analyze customer needs to provide them the most suitable service. This approach has helped the company in not only improving its relationship with existing clients but also in extending its customer base to new businesses.

Frost & Sullivan recognizes that the strength of OBS's offering has helped the company expand its business across Asia-Pacific and improve its competitive positioning. Furthermore, OBS saw a boost in its cloud contact center solutions in response to the COVID-19 pandemic as a majority of its clients implemented cloud technologies while shifting to a work-from-home environment. The company collaborated closely with its clients to scale up their contact centers to support the increase in call volumes and to manage mail and online queries.

Brand Equity

The company's customers and partners exhibit high brand loyalty and respond positively to the services provided. Orange is one of the leading global unified communications service providers, so it brings years of industry experience from its core business. The company's rich heritage in connectivity and systems integration influences the growth of its business services. OBS works closely with its ecosystem of technology, IPaaS, CPaaS, and cybersecurity partners in combination with its own ICT segment to create customized customer experience solutions. The company's continual focus on developing data intelligence to enhance its customer experience portfolio is key to its industrial growth.

Implementation of Best Practices

OBS works closely with its clients to understand their business requirements and recognize technology gaps. It aims to understand clients' needs and has initiated several

co-innovation partnerships to investigate and develop use cases. The company has developed vertical-specific use cases that demonstrate the ease of creating innovative personalized solutions, thus driving deeper client relationships. The best practices and use cases address the vertical-specific challenges organizations face as well as the implementation of advanced technologies. Frost & Sullivan believes that OBS has been successful in understanding customer requirements, customizing solutions that solve vertical-specific challenges, adopting technology, and using best practices to develop use cases that can be applied across regions.

Conclusion

As organizations begin phasing out their legacy contact center technologies, cloud contact center solutions are increasingly deployed to deliver effective and efficient customer experiences. Additionally, the COVID-19 pandemic has caused cloud contact centers to gain popularity as organizations seek to improve their contact center scalability, customer service, and agent efficiency and productivity.

Orange Business Services continues to maintain its leadership position in the market with its strong global coverage, proven track record in innovation and systems integration, best-in-class customer experience platform, and wide partner ecosystem. The company is recognized in the industry for its cloud contact center solution, delivery of enhanced customer experience services, global service availability, and robust customer references.

With its strong overall performance, Orange Business Services has earned Frost & Sullivan's 2020 Asia-Pacific Cloud Contact Center Service Provider of the Year Award.

Significance of Company of the Year

To receive the Company of the Year Award (i.e., to be recognized as a leader not only in your industry, but among non-industry peers) requires a company to demonstrate excellence in growth, innovation, and leadership. This excellence typically translates into superior performance in three key areas—demand generation, brand development, and competitive positioning—that serve as the foundation of a company’s future success and prepare it to deliver on the 2 factors that define the Company of the Year Award: Visionary Innovation and Performance, and Customer Impact).



Understanding Company of the Year

Driving demand, brand strength, and competitive differentiation all play critical roles in delivering unique value to customers. This three-fold focus, however, must ideally be complemented by an equally rigorous focus on Visionary Innovation and Performance to enhance Customer Impact.

Key Benchmarking Criteria

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated each factor according to the criteria identified below.

Visionary Innovation and Performance

- Criterion 1: Addressing Unmet Needs
- Criterion 2: Visionary Scenarios through Mega Trends
- Criterion 3: Implementation of Best Practices
- Criterion 4: Blue Ocean Strategy
- Criterion 5: Financial Performance

Customer Impact

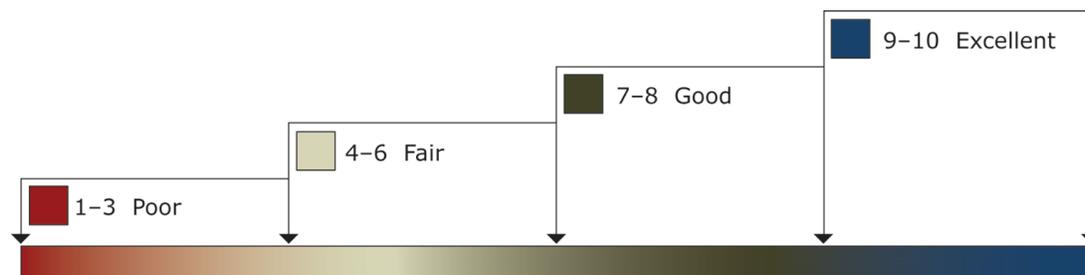
- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

Best Practices Award Analysis for Orange Business Services

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 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 considers Visionary Innovation and Performance and Customer 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, Frost & Sullivan has chosen to refer to the other key participants as Competitor 1 and Competitor 2.

<i>Measurement of 1-10 (1 = poor; 10 = excellent)</i>			
Company of the Year	Visionary Innovation & Performance	Customer Impact	Average Rating
Orange Business Services	9.0	9.2	9.1
Competitor 1	8.2	8.2	8.2
Competitor 2	7.8	8.0	7.9

Visionary Innovation & Performance

Criterion 1: Addressing Unmet Needs

Requirement: Implementing a robust process to continuously unearth customers’ unmet or underserved needs, and creating the products or solutions to address them effectively.

Criterion 2: Visionary Scenarios through Mega Trends

Requirement: Incorporating long-range, macro-level scenarios into the innovation strategy, thereby enabling first-to-market growth opportunity solutions.

Criterion 3: Implementation of Best Practices

Requirement: Best-in-class strategy implementation characterized by processes, tools, or activities that generate a consistent and repeatable level of success.

Criterion 4: Blue Ocean Strategy

Requirement: Strategic focus on creating a leadership position in a potentially uncontested market space, manifested by stiff barriers to entry for competitors.

Criterion 5: Financial Performance

Requirement: Strong overall business performance in terms of revenue, revenue growth, operating margin, and other key financial metrics.

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 they are buying the 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

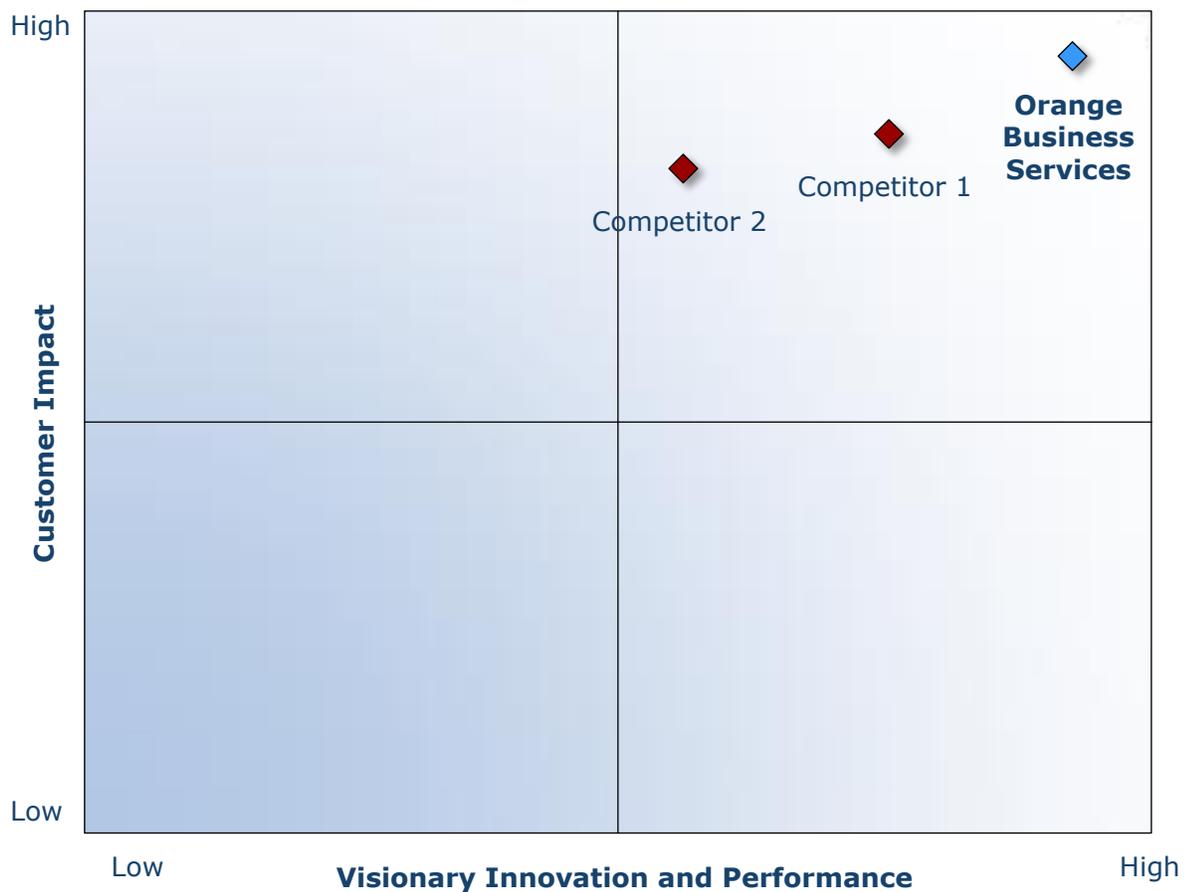
Requirement: Customer service is accessible, fast, stress-free, and of high quality.

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 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.



Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan analysts 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.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 Monitor, target, and screen	Identify award recipient candidates from around the world	<ul style="list-style-type: none"> • Conduct in-depth industry research • Identify emerging industries • Scan multiple regions 	Pipeline of candidates that potentially meet all best practices 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 practices criteria • Rank all candidates 	Matrix positioning of 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 practices 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 practices 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 practices 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 practices criteria
9 Communicate recognition	Inform award recipient of recognition	<ul style="list-style-type: none"> • Announce 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 able to 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 strategic planning 	Widespread awareness of recipient's award status among investors, media personnel, and employees

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of the 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, resulting in 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 participants and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS



About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, helps clients 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 practices models to drive the generation, evaluation, and implementation of powerful growth strategies. Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on 6 continents. To join Frost & Sullivan's Growth Partnership, visit <http://www.frost.com>.

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