

AVAYA

Recipient of the 2007 North American Frost & Sullivan  
Award for IVR Systems Market Leadership



*“Partnering with clients to create innovative growth strategies”*

## 2007 North American Frost & Sullivan Award for IVR Systems Market Leadership

### Award Description

The Frost & Sullivan Market Leadership Award is given to the company that has exhibited market share leadership through the successful implementation of key market strategies. The recipient has displayed excellence in all areas of the market leadership process, including the identification of market challenges, drivers and restraints, as well as strategy development and methods of addressing these market dynamics. Furthermore, the Award recipient has continually demonstrated solutions for monitoring market changes and for implementing superior market strategies. By utilizing these strategies for success, the company has established itself as the market share leader in its respective industry.

### Research Methodology

To choose the recipient of this Award, the analysts track competitor revenue and market share within the industry. This is achieved through interviews with all market participants and extensive secondary research of proprietary data sources. Finally, the competitors are compared and ranked for relative position. Frost & Sullivan then presents the Award to the company that received the number one industry rank.

### Measurement Criteria

In addition to the methodology described above, there are specific criteria used to ascertain final competitor ranking in this industry. The recipient has excelled by substantially increasing one or more of the following criteria:

- Market share
- Revenue growth rates
- Profitability
- Market and technology innovation

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The 2007 Frost & Sullivan Market Leadership Award for the North American IVR Systems Market is presented to Avaya in recognition of its market share leadership, effective market development strategy, and its ability to achieve a leadership position in the market despite competition from a number of accomplished competitors. Avaya is one of the leading global providers of business communications applications, systems and services. Avaya has been in the IVR business since 1985 when it introduced the Conversant IVR line of products. The company introduced its first speech applications in 2000 and has had more than 100 speech implementations in just three years.

The Avaya Self Service product line consists of the Avaya Interactive Response and Avaya Voice Portal software platforms plus the Avaya Dialog Designer speech application development environment. Both platforms integrate tightly with Avaya's contact center portfolio including Avaya Interaction Center and Avaya Proactive Contact to provide integrated inbound and outbound self- and assisted-service. Avaya Interaction Center is an open, IP standards-based soft ACD platform that offers multimedia routing, screen-pop, as well as integration to standards-based enterprise applications and communication platforms. Interaction Center is based on a highly scalable, distributed, component-based technology that can be deployed across multiple systems and locations. Both Interactive Response and Voice Portal can also be used with Avaya Proactive Contact outbound dialing to automate outbound communications such as emergency notifications or status alerts.

Avaya Interactive Response is the traditional enterprise-grade IVR platform built on TDM technology. It incorporates open standards such as VoiceXML (VXML), and Media Resource Control Protocol (MRCP). It supports both traditional Avaya Conversant touchtone applications as well as the latest VoiceXML and speech recognition applications.

In addition to its TDM-based IVR system, as of late 2005, the company offers a web-services architecture-based IVR platform called Avaya Voice Portal. This is an IP-based IVR system that accommodates both circuit switched telephony networks and IP networks, providing customers with great flexibility. Avaya Voice Portal runs across Session Initiation Protocol (SIP) and H.323 compliant media gateways, as well as traditional TDM architectures. Through MRCP, Voice Portal supports standard speech engines such as the IBM WebSphere Voice Server and the Nuance Open Speech Recognizer.

Avaya Voice Portal offers enhanced features such as dynamic re-licensing of the ports that were not available on legacy IVR systems. Dynamic re-licensing of ports, fast becoming a norm in the IVR market, ensures high availability for mission critical applications and a lower cost of ownership. Avaya Interactive Response and the Voice Portal share many common elements. For example, the VoiceXML browser is the same across both products, the same licensing mechanism is used allowing transfer of software licenses, and both share the same VoiceXML speech application design environment – Avaya Dialog Designer.

Avaya Dialog Designer (DD) is another component that the company offers as part of its IVR portfolio. Introduced in September 2005, Dialog Designer is an open, Eclipse-based integrated speech and DTMF VoiceXML application development environment.

Dialog Designer supports both Voice Portal and Interactive Response and therefore acts as a common bridging tool between IR and the VP. Dialog Designer features a common VoiceXML browser with Voice Portal and Interactive Response, helping reduce design risks caused by browser incompatibility. Thus, applications written in VXML on Avaya IR can be seamlessly migrated to the Voice Portal platform. The Dialog Designer is included with Interactive Response and Voice Portal at no cost and can be freely downloaded through the Avaya Developer Connection program.

Current market requirements and the increasing benefits of speech self service have resulted in speech becoming the cornerstone of Avaya's self-service solution strategy. Additionally Avaya has seen accelerated uptake for its Voice Portal product with a triple digit increase in Voice Portal shipments over the past year. Avaya Dialog Designer is increasingly being utilized to command and control, modify and design multiple Avaya technologies. Avaya has planned a series of enhanced product releases for 2007 including Voice Portal 4.0, Interactive Response 3.0 and Dialog Designer 4.0. All of these products are expected to deliver an expanded set of customer self-service features and upgraded standards support.

Avaya has excelled in identifying and analyzing market trends, as well as formulating and executing sound strategies for addressing these market dynamics. Avaya has successfully leveraged its leadership position within the contact center market to drive incremental growth for its self service product line. Accelerated uptake for its IP-based Voice Portal product and associated simplified deployments for speech based self service solutions are some of the factors contributing to the company's expanded growth within the self-service arena. A large installed base, aggressive IP communications and speech initiatives, innovative new products and a holistic approach to customer care technologies have ensured that Avaya finds increasing success in this market. Frost & Sullivan is pleased to identify Avaya as the market leader for the North American IVR Systems market.

#### **About Frost & Sullivan**

Frost & Sullivan, a global growth consulting company founded in 1961, partners with clients to create value through innovative growth strategies. The foundation of this partnership approach is our Growth Partnership Services platform, whereby we provide industry research, marketing strategies, consulting and training to our clients to help grow their business. A key benefit that Frost & Sullivan brings to its clients is a global perspective on a broad range of industries, markets, technologies, econometrics, and demographics. With a client list that includes Global 1000 companies, emerging companies, as well as the investment community, Frost & Sullivan has evolved into one of the premier growth consulting companies in the world.

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