

## MARKET CONDITIONS

- UCaaS is now growing at approximately 30% per year—Gartner Research
- UCaaS market to grow \$13.10 Billion in 2014 to \$23.34 Billion in 2019—Markets and Markets
- Hosted VoIP Services have hit their stride, experiencing broad adoption among small, mid and large enterprise—Infonetics Research
- Markets and Markets estimates a \$23.34 Billion UCaaS market by 2019 and the forecast from Grand View Research estimates the market to be worth \$75.81 Billion by 2020

## BENEFITS

- Delivers transformative capabilities through enhanced collaboration and communication
- Helps control capital expenditures, increase productivity and manage operational expenses
- Frees-up IT resources to enable tighter alignment with business strategies
- Offers an OPEX alternative rather than a CAPEX spend to acquire and deploy new technology
- Provides DR by placing UCaaS in a protected data center environment bringing application integrity and minimizing risk
- Imparts business agility, enabling a competitive infrastructure on which to build
- Supports growth through scalability that expands the business footprint on a standardized platform

## PRODUCT FEATURES

- Terms of 36 or 60 months
- Per seat pricing: Fixed pricing during term for adds or deletions within certain parameters
- Advanced Contact Center applications
- Network Assessment
- Pay for labor up front or amortize as an MRC
- Windstream Complete + Maintenance
- Geo-redundancy available on Mitel and required on Avaya

## TARGET CUSTOMERS AND OPPORTUNITIES

- Businesses seeking to increase productivity and decrease costs
- Businesses with limited feature set and/or aging telephony equipment
- Multi-location businesses or institutions
- Businesses seeking enhanced collaboration and mobility tools
- 100 to 10,000+ users
- Preference for OPEX model instead of CAPEX
- Need for complex applications (i.e., Contact Center)
- Lack the resources to manage their UC platform
- Businesses that demand standardization / consolidation of systems
- Current Centrex user
- Businesses that currently have a system with expensive on-going maintenance costs
- An over-taxed IT staff
- Businesses with other hosted or virtualized applications
- Requires Disaster Recovery
- Businesses that experience seasonal fluctuations

Key Verticals: Education, Retail, Healthcare, Assisted Living and Service Companies (Contact Centers)

## COMPETITIVE POSITIONING

### Internet Telephony Service Providers (ITSPs)

- Internet connectivity inherently can't provide sustainable SLAs
- Traditionally 3rd party data centers
- Potentially less financially stable
- Use 3rd party phones

### Carrier Service Providers

- UCaaS is individual, virtual instance versus multi-tenanted switch; therefore, Windstream customers aren't affected by software changes performed on others
- Private network versus public Internet and other 3rd party carriers

## COMPETITIVE POSITIONING CONT'D

### Manufacturers

- Generic services that are Internet based
- Higher rates
- Fewer bundles

### Windstream Strengths

- Single point of contact, design, network, data center protection and Day 2 support
- Private per-customer instances provisioned on a shared infrastructure
- Powered by Avaya and Mitel recognized industry leaders
- Ability to offer QoS and achieve SLAs

## CUSTOMER SEGMENT

- Peace of mind knowing their voice platform is always current, protected and available
- Affords business agility and the ability to better compete in their marketplace

## PROBING QUESTIONS

- What are your strategic plans or initiatives? 3-5 year plan or goals?
- Do you consider your network and phone system(s) a detriment or an asset to your overall business strategy?
  - Would standardizing telephony platforms prove to be an asset?
  - Would the ability to rapidly deploy additional sites through UCaaS prove to be an asset to your expansion goals?
- What impact is felt from having to manage multiple locations that may be on different platforms?
  - Do you experience complex end user training, equipment replacement issues and/or challenges with staying current on multiple platforms?
- Would a managed solution have a positive impact as we would keep the platforms current?

- Do you lack the resources or desire to maintain your voice platform(s)?
- What is your interest in OPEX versus CAPEX?
  - Are you in favor of a set monthly, affordable, budgeted charge per month?
  - Can monthly charges be better allocated across business units?
- Can your capital be used for another initiative?
- Rather than purchase a premises platform equipped for the future, why not UCaaS and build and deploy incrementally?
- Does your long-range plan involve acquiring new customers and enhancing customer service?
- Is there a need for complex apps like Call Recording, Call Center and IVR?
  - What applications do you feel would enhance your organizational strategy?
- Is seasonality affecting your business?
  - Is staffing an issue for the contact center?
- What is your view on outsourcing, staff augmentation or managed services?
- Are there expensive maintenance charges associated with your current systems?
- Do you have any other hosted or virtualized applications?
- Is business continuity something you're concerned with?
  - What are you doing today about business continuity?
- Are you currently dealing with multiple vendors— including Windstream—for network and voice services?
- Do you have any other specific industry challenges that need to be addressed?