mersive
technologies inc

North American
Professional Wireless Content Sharing
Product Line Strategy Leadership Award

2019
BEST PRACTICES
AWARDS

Significance of Product Line Strategy Leadership

Ultimately, growth in any organization depends upon customers purchasing from a 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.

Best Practices Award Analysis For Mersive Technologies

Robert Arnold
PM, Unified Communications
and Collaboration
Frost & Sullivan

Understanding Product Line Strategy Leadership

As discussed above, driving demand, strengthening brand, and differentiating from the competition 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.

Background and Company Performance

Industry Challenges

A number of trends aligning across corporations, educational institutions and government organizations, including an increased adoption of communications and collaboration tools and the bring your own device (BYOD) movement, are driving numerous changes in how and when people interact and share information. Organizations are finding that allowing employees to use the devices of their choice in the workplace and learning environments helps to drive adoption and utilization of communication and collaboration technologies. However, BYOD and the complexity of today's collaboration solutions can create technology challenges that both users and IT staff need to address.

The proliferation and diversity of devices used to access corporate information results in compatibility challenges, particularly with respect to sharing content in meeting rooms. Traditional collaboration endpoints often rely on a physical connection (i.e., HDMI, USB, VGA, etc.) to push digital content, however the physical interfaces available on Macs, PCs, iOS and Android devices all differ significantly. As such, meeting hosts and participants often face difficulties when attempting to share content from their devices in conference and class rooms. Cables and connectors made available in these shared environments also have tendencies to become missing or damaged. As a result, the user's collaboration experience is generally poor and the meeting or class session less effective than it should be.

Wireless content sharing is designed to resolve the issue of wired connections however, many solutions available on today's market are expensive, making it unfeasible to equip meeting spaces across an organization's environment at scale. At the same time, lower cost options often lack the feature set and manageability that large-scale deployments require. Further, a one-size fits-all approach leaves meeting and learning spaces of different sizes and configurations insufficiently equipped and limiting customer opportunities to standardize across their environment.

Leading providers develop and execute on an innovative product line strategy to overcome these challenges. Innovation comes in the form of support for a broad range of devices and operating systems, allowing for BOYD and a consistent user experience. A leading provider develops and delivers on a portfolio that enables organizations to implement content sharing that can be effectively deployed at scale, easy to use and manage, and offered at price points that do not ask organizations to compromise on their feature and functionality requirements. By addressing issues that exist for both users and IT, a provider is well positioned for success in the rapidly evolving collaboration market.

> *"Mersive Technologies has caught the attention of the collaboration industry. Due to its outstanding performance in the professional wireless content sharing market, Frost & Sullivan recognizes Mersive as the 2018 Product Line Strategy Leader due to the following criteria: portfolio breadth; scalability, features, customer purchase experience; and brand equity."*
>
> *Robert Arnold, Principal Analyst*

Product Line Strength and Customer Impact

BREADTH

In the dynamic and fast growing professional wireless content sharing market Mersive's product line addresses the full range of customer needs and applications.

Solstice software anchors the Mersive portfolio, providing easy to use content sharing and control capabilities for any PC, Mac, Android and iOS device. Solstice software effectively eliminates the frustrations and inefficiencies associated with traditional wired connections to meeting room displays. Solstice is available both as a free Windows software download for existing in-room PCs as well as the software that powers the Solstice Pod, a small, turn-key device for meeting rooms that currently lack collaboration hardware or for environments where BYOD is prevalent. With feature parity across Solstice Pod and Solstice Windows Software, Mersive delivers the following functionality that is inconsistently supported by alternative solutions: any number of unlimited users sharing unlimited content; customizable display layouts; multi-touch display support; support for any displays of any resolution; and configurable sharing options, access control, and use modes.

Solstice Dashboard and Solstice Discovery Services (SDS) deliver management and control capabilities that are unmatched by competitive solutions. Solstice Dashboard provides centralized, browser-based administrative capabilities to configure, manage and control Solstice endpoints across an organization's environment. Optionally, Solstice Dashboard for Windows accommodates organizations that prefer or are required by policy to leverage native network-based PC applications for administration. SDS is likewise designed to streamline activities for Solstice users. SDS enables users to see available Solstice endpoints and easily connect to their collaborative sessions. SDS support for Multi-Room capabilities and domain name services (DNS) further simplify the processes of identifying and connecting to Solstice endpoints for users.

Solstice OpenControl API facilitates integrations with third-party solutions for improved user experience and management. For example, OpenControl RESTful APIs enable integration with third-party room control systems, video and audio conferencing solutions, and room scheduling platforms such as Microsoft Office365 calendar and Exchange. In response to growing customer demand for greater ease of use and control, OpenControl also integrates with popular voice recognition solutions, such as Amazon Alexa, to enable voice-driven control of Solstice sharing and management of content on in-room displays.

Mersive Solstice is available at a variety of price points and functionality levels.

SCALABILITY

Solstice Pod is available in Small Group Standard edition for up to four users, Unlimited Standard edition, Small Group Enterprise edition for up to four users, and Unlimited Enterprise edition. The license packages follow a methodology of tiered user capacity and graduating centralized management and multi-room capabilities for customers to most closely match their requirements.

While perfectly suited for small-scale requirements, a number of optional functionalities also make Solstice ideal for large-scale deployments. Enterprise Edition Licensing enables Multi-Room sharing and control, customized welcome screens, network encryption and QoS support. With Multi-Room capabilities enabled, Solstice Discovery Services (SDS) becomes a greater value and facilitator of user simplicity across locations and rooms. For its part, Enterprise Edition's enablement to manage, configure and control Solstice endpoints deployed anywhere on the network likewise increases in value as a facilitator of admin efficiency for large-scale and multi-site deployments.

In addition to these capabilities, and others, Mersive is in active development of its Kepler software suite which will deliver Solstice monitoring and diagnostic tools, alerts, usage reporting and other analytics, and customizable configuration tables that allow admins to define their own configuration templates and be alerted accordingly in the event of performance issues.

The professional wireless content sharing market is populated by a diverse ecosystem of market participants of differing backgrounds and solutions approaches. Among them there are alarmingly pervasive tactics incorporating a "set it and forget it" mentality which puts the support onus primarily on admins and the user base. In contrast, Mersive takes a proactive approach that aims to empower and simplify life for both administrators and users.

Mersive products offer a comprehensive suite of features to serve customers at multiple levels of functionality and configuration requirements. In addition to those previously discussed, Mersive offers a greater degree of flexibility to address use cases beyond the one-size fits-all designs of many alternatives.

- Solstice Pod supports an array of connectivity options for integration into existing environments, including both Wi-Fi and wired Ethernet network connections. The Pod's two network interface cards have dedicated routing tables to ensure no traffic passes between the guest and corporate networks for security reasons. Solstice POD also incorporates an HDMI port and two USB ports for display and peripheral (keyboard, mouse, etc.) connectivity, as well as an audio output interface.

- Solstice OpenControl APIs enable integrations not available with numerous competing products. Integration with room control systems, video and audio conferencing platforms, as well as calendar and resource scheduling software ensures multi-vendor technology works seamlessly to support established workflows.

- Multi-Room is the capability to collaborate interactively in the same session simultaneously as well as multi-stream support (several users sharing simultaneously). With Multi-Room, Mersive is delivering advanced capabilities that are unavailable with most alternative solutions.

"With its progressive solutions approach and concentration on evolving customer demands, Mersive can more easily address a wider range of use cases today and tomorrow compared to its competitors."

Robert Arnold, Principal Analyst

CUSTOMER PURCHASE EXPERIENCE

Given the range of options available to them, Mersive customers will feel they are buying the most optimal solution that addresses both their unique needs and constraints.

Customers can choose from a variety of user capacity options, license editions, network connections, admin interfaces (native Windows app or browser portal), third-party integrations, and take advantage of pre-built features tailored for corporate enterprise and education environments. Solstice includes the first year of software maintenance with the initial purchase date, providing new capabilities through software updates, with optional extended maintenance available at a discounted rate.

For most organizations a one-size fits-all approach does not work. Mersive enables its customers to right-size their installations from the software, hardware, admin requirements and user distribution perspectives to effectively satisfy different network topologies and physical meeting environments.

BRAND EQUITY

After years of technology evolution, professional organizations had largely been taking a wait and see investment approach to satisfy their rapidly evolving needs. Today, they are adopting rich communications and collaboration solutions in masses.

Mersive has burst onto the business collaboration scene with precision timing. Frost & Sullivan research finds that the total global unified communications and collaboration market is quickly moving away from siloed hardware-oriented products and toward integrated software-centric solutions. As an entrepreneurial company built upon a software-based approach, Merisive is seizing opportunities to address unmet demands where its competitors have been slower to respond. As such, much larger market participants give Mersive healthy respect by regularly ranking the company as a top competitor that they must catch or emulate.

Moreover, Mersive's brand equity is also on the rise due to its impressive customer base. The company has amassed a client roster of more than 4,000 organizations worldwide, including nearly three dozen Fortune100 companies. Household names across verticals and regions, including Bridgestone, Blue Cross Blue Shield, MassMutual, AstraZeneca, Duke University, Samsung, Toyota, Yale University, GE, Mondelez International, Valpak, Unilever, Bloomberg, Comcast, NewellRubbermaid, and many others have come to rely on Mersive technology for mission-critical collaboration capabilities.

Conclusion

In the fast-growing professional wireless content sharing market customers have many options. However, they must ensure their choice effectively meets the requirements of both IT and users without compromise. Mersive's product portfolio is well positioned to meet or exceed the requirements for many organizations.

With its strong overall performance, Mersive has earned Frost & Sullivan's 2018 Product Line Strategy Award.

What is Product Line Strategy Leadership?

The award recognizes the extent to which the product line meets customer base demands, and the overall impact it has in terms of customer value and increased market share. Best-in-class companies drive demand, brand strength, and competitive differentiation while also developing unique value for customers with superior and comprehensive product lines.

Demand

Acquire competitors' customers
Increase renewal rates
Increase upsell rates
Build a reputation for value
Increase market penetration

Brand

Earn customer loyalty
Foster strong corporate identity
Inspire customers
Build a reputation for creativity

Competitive Positioning

Stake out a unique market position
Promise superior value to customers
Implement strategy successfully
Deliver on the promised value proposition
Balance price and value

Key Benchmarking Criteria

For the Product Line Strategy Leadership Award, Frost & Sullivan analysts independently evaluated two key factors — Product Line Strength and Customer Impact — according to the criteria identified below.
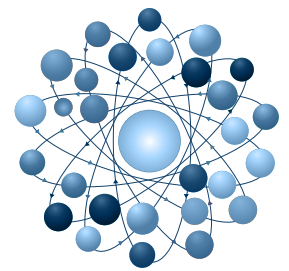
Product Line Strength

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

The 360-Degree Research Approach

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.
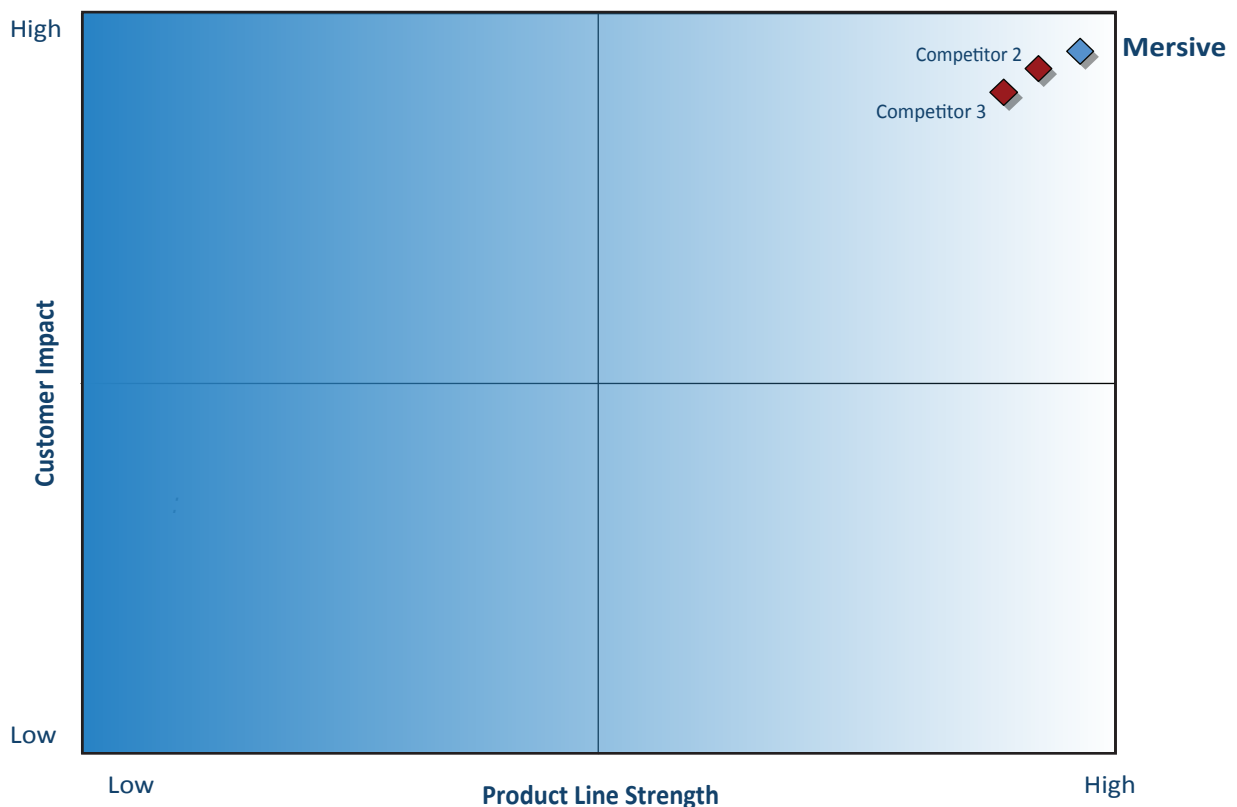
Decision Support Scorecard

Measurement of 1–10 (1 = poor; 10 = excellent)

Product Line Strategy Leadership Award	Product Line Strength	Customer Impact	Average Rating
Mersive Technologies	*10*	*9*	*9.5*
Competitor 2	*8*	*9*	*8.5*
Competitor 3	*8*	*8*	*8.0*

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.

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About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, works in collaboration with clients to leverage visionary innovation that addresses the global challenges and related growth opportunities that will make or break today's market participants. For more than 50 years, we have been developing growth strategies for the global 1000, emerging businesses, the public sector and the investment community. Is your organization prepared for the next profound wave of industry convergence, disruptive technologies, increasing competitive intensity, Mega Trends, breakthrough best practices, changing customer dynamics and emerging economies?

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