

Enabling Technology Leadership Award

Contact Center Software
Global



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Letter of Congratulations

Frost & Sullivan's global team of analysts and consultants continuously research a wide range of markets across multiple sectors and geographies. As part of this ongoing research, we identify companies that continually invest in new technologies to deliver a unique and superior customer experience, and invest in technologies that enhance a vast array of applications. This involves extensive primary and secondary research across the entire value chain of specific products.

Against the backdrop of this research, we are proud to present **ThinScale** with this year's Award for Best Practices in Enabling Technology Leadership in the contact center software industry. This is the first time that ThinScale has been recognized by Frost & Sullivan.

To achieve enabling technology leadership is never an easy task, but it is one 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. Within this context, your receipt of this Award signifies an even greater accomplishment.

Moreover, we recognize that your selection as recipient of this Award is the result of many individuals (employees, customers, and investors) making daily choices to support ThinScale and contribute in a meaningful way to the company's future growth.

Frost & Sullivan enthusiastically acknowledges and celebrates this achievement with you!

***The North America Frost & Sullivan Contact Center Analyst Team
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Background and Company Performance

Industry Challenges

Covid – 19 Global Pandemic. In February, 2020, the World Health Organization (WHO) classified Covid-19 as a global pandemic based on the ease and rate of infection, elevated mortality rates, and the degree of global spread to regions and countries around the world. A general lack of preparedness in customer care has revealed each industry's weaknesses and vulnerabilities. Every vertical market has its own unique challenges, but the concerns that are universal for all of them include lack of bandwidth, secured networks, and reliability.

Client Concerns about the Work-at-Home Model. Beyond the Covid -19 pandemic, concerns about excessively high fuel prices, commute times, family/work balance, and the environment are driving up interest in home agent programs. Network security and ramping up of WAHA have been part of a well-thought-out business continuity planning process for years. While this continues to be a challenge, a new problem has emerged: this particular virus is attacking humans, not just networks or cybersecurity protocols. All told, clients are uneasy about WAHA.

Security and Privacy Issues. Today's BPO clients are extremely concerned about how companies use their data and track their activities online. While security has traditionally been viewed as the responsibility of the IT organization, progressive companies have built a separate Security Practice to stave off the onslaught of internal and external threats. Battling agent turnover and improving the overall customer experience, continue to be top priorities in contact centers across the globe. However, no one can deny the mission-critical nature of stringent security and privacy policies, as a key benchmark for Best-in-Class contact center performance.

Agent Fraud. Within captive or outsourced contact centers, agent fraud represents the most significant and pernicious security threat. One of the most common agent actions related to contact centers, occurs when employees conduct unauthorized access to private and confidential data without a business need to access that data.

General Data Privacy Regulation. With the recent implementation of the General Data Protection Regulation (GDPR) on May 2018, it's clear how consumer data and privacy have been rightfully prioritized and enforced. GDPR can apply to a remarkably wide range of organizations that control or process data about European (EU) residents. This includes many organizations without a physical presence in the EU. The European Union's GDPR has been slowly followed by other data protection or privacy regulations mandated in different areas of the world, primarily in Brazil (General Data Protection Law) and California, USA (California Consumer Privacy Act). New privacy laws are being introduced and existing privacy laws are being enhanced around the world with stricter privacy requirements.

Extraordinary Consumer Expectations to Continue Past 2020. Consumers are more empowered and knowledgeable than ever before, and expectations for excellent customer service, sales knowledge, and technical support have soared. More and more customers are insisting that businesses anticipate their every need.

Artificial intelligence and Artificial General Intelligence (AI/AGI). This set of technologies build on machine learning by enabling machines to exhibit intelligent human-like behavior. We are seeing the breakthrough of market-relevant applications in artificial narrow intelligence (ANI).

Emerging Channels and Channel Integration. Customer interactions now typically begin on the web, interactions that have expanded to include those initiated through mobile applications. Meanwhile, text-based communication has become very popular with consumers. Both trends will accelerate with a younger generation that is more likely to “key-in” than talk. Moreover, all customers expect companies to respond to them on the channels of their choice, without repeating what was said or written via other channels.

2020 Recognition and Company Overview

ThinScale is being recognized in 2020, for its Enabling Technology Leadership in the contact center software market. Specifically, in the midst of the Covid-19 pandemic, ThinScale has developed products and solutions that enable remote and work-at-home users to securely connect to a corporate environment and access apps and desktops using their personally-owned devices.

Company Overview

ThinScale is a leader in architecting and delivering software solutions that enable organizations to effectively implement their remote working, BYOD, and business continuity strategies. ThinScale’s portfolio of Windows-based software-only solutions enable existing hardware, owned by either the organization or the user, to be easily converted into secure, flexible, centrally-managed thin clients.

Technology Leverage

Commitment to Innovation

ThinScale has expertise in many server-based computing and virtualization technologies and is perhaps most widely recognized for disrupting the thin client market with its release of ThinKiosk, the first Windows-based PC to thin client converter, and its more recent release of its BYOD thin client offering Secure Remote Worker. ThinScale has a demonstrated track record of delivering best-in-class solutions for leading customers across industries. This is especially true in Business Process Outsourcing (“BPO”), where

many of the leading global players rely on ThinScale's technology to deliver, secure, and managed endpoints across their vast, distributed workforces and home working programs.

ThinScale's ThinKiosk is a software-only thin client that repurposes an existing Windows device (PC, laptop or thin client) into a Windows-based thin client. ThinKiosk is the first product developed by ThinScale and was originally released in 2013. The solution reduces hardware and management costs, while also dramatically improving the end-user experience.

Secure Remote Worker developed out of the demand for a secure BYOD option that would work on user or agent owned devices. Like ThinKiosk, it also locks down the device but only temporarily, allowing the user to switch between their personal environment and a temporary corporate workspace environment without needing to reboot, dual-boot, or boot from an external USB device. Once logged into Secure Remote Worker, the user can only access the Secure Remote Worker interface where the IT administrator has full control. Once finished, the user exits Secure Remote Worker and all device restrictions are lifted, with the user regaining full control of their local device.

This enables companies to quickly and easily roll out secure WAHA initiatives leveraging agent-owned devices thereby reducing the costs and logistics associated with the purchase and distribution of equipment.

Key benefits include:

- ✓ Secure workspace environment
- ✓ Enables secure BYOD on user/agent-owned devices
- ✓ Easy and Fast Deployment
- ✓ Removal of logistical complexities
- ✓ PCI/HIPAA/GDPR Compliance
- ✓ Endpoint/device Validation

Commitment to Creativity

The ThinScale team are the creators of **Secure Remote Worker**, the leading software for secure work at home using personal devices Windows.

Pivoting to a Modern Digital Workplace

ThinScale is well-known in this nascent industry for its innovation, creativity and expertise. As a testament to this, in April 2020, ThinScale announced the launch of Secure Remote Worker 6.0. Listed below are the major updates in this release:

- ✓ Chrome Support
- ✓ System Tray Integration

- ✓ Powershell Module
- ✓ Remote Disable and Uninstall

The rather small but dynamic ThinScale team disrupted the thin client market with ThinKiosk - the first Windows-based PC to Thin Client converter - back in 2013. Quietly and effectively ThinScale has empowered IT departments, worldwide, with software solutions that are mission-critical in today's modern digital workplace. In 2018 ThinScale received the award for Emerging Technology Company of the year, from Technology Ireland.

Commercialization Success

Customized for BPOs

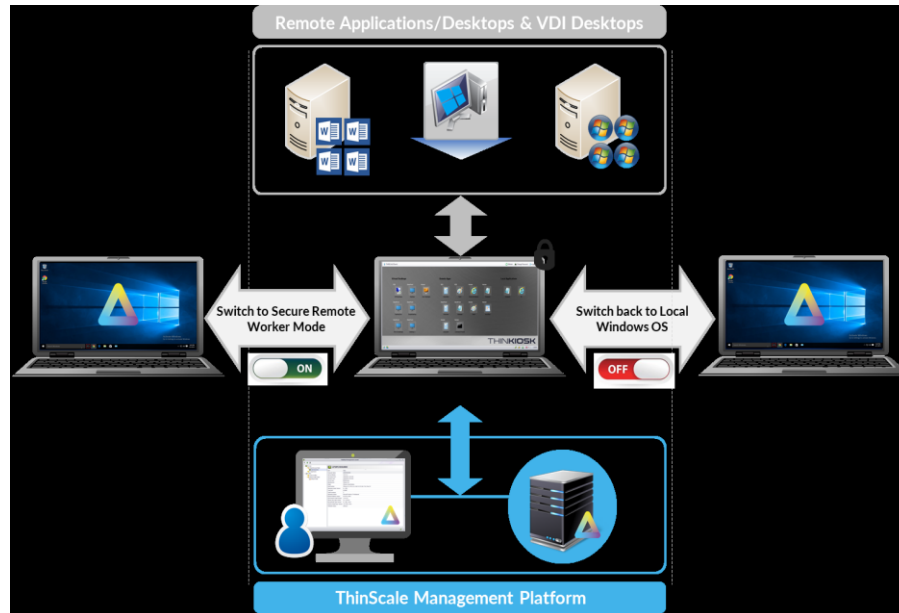
ThinScale products have been purposely designed to deliver features and benefits to companies looking to expand or roll out work at home programs utilizing a BYOD model. This model has been rapidly adopted by global BPOs as they looked to WAH programs as a way to achieve business continuity during the Covid-19 pandemic. The secure BYOD model offers many benefits and removes logistical, financial and resource-related limitations.

How it Works

As shown in Exhibit 1.0, Secure Remote Worker allows an end user to use their own Windows device. By default, an end-user will continue working as normal and will have full access to their local Windows PC or laptop. When they logon to the device, they still have a startup menu and full access to resources, applications, and settings.

Then, when Secure Remote Worker is launched on their Windows PC or laptop, and the end-user enables the Secure Remote Worker feature, the PC or laptop is placed into "worker" mode. At this point lock down policies are applied, Windows Explorer is removed, and the Secure Remote Workspace user interface is launched.

Exhibit 1.0



Source: ThinScale2020

Customer Impact

Price/Performance Value

As mentioned earlier, Secure Remote Worker enables end users to use their personally owned Windows devices to connect to corporate resources by locking down the device and delivering a secure, compliant workspace environment. Deploying ThinScale's software suite makes it easy for companies to improve productivity, quality, security and compliance. Listed below are just a few of ThinScale's differentiators in the market:

Lower Initial and Total Cost of Ownership (TCO). Given that BPO agents can utilize the hardware that they already own, the only charge/cost is for the software license. The license can be deployed, retracted and redistributed quickly and simply for seasonal requirements.

Centralized Management. The secure workspace environment is managed centrally by BPO IT teams using the ThinScale Management Platform. This allows IT to ensure that the environment is secure and up-to-date.

Enhanced End User Experience. The Secure Remote Worker user interface is a familiar Windows interface that allows agents/end users to take advantage of, and continue using, all of the features and benefits that they are accustomed to.

Customer Service Experience

ThinScale's technology is especially important for extremely large Business Process Outsourcing (BPO) service providers with *global* operations. Due to the pandemic, they have been compelled to vacate contact center sites in favor of the deployment of a Work-at-

Home-Agent (WAHA) model. What makes this initiative so compelling is the sheer scale and speed of this deployment, as hundreds of thousands of agents that have been impacted - globally.

Extensive Marquee Client Base

ThinScale's clients include several of the world's largest Tier 1 contact center companies. These clients include global operations, a number of which have more than a quarter of a million employees and agents, who deliver a variety of call center services.

Brand Equity

Leveraging Existing Assets

Secure Remote Worker scales to deliver compliant, reliable and secure environments to thousands of devices. ThinScale's modern solutions enable flexible working arrangements. As the pandemic spread, it became a serious and costly challenge to deliver physical thin-client devices, laptops and computers. Secure Remote Worker solves this problem by speeding up hiring and 'onboarding processes' - thereby saving time and significant financial resources for BPO clients. No need to wait for the delivery of a physical asset; there's zero maintenance; and upgrades are unnecessary.

Finally, note this testimonial from the world's largest BPO service provider:

"From a single click, the whole process takes under four minutes and the agent is up and running. No comparison to hardware based solutions!"

Marlon Beltz - Director of Desktop Virtualization/WAH, Teleperformance

Conclusion

When it comes to leveraging technology and customer service, Frost & Sullivan believes that ThinScale is at the vanguard of advancing products and solutions for companies with the need to deploy remote employees and customer care agents. ThinScale offers an array of technological solutions, at very reasonable cost, to improve systems, operating processes and service levels across global markets; ensuring continuity of the service, privacy, compliance and security.

ThinScale continues to show tremendous growth, a testament to the company's strategic resourcefulness at an unprecedented and challenging time in world history. And so with its strong overall performance during this extremely disruptive period, ThinScale has earned Frost & Sullivan's 2020 Enabling Technology Leadership Award.

Significance of Enabling Technology Leadership

Ultimately, growth in any organization depends upon customers purchasing from a company and then making the decision to return time and again. In a sense, then, everything is truly about the customer—and making those customers happy is the cornerstone of any long-term successful growth strategy. To achieve these goals through enabling technology leadership, an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.



Understanding Enabling Technology Leadership

Product quality (driven by innovative technology) is the foundation of delivering customer value. When complemented by an equally rigorous focus on the customer, companies can begin to differentiate themselves from the competition. From awareness, to consideration, to purchase, to follow-up support, best-practice organizations deliver a unique and

enjoyable experience that gives customers confidence in the company, its products, and its integrity.

Key Benchmarking Criteria

Technology Leverage

Criterion 1: Commitment to Innovation

Requirement: Conscious, ongoing adoption of emerging technologies that enables new product development and enhances product performance

Criterion 2: Commitment to Creativity

Requirement: Technology leveraged to push the limits of form and function in the pursuit of “white space” innovation

Criterion 3: Stage Gate Efficiency

Requirement: Adoption of technology to enhance the stage gate process for launching new products and solutions

Criterion 4: Commercialization Success

Requirement: A proven track record of taking new technologies to market with a high rate of success

Criterion 5: Application Diversity

Requirement: The development and/or integration of technologies that serve multiple applications and can be embraced in multiple environments

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 most 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.

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 globe	<ul style="list-style-type: none"> • Conduct in-depth industry research • Identify emerging sectors • Scan multiple geographies 	Pipeline of candidates who potentially meet all best-practice 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-practice 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-practice 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-practice 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-practice Award recipient	<ul style="list-style-type: none"> • Review analysis with panel • Build consensus • Select recipient 	Decision on which company performs best against all best-practice criteria
9 Communicate recognition	Inform Award recipient of Award recognition	<ul style="list-style-type: none"> • Present 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 is 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 future 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 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 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, enables clients to 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 practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages more than 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.

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