



2014 Global Customer Experience Management
Customer Value Leadership Award



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



50 Years of Growth, Innovation & Leadership

Background and Company Performance

Industry Challenges

Frost & Sullivan recognises that from 2G to 3G to LTE, mobile communication technology has achieved rapid progress in the past few years, paving the way for innovation and developments in the wireless communication industry. With a rapid growth in the number of mobile subscribers and the proliferation of mobile devices and tablets, human-to-machine, and machine-to-machine communication platforms, service providers are facing challenges in terms of keeping up with the amount of data, demands from end users, and technology developments.

Big Data continues to drive the demand for mobile data monitoring solutions by putting tremendous strain on networks. Big Data is characterised by:

- Data sets that are large and complex, and which current database tools and applications have difficulty managing and processing
- Large volume and growth of data that CSPs are facing due to growth of video traffic, sensor traffic, and other sources of data traffic
- High velocity of data due to increased connectedness, mobile applications, and unrelenting time-sensitive traffic created in the social media environment
- Large variety of data due to social networking traffic, the rise of user-generated content, and machine-generated data, leading a variety of structured and unstructured data formats that CSPs have to manage

Frost & Sullivan's research shows that service providers (SPs), network equipment manufacturers (NEMs), and enterprises have a need for monitoring solutions to ensure that the customer experience is not compromised.

Customer Value and Implementation Excellence

Total Customer Experience

To respond to the increasing customer demand in Customer Experience Management, Polystar has established a strong position among the CEM vendors through its Real-time Network Monitoring, Customer and Network Analytics, Service Assurance, and CEM solutions. The company's extensive product portfolio continues to meet demanding customer requirements and maintains a perfect balance between legacy and next-generation technologies. Frost & Sullivan's analysis confirms that Polystar's solutions are known for their integrated real-time data collection capabilities coupled with high-level business and network analytics applications that provide a unique insight into subscriber behavior and help network operators improve their quality of service and deliver the best possible customer experience.

Product Value

Polystar's products provide its SPs, NEMs, and enterprise customers with a focused approach to Big Data analytics and network, customer and service assurance.

Polystar's product line consists of the following solutions: Network Insight – enabling customers to monitor and troubleshoot networks via non-intrusive probes, Customer Insight - a complete analytics suite that delivers critical knowledge regarding customer behavior and Solver - a high performance load, stress, and feature testing solution.

Polystar's Customer and Network Insight solutions offer operators an end-to-end Customer Experience Management solution and form the foundation of a comprehensive CEM deployment.

The customer-centric Network Insight application suite helps operators gain a complete picture of the network through a range of dashboards, allowing them to drill down to specific key performance indicators (KPIs) and key quality indicators (KQIs) that indicate the level of actual and perceived service quality. Polystar's Network Insight solution enables operators to provide the best customer experience through outstanding network performance and quality. It helps operators to gain competitive advantage, improve customer experience and brand loyalty, while taking control of their networks and gaining a better understanding of the network behaviour.

Polystar's Customer Insight solution helps operators to secure competitive advantage by understanding customer behaviour; enabling outstanding customer care; boosting retention of the most valuable customers; and adapting marketing and offerings to actual customer behaviour. It helps operators to improve overall customer satisfaction and reduce churn.

The Marketing Analytics application – a part of the Customer Insight solution suite - also enables operators to segment their customers by the pattern of their data usage. This helps them prioritise important customers in order to deliver the appropriate service quality according to their data usage.

Polystar's Solver is a load, stress, and feature test tool for SIP, PSTN, 2G, 2.5G, 3G, and 4G networks. In addition, Solver is capable of simulating a Radio Access Network (RAN/UTRAN/E-UTRAN) for GSM/GPRS, UMTS, and LTE with a high volume of connected mobile subscribers. One of the added benefits of this solution are the simplified qualitative performance analysis capabilities.

Frost & Sullivan notes that in February of 2014 Polystar introduced a new solution, Application Recognition Monitoring, which became a part of the company's mobile data monitoring suite of applications. This product, which is an enhancement to both the Network Insight and Customer Insight solutions, is capable of delivering Deep Packet Inspection (DPI), providing real time analytics about the application performance and usage at a network level for more than 1600 individual applications.

Polystar has an impressive Big Data solution that helps SPs collect and manage the massive amounts of difficult-to-analyse data by using common database management solutions. Big Data presents tremendous challenges for SPs as there has been an

explosion of data flowing across their networks, mainly driven by rapid smartphone adoption and various over-the-top (OTT) applications. Polystar helps SPs by providing proactive network analysis in real time and allowing them to predict problems and correct them before they affect the end customers. SPs' ability to understand customer behavior is key to maintaining their customer base and increasing customer loyalty; Polystar's solutions are instrumental in this analysis.

Purchase Experience

Polystar now has more than 110 customers across more than 50 countries. Currently, the company has 11 offices across the globe and it continues to increase its global footprint by adding new offices and working through value-added resellers in order to provide local support and superb service and purchase experience to its customers. In order to improve its customer purchase experience and client base, Polystar has been continuously growing its global presence. In February 2014 the company opened new offices in Toronto, Canada and Karlstad, Sweden, and, in April, a new regional sales and support office in Johannesburg, South Africa.

Ownership Experience

Frost & Sullivan's research reveals that Polystar's customers speak very highly about the company's solutions as well as the ownership experience. Polystar's solutions are very user friendly and, at the same time, packed with insightful analytics that are necessary to see the health of the network as well as the individual customer experience. Polystar's strong focus on customers' needs has proven to be one of the key factors behind its success. The company holds several "User Meetings" throughout the year to collect user feedback from customers and to discuss current product features and evolving customer needs. Such events gather a number of Tier I SPs, industry partners, and other customers. Such meetings consist of workshops, discussions, and educational presentations by experts.

The lessons from each session are closely monitored by Polystar and acted upon via new product introductions or product upgrades, thereby improving overall ownership experience for its customers.

Service Experience

With the rapid deployment of 4G services, the demand for effective mobile network and customer experience management solutions is on the rise. Polystar is committed to providing excellent service experience to its customers through product support and closer relationships across the globe. Frost & Sullivan's research shows that numerous customers testified about the exceptional quality of service and support Polystar delivers to them which, in turn, resulted in SPs delivering and capitalising on better quality of service to their customers.

Conclusion

Polystar is the global Network and Customer Analytics, Network Monitoring, and Test solutions company. The company's strong focus on technology innovation won Polystar recognition as one of the fastest-growing companies in Sweden.

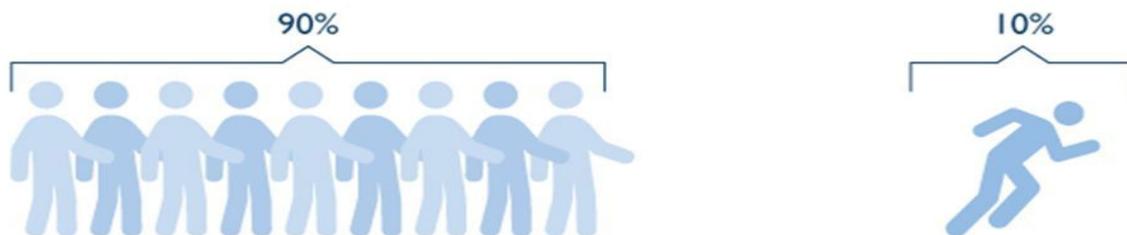
Since its establishment in Stockholm in 1983, it has experienced continuous and sustainable growth, and evolved to a global presence, serving its customers in over 50 countries. Polystar was proud to announce that CAGR for 2012 and 2013 reached 31%.

In addition, Frost & Sullivan's independent analysis of the Customer Experience Management market clearly shows that Polystar's strong customer focus is a key contributor to the company's ability to deliver superior value to its global customer base. For the reasons mentioned above, Polystar is a worthy recipient of Frost & Sullivan's 2014 Customer Value Leadership Award in the Customer Experience Management market.

Customer Value Leadership

Ultimately, growth in any organisation depends upon customers purchasing from your company, and then making the decision to return time and again. Everything is truly about the customer—and making those customers happy is the cornerstone of any successful, long-term growth strategy. To achieve these dual goals, a company must be best-in-class in three key areas: (1) to take into account what competitors are doing - and what they are not doing; (2) to meet customer demand with a comprehensive, value-driven product or service portfolio; and (3) to establish a brand that has deep resonance for customers and stands apart from other providers."

To achieve best-practice levels in brand, demand, and positioning is a rare and significant accomplishment, and that is why Frost & Sullivan celebrates it with the Customer Value Leadership Award. Recipients of this award represent the top ten percent of their industry: the other ninety percent just can't keep up.



Frost & Sullivan's Global Research Platform

Frost & Sullivan maintains more than 50 years in business and is a global research organisation of 1,800 analysts and consultants who monitor more than 300 industries and 250,000 companies. The Company's research philosophy originates with the CEO's 360 Degree Perspective, a holistic research methodology that encourages us to consider growth challenges, and the solutions companies employ to solve them, from every angle. This unique approach enables us to determine how best-in-class companies worldwide manage growth, innovation and leadership. Based on the results of our research in

customer value leadership, Frost & Sullivan is proud to present the 2014 Global Customer Value Leadership Award for Customer Experience Management to Polystar.

Key Benchmarking Criteria

For the Customer Value Leadership Award, we evaluated the total client experience and strategy implementation excellence according to the criteria detailed below.

Customer Value Excellence

- Criterion 1: Total Customer Experience
- Criterion 2: Product/Service Value
- Criterion 3: Purchase Experience
- Criterion 4: Ownership Experience
- Criterion 5: Service Experience

Implementation Excellence

- Criterion 1: Vision Alignment
- Criterion 2: Process Design
- Criterion 3: Operational Efficiency
- Criterion 4: Technological Sophistication
- Criterion 5: Company Culture

The Intersection between 360-Degree Research and Best Practices Awards

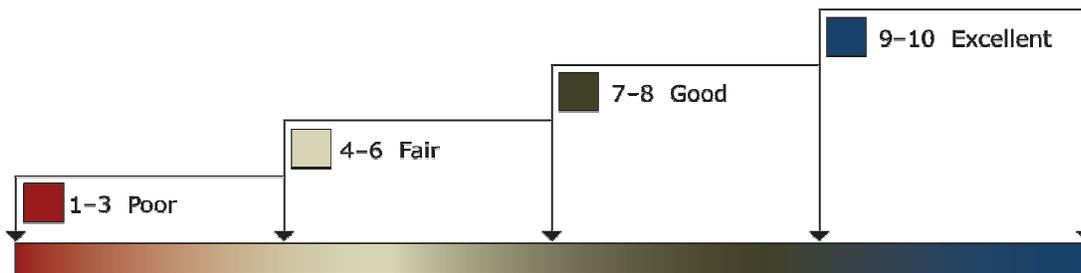
Research Methodology

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 players and for identifying those performing at best-in-class levels.



Decision Support Scorecard and Matrix

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customised Decision Support Scorecard and Matrix. This analytical tool compares companies' performance relative to each other. It features criteria unique to each award category and ranks importance by assigning weights to each criterion. The relative weighting reflects current market conditions and illustrates the associated importance of each criterion according to Frost & Sullivan. This tool allows our research and consulting teams to objectively analyse performance, according to each criterion, 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.



Best Practice Award Analysis for Polystar

Decision Support Scorecards: Customer Value Leadership

The Decision Support Scorecard, shown below, includes all performance criteria listed on page 5 and illustrates the relative importance of each criterion and the ratings for each company under evaluation for the Customer Value Leadership Award. The research team confirms the veracity of the model by ensuring 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.

Finally, to remain unbiased and to protect the interests of all organisations reviewed, we have chosen to refer to the other key players in as Company 2 and Company 3.

DECISION SUPPORT SCORECARD FOR CUSTOMER VALUE LEADERSHIP AWARD:
CUSTOMER VALUE EXCELLENCE

<i>Measurement of 1-10 (1 = poor; 10 = excellent)</i>	Award Criteria					
Customer Value Excellence	Total Customer Experience	Product/Service Value	Purchase Experience	Ownership Experience	Service Experience	Weighted Rating
Relative Weight (%)	20%	20%	20%	20%	20%	100%
Polystar	9.9	9.5	9.5	9.8	9.9	9.7
Company 2	8.0	8.2	8.0	8.0	8.1	8.0
Company 3	7.2	7.5	7.0	6.5	7.0	7.0

Criterion 1: Total Customer Experience

Requirement: Customers receive exceptional impression at every stage of the purchase cycle

Criterion 2: Product/Service Value

Requirement: Products or services offer the best value for the price, compared to similar offerings in the market

Criterion 3: Purchase Experience

Requirement: It is as simple for salespeople to sell the product or service as it is for the customer to buy the product or service

Criterion 4: Ownership Experience

Requirement: Customers are proud to own and use the company’s product or service

Criterion 5: Service Experience

Requirement: Customer service is accessible, fast, and stress-free

DECISION SUPPORT SCORECARD FOR CUSTOMER VALUE LEADERSHIP AWARD:
IMPLEMENTATION EXCELLENCE

<i>Measurement of 1-10 (1 = poor; 10 = excellent)</i>	Award Criteria					
	Vision Alignment	Process Design	Operational Efficiency	Technological Sophistication	Company Culture	Weighted Rating
Implementation Excellence						
Relative Weight (%)	20%	20%	20%	20%	20%	100%
Polystar	9.5	9.5	9.8	9.8	9.5	9.6
Company 2	8.0	8.0	8.2	8.1	8.2	8.1
Company 3	7.0	6.5	7.0	7.1	7.0	6.9

Criterion 1: Vision Alignment

Requirement: The executive team is aligned on the organisation’s mission and vision

Criterion 2: Process Design

Requirement: Processes support the efficient and consistent implementation of tactics designed to implement the strategy

Criterion 3: Operational Efficiency

Requirement: Staff performs assigned tactics seamlessly, quickly, and to a high quality standard

Criterion 4: Technological Sophistication

Requirements: Systems enable companywide transparency, communication, and efficiency

Criterion 5: Company Culture

Requirement: The executive team sets the standard for commitment to customers, quality, and staff, which translates directly into front-line performance excellence

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 almost 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 31 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.

Disclaimer

Quantitative market information is based on primary interviews and therefore is subject to fluctuation. Frost & Sullivan is not responsible for incorrect information supplied to us by manufacturers or users. Our research services are limited publications containing valuable market information provided to a select group of customers. Our customers acknowledge, when ordering, subscribing or downloading, that Frost & Sullivan research services are for customers' internal use and not for general publication or disclosure to third parties.

No part of this research service may be given, lent, resold, or disclosed to noncustomers without written permission. Furthermore, no part may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the permission of the publisher.