

Enterprise Connect 2022

Cage Match!

Highlights

Webex: Competitive Position and Differentiation



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About This Ebook

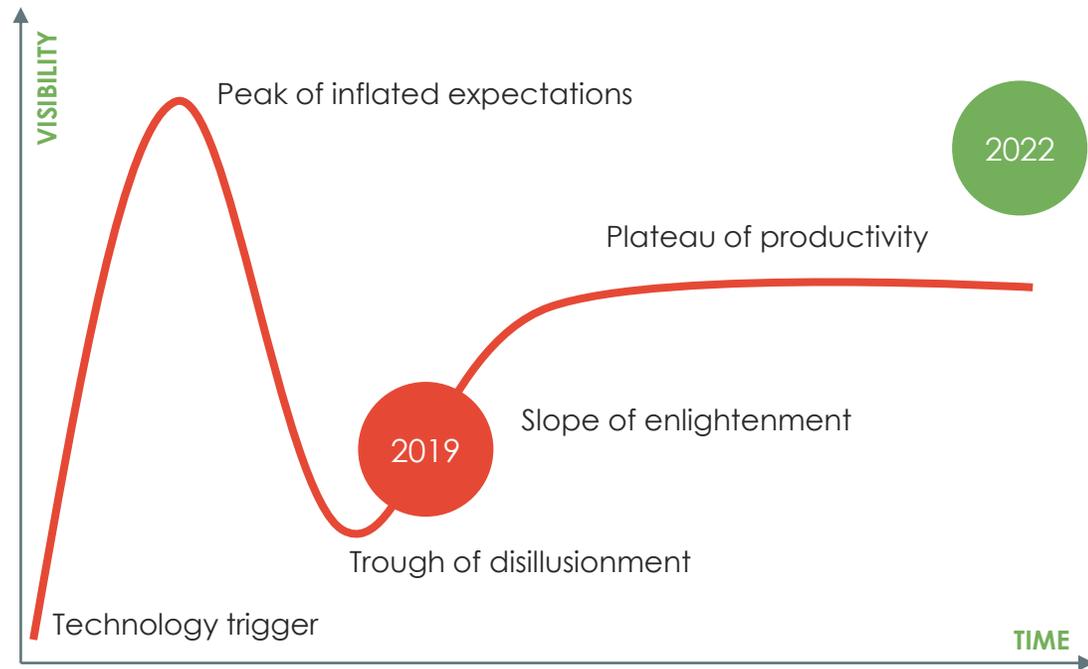
Each year **Brent Kelly and Phil Edholm** deliver a highly attended UCaaS vendor assessment at the Enterprise Connect industry conference

This ebook presents **highlights of the 2022 assessment and Cisco's Webex key strengths** and differentiators

While sponsored by Cisco, the views in this ebook are **based on the author's independent and unbiased research**, in preparation for the assessment delivered at Enterprise Connect

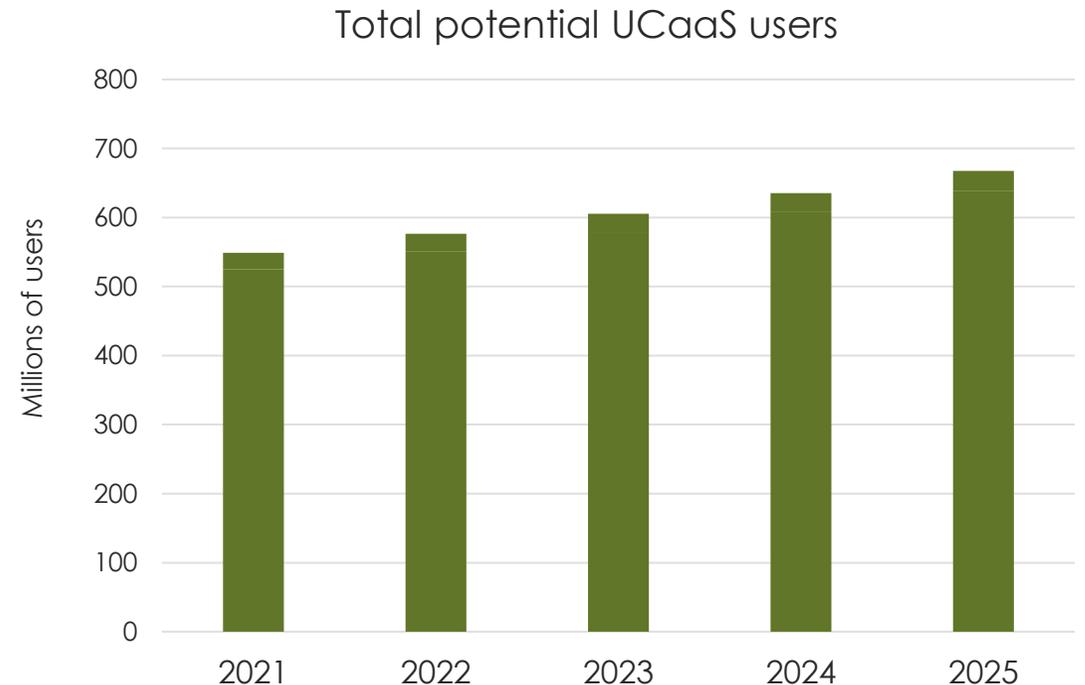
The UCaaS Market is Maturing

Market evolution



Source: Crossing the Chasm | Geoffrey Moore, Chasm Group, LLC

Huge addressable base



Source: PKE Consulting and Omdia Analysis

The Vendors We Evaluated



45M cloud seats

40M on-premise IP PBX seats



216M paying Teams subscribers/monthly active users

Number of active UCaaS/telephony users unknown



5-6M UCaaS seats

Primarily telephony focused

Video offer recent



32M total seats

12M in use for our defined meetings

Primarily meetings focused

➔ **These companies are positioned to be long term leaders in the UCaaS market**



Webex Strategy and Differentiation

Webex is “the Apple” in this Market

Being the software and hardware integrator is different

Optimized experience

In-house application and devices

Improved functionality and ease of use

Advanced capabilities driven by deep integration

Integrated delivery

Lower overall costs and better outcomes

Better management and operations

Includes both edge devices and the network

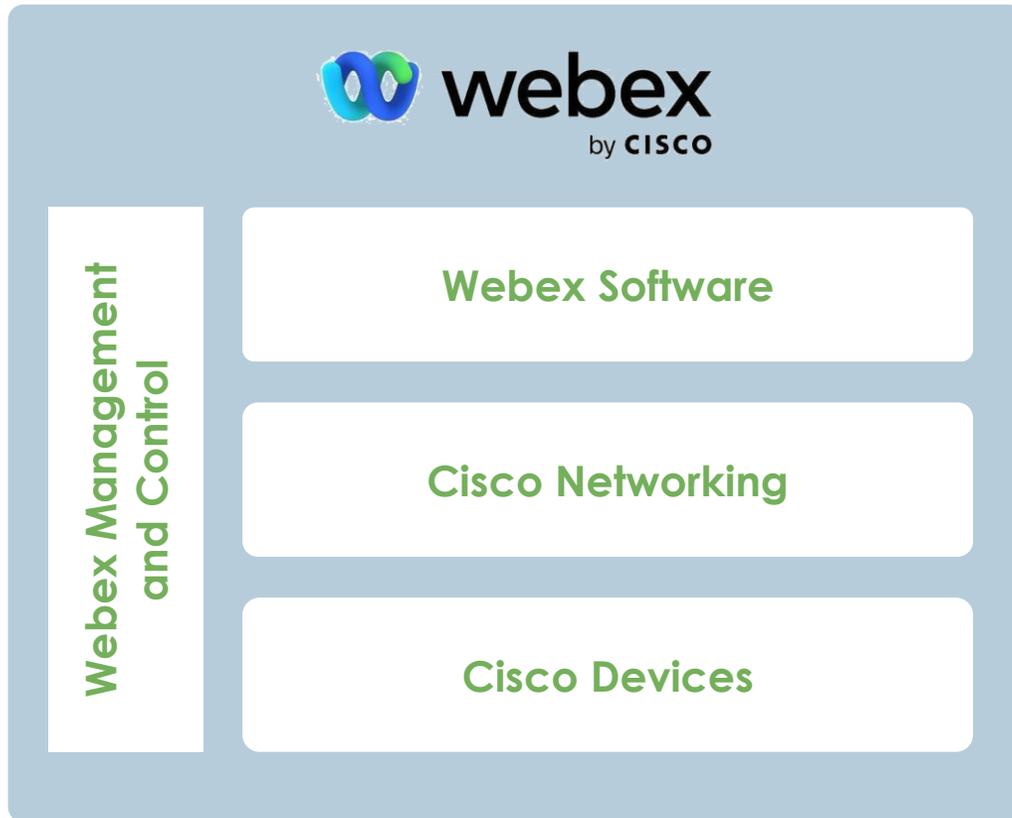


Strategy Similarities

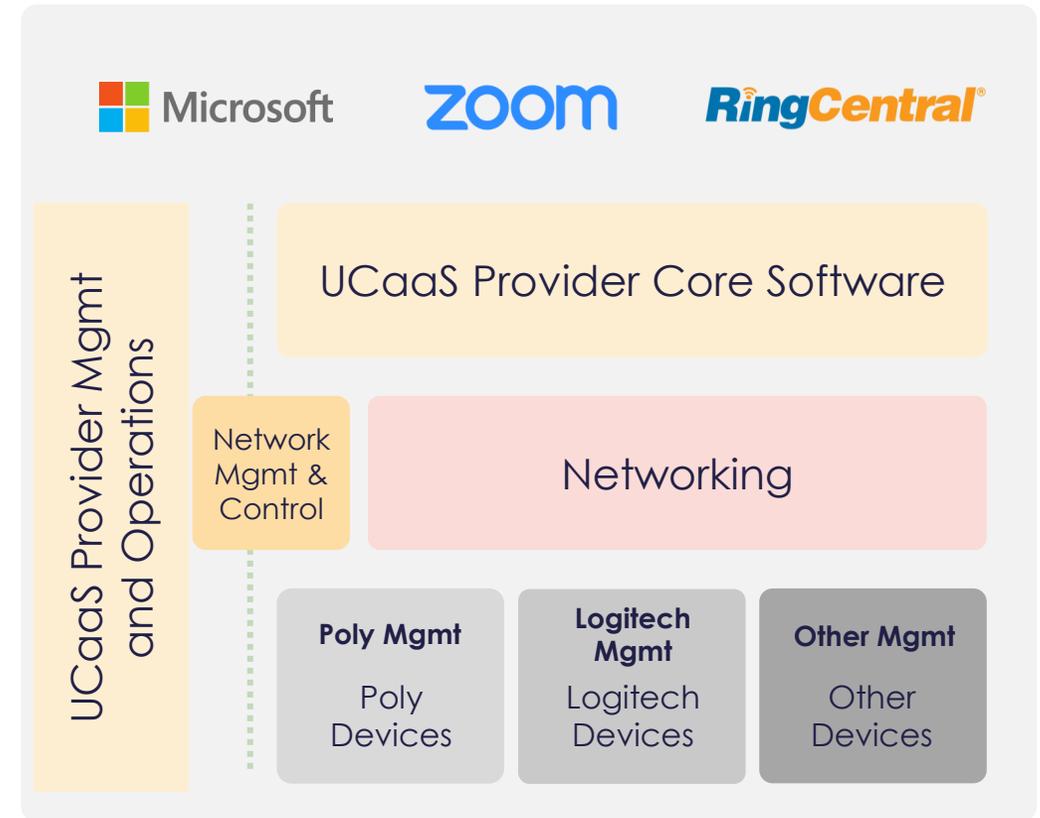


The Webex Platform Advantage

Single integrated platform



Complexity is exponential



Webex Devices

Desk & hybrid devices

Purpose-built collaboration for the home and office desk



USB cameras



Headsets



Room devices

Video bars and collaboration kits



Single and multi-screen integrated room systems



Room controls and peripherals



Phones & frontline devices

Wireless & DECT phones



Desk Phones



Conference phones



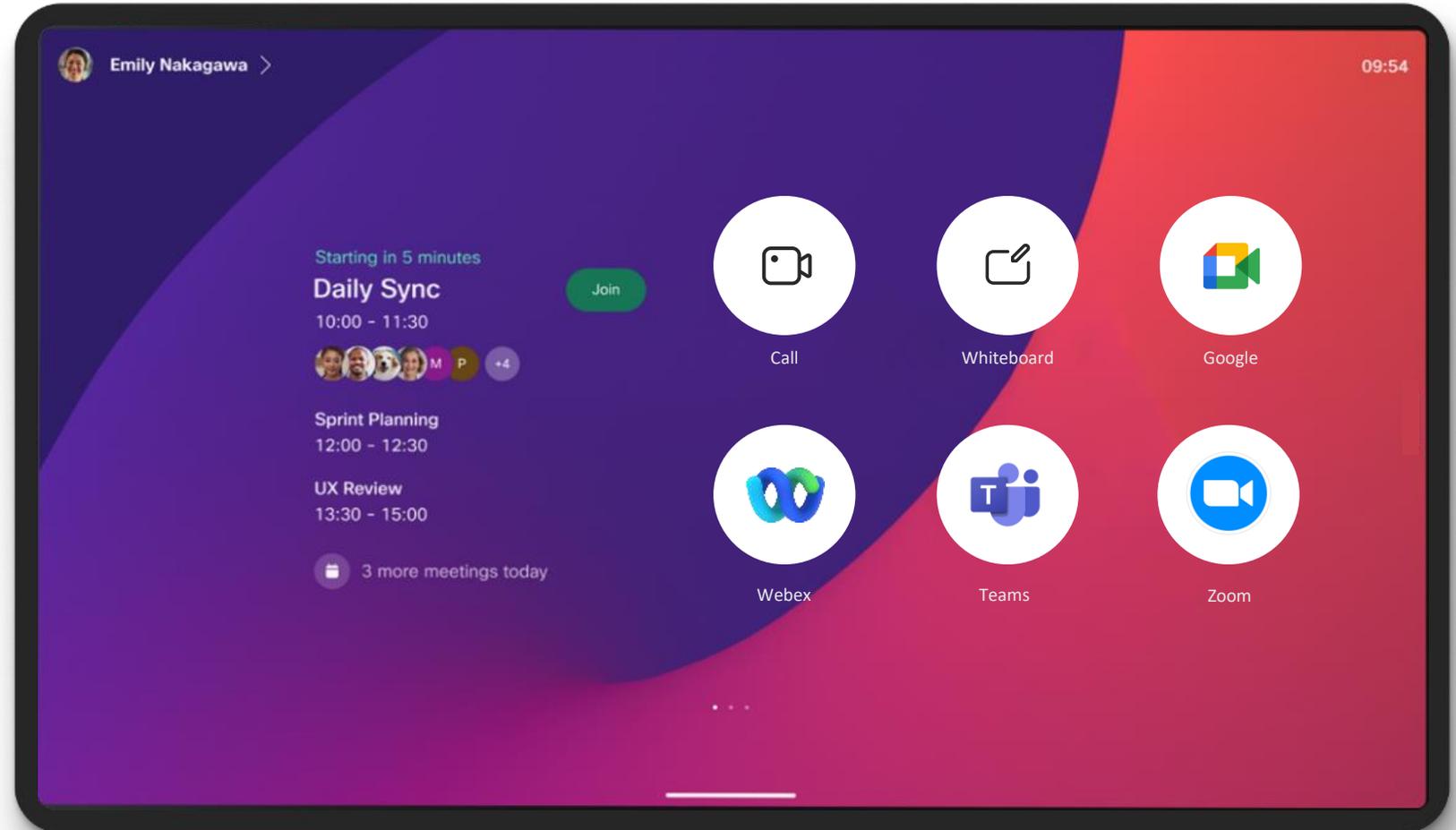
→ Consistent experience across devices and meeting spaces

Leadership integrating video hardware with sensors and networks

Advanced capabilities integrating room intelligence with core UCaaS functions

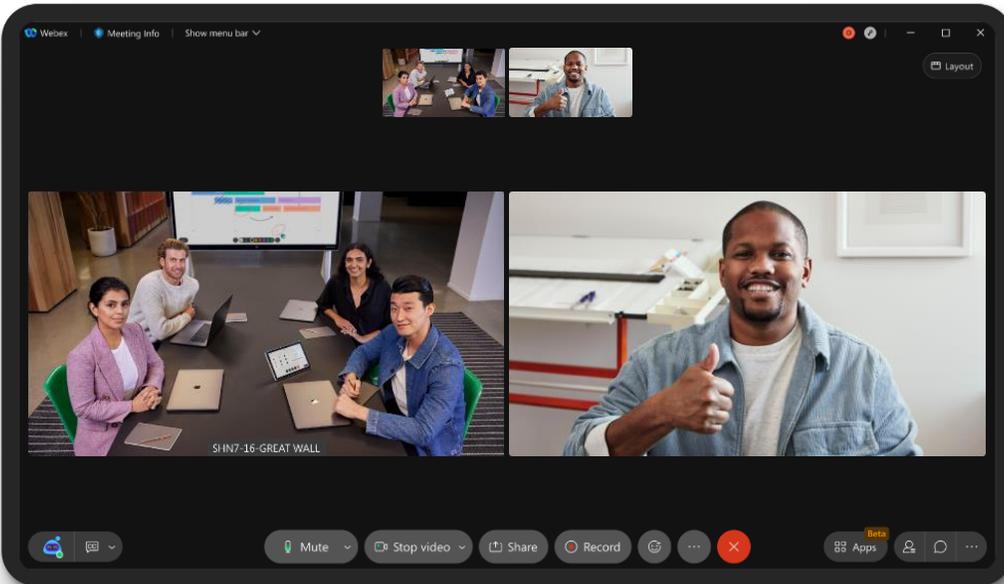
Webex Device Interoperability

→ Webex endpoints can join meetings hosted in Microsoft Teams, Zoom Video, and Google Meet



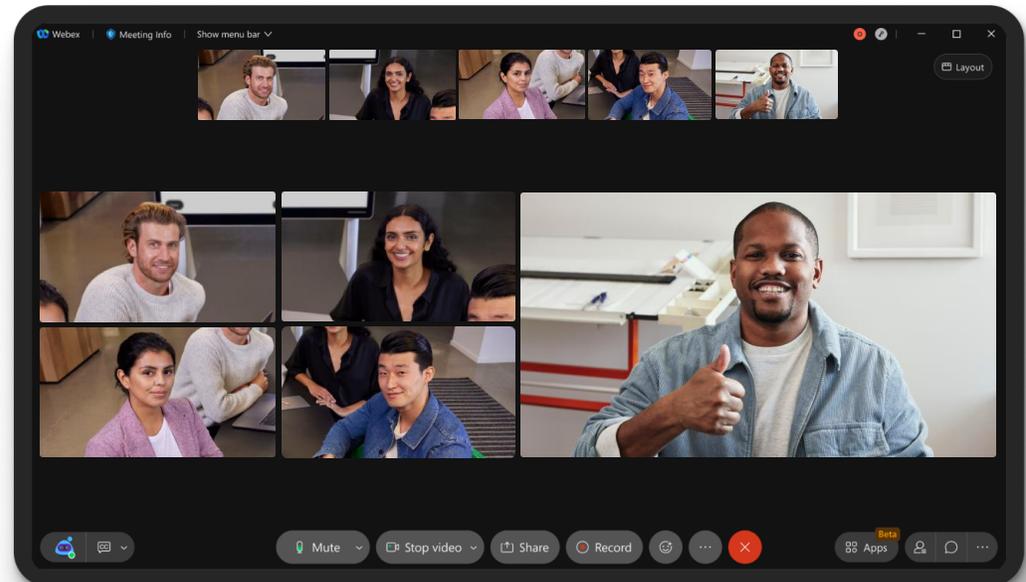
Webex Meetings: People Focus

Before



➔ All Webex devices support people focus

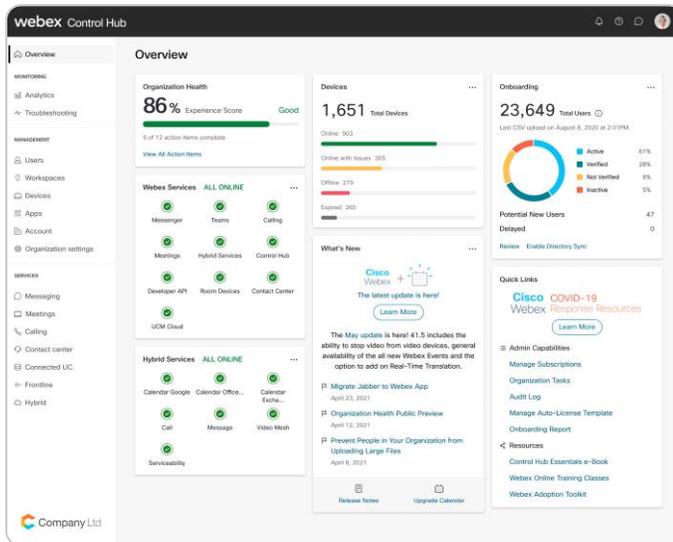
After: equalized participant view



➔ Key for hybrid meetings equity and productivity

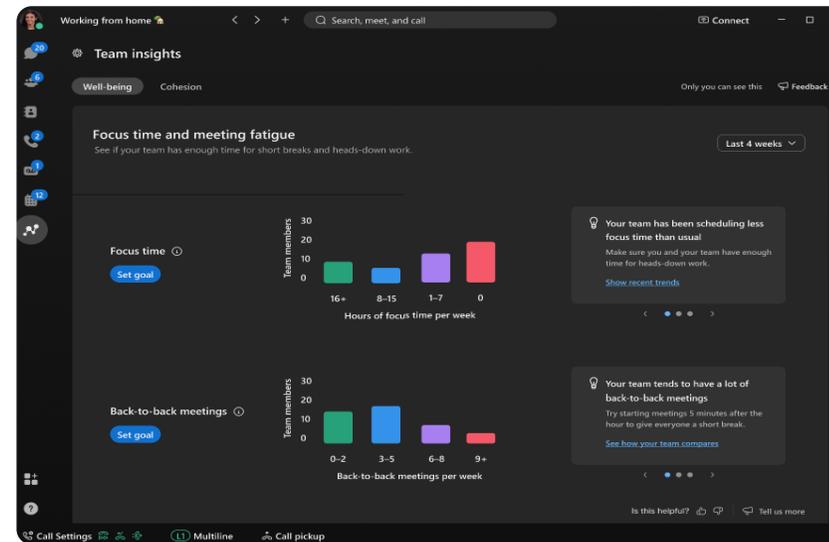
Webex Management

Control hub



One place for management

People insights



Collaboration analytics and insights

➔ Strong Webex IT capabilities deliver complete integrated management

Webex Collaboration AI

Webex Assistant

- Highlights
- Meeting transcript/recording
- Take an action item
- Closed captioning
- Take a note
- Voice commands

Voice recognition and intelligence

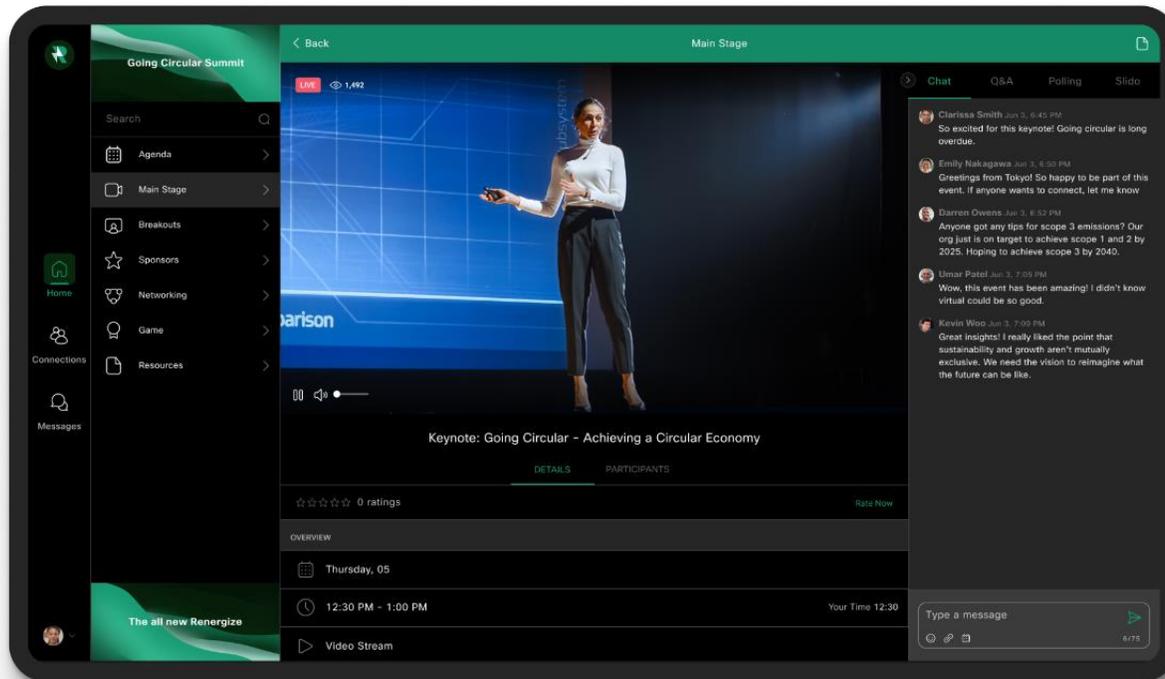
Simultaneous translation



13 base languages to over 100 languages

→ Extensive AI capabilities optimized for real-time collaboration

Webex Events



In-Person, remote, or hybrid

Extensive analytics

Slido audience engagement

Included in Webex at no additional charge

➔ **Current gold standard for complete large event functionality**

➔ **Events are critical for employee and customer engagement in the new hybrid work world**

Audio Intelligence Across Webex Portfolio

Noise cancellation



Reduces connection noise

Background noise removal



AI based identification and removal

Optimize for my voice

Focuses on the speaker's voice only



Focuses on the speaker's voice only

Optimize for all voices

Equalizes group meeting voices



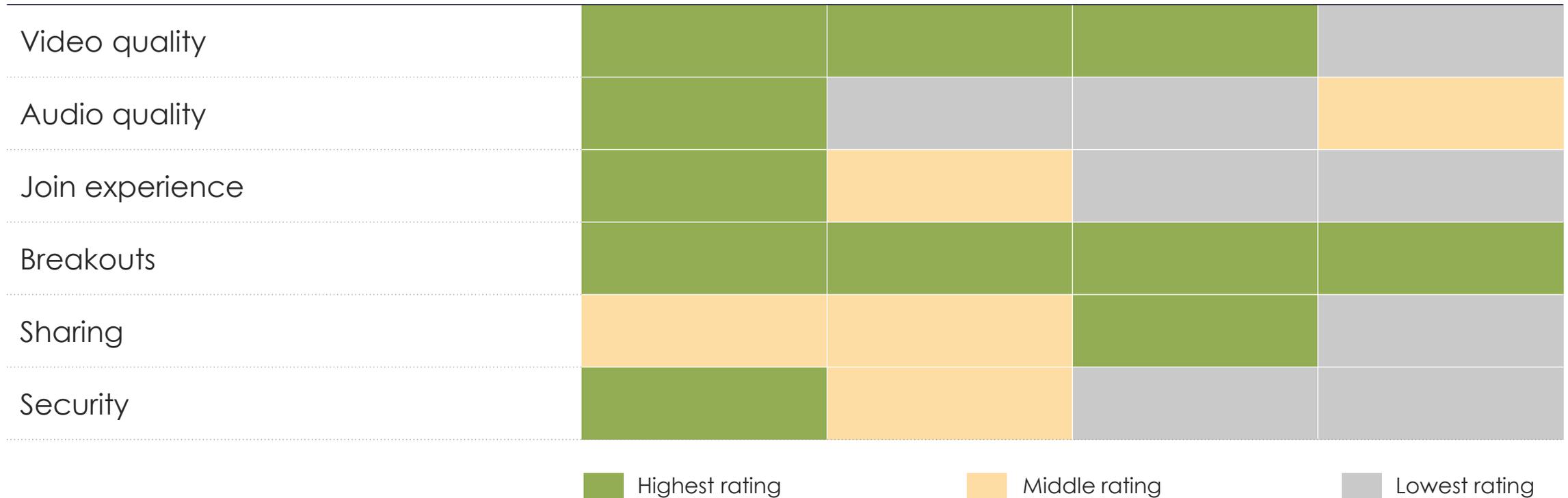
Equalizes group meeting voices

➔ **Advanced audio capabilities available across both devices and application**



Product Comparisons

Meetings Functionality Comparison



➔ **Webex leads or co-leads in most meeting evaluation criteria**

Telephony Offer Comparison



Great features
Most countries – 86
DID inbound
Integrated management
On-premises solutions



Good offer
Fewer countries
Premises solution
Partner options



Good offer
2nd most countries
Low-cost point



Most features
Regulated carrier, does not enable other PSTN services
Telephony management

➔ **Cisco experience in premises to cloud migration is a significant advantage**

Events Comparison



	webex by CISCO	Microsoft	zoom	RingCentral®
Internal corporate events	5000 participants 100K option	1000 participants	10,000 participants Added cost	10,000 participants 3rd party registration / analytics
Internal team events	5000 participants Included in suite	1,000 participants Included in suite Integrated with office	Added license cost	Basic service Cost TBD
External events	The gold standard for large/complex events	Limited capabilities	Recent major enhancements Event mobility White labeling Consumer familiarity	No event capabilities

Highest Rating

Middle Rating

Lowest Rating

➔ **Webex leads in all events evaluation criteria**

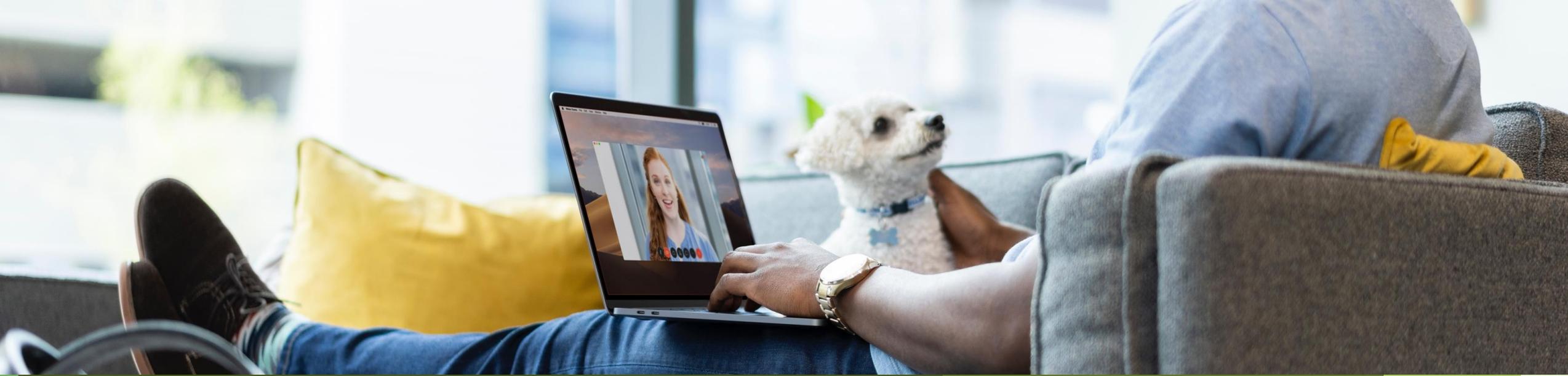
Noise Removal Comparison



	webex by CISCO	Microsoft	zoom	RingCentral®
Noise removal – no voice – default/auto settings	Highest rating	Lowest rating	Middle rating	Lowest rating
Noise removal – no voice – advanced/high settings	Highest rating	Lowest rating	Middle rating	Lowest rating
Noise suppression – with voice – default/auto settings	Highest rating	Lowest rating	Lowest rating	Highest rating
Noise suppression – with voice – advanced/high settings	Highest rating	Lowest rating	Middle rating	Middle rating

Legend: ■ Highest rating, ■ Middle rating, ■ Lowest rating

➔ **Demonstrated Webex leadership in AI for Noise removal and reduction**

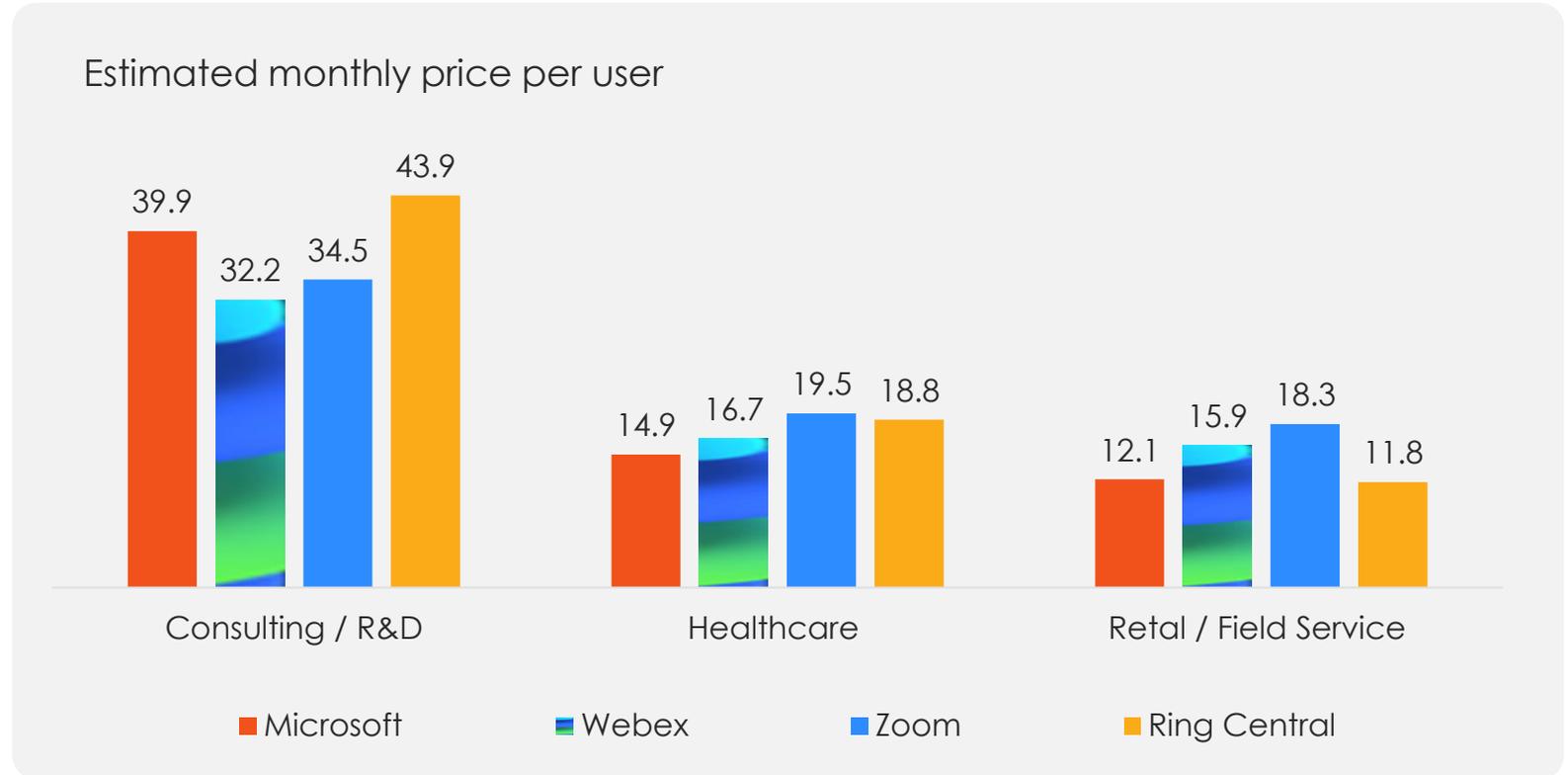


Pricing Comparisons

Typical Use-Case Pricing

Overall variation is less than \$150 per year per employee – benefits dramatically outweigh differences

RingCentral includes PSTN, Cisco and Zoom skewed by disproportionate frontline cost



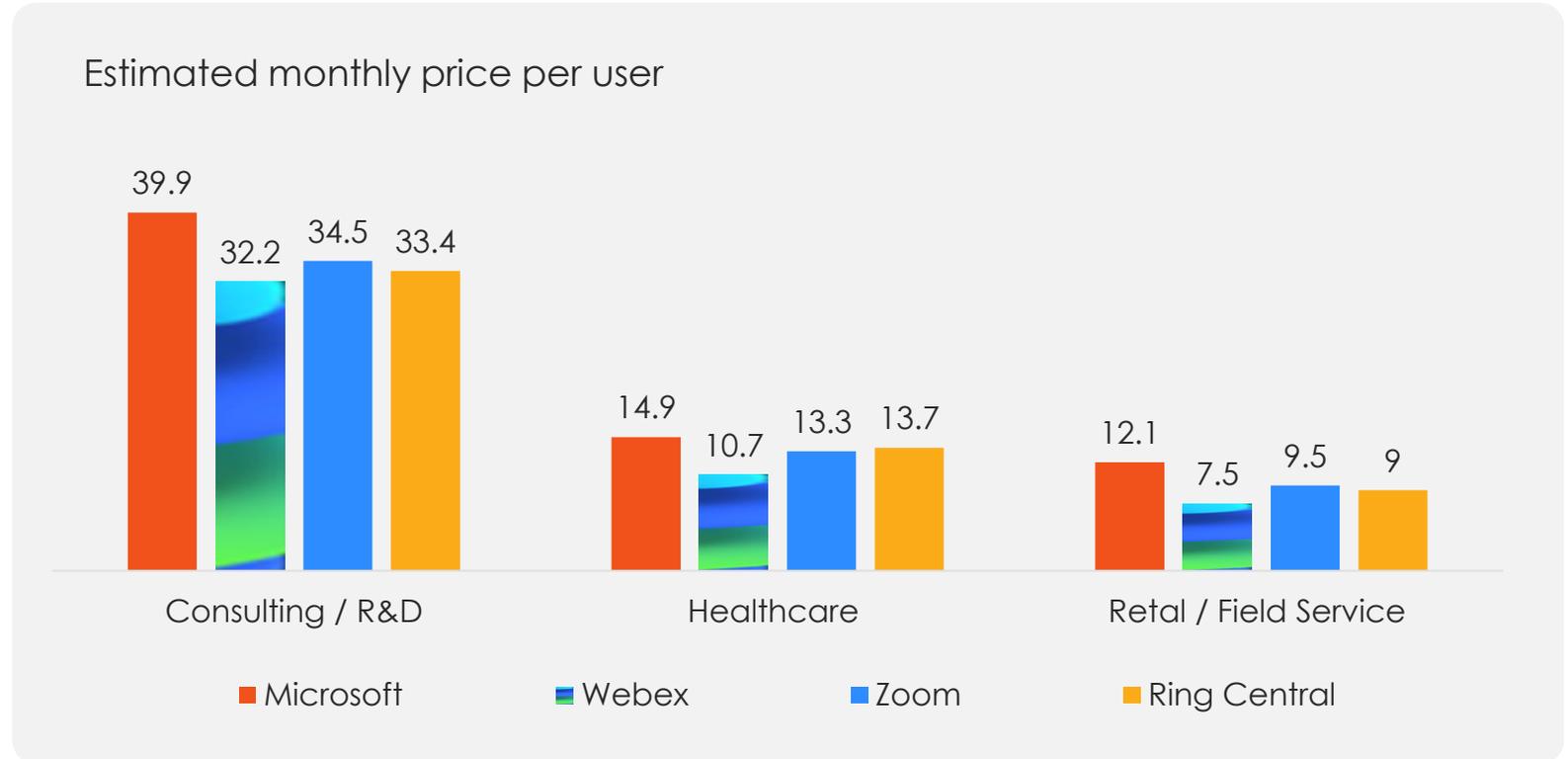
➔ **Highly competitive Webex pricing**

Adjusted Use-Case Pricing

Pricing including adjustments for competitive in-market deals

Assumes a reduced RingCentral cost without included PSTN access

Assumes a lower cost Frontline offer from Cisco and Zoom



➔ **Webex price leadership after component adjustment**

Webex Device Cloud Promotion

More accessible, more affordable



Webex Desk Camera

Webex Desk Hub* + Camera

Webex Desk*

Webex Desk Pro

Room Kit Mini

Room Kit

Cloud	\$159	\$878	\$1,499	\$2,999	\$1,799	\$3,599
Premises	\$219	\$1,714	\$2,995	\$5,495	\$3,795	\$6,995

Prices shown are Cisco suggested resell price | Cloud – customers with company wide Cloud Meeting subscriptions (Webex Suite EA or Meetings AU, EA)

➔ **Webex cloud device pricing is highly competitive compared to all eco-system vendors**

Our Overall Assessment

➔ Webex is the overall leader when both meetings and telephony capabilities are considered



About Us



Phil Edholm

President & Principal | PKE Consulting LLC

Phil Edholm is a recognized UC industry leader and visionary. In 2007, he was recognized by Frost and Sullivan with a Lifetime Achievement Award for Growth, innovation and leadership in telecommunications for an essential role in creating the VoIP industry. He was a leader in the market adoption of webRTC, the technology underlying much of today's UCaaS industry. Phil has 18 granted US patents and holds a BSME/EE from Kettering University.

Since 2012, Phil has been an Analyst/Consultant in the communications and collaboration industry. He regularly consults to large end users and UCaaS vendors to assist in their planning and analysis of the market. As part of the PKE Consulting analysis practice, Phil has been focused on the major vendors, providing a highly anticipated yearly assessment at the Enterprise Connect Industry conference. Based on extensive research, this analysis has been delivered in partnership with Brent Kelly since 2013.

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Thank You