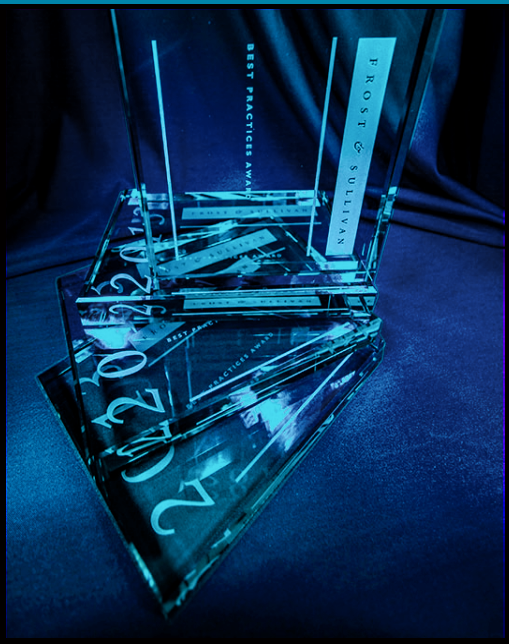# FROST & SULLIVAN

NICE®

2016 North American
911 Recording and Quality Management
Company of the Year Award

FROST & SULLIVAN

2016 BEST PRACTICES AWARD

NORTH AMERICAN
911 RECORDING AND QUALITY MANAGEMENT
COMPANY OF THE YEAR AWARD

2016
BEST PRACTICES
AWARDS

Contents

Background and Company Performance

Industry Challenges

Public safety answering points (PSAPs) – which handle 911 calls – and emergency communications centers that dispatch first responders are facing evolving incidents and threats, demographics, and technologies. Terrorism and unrest have joined violent, property, and hate crimes to the long roster of life-and-loss causing events that are being reported, investigated, and analyzed. North America's aging population will generate more 911 calls from accidents, falls, and illnesses.

Meanwhile, the ubiquity of mobile communications drives 911 responses. Frost & Sullivan estimates that mobile communications originate nearly 80% of 911 calls. And more PSAPs are now text-enabled, as the adoption of Next Generation 911 (NG911) opens the door to mobile-transmitted images and streaming video, and to the Internet of Things (IoT) and telemetry data.

In other words, wireless and the rise of new communication channels are making 911 responses and reporting more complex. Consider that multiple individuals might report the same events, while so many calls may or may not contain new information. Inadvertent "pocket dialed" calls that consume significant PSAP resources are also common. Also note that poorly-handled 911 incidents are shared on social media.

Such developments have put additional pressure on PSAPs to ensure 911 service quality. PSAPs must do their best to avoid diminishing call quality and performance that may put the public at greater risk.

Visionary Innovation & Performance and Customer Impact

Criterion 1: Addressing Unmet Needs

NICE's 911 applications are intended to build public confidence in emergency services while assisting the relevant departments in managing tight budgets. As such, NICE offers a set of 911 solutions that meet the need for effective, responsive, and accountable multi-channel emergency contact handling, and for swift and decisive incident investigation and follow-up.

NICE Inform is NICE's flagship offering for 911 centers. A leading digital evidence management solution, NICE Inform records, manages, and synchronizes multi-channel interactions between citizens, PSAPs and first responders, to provide a complete, true record of incidents. NICE Inform assembles telephony and radio communications into an authentic incident timeline along with SMS 911 texts, geographic information systems (GIS), screen recordings, video, and other multimedia, for comprehensive insight into the "who, what, when, where and why" of incidents.

NENA i3-compliant and future-ready, NICE Inform works hand-in-hand with NICE's traditional and IP capture platforms to support virtually any radio and telephony environment, enabling a seamless migration to next generation emergency communications. NICE Inform is also integrated, certified, and field proven with leading NG911 call handling, text-to-911, and RoIP (Radio over IP) systems so PSAPs get complete incident reconstruction capabilities today while equipping themselves for P25 and future multimedia communications tomorrow.
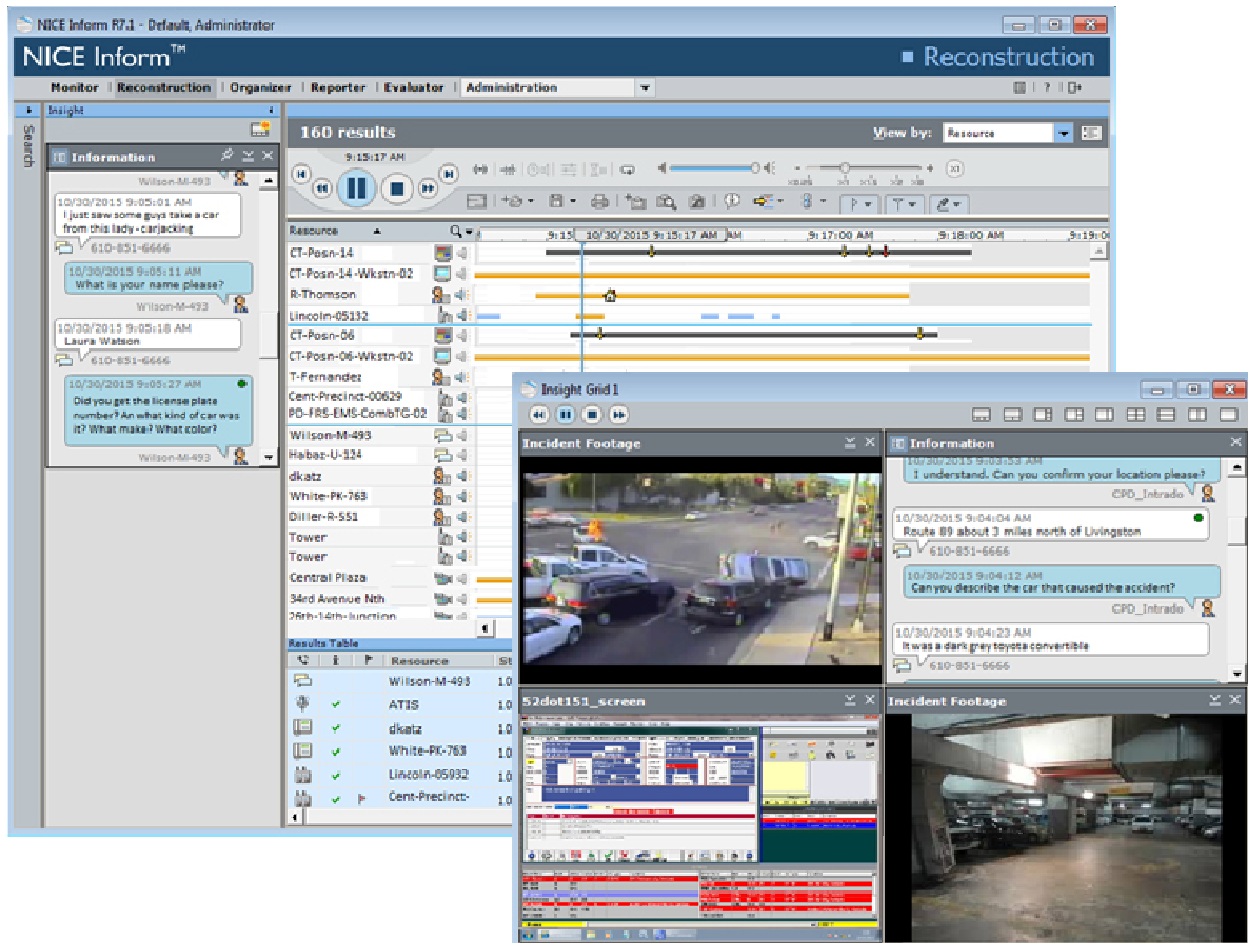
NICE Inform integrates and put into context information from many sources to help PSAPs reconstruct and understand the who, what, when, where and why of an incident.

In addition to multimedia incident reconstruction, NICE Inform provides an assortment of feature-rich modules which PSAPs can use to gain insights from growing volumes of multi-channel interactions. They include: integration to Priority Dispatch AQUA Evolution for streamlining case reviews; quality assurance (QA) scheduling, evaluation and reporting tools; audio and text analytics; and instant replay for real-time decision support. NICE Inform is available in standalone and hosted (matrix) configurations for PSAPs that want to reduce IT infrastructure costs while maintaining their autonomy.

Criterion 2: Visionary Scenarios through Mega Trends

NICE Inform aligns with key Mega Trends. It supports Safe Cities by helping to ensure optimal multi-channel and NG911 response. NICE Inform also efficiently gathers information to solve crimes and accidents, provides detailed information to authorities, and helps prevent or mitigate such future events. And NICE Inform aligns with Social Trends. It enables PSAPs to handle and record text messages as well as the full spectrum of multimedia communications that will be enabled through NG911. Built-in QA capabilities also help PSAPs to improve the effectiveness of their responses for all types of emergency communications.

Criterion 3: Implementation of Best Practices

NICE Inform incorporates a wide range of 911 best practices in its solutions. The NICE Recording is truly multi-channel. It logs 911, radio and VoIP calls, call taker workstation screens, computer-aided dispatch (CAD) data, locations from GIS, SMS text–to-911 messages, and it integrates with other sources, such as CCTV video.

Various NICE Inform modules address different PSAP needs. NICE Inform Monitor enables supervisors to simultaneously monitor multiple channels in near real-time. NICE Inform Verify replays the last recordings over pre-defined search periods. NICE Inform Audio Analytics enables PSAPs to streamline investigations, ensure compliance and quickly find and categorize calls for QA review. And NICE Inform Reconstruction synchronizes isolated information from multiple channels and puts it into proper context to recreate incidents from every angle, from start to finish. NICE Inform Organizer then stores this collected content, including third party files, in central, secure folders, providing instant, web-based access for authorized reviewers. It ensures data accuracy, authenticity, and integrity while maintaining chain of custody.

Meantime, to ensure optimal call taker performance, NICE Inform Evaluator enables incident evaluation, including those involving multiple channels, interactions, and people. NICE Inform Evaluator's robust capabilities streamline every aspect of the QA process – from automated scheduling to pre-programmed templates and form builders for scoring calls.   NICE Inform Reporter provides customizable, chart-based call volume and evaluation reports to monitor current status and track trends and progress over time.

Finally, both the NICE Recording and NICE Inform solutions run over traditional networks as well as privately-managed emergency services IP transport networks (ESInets). Both applications will be able to use national public safety broadband networks, such as FirstNet, which will complement NG911 services when they're deployed.

Criterion 4: Blue Ocean Strategy

NICE's corporate strategy focuses on its core structured and unstructured data capture

and analysis solutions, aimed at real-time decision-making and guidance. NICE applies these capabilities synergistically across its lines of business. This approach maximizes the returns from NICE's product development both internally and from strategic acquisitions.

To illustrate, NICE has long had a strong presence in the customer interaction industry market. In early 2016 it acquired Nexidia to enhance its customer analytics capabilities. Next, NICE acquired Voice Print International (VPI), which brought additional call recording and QM expertise, service and support experience, and new clients. As a result VPI bolstered NICE's presence in the customer interaction and public safety markets.

NICE also recently added new QM capabilities to NICE Inform. Its audio analytics offers greater search precision for quality assurance (QA) and compliance through a powerful search syntax that enables it to proactively identify compliance issues before they become systemic problems. PSAPs also can tailor searches to various confidence levels to reduce false positives or return wider ranges of results. New integrations with Priority Dispatch's AQUA™ and APCO's 9-1-1 Adviser enable call evaluators to conveniently play back audio recordings directly from those case review interfaces and complete QA reviews in half the time, because they don't have to toggle from system to system to search and play back calls.

NICE Inform also now enables PSAPs to export text-to-911 conversations for investigations. The text-to-911 records can also be combined with recorded 911 calls, radio communications, screens, and other incident data to create complete and authentic incident timelines. Meantime, NICE also has bolstered support for other vendors' complementary solutions. NICE Inform is now integrated with and certified to support leading NG911 call handling and text-to-911 applications, including the latest versions of Airbus DS Communications' VESTA and West Corporation's VIPER.

But NICE's public safety solutions go well beyond serving the needs of 911 centers. For example, police departments everywhere are investing in digital policing initiatives to better safeguard the public. But the growth in digital silos has a downside – it's making investigations more complex than ever. The sheer volume of digital evidence, coming from more and more systems, has outpaced the tools investigators have to collect, analyze and share it. NICE Investigate, a revolutionary new open digital policing and investigations software solution from NICE, was designed to fill this gap. It automates the collection, analysis and sharing of case evidence to help investigators close more cases faster.

Criterion 5: Customer Ownership Experience

NICE's customers have experienced strong results with its portfolio of recording and QM solutions. NICE's solutions have helped PSAPs improve service quality, while improving their efficiency at the same time.

For example, the City of Westminster Police Department, Colorado, first implemented

NICE Inform in November 2007 and it continues to be a 'power user' of NICE Inform to this day. According to Karin Marquez, the City of Westminster's Communications Supervisor, the department has reaped cost savings, space savings, efficiencies and other benefits – using the system to fulfill incident reproduction requests for investigators, three courts and the fire department. The city also uses the NICE Inform Evaluator Quality Assurance module for periodic, form-based quality audits of call taker and dispatcher communications, to increase the objectivity and impact of the city's QA program.

"I love the product," Marquez said. "It has streamlined our processes and given our users more information than ever before. It's great to be able to add CAD reports and other notes along with the call and radio recordings into one neat electronic package. This helps our detectives to better correlate information and gain more accurate insights for investigations. They can add reports, photos, third party video recordings, and CAD notes that could otherwise take up 20 pages of paper in the incident folder, then package it all nicely for the District Attorney. And quality evaluators can score calls more objectively when they can clearly see how the entire incident unfolded."

Marquez also stressed another factor that played into the City's selection of NICE. "Next Generation 911 is moving pretty quickly and we want to be ready," she noted. "One of the things we were looking for was the ability to transition into the IP world and NICE absolutely offered that. We decided that NICE had more of what we were looking for than any other vendor and it would be easier to move into the future with NICE Inform."

Criterion 6: Brand Equity

NICE's Inform has been serving the emergency services market since 2007. Its solutions are used in over 3,000 public safety organizations worldwide, including the New York City and Los Angeles police departments, which handle over 12 million and 6 million 911 calls annually, respectively. The City of New York, which has used NICE applications since 2001, tapped NICE to equip its newest 911 center with call recording and incident management applications. NICE's growing customer roster also includes hundreds of other departments in large and fast growing metro areas and in mid-sized cities.

Conclusion

Emergency communications centers worldwide are being inundated by change. New citizen communication channels and NG911 are transforming the role of PSAPs and the way they interact with first responders and the public. As the pace of change accelerates, PSAPs will need to manage more types and larger volumes of multimedia information, and adapt to these changes that impact operations and evidence management to ensure they're continuing to provide the highest levels of services to communities and other stakeholders. Highly capable multi-channel recording and QM systems are at the core of the PSAP ecosystem and necessary to ensure quality responses, accountability, productivity, and expedient investigations. Solutions also must help budget-stressed PSAPs to control costs.

NICE's pace of innovation, the breadth and depth of solutions, and its commitment and experience serving the needs of the public safety market continue to impress. With its strong overall performance, NICE has deservedly earned Frost & Sullivan's 2016 Company of the Year Award for 911 Recording and Quality Management solutions.

Significance of Company of the Year

To win the Company of the Year award (i.e., to be recognized as a leader not only in your industry, but among your non-industry peers as well) requires a company to demonstrate excellence in growth, innovation, and leadership. This kind of excellence typically translates into superior performance in three key areas: demand generation, brand development, and competitive positioning. These areas serve as the foundation of a company's future success and prepare it to deliver on the two criteria that define the Company of the Year Award (Visionary Innovation & Performance and Customer Impact).

Understanding Company of the Year

As discussed above, driving demand, brand strength, and competitive differentiation 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 visionary innovation to enhance customer value and impact.

Key Benchmarking Criteria

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated two key factors—Visionary Innovation & Performance and Customer Impact—according to the criteria identified below.

Visionary Innovation & Performance

       Criterion 1: Addressing Unmet Needs
       Criterion 2: Visionary Scenarios Through Mega Trends
       Criterion 3: Implementation Best Practices
       Criterion 4: Blue Ocean Strategy
       Criterion 5: Financial Performance

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

Visionary Innovation & Performance

Criterion 1: Addressing Unmet Needs
Requirement: Implementing a robust process to continuously unearth customers' unmet or under-served needs, and creating the products or solutions to address them effectively

Criterion 2: Visionary Scenarios Through Mega Trends
Requirement: Incorporating long-range, macro-level scenarios into the innovation strategy, thereby enabling "first to market" growth opportunities solutions

Criterion 4: Implementation of Best Practices
Requirement: Best-in-class strategy implementation characterized by processes, tools, or activities that generate a consistent and repeatable level of success.

Criterion 3: Blue Ocean Strategy
Requirement: Strategic focus in creating a leadership position in a potentially "uncontested" market space, manifested by stiff barriers to entry for competitors

Criterion 5: Financial Performance
Requirement: Strong overall business performance in terms of revenues, revenue growth, operating margin and other key financial metrics

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 like 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

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.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS

Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan Awards 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	• 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	• Interview thought leaders and industry practitioners • Assess candidates' fit with best-practice criteria • Rank all candidates	Matrix positioning all candidates' performance relative to one another
3 **Invite thought leadership in best practices**	Perform in-depth examination of all candidates	• 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	• 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	• 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	• 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	• 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	• Review analysis with panel • Build consensus • Select winner	Decision on which company performs best against all best-practice criteria
9 **Communicate recognition**	Inform award recipient of award recognition	• 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 may share award news with stakeholders and customers	• 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

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.