

Independent Messaging Vendors Offer Greater
Value for a Dynamic Marketplace

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1

AVST Thrives in an Increasingly Competitive Environment

Voice Messaging Revisited

Shifting Paradigm

Voice messaging has evolved considerably since the early 1990s when businesses used answering machines or did not have any kind of voice messaging capabilities at all. Today, professionals cannot imagine business communications without basic voice mail at least and some truly appreciate the benefits of advanced unified messaging solutions. Regardless of how overwhelming the communication overload becomes with both voice and data communications penetrating our lives deeper and deeper, business users believe that their effectiveness and customer relationships are highly dependent on their increasing availability to partners and customers. However, they are also becoming increasingly aware of the fact that their productivity and efficiency can be greatly improved if different communication channels become more integrated and messages can be accessed via a common interface. Some businesses today are, therefore, benefiting from more advanced solutions such as unified messaging, voice-enabled voice mail and even unified communications.

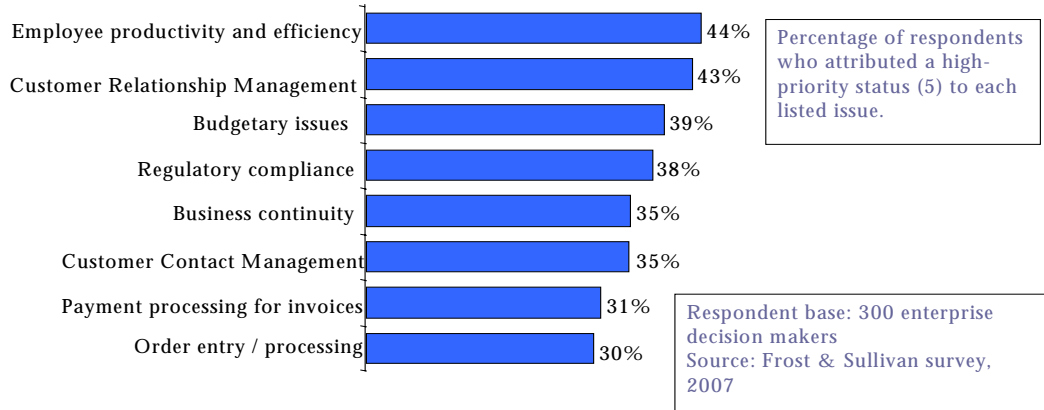
Frost & Sullivan recently conducted a survey of enterprise decision makers' business objectives and respective IT and telecom investment priorities.

Chart 1.1 shows that employee efficiency and productivity is ranked very high in terms of business priorities by North American businesses participating in Frost & Sullivan's 2007 survey.

Chart 1.1

Business Priorities

Q: Please indicate the extent to which each is a priority for your organization in the next one-two years, using a 5-point scale where 5 is high priority and 1 is low priority.



Note: All figures are rounded. Source: Frost & Sullivan

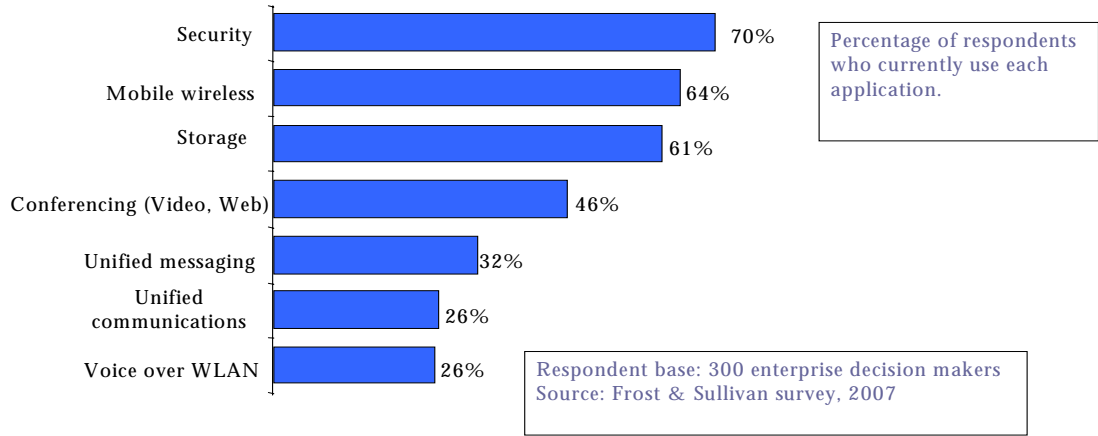
Even though unified messaging has been around for many years now, it has failed to gain ubiquitous penetration among business users. Vendors and industry pundits have come to realize that it offers considerable value only to certain businesses and functions within each business. Voice mail users for whom telephone and/or email communications are not as critical for their ability to perform their business tasks, would not see as much value in the integrated interface and other claimed benefits of unified messaging. Since unified messaging solutions typically cost more than basic voice mail, especially in a TDM environment, businesses would refrain from investing in such solutions unless a large number of the employees in their organization could derive substantial benefits from it.

Charts 1.2 shows how unified messaging compares to other advanced communication solutions in terms of current adoption by North American businesses participating in Frost & Sullivan's 2007 survey.

Chart 1.2

Advanced Applications Currently Used

Q: Please indicate whether the following applications are currently being used by your organization.



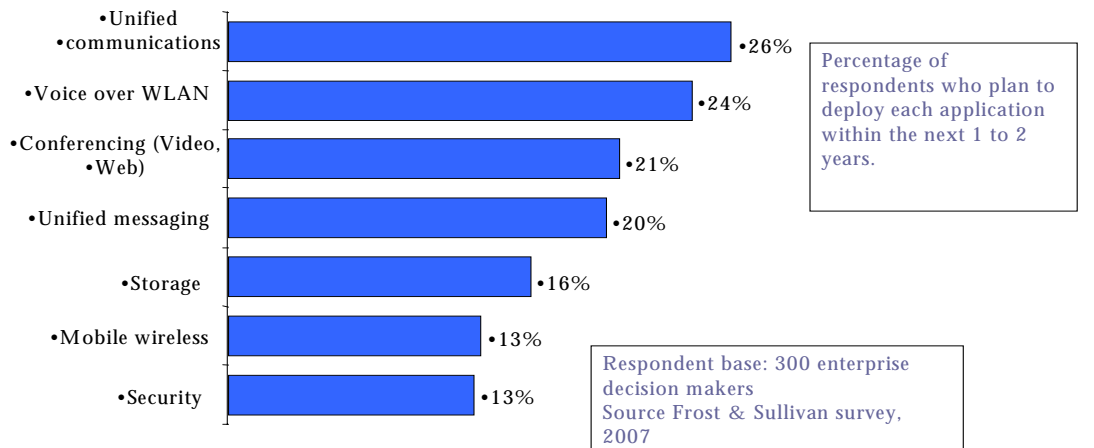
Note: All figures are rounded. Source: Frost & Sullivan

Charts 1.3 shows how unified messaging compares to other advanced communication solutions in terms of anticipated adoption by North American businesses participating in Frost & Sullivan's 2007 survey.

Chart 1.3

Advanced Application Adoption Over the Next 2 Years

Q: Please indicate whether the following applications are likely to be deployed by your organization within the next 1 to 2 years.



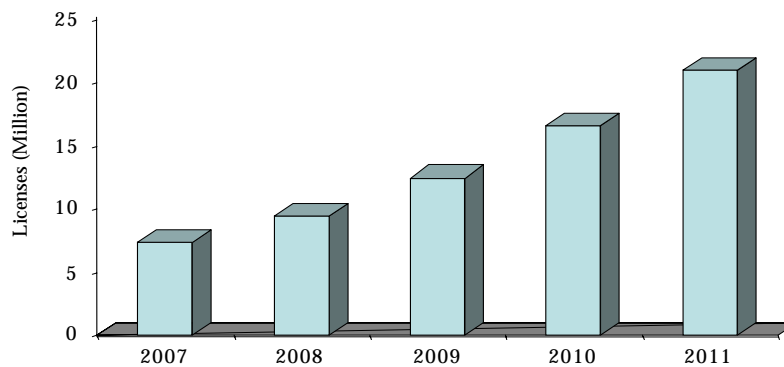
Note: All figures are rounded. Source: Frost & Sullivan

The paradigm is changing somewhat now, however, with vendors such as Avaya and Sphere increasingly "giving away" unified messaging capabilities as part of their voice mail solutions, essentially ensuring the ubiquitous availability of unified messaging in case customers choose to utilize it at a later date. With such strategies in place, and due to the fact that most business telephone and voice mail systems are reaching the end of their useful life around 2007 and 2008, and businesses are looking to migrate to next-generation, IP-based platforms, vendors are likely to experience more rapid adoption of unified messaging solutions.

Chart 1.4 shows Frost & Sullivan's forecast of UM license shipments in North America for the period of 2007 to 2011.

Chart 1.4

Enterprise Voice and Unified Messaging System Market: Unified Messaging License Forecasts (North America), 2007-2011



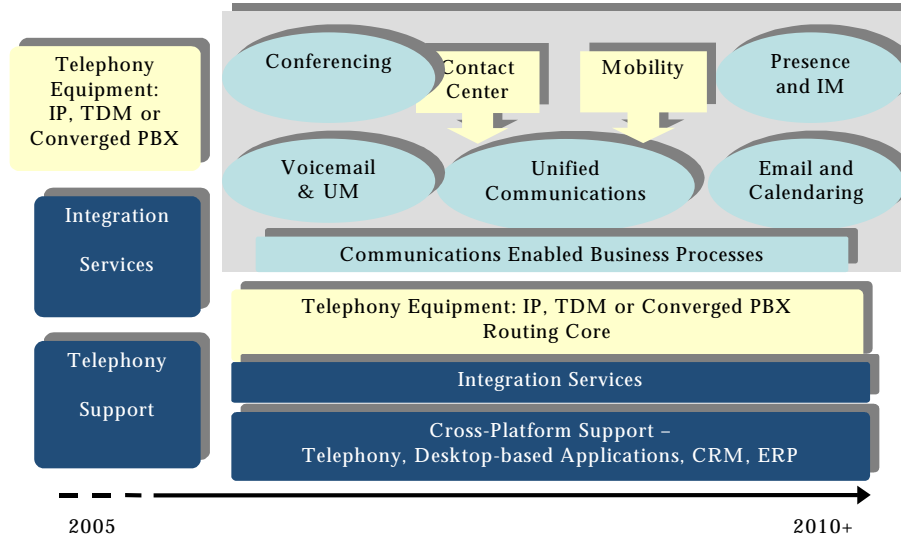
Note: All figures are rounded. Source: Frost & Sullivan

The drive toward unified communications is expected to give unified messaging a major boost as well. As IP telephony becomes increasingly pervasive in the business space, vendors are looking to leverage the converged infrastructure to cost-efficiently integrate various communication applications with presence and incorporate such applications into business processes. Unified communication solutions provide users with a common interface to telephony, conferencing and collaboration, voice or unified messaging, instant messaging and email. Microsoft as well as some other vendors are placing unified messaging at the core of their unified communication solutions.

Chart 1.5 illustrates the composition of a unified communication solution and shows how it will impact the communication market paradigm.

Chart 1.5

Unified Communications Changes Paradigm



Source: Frost & Sullivan

Competition Intensifies as the Value Proposition Evolves

Most of the telephony system vendors have had unified messaging solutions for several years now. Avaya and Cisco originally focused on the single-store architecture, whereas Nortel offered a dual-store solution that offered an integrated interface to the separate email and voice message stores. Currently, most vendors are looking to provide both options to their customers so they can decide which one works best for them. Some vendors offer fax integration themselves (AVST, for example), whereas others leave that to third-party vendors. Further, most vendors are looking to add speech capabilities to their unified messaging solutions. While text-to-speech (TTS) has become more commonly available, automated speech recognition (ASR) is only now gaining traction. In fact, some vendors have realized that adding speech capabilities to basic voice mail substantially enhances the value proposition of this solution. The ability to use spoken commands to navigate through voice messages, place a call without exiting the voice mail menu, and the ability to speak people's names when calling a business that has deployed a messaging system with a speech-enabled auto attendant provide users with a greater level of convenience and flexibility.

As incumbent vendors such as Avaya and Nortel face increasing competition from next-generation players such as Cisco, they are looking to differentiate by adjusting both their products and strategies. Avaya has been particularly aggressive in enhancing its portfolio to meet evolving demand. It has introduced "integrated" (to be differentiated from "unified"), dual-store messaging for customers that are not ready to replace their existing infrastructure with an advanced, single-store solution. Further, it is now offering all of its messaging systems with unified messaging functionality pre-integrated.

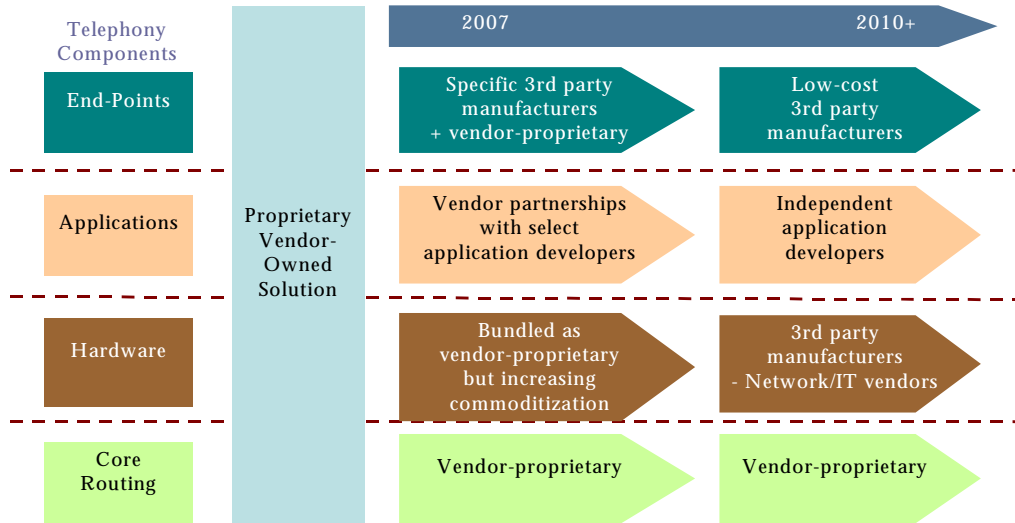
The increasing penetration of instant messaging and presence in enterprises has enabled companies such as IBM and Microsoft to become increasingly involved in the world of business communications. Both companies have aggressive strategies for the delivery of a unified communication experience to customers by integrating a variety of communication applications through presence and navigating through these applications using a single interface. While both vendors are currently partnering with PBX vendors for the telephony component, Microsoft has expressed intentions to eventually develop its own call control capabilities on its Office Communications Server (OCS).

Avaya, Cisco, Nortel and Siemens are addressing anticipated demand for unified communications in different ways. While all four companies have their own solutions for this market, Nortel has also entered an alliance with Microsoft for joint R&D, marketing, promotion, and service support of unified communication solutions. Unified communications is likely to allow all these vendors to expand their revenue opportunities, but the road to success will not be without challenges. Integration of multiple applications from different vendors (as no vendor can offer an end-to-end solution at present) is going to be risky and costly and customers are not going to jump on the bandwagon overnight. Further, customers that do not find their voice communications critical to their business are likely to see limited value in unified communications. Finally, some customers would prefer to continue to deploy standalone, best-of-breed applications from vendors of their choice.

Chart 1.6 illustrates the move to unbundled architecture in the telecommunications market. It shows how the value chain is evolving.

Chart 1.6

Move To Unbundled Telephony Architecture



Source: Frost & Sullivan

Independent Messaging Vendors Offer Greater Flexibility

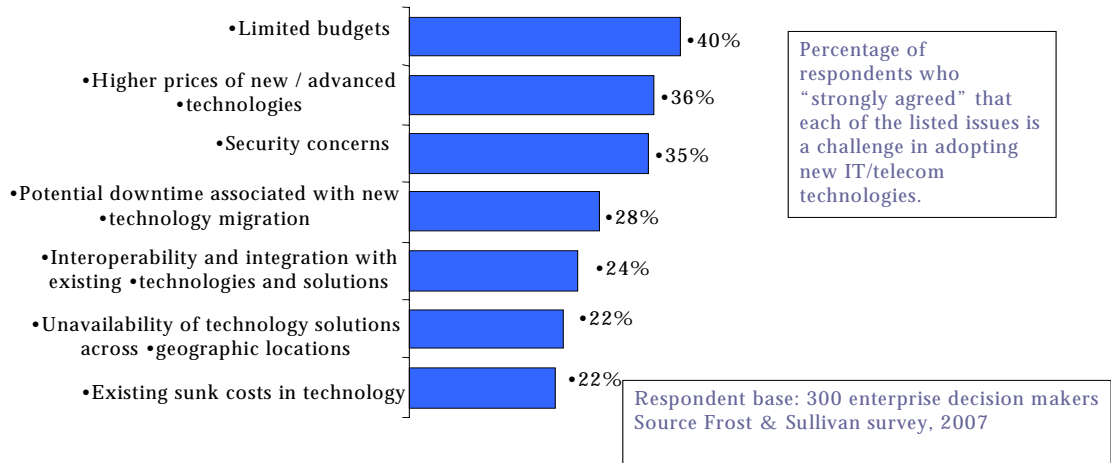
Many businesses have multiple telephony systems from different vendors and are facing various integration issues when trying to deliver a single set of communication applications enterprise-wide. Such customers truly appreciate the ability to deploy a messaging solution that integrates with different telephony systems and offers advanced capabilities at the same time. Cost-effective solutions that meet all these needs are, therefore, likely to gain the greatest traction in the marketplace.

Chart 1.7 shows some of the challenges that North American businesses face in adopting new IT and telecom solutions.

Chart 1.7

Challenges Faced by Companies in Adopting New IT/Telecom Technologies

Q: Please indicate the extent to which each challenge applies to your organization using a 5-point scale where 5 is strongly agree and 1 is strongly disagree.



Note: All figures are rounded. Source: Frost & Sullivan

It is obvious that limited budgets and high prices of advanced technologies represent a major barrier to adopting new technologies. However, a quarter of all respondents also stated that interoperability with existing equipment is a significant factor as well.

In such scenarios, companies like AVST with its CallXpress solution can offer the best solution.

AVST has evolved over the years adjusting its products and business model to meet evolving customer needs, but it has remained true to its principle of offering solutions that provide customers with maximum integration flexibility by being completely PBX-independent and supporting virtually every type of groupware on the market today. AVST first gained market recognition as AVT, later changed its name to Captaris and eventually became AVST. Currently, AVST ranks sixth in the North American unified messaging market in terms of revenues, which shows that it is offering considerable value to customers as it is surpassed only by giant incumbents such as Avaya, Cisco, Nortel, Siemens and Active Voice/NEC.

CallXpress, its flagship solution, offers advanced voice mail, call processing unified messaging notification, faxing and speech-based personal assistance capability. This unified communication solution enables users to access their business messages from any voice or data device, either via a graphical, touch-tone or a speech interface. CallXpress scales from 4 to 192 ports per server, up to 20,000 users per server, and can be networked for larger capacity. CallXpress also has extensive call processing capabilities including IVR, speech-enabled auto attendant (using the CallXpress Speech Server) and personal assistant integrated with its voice and unified messaging solutions.

Finally, what makes the solution particularly unique and valuable to AVST's customers is the fact that it integrates with virtually all major traditional and IP telephony platforms and telephone systems. It should be noted that the majority of the voice and unified messaging solutions available on the market are offered by telephony platform vendors and are only interoperable with the same vendors' telephony infrastructure. As companies seek to consolidate their telecom infrastructure and provide a uniform experience to both internal and external users, they are choosing messaging platforms that can run on multiple different switches, which should make AVST their vendor of choice. Additionally the AVST solution has several of the legacy brand telephone interfaces built into the product, which minimizes training and accelerates the deployment of the new solution.

A speech interface offered using the CallXpress Speech Server is another capability that differentiates AVST's solution from competitors' products. Available in 4 to 48 ports, CallXpress Speech Server supports up to 10,000 users. The speech server and the messaging solution share a common database and have common administration. Going forward, AVST will bring both sets of capabilities onto one platform in CallXpress Version 8.0 which will make it even easier for enterprises to deploy a messaging solution with speech already integrated.

Since the past years have shown that customers seem to have varying preferences for either a single-store or a multiple-store architecture, AVST has chosen to offer maximum flexibility to its customers. CallXpress can be deployed either in a single-store or a dual-store scenario and provides a relatively easy migration from one to the other. For other leading vendors in this market, such a procedure is complex and sometimes involves deciding between separate products or requires the purchase of additional servers. AVST's latest release of CallXpress, Version 7.9, adds additional unified messaging capabilities including a version referred to as "secure" that is designed to meet the emerging enterprise demands for solutions that support emerging compliance and confidentiality requirements.

AVST offers flexibility in other ways as well. For example, CallXpress works on its own independent user database. Therefore, deploying the AVST solution does not cause alteration of a company's Active Directory, but allows enterprises to leverage the already existing Microsoft management console for centralized management of users.

AVST also offers NotifyXpress, an outbound notification add-on and RightFAX to its flagship product CallXpress, furthering its goal to provide solutions that can adapt to the future needs of its customers.

Finally, AVST has integrated a line of telephony servers with its messaging solution offering the added convenience of a turn-key solution. The telephony server product line features three versions: the CallXpress T-2000 telephony server (small-to-medium businesses), the CallXpress I-4000 and the CallXpress I-6000 version for medium to large enterprises.

CallXpress 7.9 also offers new SIP integrations to several of the major PBX brands, enhanced localization features, and the ability for enterprises to select the unified messaging architecture that best meets their storage, access and security needs. Customers can also mix and match architectures to meet different departmental or user requirements.

Case Studies Prove the Unique Value Proposition of CallXpress

Introduction

AVST has been quite successful in developing a partner channel that allows it to focus on product development and helps it to reach out to a diverse customer audience. AVST boasts Verizon, Qwest, Cincinnati Bell, BlackBox, Shared Technologies, NetVersant and Altura Communications as major resellers and Ericsson as an OEM partner.

In order to obtain a first-hand perspective on how customers perceive CallXpress and the benefits that it offers, Frost & Sullivan tapped into AVST's partner channel. We spoke with Lou Hansell of Telephone Intelligence, an experienced CallXpress reseller. Lou Hansell's 17-year track record with CallXpress goes back to the original AVT company that offered the earlier versions of the product, Captaris, which represented the next stage of the company's evolution, as well as the current AVST that develops, markets and promotes today's most sophisticated versions of the combined CallXpress messaging and CallXpress Speech Server solutions. Telephone Intelligence, comprising mostly of technicians that know the CallXpress product "inside-out", consults clients in the selection of messaging and IP telephony solutions. It generates business primarily through client referrals, word-of-mouth recommendations, and AVST leads.

Further, we spoke with some of AVST's customers in order to validate the facts and claims stated by AVST and Telephone Intelligence. Here follow two case studies that clearly demonstrate that CallXpress offers a unique value proposition to diverse business users.

CallXpress Meets Evolving Customer Needs—Banyan Productions

Banyan Productions is one of the leading producers of reality and lifestyle programming. It was founded in 1992 and has been a CallXpress customer almost from the very beginning. Since then, Banyan's messaging system has gone through several phases of evolution dictated either by evolving company needs or by advancements to the messaging system made by AVST. According to George Kalman, Director of Information Technologies at Banyan, several reasons have made him and his company loyal and satisfied CallXpress customers including the following:

Its absolute reliability. Banyan Productions has never experienced downtime of its CallXpress system since it was first installed over a decade ago. The only time the system was down was after a fire and an ensuing flooding and AVST quickly shipped a replacement system over night which was up and running the next day. According to Mr. Kalman, this fact points to the advanced and very thorough programming that has been invested in this system.

Its unique features. Throughout the years, CallXpress has met some of Banyan Productions' most unique needs. One of the typical challenges a movie/show production company faces is the constantly changing number of people on staff. As people become recruited to participate in various programs, they need new voicemail accounts as well as easy access to their voice messages. CallXpress, due to its easy management and administration, allows Banyan to quickly and efficiently create and later on delete mail boxes, and it also allows users to access their messages via a single interface, more specifically—over their PCs, which enables some individuals to work remotely if space at the company's office is limited. Further, many of Banyan's employees are frequently on the road and working in remote locations. The ability to receive faxes and voice messages through an email interface or to redirect faxes to different fax machines has been invaluable to Banyan in improving employee efficiency.

Ease of management and administration. George Kalman is the only person in charge of the company's IT and telecom infrastructure. That is why it is very important for him to be able to efficiently manage all of the company's solutions, systems and applications. Therefore, he greatly appreciates CallXpress's ability to allow him to configure features and settings quickly and easily.

Here follows a brief account of the Banyan Productions' CallXpress deployment.

In 1996-1997, Banyan Productions deployed an early version of the CallXpress platform. Banyan's Director of Information Technologies, George Kalman, knew CallXpress and Telephone Intelligence from a previous job. He trusted Telephone Intelligence and its staff for their integrity and competence and chose to work with them to deploy a voice messaging system at his new company.

When George joined Banyan, the telecom infrastructure at the company left a lot to be desired. Banyan was using a Centrex service that made it difficult to deploy a sophisticated messaging solution in conjunction with it. Therefore, George worked with Telephone Intelligence to select a telephone platform that would allow them to also take advantage of an advanced messaging system such as CallXpress. Eventually, he selected an Avaya telephone system from Empire Technologies, an Avaya distributor, which provided reliable solutions and efficient service.

It should be noted that one of the key factors that favored George's decision to select CallXpress was investment protection. He wanted a messaging platform that would integrate with any phone system that Banyan chose to deploy over the ensuing years.

Further, Banyan's decision to select CallXpress also had to do with their need to be able to use company-wide voicemail distribution lists, a feature elegantly executed in the CallXpress solution. The company also appreciated the auto attendant, which they found quite useful for distributing calls to the appropriate mailboxes during the night and on weekends.

Later, as Banyan's users became increasingly accustomed to the system, George Kalman chose to take advantage of some of the more advanced features of the CallXpress. Thus Banyan deployed RightFax (a fax server) and enabled its employees to send faxes from their desktop and either receive faxes in their email boxes or redirect them to different fax machines.

Around 2002, as Banyan employees demanded the need to communicate more efficiently and the deployment of email made unified messaging increasingly attractive, the company chose to take advantage of CallXpress's unified messaging capabilities. CallXpress's ability to integrate with a variety of email systems, including Lotus Notes, Microsoft Outlook and IMAP made it very easy for Banyan to upgrade its users to unified messaging as they were using a very basic IMAP email system.

Today, Banyan is running on the latest version of CallXpress. Banyan's employees access their voice, fax and email messages on their Blackberries and smart phones, desktop phones and through their email. Since Banyan's staff has been using an increasing number of mobile devices over the past couple of years, the ability to access messages over mobile devices has greatly improved their efficiency. If the mobile device (such as a PDA, for example) cannot handle a wav file, CallXpress sends an email notification to the user about the received voice-mail with a caller ID. Banyan has not yet deployed speech recognition for auto attendant and personal assistant, but text-to-speech for email reading has been deployed since 2002.

The Banyan case showcases CallXpress's flexibility. When the client first deployed the system, it chose only basic voicemail because it served its needs. Eventually, the client chose to take advantage of the benefits of software-based faxing and unified messaging and the upgrade was smooth and easy. Yet, the most important factor in Banyan's decision making process was the need to make a future-proofed investment in a messaging system that would interoperate with any telephony switch.

CallXpress Meets Specific Customer Needs—Rowan University

Rowan University has evolved from a school specializing in training teachers for New Jersey schools, to a comprehensive university, known for its high-quality education and moderate price.

Frost & Sullivan spoke with Bruce Klein, the University's Director of Network and System Services, who shared some insight on the CallXpress deployment. Similar to Banyan Productions' George Kalman, Bruce pointed out the following advantages of the CallXpress platform:

- It's cost-effective.
- It's feature-rich and lends itself to further manipulation and provisioning of additional features and capabilities.
- It's the easiest solution to manage and administer.

In 2005, Rowan University started looking to update and consolidate its telecom infrastructure. The University had decided to deploy an IP telephony system next to a legacy one and was facing various integration challenges. As voice messaging is critical for student, faculty and administration, the IT staff wanted to deploy a sophisticated messaging platform that could easily interoperate with both of its telephony switches and could provide a variety of enhanced capabilities to its users.

Rowan University ran demo platforms from several vendors for about a year until it decided to deploy CallXpress. It first tried Siemens' HiPath voice messaging solution, but the price was quite high and the customer's MIS staff received little support from the vendor. The University also tested Cisco's IP Unity, but it did not integrate well with Siemens' telephony system, was also quite expensive and was difficult to administer. Interactive Intelligence's Communité system was also tested, but in spite of its advanced features, it was not selected because it also was costly and difficult to manage. AVST's CallXpress proved the least expensive of all systems and the easiest to manage and administer. Further, its ability to provide separate mail boxes for users with shared extensions, like in a dormitory-type environment, was far superior to any other system.

Eventually, the University's Request for proposal (RFP) included a lot of the features and capabilities that CallXpress could offer so it made AVST's solution a natural choice. Rowan University deployed a 48-port system, 32 ports of which were integrated with the ROLM legacy telephony system, and the other 16—to the new Cisco solution. Eventually, the University plans to migrate all of its telephony capabilities to Cisco infrastructure. Therefore, in this process of transition, Rowan felt it was extremely important to have a voicemail system that could integrate with both legacy and next-generation solutions by different vendors. Users in the Rowan community can message any other user, without regard to the type of PBX the user is located on. From the demos received, CallXpress was the only solution that could provide a smooth integration with multiple telephony switches.

The University IT staff was also looking for a solution that was easy to administer. By virtue of its size and the large number of users that it needed supported on the messaging platform (the University's total population is 11,000), the IT staff really appreciated the easy administration of the CallXpress product. One of the requirements of the University was to be able to have shared extensions, but separate mailboxes. This took hours of programming on the ROLM platform and just minutes on the CallXpress, which gave it an immediate competitive advantage and a hard-dollar ROI in terms of IT labor savings.

Rowan's IT administrators purchased about 600 UM licenses and have enabled about 115 actual UM users so far. Naturally, unified messaging is not a capability that provides equal value to all users. One of the barriers to widespread adoption of unified messaging is the difficulty in assigning different functions to different users. However, CallXpress makes the allocation of different features and functionalities to different users relatively easy. Bruce Klein claims that not a week goes by without some university staff asking for UM capabilities. Word of mouth helps popularize the solution and its benefits while eliminating the challenges of forcing a large number of reluctant new users to learn to use new features. Bruce expects the UM population to continue growing rapidly in the future.

Some of CallXpress's additional benefits that the University appreciated included the message waiting light indicator that signals when a message has been received either on the voicemail or Exchange server. Further, RightFax, AVST's software-based fax solution, was considered a valuable feature that would improve staff efficiency. The ability to handle all three message types—voice, fax, and e-mail—in their inboxes gave users more information-handling power.

Post-installation, the optional Interactive Voice Response (IVR) capabilities of AVST's solution proved particularly compelling. The University, with two very different and distinct user types—students and faculty—wanted an automated attendant directory that would offer only student names or only administration and faculty names, depending on the number called. Rowan has now expanded that functionality to separate departments, so that callers to the Engineering or Education departments are offered a directory of those users in the respective department.

Like most universities, Rowan University faces budget challenges. However, going forward, it intends to deploy CallXpress's speech recognition capabilities. Speech recognition technology will allow easy and convenient manipulation of directories and messages. Further, the speech-enabled auto attendant will allow the University to use fewer DIDs, which will result in substantial cost savings.

The Rowan University case validates some of the most valuable and unique characteristics of CallXpress. In spite of multiple vendor claims that their messaging solutions integrate with other vendors' telephony systems, CallXpress is, in fact, one of the few messaging platforms that is truly PBX-independent. Further, customer testimonials confirm that it is one of the easiest to manage and administer, which makes it a favorite to any IT staff that has tried it. Last but not least, it offers great value in terms of features and capabilities for its price.

Conclusion

As the voice and unified messaging market gradually becomes an integral part of the broader unified communications market, vendors' business models are likely to evolve. Larger vendors such as Avaya, Cisco, Microsoft and Nortel will most likely look to offer a one-stop shop to their customers for all solutions and applications that provide the customer with an end-to-end unified communications experience. Other vendors like AVST, on the other hand, are likely to be more successful by focusing on providing advanced messaging solutions that integrate with multiple vendors' telephony and groupware platforms and thus grant customers a greater degree of flexibility and independence while future proofing their major IT investments.

As the above case studies show, AVST's success in the marketplace has been due to several important features and capabilities of its CallXpress and RightFax products, as follows:

- Reliability and scalability
- Their ability to integrate with multiple switches and email systems
- Their unique features and feature flexibility including a graphical interface or telephone access to various kinds of messages – from email to fax to voice
- Ease of management and administration including setting up and deleting mail boxes, selecting different features for different users (plain voicemail vs unified messaging), and setting up the auto attendant and the IVR to intelligently activate different directories or access enterprise data

Frost & Sullivan believes that AVST will continue to successfully compete in the messaging space as the market evolves. It seems particularly well positioned to penetrate companies with mobile and remote staff, varying number of employees and messaging accounts, multiple telephone systems or companies in the process of migration from one phone system to another.