2014 Brazilian Mobile Device Management Entrepreneurial Company of the Year Award
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Letter of Congratulations

We are proud to present you with this year’s award for best practices in Entrepreneurial Company of the Year in the Mobile Device Management (MDM) industry.

Frost & Sullivan has a global team of analysts and consultants continuously researching a wide range of markets across multiple sectors and geographies. As part of this ongoing research, we identify companies that display true entrepreneurial spirit in creating innovative and potentially disruptive new services or solutions in specific markets. This research involves extensive primary and secondary research across the entire value chain of specific markets. Against the backdrop of this research, we are pleased to recognize AirWatch by VMware as the Entrepreneurial Company of the Year in the MDM Market.

To achieve excellence in entrepreneurial innovation is never an easy task, but it is one made even more difficult due to 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 receipt of this award is the result of many individuals (employees, customers, and investors) making daily choices to believe in the organization and contribute in a meaningful way to its future. We believe that such an achievement should be acknowledged and celebrated.

We hope you use this award as a platform for strengthening your brand, building awareness among new and existing customers, and inspiring your team to even greater levels of performance.

Once again, we congratulate you on your achievements and wish you great success in the future. We are here to support you on any future endeavors.

Sincerely yours,

David Frigstad
Chairman
Frost & Sullivan
Background and Company Performance

Industry Challenges

Mobile device management (MDM) refers to the ability to monitor, configure, diagnose, and troubleshoot mobile devices for reporting, compliance, and other device life cycle management purposes. The number of devices is constantly increasing among enterprises, and employees are now following the Bring Your Own Device (BYOD) trend in their workplaces more often in order to stay connected from anywhere and account for increased productivity. Thus, it is no longer necessary to be at the office to work and have access to all corporate data. Restrictive information technology (IT) policies for personal devices can, however, lead to employee dissatisfaction and, thus, reduce their productivity levels. BYOD has become a challenge for companies due to security issues and data protection. Hence, IT services will be required to manage a mix of corporate-owned and employee-owned mobile devices.

In the Brazilian market, BYOD is becoming more important with every passing day. For example, the education segment is adopting tablets for its students to increase their learning levels, and classes have, thus, become more interactive. Additionally, segments, such as those of retail and pharmaceuticals, have sales executives who are beginning to use tablets in order to sell products instead of using product catalogs. This is primarily driven by the objective of cost reduction, as it is no longer considered necessary to print a catalog listing the different kinds of products. Besides, it also eliminates the need to carry a lot of weight, as tablets are light.

As these mobile devices need to be increasingly managed, the MDM solution emerges as an effective offering to manage devices, users, groups, and policies from a single-user interface. The solution also ensures that mobile devices can work properly. This includes having the most recent on-device software, maintaining the latest security features, and providing appropriate reporting and feedback on device performance.

The main challenge in the MDM market is to manage all of the devices that employees are bringing to the workplace and also ensure data security. Separating corporate data that can be accessed by employees and restricting where employees can access the data from, in addition to either deleting or blocking information if an employee loses his or her device, provides this security.

Thus, effectively using their entrepreneurial excellence and market experience, companies that offer competent MDM solutions and have a strong knowledge and understanding of the Brazilian needs find themselves better positioned to address the challenges pertaining to especially data protection and security and remain ahead of competition in the Brazilian space.
**Entrepreneurial Innovation and Customer Impact of AirWatch**

**Market Disruption**
AirWatch by VMware has over 600 employees for conducting research and development (R&D) in its quality assurance department. This group develops MDM solutions for all types of platforms, such as iOS, Android, Blackberry, Mac OS X, Symbian, Windows Mobile, and Windows Phone, for all of the locations where the company has its operations. Also, the company offers solutions for different kinds of industries, such as education, enterprise, finance, government, healthcare, retail, hospitality, nonprofit organizations, small and medium-sized businesses, and transportation.

AirWatch by VMware’s solutions are available in 17 languages, 1 of them being Portuguese. The company is also able to support hundreds of devices through a robust architecture that is configurable according to a client’s environment and requirements. AirWatch by VMware products are built on industry standard technologies, featuring a flexible delivery system for the MDM platform, from where cloud-based solutions can be adopted, or the solution can also be delivered on premises. The company has data centers across the globe. AirWatch by VMware’s enterprise architecture for MDM provides scalability and multi-tenancy, in addition to allowing for integration with existing systems and flexibility for deployments on premises or on the cloud.

**Competitive Differentiation**
In February 2014, AirWatch was acquired by VMware for approximately US$1.54 billion. This acquisition was important and gave both AirWatch and VMware competitive differentials. For VMware, it will add a fundamental element to its portfolio for end users, which will be able to boost its mobile workforce with enhanced security. For AirWatch, it will help the company take its security solutions to a bigger group of clients. With the combined power of AirWatch and VMware, customers will enjoy a complete solution that allows end users to work from any device, anywhere, anytime, with maximum security.

AirWatch by VMware has different pricing bundles of enterprise mobility management (EMM) tools, characterized by the following colors, which ensure more basic security to a full value-added service portfolio: Green Management, Orange Management, Blue Management, and Yellow Management. This gives clients the chance to contract the plan that best features the necessities and pay for it, not obliging the client to hire a plan to use just some features. Clients can also purchase features standalone if a bundle does not meet their needs.

**AirWatch by VMware Strategy**
To enjoy a strong position in the market and differentiate itself from others, AirWatch by VMware designed its enterprise architecture to meet deployment complexities, security...
requirements, and mobile growth. The solutions can be easily deployed in the cloud or on premises, and AirWatch by VMware architecture can also provide high security, scalability, and multi-tenancy, role-based access that allows organizations to delegate administrative roles based on relevance to end-user job function, automated monitoring, high availability, and disaster recovery as well as global deployment.

For enterprise integration on the cloud, AirWatch by VMware, with its Enterprise Integration Services (EIS), connects clients’ cloud instance to the on-premises platform through a secure, self-service process from the console. For on-premises environments, deployed in tiered network models, the server enables AirWatch by VMware to communicate to various corporate services across network layers.

AirWatch by VMware also offers a flexible delivery model to offer all its solutions on the cloud and on premises as part of a complete mobile ecosystem.

**Customer Purchase Experience**

AirWatch by VMware continuously evaluates and improves the functionalities that its MDM solutions can bring to the market. This is done in order to deliver the best MDM solutions to its clients, enhancing their experience with a user-friendly offering that is able to support all types of trends emerging in the Brazilian market, especially BYOD.

The company also offers services to increase the value it renders to its clients, such as organizing training for clients and distribution channels to optimize the mobile strategy, with institutional videos and training webinars. It also ensures 24/7/365 global support, along with the availability of account managers to personalize and provide a consultative approach to customers when required. The company also provides services pertaining to the implementation of its MDM solutions in Brazil. AirWatch by VMware trains and is always increasing the number of its partners so they can provide the best services to customers across Brazil.

**Customer Service Experience**

AirWatch by VMware provides the best service experience to its clients by generating updates about its MDM and EMM solutions in real time when a new operating system is released. The best example was with iOS 8, the newest version of Apple, on the day it was launched. AirWatch by VMware updated its enterprise mobility management platform to protect this new operating system, thereby enabling the IT administrators to take advantage in terms of security, management, and content.

One example of AirWatch by VMware’s high speed of response to the Brazilian market needs and its dedication to improve its customers’ service experience and level of satisfaction is related to the fact that in Brazil, if an employee sees an email after his or her daily working hours, it is considered extra working hours. Companies were looking for
solutions that could block employees from receiving emails after their working hours or on the weekends. This functionality was very quickly incorporated into AirWatch by VMware’s MDM solution, thereby demonstrating the company’s dedicated commitment to its Brazilian customers from the inception of its operations in Brazil.

**Brand Equity**

To increase its brand equity and awareness among customers in the Brazilian market, AirWatch by VMware is constantly in touch with existing and prospective Brazilian customers to showcase its solutions and receive feedback from customers based on their experience with its solutions. One example that clearly demonstrates AirWatch by VMware’s commitment to Latin American customers is its participation in Futurecom, the largest Latin American event for IT and telecommunications. Additionally, the company also organizes its own events in Brazil for clients and prospective clients, where the company shows its new solutions, highlighting their differentials in the market. Its partners play a strategic role in Brazil, which is why the company has a strong commitment to train them and provide all the support they need to implement AirWatch solutions; partners are also able to provide after-sales support when necessary for its clients. The company has taken all of these initiatives to increase customer satisfaction and enhance its brand awareness among customers through its demonstration of the strong commitment to addressing and satisfying customer demands.

**Conclusion**

AirWatch by VMware develops solutions for Brazilian customers by first understanding client needs through local events and by delivering solutions with certified partners that have in-depth knowledge of AirWatch by VMware’s implementation solutions. This customer-centric focus, along with its dedication to launch new solutions and keep improving the features of the existing ones, clearly demonstrates the company’s strong commitment to its clients in Brazil.

With its strong overall performance, AirWatch by VMware has earned Frost & Sullivan’s 2014 Entrepreneurial Company of the Year Award.
Significance of Entrepreneurial Leadership
Ultimately, growth in any organization depends upon customers purchasing from your 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 innovation or growth strategy. To achieve these dual goals (customer engagement and growth), an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, differentiating from the competition. This three-fold approach to successful entrepreneurship is explored further below.

Understanding Entrepreneurial Leadership
Demand forecasting, branding, and differentiation are part of an entrepreneurial company’s larger journey toward forming deep relationships with customers and permanently altering the market with their actions. These two concepts—entrepreneurial
innovation and customer impact—are therefore the cornerstones of this award, as discussed further in the next section.

Key Benchmarking Criteria

For the Entrepreneurial Company of the Year Award, we evaluated two key factors—Entrepreneurial Innovation and Customer Impact—according to the criteria identified below.

**Entrepreneurial Innovation**
- Criterion 1: Market Disruption
- Criterion 2: Competitive Differentiation
- Criterion 3: Market Gaps
- Criterion 4: Blue Ocean Strategy
- Criterion 5: Passionate Persistence

**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

Best Practice Award Analysis for AirWatch by VMware

**Decision Support Scorecard**

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, 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.

RATINGS GUIDELINES

The Decision Support Scorecard is organized by Entrepreneurial Innovation and Customer Impact (i.e., the overarching categories for all 10 benchmarking criteria; the definitions for each criteria are provided beneath the scorecard). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms 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.

The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, we have chosen to refer to the other key players in as Company 2 and Company 3.

**DECISION SUPPORT SCORECARD FOR ENTREPRENEURIAL COMPANY OF THE YEAR AWARD (ILLUSTRATIVE)**

<table>
<thead>
<tr>
<th>Measurement of 1–10 (1 = poor; 10 = excellent)</th>
<th>Entrepreneurial Innovation</th>
<th>Customer Impact</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrepreneurial Company of the Year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AirWatch by VMware</td>
<td>9.2</td>
<td>9.0</td>
<td>9.1</td>
</tr>
<tr>
<td>Competitor 2</td>
<td>8.8</td>
<td>8.4</td>
<td>8.6</td>
</tr>
<tr>
<td>Competitor 3</td>
<td>8.4</td>
<td>8.2</td>
<td>8.3</td>
</tr>
</tbody>
</table>

**Entrepreneurial Innovation**

**Criterion 1: Market Disruption**
Requirement: Innovative new solutions that have a genuine potential to disrupt the market, obsoleting current solutions and shaking up competition

**Criterion 2: Competitive Differentiation**
Requirement: Deep understanding of both current and emerging competition to create and communicate strong competitive differentiators in the market

**Criterion 3: Market Gaps**
Requirement: A clear understanding of customers’ desired outcomes, the products that currently help them achieve those outcomes, and where key gaps may exist

**Criterion 4: 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: Passionate Persistence**
Requirement: A deep belief in the “rightness” of an idea, and a commitment to pursuing it despite seemingly insurmountable obstacles

**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

**Decision Support Matrix**
Once all companies have been evaluated according to the Decision Support Scorecard, analysts can then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.

**DECISION SUPPORT MATRIX FOR ENTREPRENEURIAL COMPANY OF THE YEAR AWARD (ILLUSTRATIVE)**
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.
**Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices**

Our awards team follows a 10-step process (illustrated below) to evaluate award candidates and assess their fit with our best practice criteria. The reputation and integrity of our awards process are based on close adherence to this process.

<table>
<thead>
<tr>
<th>STEP</th>
<th>OBJECTIVE</th>
<th>KEY ACTIVITIES</th>
<th>OUTPUT</th>
</tr>
</thead>
</table>
| 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 | 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.