

2009 EMEA Hosted IVR Services Market
Product Line Strategy Award

EXCELSIS Business Technology AG

Excelsis Business Technology was founded in 1998 as a professional services organization in Stuttgart, Germany. Three key acquisitions in 2004 and 2005 propelled the transition of the company's core focus towards speech solutions. Today, Excelsis is one of the leading providers of on premise and hosted speech and voice products in Germany and adjacent markets.

The backbone of Excelsis's product line is the Excelsis Speech Solutions Platform. Developed in-house, it is a hardware-agnostic, standards-based environment that supports a variety of speech technologies including recognition, verification and TTS. The use of Java and VoiceXML is crucial to reducing time to market and development costs. The platform also provides a JavaBeans component model that includes helpful tools such as caller profiles, authentication tools and pre-defined dialogue objects. Robust administrative tools allow for efficient management of the speech implementation – capabilities include powerful reporting and analysis (offline or in real-time) and multi-channel notification. Excelsis also has several partnerships with technology vendors including Genesys, Intervoice, VoiceObjects and Nuance and offers and runs a variety of platforms to provide true flexibility to the customer.

Product Line Diversity through Repeatable Modules

The standardization of grammar allowed by the use of VoiceXML and related technologies allows code to be reused by multiple applications. By tapping into a library of pre-existing modules, the development time associated with each project can be significantly reduced. This is especially important in the hosted services market, where the customer is typically averse to the capital expenditure associated with integration and customization.

Excelsis offers a suite of over 50 speech enabled applications. These modules form the Excelsis Voice Suite, and using an 'assemble and customize' approach packages are selected based on customer needs and then integrated into a speech implementation. Modules include a call transfer attendant, address capture and validation, automated menu based speech guidance, a survey tool, an order taking tool, automated password management, meter reading and track & trace among others.

Multilingualism is Key

A major factor restraining the adoption of speech technologies in EMEA is the sheer diversity of languages within the region. The problems associated with customizing solutions to a particular country or region are exacerbated by local dialects and variations which may adversely affect the accuracy of prediction. Ineffective speech IVRs lead to frustration among end-users and perpetuate a negative perception regarding the use of speech in self service.

One of the important ways that Excelsis has differentiated itself competitively is through the ability to deliver effective speech enabled solutions for specific markets. Implementations in Germany may encounter variations in the language from north to south. Typical implementations in Switzerland will not only require four languages – English, French, German and Italian but will also have to accurately recognize regional dialects within each one. Using ASR technology from Nuance and Telisma, Excelsis has carved a niche for itself in dealing with these challenges. A recent customer was the Emirate of Dubai that required a speech enabled application for its public transport system. The Excelsis implementation functions in English and Arabic, and is specifically tailored to the language patterns of the locals as well as the sizable migrant population.

Conclusion

A precursor of Excelsis's current platform was used in the very first speech implementation in Germany in 2001. This lengthy development time has resulted in a truly excellent platform that is well prepared to meet the needs of the emerging

IVR services markets in Germany and beyond. Recent customer wins include KabelBW and IKEA Germany as well as the Emirate of Dubai as previously mentioned.

For the Product Line Strategy Award in the Hosted IVR Services market in EMEA, Frost & Sullivan recognizes EXCELSIS Business Technology for the effective utilization of standards based development to create a complete suite of speech enabled products, and for demonstrated excellence in providing strong, accurate solutions in challenging environments.

Award Description

The Frost & Sullivan Award for Product Line Strategy is presented each year to a company that has demonstrated the most insight into customer needs and product demands. The recipient company should have optimized its product line by leveraging products with the various price, performance, and feature points required by the market.

Research Methodology

To select the Award recipient, the analyst team tracks end-user requirements and market dynamics within the industry. This process includes interviews with suppliers, end-users, and industry experts. The product lines are compared with customer base demands, and the top-ranking provider is then presented the Award.

Measurement Criteria

In addition to the methodology described above, there are additional criteria used to determine the final competitor rankings in this industry. The recipient of this Award will have excelled in one or more of the following criteria:

- Introduction of new products, strategically positioned to balance the product line
- Ability to accommodate different market segments, or different markets within an industry by repurposing technology
- Enhancement of product offerings through optimization of packaging, service, delivery, financing, and/or other value-added services
- Strategic technology or marketing acquisitions or alliances

About Best Practices

Frost & Sullivan Best Practices Awards recognize companies in a variety of regional and global markets for demonstrating outstanding achievement and superior performance in areas such as leadership, technological innovation, customer service, and strategic product development. Industry analysts compare market participants and measure performance through in-depth interviews, analysis, and extensive secondary research in order to identify best practices in the industry.

About Frost & Sullivan

Frost & Sullivan, the Growth Consulting Company, partners with clients to accelerate their growth. The company's Growth Partnership Services, Growth Consulting and Career Best Practices empower clients to create a growth focused culture that generates, evaluates and implements effective growth strategies. Frost & Sullivan employs over 45 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from more than 30 offices on six continents. For more information about Frost & Sullivan's Growth Partnerships, visit <http://www.frost.com>.

www.awards.frost.com