Digital Signage

"The next generation SP Managed Service"

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DMSaaS Lead – Emerging Markets

Why Managed Services?

➤ The Opportunity: Business Video and Digital Signage

➤ Digital Signage Applications

➤ SP Advantages- Managed Services

➤ Use Cases

➤ Next Steps

What is Digital Media?

- Digital Media is one of the most compelling and effective ways for organizations to communicate with customers, employees, partners or students about products, important news, training and events. DM brings both intimacy and immediacy to communications and information and reaches target audiences anytime, anywhere

  - *Desktop Video*

  - *Digital Signage*

  - *Enterprise Video*

90% of Internet traffic will be video by 2014.

Video applications are one of the few solutions where true ROI can be demonstrated.

Service Provider Business Concerns

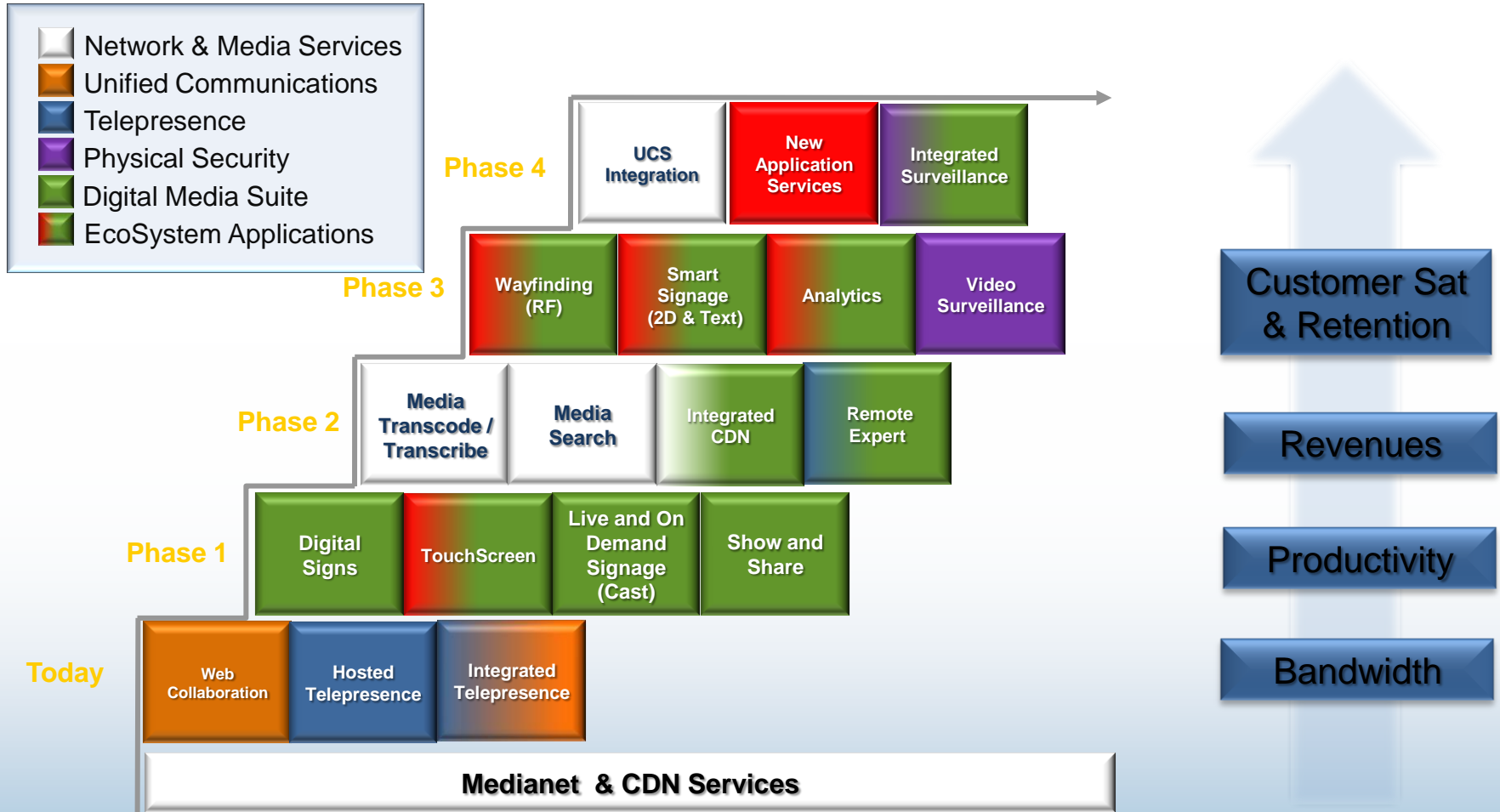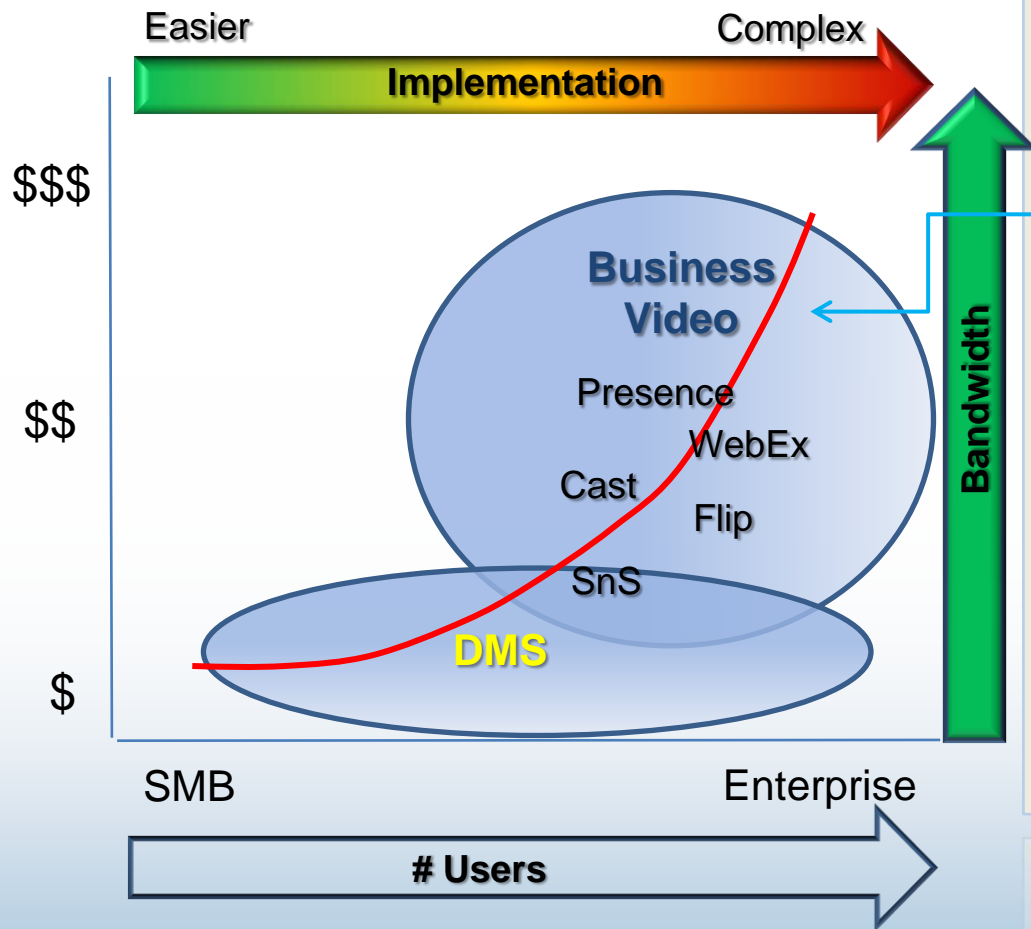|	
Revenue Growth	• Profitable service offerings • Pricing and commoditization concerns • Business Model strategies
Infrastructure Investment	▪ Increase utilization of network and DC assets ▪ Explosive video growth, impact on network ▪ Extending additional network services
Customer Base	▪ Need for differentiation - customer experience ▪ Customer retention and loyalty

Pervasive Video "the broader picture"

Increasing ROI with Added Solutions

Legend:
- ☐ Network & Media Services
- ☐ Unified Communications
- ☐ Telepresence
- ☐ Physical Security
- ☐ Digital Media Suite
- ☐ EcoSystem Applications

Phase 4: UCS Integration | New Application Services | Integrated Surveillance

Phase 3: Wayfinding (RF) | Smart Signage (2D & Text) | Analytics | Video Surveillance

Phase 2: Media Transcode / Transcribe | Media Search | Integrated CDN | Remote Expert

Phase 1: Digital Signs | TouchScreen | Live and On Demand Signage (Cast) | Show and Share

Today: Web Collaboration | Hosted Telepresence | Integrated Telepresence

Medianet & CDN Services

Customer Sat & Retention

Revenues

Productivity

Bandwidth

Leveraging Digital Signage to Drive MS
Promoting SP Assets and Expertise

- ✓ A Digital Signage (DMS) foundation enables new business services. It is an accretive investment

- ✓ Business Video extends the SP value proposition and drives new monetization opportunities

- ✓ **Implementation complexity promotes SP expertise**

- ✓ **Compelling business services *expand Customer Relationships and drives* Customer Retention.**

What Does Business Video Enable?

Sales and Marketing	Corporate Communications	Training	Information Sharing

Sales and Marketing
- Promote, cross-sell/up-sell
- Marketing videos that grab viewer attention
- Compelling product and service information
- Provide a human face on content
- Reduce perceived wait time

Corporate Communications
- Direct line of communications to employees or customers
- Global corporate messaging consistency
- Immediate executive communications
- Live broadcast of company events

Training
- Cost-efficient training to remote employees
- Information consistency across channels
- Power of video—users retain more information
- Increased ability to absorb information in searchable segments

Information Sharing
- Instant communications for rapid response
- Directional signage (way-finding)
- Informational videos available on-demand
- Breaking news relevant to employees/emergency communications

Digital Signage
Business Applications

Sales Uplift
- These screen networks take specific aim at increasing sales using digital messaging. Examples include "sale on aisle four"- type messages, countdown discounts, cross-sell messages located in strategic parts of the store.
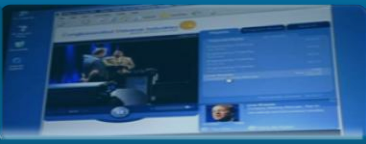
Brand Messaging
- Extending the business brand and enhancing the customer's opinion and experience of that brand.

Third Party Messaging
- Under this model, businesses that own or host the screens sell some or all of the screen real estate to third parties. Directly addresses ROI.

Internal Communications
- Used for improving internal corporate, government office or institutional communications. This "inward facing" signage can be used to boost morale, recognize achievements and improve business or organizational processes

Public Messaging
- Keep the general public connected with the services they need. Can be used to broadcast critical, time-sensitive information, or even evacuation orders, by pushing impossible-to-ignore audio alerts and live video feeds to screens.
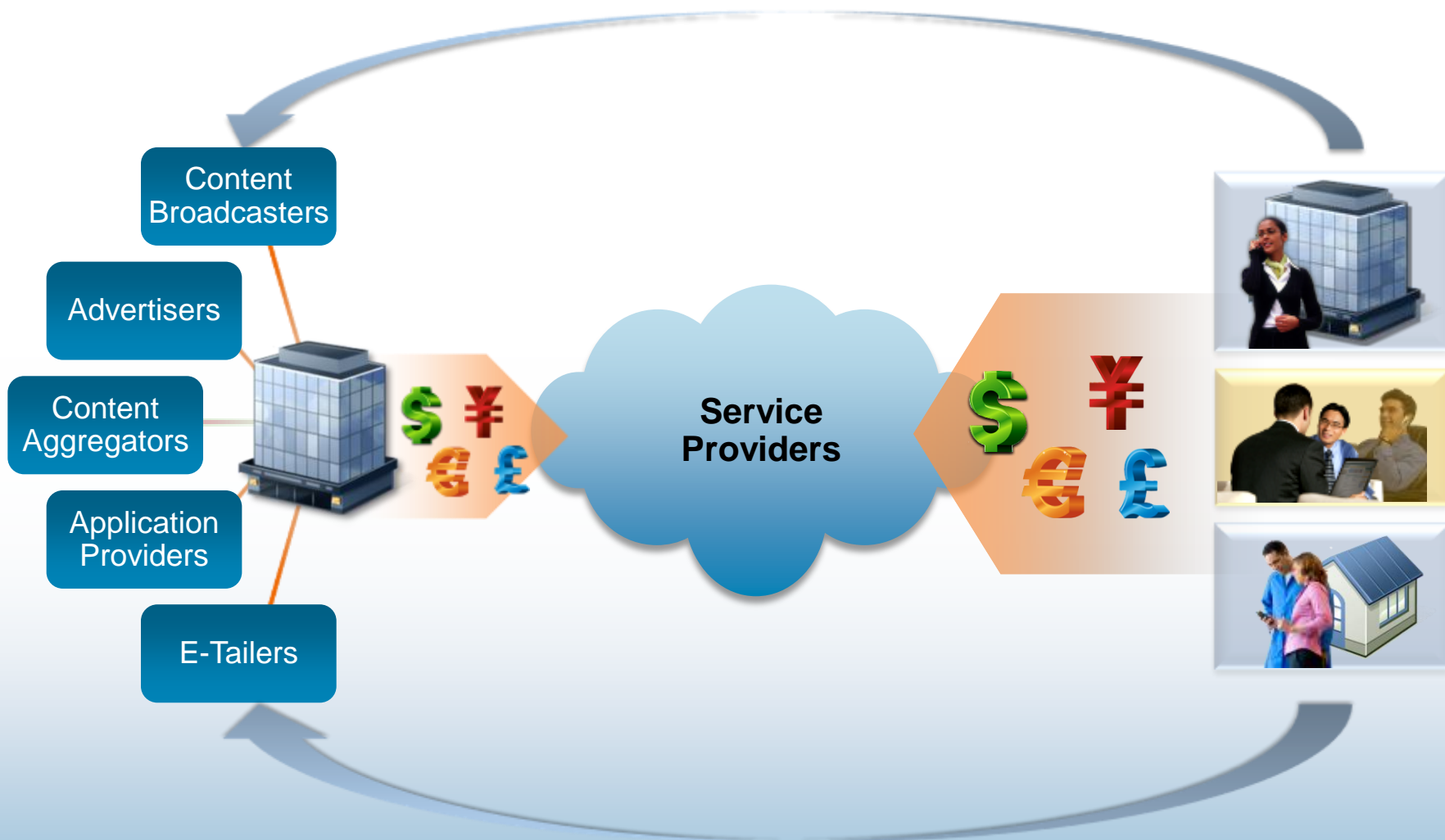
Customer Interaction
- Customers hate waiting in lines, used to minimize perceived wait time, providing entertainment and lifestyle content to catch the customer's eye and improve his mood.

Source: Digital Signage Today, 2009

Capitalizing on Two-Sided Markets
Business to Business to Consumer (B2B2C)

Digital Media Signage as a Service (DMSaaS)
SP Benefits

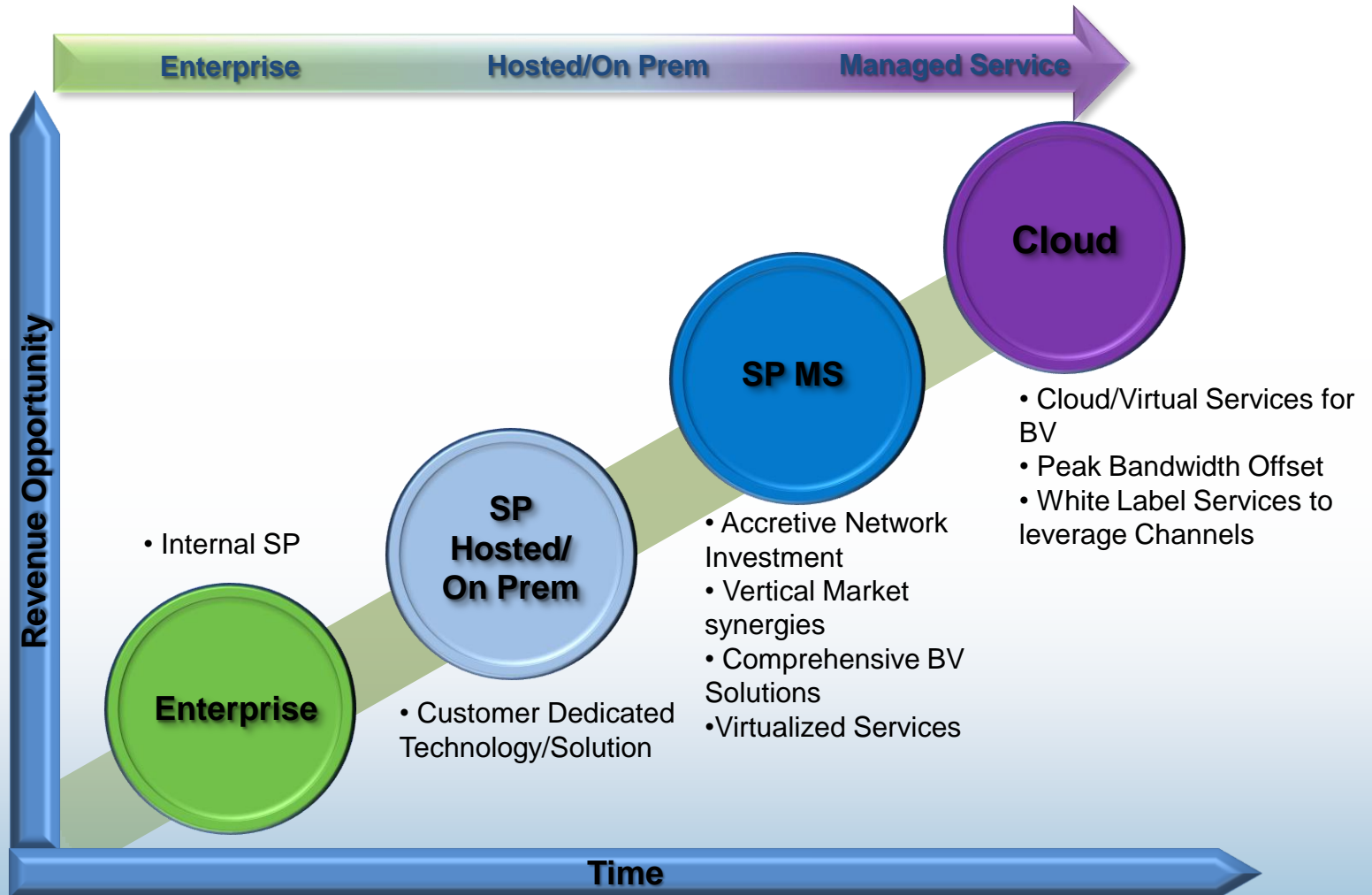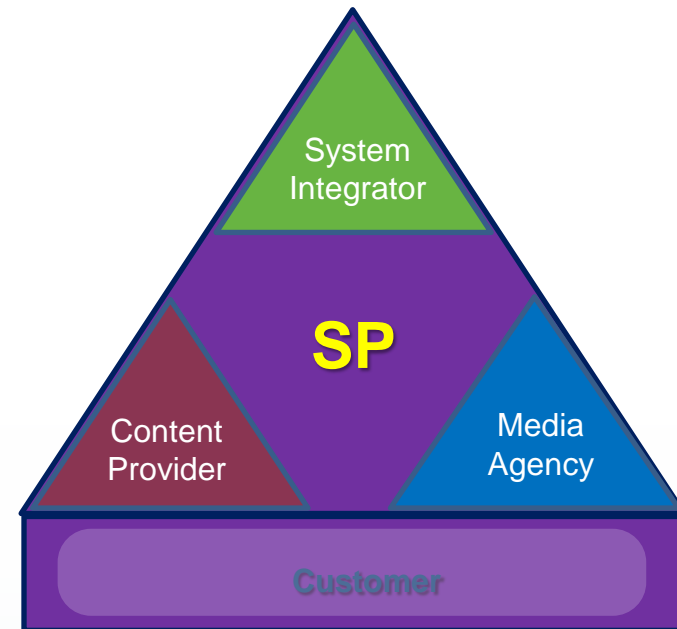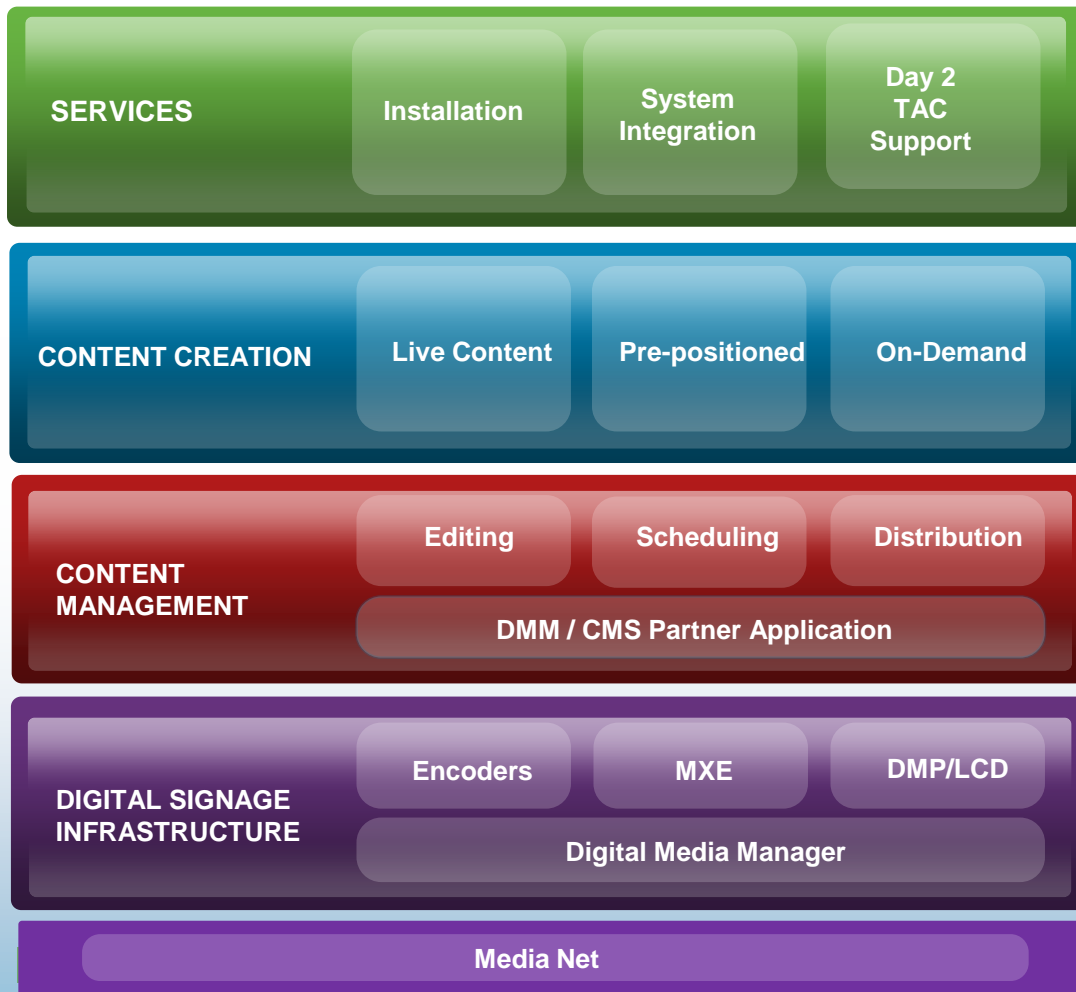|	
Revenue Growth	*Expansion of Network and Managed Services* • Bandwidth and data center subscription uplift • Potential for additional services • Monetization of business video growth
Infrastructure Investment	*Economies of Scale* ▪ An accretive investment, _leverages existing network and data center assets._ ▪ Leverage existing SaaS support resources for service management
Customer Base	*Enhanced Business Relationships* ▪ Service bundling creates customer "stickiness" ▪ Expanded relationships with non-IT divisions, such as Sales and Marketing. Similar to Directory Services advantages ▪ Partner effect with Business Models, Media Strategy and Content Development

Monetization through Managed Services
Expand Time to Value

Enterprise → Hosted/On Prem → Managed Service

Revenue Opportunity ↑

Enterprise
- Internal SP

SP Hosted/On Prem
- Customer Dedicated Technology/Solution

SP MS
- Accretive Network Investment
- Vertical Market synergies
- Comprehensive BV Solutions
- Virtualized Services

Cloud
- Cloud/Virtual Services for BV
- Peak Bandwidth Offset
- White Label Services to leverage Channels

Time →

DMSaaS
Managed Services

SERVICES	Installation	System Integration	Day 2 TAC Support

CONTENT CREATION	Live Content	Pre-positioned	On-Demand

CONTENT MANAGEMENT	Editing	Scheduling	Distribution
	DMM / CMS Partner Application		

DIGITAL SIGNAGE INFRASTRUCTURE	Encoders	MXE	DMP/LCD
	Digital Media Manager		

Media Net

System Integrator

SP

Content Provider

Media Agency

Customer

- ▪ **Margins and GTM strategy will dictate which components the SP will offer directly for MS bundle.**
- ▪ **Customer relationships controlled by the SP**
- ▪ **Leverage network infrastructure**

DMSaaS
Business Model Examples

Marketing and sales / **GTM Strategy**	• **Retail, Airports, open spaces - ad funded** • **Advertising Exchange SP Sales, channel**
Displays and DMP's	• **SP Owned**
Content Creation	• **SP or Content Provider**
Content Mgmt System	• **SP or Ecosystem Partner**
Network Opn's & support	• **SP and/or VAR Channel**
Installation & Implementation	• **SP or SI**

DMSaaS
Business Model Examples

Marketing and sales **GTM Strategy**	• **SP monthly fees based on #displays/DMP's, DMM -- SLA's** • **Content Creation & Mgmt billed by 3rd party**
Displays and DMP's	• **Owned by SP** • **leased to Customer**
Content Creation	• **Content Provider Or Enterprise**
Content Mgmt System	• **Content Provider or Ecosystem Partner**
Network Opn's & support	• **SP and/or VAR Channel**
Installation & Implementation	• **SP or SI**

DMSaaS
Business Model Examples

Marketing and sales **GTM Strategy**	• **Single SP Invoice, includes**: • **Displays, DMP's & DMM** • **Content Management -- SLA**
Displays and DMP's	• **SP Owned**
Content Creation	• **SP or Content Provider**
Content Mgmt System	• **SP**
Network Opn's & support	• **SP**
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Architecture

Single DMP Site

DMP

DMPs

ECDS

IP VPN Network (SP)

ECDS

Transcoding

Content Development/ Media Agency

DC Switches

SAN Storage Array

SP Data Center

DMM Server

CMS

WWW Server

Directory service

Video Streaming Server
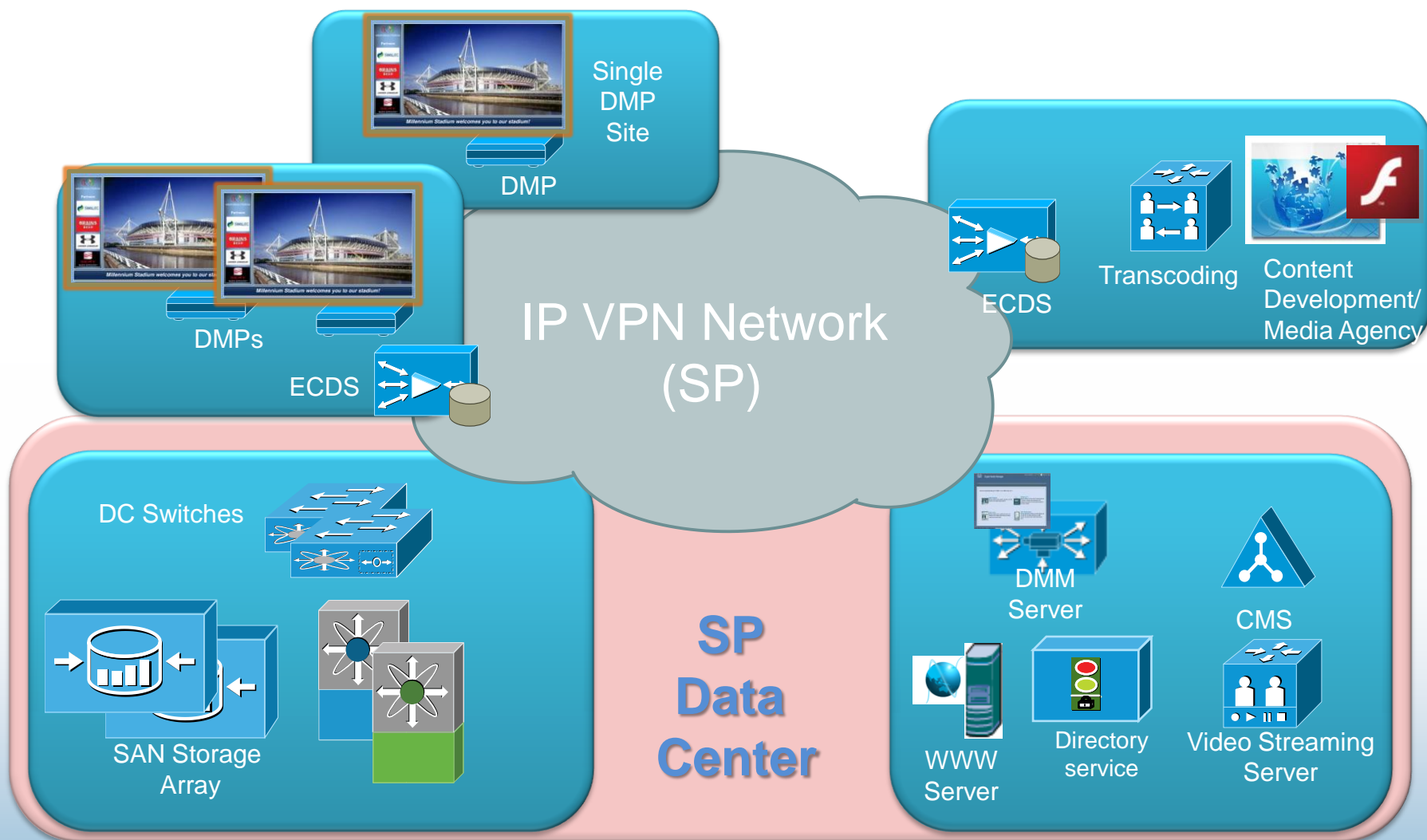
Cisco Digital Media Suite Customers

Lloyd's of London

LLOYD'S

- World's leading insurance brand

- Challenge:

    The need to modernize the look of Lloyd's

- Implemented Cisco Digital Signage with the goal to modernize Lloyd's and received much more:

    Informs brokers while they wait to see an underwriter (underwriting floor receives > 4,000 brokers each day)

    Adds value to members' subscriptions

    Opens new opportunities for communicating with its members through rich, dynamic content

- Business Benefits:

    Broker new contracts and deals

    Ability to switch screens on and off automatically **reduces energy costs**

    Increase revenue by improving member experience

"Our original goal was to modernize the look of Lloyd's. Not only has the new system done this brilliantly, it has opened up so many more opportunities for communicating with our members."

– Craig Carter, IT Architect, Lloyd's of London

Norsk Tipping
Real-Time Communications and Marketing

- Official Norwegian lottery founded in 1949

- Challenge:

    Tremendous costs around paper distribution to 4500 retail locations

- Implemented Cisco Digital Signage across all locations for more efficient:

    Marketing and promotions to customers

    Communication around results, odds

- Business Benefits:

    Increase revenue by driving product up-sell/cross-sell

    Reduce printing costs and eliminated paper waste

    Faster customer communications

    ROI analysis of sales

"With its flexibility and scalability, the Cisco Digital Media suite is helping us strengthen our brand, increase sales, make it more attractive for retailers to sell our products, and maintain customer confidence."

– Stein Onsrud, Technology Advisor, Norsk Tipping AS

Stars Centre

- Stars Centre is part of the City Centre shopping complex in Heliopolis, Egypt

- Challenges:

  Needed a simple and flexible way to attract customers

  Needed a new way to drive revenue from advertising

- Implemented Cisco Digital Signage:

  About 500 DMPs across the mall to entertain and attract customers

  Ability to display compelling content such as advertisements, movies, Web pages, images, flash animations, and live feeds that entertain

- Business Benefits:

  Increase customer satisfaction and draw crowds

  Higher sales as a result of larger crowds

  Generate revenue from selling advertising space

  ROI: conservative study estimated payback time **< 2 years**

CityJet

- Background

  Subsidiary of Air France

  Carries about 1.6 million passengers per year

- Challenges

  Scale training and improve their corporate identity with both onsite and mobile employees spanning three base airport locations

- Benefits of Cisco's Digital Signage and Social Video Systems

  Increased productivity by communicating company wide initiatives in real-time

  Brand protection and awareness

  Strengthened staff morale

College of Southern Nevada

- College of Southern Nevada (CSN) is the largest college in Nevada serving two-thirds of Nevada's population

- Challenges:

    Need to communicate to remote offices

    Provide training

    Distribute executive communications

- Benefits of Cisco Digital Signage implementation:

    Critical component of safety strategy for communication during emergencies allowing for **instant communication** and the **avoidance of panic**

    Lowered printing costs and campus clutter by reducing the number of posters necessary to promote events on campus

    Encourages and **improves collaboration**

"Video technology is everywhere. If you don't have it, you're behind. With Cisco's Digital Signage Solution you're not only keeping pace, you're ahead of the curve. DMS has helped our college communicate better."

- Josh Feudi, Interim CIO, College of Southern Nevada

Orange - TPSA Poland

- **Challenge:**

  Orange and TPSA faced GTM challenges with traditional paper marketing campaign - very complex logistics, high risk of mistakes, complicated process of advertisement processing.

- **Solution:**

  By implementing DMS Orange will reduce huge costs of printing marketing materials and their distribution across the Poland.

- **Business Benefits:**

  Orange has created new marketing revenue streams. They will sell advertisement spots for mobile terminals manufacturers like NOKIA, SAMSUNG, HTC, Apple in POS.

Cisco Systems
Engage and Inform 67,000+ WW Employees

- "Cisco Now": Corporate-branded, all-employee news and corporate information digital signage property

- Challenge:

  Needed a more efficient and effective way to engage and inform employees around the globe

- Implemented Cisco Digital Signage to dynamically deliver global and site-based news:

  Includes employee cafes, break areas, labs, badge rooms

  Content includes: corporate/product announcements, company facts, customer wins, financial updates, volunteerism opportunities, crisis communications

- Benefits:

  Centralized and standardized communications, with ability to customize content to ensure location relevancy

  Platform is easily being extended to customer-facing executive & customer briefing centers, lobbies, sales offices

  Alignment with CEO John Chambers' vision of using video communication to drive company strategy

Next Steps…..

- Hold a joint Business Acceleration Workshop to define vertical GTM strategy

   Customer demographics

   Margin Analysis

   Build Use Cases

   Develop Sales Enablement Resources

- Adopt DS for corporate communications, building signage, employee training, way-finding, etc.

Why Do SP Customers want Managed Services?

- Limited expertise and capacity

- Faster time to market and consistency for high impact content

  Sales, communications, information, security, safety, etc

  Flexible online content management

- Updated brand image

- Limited capital (SMB)

- OpEx vs. CapEx equation (Enterprise)

- Increased productivity

  Collaboration, Communications, Time to Market, Consistency

- Full Outsourcing through SP & Media House (No more IT barrier)

- High Quality & Secure operations thru SLAs

- Fixed monthly fee/DMP

Sales Enablement for SP's
Tools and Resource Ideation

Sales

- Top Questions for Customers

- The Executive Conversation

- Business Justification Tools

- SP's Differentiators

- Services and Support (Network Assessment, Readiness…)

- Partner Engagement

- Incentive Programs

- Communications

  - Best Practices

  - Communities of Interest

- *Use Collaboration Assets*

Business Paradigm

- Similarities to Yellow Pages business. Revitalized customer sales engagement and partnership

- SP Enterprise (retail, etc) adoption drives awareness

- Business Model Options

Customer Awareness/Input

- Biz Video Demo Center

- Video Demo Days

- Brand Awareness Campaigns

- Executive Sponsorship Program

- Focus Group/Panels for Pricing

Customer Support

- DS Impact Analytics (ROI)

Digital Signage
Target Customers for the SP

- Managed or Hosted Service

    Retail Sales

    Banking/Finance

    Healthcare

    Transportation

    Public Sector

    Food Services

    Sports & Entertainment

    Hospitality

- Enterprise

    Employee Communication

    Training

    Collaboration and Connected Workplace

    Customer Service

    Concierge/Lobby Ambassador

SP Business Acceleration Workshop
Work Streams

Customer Metrics Drive Workshop →

	Customer Demographics	Vertical Markets	Business Models & Pricing
GSP VSP	**Galster (Field)**	**Galster/Blau**	**Galster, Blau**
DMS BU	Jain (BU)	Pinyol	Jain
Cisco AT	tbd	Pryor	McDaid
SP Team	tbd	tbd	tbd
Deliverable	➢ Customer profile and market information for GTM Strategy ▪Collaborate with *SP's Sales and Marketing* ▪ Segment by vertical markets	➢ TAMs, penetration, growth forecasts, margin, SMB vs. VSE vs. Enterprise ▪Leverage Customer Demographics ▪Capture pricing and cost benefits ▪Develop high level benefit summary	➢Create Business Models relative to GTM strategy and financial goals ▪Build Model Options and input parameters ▪Cost reductions and Revenue potential ▪ROI and Montetization content
Due Date	Pre-workshop	Pre-workshop	Pre-workshop

Sales Enablement
Potential Work Streams

Post Workshop Projects →

	Sales Enablement (Workshop Output)	Sales Engagement Technical Services	Sales Support	Brand and Solution Awareness
SP Lead	tbd	tbd	tbd	tbd
Cisco Lead	Galster	Black	tbd	tbd
Deliverable	➢ ID Roadblocks, define programs and tools to drive awareness and adoption of DS. ▪Sales tools, incentives and campaigns ▪ Customers ▪ Support + Other	➢ Bandwidth Calculator ➢ Network Readiness Assessment ➢ Video Discovery Workshop	➢ Financial Discussion Tools ➢ Executive Conversation - Business Training ➢ Demo's, EBC's, POC's, Loaner Programs ➢ Partner Incentive Programs ➢etc	➢ SP Customer Demo Days ➢ Internal Communities of Interest (promote Best Practices, etc) ➢ SP's adoption of DS in retail outlets (cross leverage as demo sites)
Due Date	tbd	tbd	tbd	tbd

Service Description

- "DMS Managed Service" is contracted by End-Customer for a period of 2 to 3 years

- DMPs, DMM and CMS are provided to End-Customer by SP (SP remains the owner of the products during the entire period of Managed Service)

- "DMS Managed Service" is deployed across the IP VPN network of the SP`

- SLA for " DMS Managed Service":

  - - 4hrs for DMM (4hrs SP base) + CMS: Backup provided by SP

  - - SLA for DMP equivalent to SLA from SP IP VPN

- SP may provide LCD/Plasma Displays on customer request. With Cisco Displays, SP may provide similar SLA as for any CPE or DMP

- SP may provide as a service TV streaming content

- Pricing quotation are provided on a per/project basis (See pricing similation)

Service Description

- 1 DMM/multiple customers (possible redundant DMM)

- Enabledware Multi-tenant platform for content management, editing and scheduling

- DMM and Enabledware servers are hosted in SP Data Center

- Content creation, scheduling and distribution remain customer responsabilities or potential media house - Some SPs can provide content creation and management as an optional service

- TV Broadcasting can be provided by SP as an extra service

- SP/Partner provides training for content creation, distribution & management

- SP secures content back-up

Cisco Digital Media
Bundled Business Video Example

Digital Signage
- LCD's, DM Encoders, DM ~~ager~~ to produce media
- Remote Publishing to endp~~~~
- Optimized WAN delivery

> **Baseline Service**

Cisco
- Live E~~~~

> **Add on-demand viewing based on functional location**

Cisco Show and Share
- So~~~~
- En~~~~
- Vid~~~~
- Secure business workflows

> **Push content to targeted internal audience**

M~~~~
- ~~~~
- ~~Transcoding~~

> **Transcoding and transcription of content**

F~~~~
- ~~~~
- ~~Indexing and Key words~~

> **On-demand viewing based on text/tag search**

Telepresence
- Live v~~~~
- Realis~~~~
- VPOD opportunities

> **Live and on-demand replay of TP recordings, virtual attendant, virtual expert services**

Medianet and CDN (eCDS/CDS-IS)
Efficient content delivery