Cisco Cloud Calling offer for Service Providers

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1-24-2019
Agenda

- UCaaS Market
- Cisco BroadCloud Calling Offer
- Commercial Overview
A Rapidly Changing Market

2017 Seats Segmentation

- **On-Premise**
  - Large 500+
    - 23%
  - Mid-Market 101-500
    - 30%
  - Small 31-100
    - 25%
  - Micro <30
    - 23%

- **Cloud**
  - Large 500+
    - 21%
  - Mid-Market 101-500
    - 11%
  - Small 31-100
    - 15%
  - Micro <30
    - 53%

**Current Penetration**
- 9%
- 5%
- 4%
- 19%
- **TOTAL**
  - 21%
  - 22%
  - 17%
  - 11%
  - **15%**

**2021 Market**
- $4.6B
- $2.7B
- $3.5B
- $9B
- **TOTAL**
  - $20B

**CAGR to 2021**
- 21%
- 22%
- 17%
- 11%
- **15%**

Sources: MZA, Gartner

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The Service Provider Advantage

Market share Leadership

65% Cloud calling market share**

70% Will consider SP as UCaaS vendor***

Leading in top UCaaS buying criteria*

- Reliable service: 63%
- Security: 54%
- Good user interface: 44%
- Cost per seat: 38%
- Technology evolution roadmap: 18%

Strongly positioned to capture the shift to Cloud Collaboration

* Frost & Sullivan
** IHS Research
*** BroadSoft Enterprise Survey
BroadSoft acquisition accelerates UCaaS platform leadership worldwide

- Complete UCaaS Solution – all workloads
- Reliable communication via major SP partners
- Industry leading devices – cloud connected
- Cisco Collaboration Flex program

Ubiquitous solution for small, midmarket and enterprise
Cloud Calling Market Leadership

- 25 of top 30 Service Providers
- 25M+ Cloud Users
- #1 Market share
- 57% Cloud Call Control Share
- 600 Cloud Channel Partners
Cisco is the UCaaS platform leader
We power over 57% of the global cloud UC user base
Cisco powers over 50% of Gartner UCaaS MQ providers

First time Cisco included following the BroadSoft acquisition

Cisco BroadWorks, Cisco BroadCloud and Cisco HCS power:
• 8 of 15 Magic Quadrant entrants
• 3 of 5 Leaders Quadrant entrants
BROADSOFT CONNECTIONS 2018

November 12 - 15
The Diplomat, Miami

1455 Attendees
700 Service Provider Decision Makers
209 Service Provider Companies
55 Solutions Partners (Sponsors)

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MWC19
Barcelona
February 25-28, 2019
Fira Gran Via
Av. Joan Carles I, 64
08908 L'Hospitalet de Llobregat, Barcelona

Cisco Booth #3E30
Hall 3 Hybrid Hall
Cisco BroadCloud Calling offer overview
New: Cisco BroadCloud Calling with Webex Teams

Simplified All-in-One Package Available from Service Providers

Proven Enterprise Cloud PBX Now for Available Mid-Market and Large Enterprises

New! Cisco BroadCloud Calling

New! Flex Plan for Service Providers

New! Simplified All-in-One Package in one bill

New! Cisco Calling App
Simplified all-in-one package

Cisco BroadCloud Calling

Cisco BroadCloud Calling Premium subscription
- Full featured PBX replacement in the cloud
- Common Area and Standard Station options

Cisco BroadCloud Group features
- Unlimited subscription of Auto-attendant, Shared Call Appearance, etc

Webex Teams included
- Messaging, Screen sharing, audio and video conferencing for up to three participants

Cisco Webex Meetings

Enterprise grade meetings experience
- Meeting Room recording
- Meeting Room locking
- Remote dial-in access over PSTN

Entire Cisco Multi-Platform Phones and headset portfolio

Complete range of Cisco video endpoint selection

*select models only
## Market availability – Cisco BroadCloud Calling

<table>
<thead>
<tr>
<th>Contract &amp; International Countries</th>
<th>International Only Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>Austria</td>
</tr>
<tr>
<td>Australia</td>
<td>Malta</td>
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<td>Canada</td>
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<td>Spain</td>
<td>Switzerland</td>
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<td>UK</td>
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</table>

Nov 30th 2018 for listed country support. Others to be added on continuous basis.
Deployment scenario

Acme is a US Service Provider with an enterprise customer ‘Digital Design’ that is headquartered in Dallas with branch offices in Munich and Budapest.

Service Configuration

Regional Platform
- North America

Contract Country
- United States
- USD

International Countries
- Germany – fully localized
- Hungary – partially localized

Data Centre Locations
- US
Cisco BroadCloud Calling
PSTN Connectivity Overview

- **Service Provider Bundled PSTN – Now**
  - Service Provider interconnect to Cisco BroadCloud and responsible for bundling BroadCloud Calling and PSTN solution

- **Local Gateway to PSTN – Q1 CY19**
  - Enterprise or VAR managed edge device for signaling and PBX functionality with PSTN calls routing through local gateway or UCM cluster via local SIP Trunk or PRI
  - Partner facilitated deployment and configuration

- **Bring Your Own SIP Trunk – Roadmap**
  - Partner helps customer procure and provision PSTN, via certified SIP trunk provider interconnected directly to Cisco BroadCloud core.
  - Enterprise level interconnect to the Cisco BroadCloud core
Integrated Calling with Webex Teams

Webex Teams

Calling App

- Call from Contact
- Direct Dialing
## Supported Devices (MPP)

<table>
<thead>
<tr>
<th>Basic Product Line</th>
<th>Conference Room</th>
<th>Advanced Product Line</th>
<th>Video</th>
<th>Accessories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cisco IP Phone 6800 Series Cisco IP Phone 7800 Series</td>
<td>Cisco IP Conference Phone 7832</td>
<td>Cisco IP Phone 8800 Series MPP DECT</td>
<td>Cisco 88x5 Series Video Phone</td>
<td>Key Expansion Modules Headsets</td>
</tr>
</tbody>
</table>

### Telephony Adapters

- Cisco ATA 190 series
Webex Common Identity

- Single Identity across all Cisco Webex services
- Webex Meetings
- Webex Teams
- Cisco BroadCloud Calling
- Single Sign-On across all Webex services
- Identity sync from Enterprise to Cisco BroadCloud
- Delegated authentication from Cisco BroadCloud to Enterprise
More Features

All the enterprise features you need

Enables you to move your calling to the cloud

Meets all your business requirements

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Cisco BroadCloud Calling – Provisioning Flow

1. Ready To Order
2. Cisco Commerce Workspace
3. Calling Order in CCW
4. Entitlement Managed in Control Hub
5. Cisco BroadCloud Flow-Through Provisioning
6. Provisioning Complete
Single, centralized administration that’s easy

Cisco Webex Control Hub

Cisco BroadCloud Calling Administration
Why Cloud Calling From Cisco?

- Most experienced cloud calling provider in market globally
- Comprehensive enterprise-class collaboration suite with ONE unified experience
- Simplified all-in-one package with SP network
Cisco Collaboration Flex Plan

Cloud, Hosted, Premises & Hybrid
Separate purchasing from deployment

Subscription
Easy OpEx budgeting

Grow at your own pace
Add subscriptions and services as you go

All-in-one user based subscription
Collaboration Flex Plan
The Suite

Meetings

Cloud
On-Premises

100%
Enterprise Agreement
15%
Active User

Calling

Cloud
Hosted
On-Premises

100%
Enterprise Agreement

Messaging

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Collaboration Flex Plan
Cisco BroadCloud Calling: Where Does it Fit?

Meetings
- Cloud: 100% Enterprise Agreement
- On-Premises: 15% Active User, 0% Named User

Calling
- Cloud: 100% Enterprise Agreement
- Hosted: Named User
- On-Premises: 0%
Buying Cisco BroadCloud Calling under A-FLEX

**Top Level SKU (A-FLEX)**

- **Standalone Calling**
  - Named User (NU)
  - Enterprise Agreement (EA)

- **Standalone Meetings**
  - Named User (NU)
  - Active User (AU)
  - Enterprise Agreement (EA)

- **Combinations**
  - NU Calling + NU Meetings
  - NU Calling + AU Meetings
  - NU Calling + EA Meetings
  - EA Calling + NU Meetings
  - EA Calling + AU Meetings
  - EA Calling + EA Meetings

**Land and Expand**

Phones and Video Endpoints
Example - BroadCloud Calling Only Flex Deal

- BroadCloud Calling Transfer Cost
  - Cisco Sales Paid on Flex Portion

- Partner’s PSTN

- Partner’s $$$

= Customer’s Calling Price
  - Partner Sales Paid on Customer Deal
Partner Considerations

Commercial Considerations

• Must be able to sell the Collaboration Flex Plan – the Suite
• Must be a Cisco Cloud and Managed Service Provider (CMSP) Partner
• Partner Account is tied to a Contract Country
• Invoices provided at the Partner Account level

Technical Considerations

• Must be a regulated carrier in a country where service is offered
• One wholesale PSTN Interconnect per Partner Account
• Maintenance windows are scheduled based on the regional platform
• Must be able to take Tier One Support Calls
Partner Enablement

Understand the BroadCloud & Flex market opportunity

Define your offer

Establish contracts with Cisco & PSTN

Account creation and PSTN interconnect

Order, provision, operate & certify

GTM with Cisco

New Partner Introduction
Service creation support, aligned Cisco & BroadSoft teams and messaging, early offer insight
Summary

- Best in class suite
- Seamless migration and integration
- Safe and secure global platform
- Simple and ready to buy solutions

Visit http://www.cisco.com/go/cloudcalling