



TalkingPointz Insider Report

The Most Important Enterprise Communications News from September 2020

by Dave Michels

This is a condensed version of the full 10 page September Insider Report.

This preview report contained about half of the content found in the [full monthly Report](#). Insider Reports are published monthly at [TalkingPointz.com](#). Insider Reports are the most efficient way to keep up with industry news and trends. Highly condensed and easy to skim.

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“Are you feeling down? Isolated? Uncertain about the future? Worried about what comes next? Then you may be suffering from ... consciousness.” A tweet from [Sarah Cooper](#) that captured September for me. It’s seeping into general awareness that this pandemic isn’t ending anytime soon. Remember when EC20 was pushed from the spring to the fall? Now it’s being pushed to the fall of 2021 — and that may be optimistic. Pandemics do end, and we are all anxious for the Fat Lady to sing.

The best mitigation strategy for a highly contagious virus remains social distancing and face masks. This is much harder than it sounds. Social distancing is incompatible with a vibrant economy. Political leaders seek to balance economic and public health risks — effectively, calculated losses, though not for soldiers but civilians. The world has done reasonably well in implementing safety precautions to keep essential services running, but as we move into general reopening, tremendous confusion and misinformation remain.

As a result of all these factors, the virus is climbing again. Coronavirus cases were largely on a downward trend from July highs, but that ended in September. More than half the states are reporting an increase in cases. The death toll has crossed 1M globally (with over 20% in the US). That’s more than malaria, influenza, cholera and measles combined. And there’s no indication things will slow anytime soon. For example, Florida, despite [having the third highest number of confirmed cases](#) and the fifth highest number of Covid-19 fatalities, is moving into Phase 3 of its reopening plan, which eliminates capacity restrictions on restaurants statewide — and prohibits communities from setting more stringent restrictions.

Despite this, there’s still a lot of debate over appropriate precautions and risks. Face masks are particularly polarizing. Health professionals insist they help, but there’s widespread refusal to accept the science. It’s not just the virus; there’s basically a general war against science. We are living through a golden age of both readily available facts and denial of those facts.

Name your poison. Would you like to debate face masks, evolution, whether US police officers mistreat Black people, or if vaccines cause autism? Are those too controversial? How about if Earth is flat? Despite scientific evidence and consensus, false information thrives. Kellyanne Conway was prescient when she used the term “alternative facts” in January 2017 in defense of Spicer’s inaugural attendance claims. There are indeed alternative facts available to anyone, for any side of any topic — validation has never been easier.

[Post continues in full version]

Have you heard? [Real-Time, Recorded](#) is a new weekly short video about industry news. Sometimes news can’t wait for the Insider Report. **Dave Michels** and **Zeus Kerravala** provide what you need to know in a weekly 10 minute video.

General News

Big Tech Backlash: There's a rebellion forming against big tech. September's headlines included the following: Italy's competition watchdog [launched](#) an investigation into Apple, Google, and Dropbox over cloud storage. The Australian Competition and Consumer Commission launched an [inquiry](#) into Google and Apple's app stores. Canadian lawyers [filed](#) a class action suit against Google for perceived abuses in how it handles personal information. Irish regulators [started](#) an inquiry into Facebook's movement of data from European users to the US. Australia and Facebook are in a [standoff](#) over news. Even here in the US, [it appears](#) the Justice Department may file a suit against Google. These are largely governments vs. tech. There's no indication yet that organizations or individuals are fed up, but I expect that will change.

Microsoft Duo Phone: Microsoft continues to come up with innovative smartphone failures. The Duo phone is an Android phone with three screens. It's more expensive than a folding display phone and less practical at the same time. A mainstream Microsoft-branded Android phone seems like a no-brainer to me. #TooObvious?

Apple Event Reality: Apple announced updates to its Watch and iPad lineups that were moderately interesting if you care about watches and iPads. More interesting was the underlying unspoken theme of augmented reality (AR). The new A14 chip in the iPad Air is a 16-core neural engine with advanced image processing. Even the A12 chip, now in the iPad 8th Gen is marketed for AR. The new Watch Series 6 has Apple's U1 Chip with spatial awareness. The new djay Pro app uses gestures to control music and the SwingVision app analyzes your tennis swing. The new Apple Fitness + Watch is to provide personalized workouts.

Microsoft for Operators: Cloud opportunities are transforming Microsoft from a B2B company into a B2C company — as in Business to Carrier. Microsoft launched Azure for Operators, a new initiative aimed at network operators that combines cloud, 4G/5G cellular, and edge. This is positioned for always-on, always-connected applications and devices — a category that's growing now and that's expected to accelerate with 5G. The solution uses acquired technologies from Metaswitch and Affirmed Networks.

Microsoft Ignite: Microsoft hosted a virtual Ignite, its annual conference aimed at IT pros. Many of the announcements relating to enterprise comms are covered below.

Perhaps the biggest surprise didn't come from the Teams team: Azure Communication Services now offers a new set of APIs that give developers access to video, voice, chat, and screen-sharing services. Microsoft suggested the new service is what powers Teams. (That's a bit suspicious, as APIs can come to market much faster than applications built on them. For example, Vonage built VBC on its CPaaS infrastructure.) Also, Dynamics 365 and Azure Communication Services are introducing a voice channel. This development effectively adds omnichannel capabilities to Dynamics as a scalable, single-vendor solution.

When ACS becomes GA, Microsoft becomes a CPaaS provider. The category is mostly associated with Twilio and Vonage, but it's getting crowded. Other CPaaS providers include Avaya, Bandwidth, Mitel, and Plivo. This initial version of ACS is largely limited to modalities found in Teams, so the headlines calling it a "Twilio killer" are premature at best. For starters, Twilio offers an extensive catalog of services and integrations such as WhatsApp, email, and advanced contact center technologies. Nonetheless, it's an intriguing development from Microsoft.

I also want to touch on the new Wellbeing programs announced in Teams, which offer a fascinating intersection among Microsoft value propositions. Office 365 has always been about an integrated experience. The marquee applications of Outlook, Teams, Edge, and Office work together seamlessly, and the interactions provide valuable data. MS Graph makes use of that data, enabling AI-powered features and behavioral analytics. Microsoft is now using data to identify unhealthy patterns such as working too much — and that's been a legitimate issue during the pandemic.

MS Graph watches more than hours logged. It also gauges who you are interacting with, how frequently, and the tone used. There's a Big Brother feel to MS Graph that is in conflict with "Microsoft believes privacy is a fundamental human right" — a line touted in several Ignite sessions related to customer data belonging to the customer. Microsoft does not sell customer data or use it for targeted advertising. But can a company that analyzes every keystroke still tout privacy?

Along these lines was the new Customer Key feature for Teams. Customer Key allows IT managers to secure data stored in Teams with their own encryption key. It's an added layer of protection that can help with compliance matters — but there is still no way to keep your Teams data secure from Microsoft.

Twilio Signal: Twilio went all out at this year's Signal conference. The program lineup included Barack Obama, Trevor Noah, and Bill Nye. There were five major announcements: WebRTC Go, Event Streams, Microvisor, Flex Ecosystem, and Frontline. I didn't hear "monolithic" in any of the keynotes.

WebRTC Go is a new offer to simplify 1:1 video. It's a simplified/productized implementation of WebRTC, optimized and secure for enterprise uses. The **Flex Ecosystem** offers a collection of partners ready to make Flex better. Launch partners include Google CCAI, Salesforce, Zendesk, and Calabrio (plus 26 more).

Developers can now subscribe to a stream of updates. **Event Streams** supports multiple types of events. Initially it works only with AWS Kinesis, but other systems will be added. **Microvisor** simplifies networking for IoT devices. This is associated with Twilio's acquisition of Electric Imp — identified in last month's Insider Report. Looks like Twilio is expanding into embedded systems.

I think most interesting is **Twilio Frontline**, a mobile app (not an SDK) for deskless use cases. It leverages the Twilio Conversations API (launched last year) and provides a way for customers to directly connect with frontline (essential) workers. These routes can be fixed or just-in-time. It allows a customer to directly reach a particular employee or employee role. The app supports voice, SMS, wireless connectivity through Super SIM, TaskRouter and more.

Meetings

MS Ignite Meetings: There were a number of announcements related to Teams meetings at Ignite. However, Teams played a less dominant role than prior Ignites. Most of the improvements are evolutionary. For example, the ability to create tasks from chats, stream playback improvements, and more Together Mode backgrounds. Microsoft improved the ability to customize meeting layout. Among the more significant Teams announcements are a new survivable gateway solution, a meeting recap feature that automatically collects and centralizes content and artifacts from meetings, a prejoin experience to select and test A/V settings, and an improved search capability.

There were several announcements that seemed inspired by the pandemic. These include touchless at-office meetings facilitated by the use of a personal smartphone as a controller, voice control through Cortana, and Teams casting for wireless sharing. There were some wellbeing features that leverage MyAnalytics to identify personalized recommendations intended to improve productivity and wellbeing — such as a virtual commute(?) at the start and end of the business day. Also, there were several announcements related to frontline workers (now redubbed "essential workers"), including scheduling tools and a walkie-talkie feature. Microsoft Whiteboard — separate but integrated to Teams — now supports sticky notes.

With a look to the future, Teams will soon support break-out rooms. This is a critically important feature for distance education. A more streamlined/integrated approach to live events and webinars is coming later this year. New apps were released for (Windows and Android) MTR.

Microsoft continues to roll out new features on Teams, particularly related to Meetings. While the client is becoming very rich, the meeting experience on a browser remains very limited.

New Hardware for Teams: Poly announced its G7500 is now Teams Certified. New collaboration bars were announced from **AudioCodes** and **Yealink**. **Lenovo** announced the ThinkSmart Hub room controller which is already packaged in a new AudioCodes MTR bundle. Microsoft announced Intelligent Speakers that supposedly enable speaker attribution in shared rooms. Microsoft launched a FastTrack program for meeting rooms along with a device as a service (US) program. Still no collaboration bar from Logitech, though it seems inevitable. Still surprises me that Google itself does not support Android-based room systems.

Microsoft also previewed a new solution for panels that can be mounted outside a meeting room. The panels display room reservations and can also assist with space management. The device shown at Ignite was the next generation of the **Crestron** panel. It's an Android-based tablet built for purpose. This is an incremental upgrade for Crestron's Flex line, but those panels typically run Crestron software. In January, the panels will be able to run Microsoft Teams software. Yealink and others are expected to join the party too.

Panels have historically been separate but integrated solutions. In the cloud era, adjacencies are becoming logical service expansions. It's a reasonable move for table-top controller manufacturers to move to the exterior wall. With Crestron it's quite literally the same hardware. I expect to see more vendors make the same journey.

Reviews: See these TalkingPointz video reviews of the [Poly Eagle Eye Cube](#) and the [Cisco Desk Pro](#) on TalkingPointz. Facebook Portal Review coming soon. Also, see [Put Teams Devices on Hold](#) on No Jitter.

Engagement

CX Summit: Five9 hosted a virtual CX Summit and announced the GA of Agent Assist and Virtual Agent and a new framework for recording dubbed VoiceStream. Agent Assist and Virtual Agent are becoming familiar topics, at least in terms of websites and brochures. Despite the power of Google CCAI, virtual agents and agent assist solutions remain limited. Five9 is working to cross the chasm with its own integration of CCAI and Inference Studio to simplify the use of virtual agents. Regarding agent assist, Five9 developed a summarization capability (assisted summarization) that could improve logging and reduce post-call agent work.

VoiceStream is a new cloud-to-cloud framework that will enable partners to request audio, text, or intents via API calls. While recording is more common than ever, it's not easy to securely share the content. It will be interesting to watch how VoiceStream matures and whether the architecture expands beyond Five9. [More on No Jitter](#).

Genesys Updates: Genesys continued with organizational changes this month: a new CFO, significant restructuring of marketing, and a new "VP of Multicloud Commercial Operations." In a [TalkingHeadz podcast this month, CEO Tony Bates explained](#) that many of the recent changes were to position Genesys for significant growth. Also this month, Genesys Cloud introduced Sentiment Analysis with the claim that 700 customers used it to analyze 2.7M words in one hour (my general experience with TTS has me thinking it was 2M words that sound similar to what was spoken).

AWS Connect APIs: Two new APIs for Connect were announced. The first lets users programmatically create or update routing profiles. This can enable dynamic routing conditions. A contact flows API allows admins to programmatically configure and test contact flows such as among development, staging, and production environments. Amazon also lowered outbound telephony rates globally.

Unified Communications

RingCentral Expands in Europe: RingCentral announced a new datacenter in Frankfurt and a new office in Hamburg, Germany. As UCaaS providers expand globally, there's a chicken-egg thing with opening new markets. RingCentral's alliances (Avaya, Atos, and ALE) reduce the risk associated with expansion.

Germany, in particular, has a number of requirements. RingCentral's new datacenter in Germany will offer customers local data storage and the ability to keep voice and video call media local. All team messaging, voicemails, audio and video recordings, call logs, faxes, and analytics data will also be stored locally. Additionally, RingCentral complies with the European Union's requirements of Cloud Computing Compliance Criteria Catalogue (C5), which is a baseline of security controls that was developed by the Federal Office for Information Security in Germany.

Unify Office Available: Atos and RingCentral announced that Unify Office is now available in France and Germany with availability in Austria, Belgium, Ireland, Italy, Spain, and The Netherlands coming soon. Unify Office by RingCentral can be purchased directly from Atos and will be available from its in-region partners, including Itancia and BusinessCom.

Messaging

Productive Teams? Microsoft Teams now integrates with **Prodoscore**. This will give managers better visibility into (distributed) team productivity. Prodoscore provides a productivity score after passively assessing conversations across multiple channels (including email, voice, CRM activities, and messaging) and applications. Prodoscore's suite of integrations also includes Dialpad (this month), RingCentral, Vonage, Salesforce, and G Suite.

Avaya Spaces: Avaya introduced more updates to the messaging components of Spaces. Participants can now see if a user is typing. Also, there are new filters, dashboard improvements, improved notifications, new UX colors, and Dark Modes.

Acquisitions

Dialpad and Highfive: Dialpad announced that it acquired video conferencing provider Highfive. It's a nice fit. Both are cloud-native, Silicon Valley companies. Dialpad had a limited video capability within its UberConference brand, but Highfive brings a more robust solution based on WebRTC and a very innovative approach to room systems. Dialpad has a robust telephony solution, AI from its 2018 acquisition of TalkIQ, and now a strong video capability. Highfive was rumored to be in play. Verizon acquired BlueJeans just a few months earlier. Meetings technology has become critical in 2020, and most expect WFH to remain popular for years to come. Terms were not disclosed.

Financial News

Avaya Debt Changes: Avaya took advantage of low interest rates to restructure some of its debt. This was previously announced and now closed. The unit closed an offering of \$1B in senior first-lien notes due 2028, bearing interest at 6.125% per annum. Proceeds were used to repay outstanding indebtedness under its existing senior secured first-lien term loans due December 2024. And \$800M of those loans that were not repaid or repurchased extended maturity to December 2027. Avaya has also extended the maturity of its asset-based revolving facility to September 2025, from December 2022, and reduced commitments there to \$200M from \$300M.

Asana enjoyed a double-digit rally on its first trading day (September 30) with shares settling at \$28.80, giving it a \$4.86B market valuation. The software provider for tracking group projects was given a reference price of \$21 before it listed directly on the NYSE.

Replicant announced it raised \$27M in a Series A round led by Norwest Venture Partners with participation from returning investors Bloomberg Beta, Costanoa Ventures, and founding investor Atomic. Replicant offers contact center automation with human-like interactions. Replicant was founded on the belief that machines are ready to have useful and complex conversations with people to transform customer service. It's Co-Founder and CEO, Gadi Shamia, was previously associated with Talkdesk.

Observe.AI raised \$54M in a Series B round led by Menlo Ventures, along with participation from Next47 and NGP Capital. The startup provides AI-based transcription and analytics software for call centers. The latest round brings the total capital raised by Observe.ai to \$80M.

This Month's Goodreads

1. [Pagers, Pay Phones, and Dialup: How We Communicated on 9/11](#)
2. [Zoom Invests in Big Messaging Upgrade in Challenge to Slack](#) (\$) (refuted by Zoom)
3. [A fight over freedom at Apple's core](#) (\$)
4. [My semiconductor conspiracy theories](#)
5. [Facebook Says it Will Stop Operating in Europe If Regulators Don't Back Down](#)
6. [Bill Gates Just Explained How He Used 'Negative Praise' to Lead Teams at Microsoft, but Only the Best Leaders Can Copy It](#)
7. [Facebook adds more guidelines for internal employee speech, banning political images in profile pics](#)
8. [Did Alexa ever stand a chance?](#)
9. [The looming legal minefield of working from home](#) (\$)
10. [What the Hell Happened to Skype?!](#) (video)

More Stuff

Listen to the two [TalkingHeadz Podcast](#) interviews of September: [Noreen Allen, CMO of Bandwidth](#) and [Tony Bates, CEO of Genesys](#). Subscribe to TalkingHeadz on your favorite Podcast app.

Next TalkingPointz Research Note: A Deep Dive on RingCentral

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