An Insider's Guide to Enterprise Communications News
by Dave Michels

Here's what's important from June 2019 . . .

Events

The **Cisco Collaboration** team used the **Cisco Live** customer conference to make a variety of announcements. Cisco's cognitive collaboration strategy was visible throughout the diverse announcements. Webex Teams received most of the attention including integrated calling. It can also now register to CUCM and HCS environments in addition to the Webex Cloud. Jabber now has a Webex Teams UI to facilitate premises to cloud migrations. Webex Meetings got People Insights, virtual name tags, and transcriptions. Webex Control Hub improvements included granular administrative control related to workflow integrations.

The Customer Journey Platform was renamed Webex Contact Center completing the Webex brand's transformation from product to cloud suite. The CC service also got improved integrations with Salesforce, Dynamics, Zendesk, and ServiceNow. New Webex Teams data centers were opened in London, Amsterdam, and Frankfurt. Webex Calling support was extended to 41 countries (global service supports 5 currencies and 7 languages).

Cisco's collaboration portfolio is very broad: meetings, calling, hardware, and CC — all of which are global and span premises, hosted, and cloud. As a result, a set of announcements like this can appear random. The important observation is that the company is moving aggressively in the three most disruptive areas in enterprise communications: AI, CCaaS, and video.

It was nice to see Teams get so much attention in June. There were hardly any updates earlier this year. Workstream Collaboration remains a critical component of enterprise communications, but meetings and CCaaS are setting the agenda.

Xperience19: Genesys hosted its newly branded user conference at the new Denver Gaylord. Genesys announced Genesys Cloud, which is its new cloud-first offer as its primary solution. Genesys Cloud is largely built on and around PureCloud, but it is also intended to support PureConnect and PureEngage for private cloud services as well as supplemental services for premises-based deployments.

Genesys Cloud can largely be described by Genesys AI. The majority of these modules are delivered via AI technologies that it owns. The major exceptions are Google AI for CC (not yet implemented) and third-party assistants that can operate in its chatbot framework now known as Kate.

It's a significant refresh from a marketing perspective, not so much from a technical perspective. Over the past several years, Genesys has worked hard to brand PureEngage and PureConnect as related but separate options to the acquired PureCloud brand. Now, instead of three options, it's Genesys Cloud — confusingly described as a "single platform." Kate has gone from a comprehensive AI umbrella to a relatively minor component of its AI portfolio. Big changes in messaging, but the product portfolio remains largely intact with reasonable incremental upgrades.

Tony Bates, named the new CEO a month before the event, was in attendance, but did not share how his leadership may impact the Genesys we know. See my #Xperience19 event video here.

Kazoocon is the annual provider customer conference for 2600Hz and its Kazoo platform. Several soft announcements were made, but no press releases were issued (2600Hz is an engineering-oriented company). The biggest announcement was a new wholesale partnership with T-Mobile Business. Now its service providers will be able to resell GSM data services. Kazoo offers some integration, but calling integration is only available via its partnership with Sprint. T-Mobile's GSM approach offers more devices. Resellers are likely to embrace T-Mobile primarily for Internet data services. Other news: a new App Exchange was launched to promote a more vibrant third-party ecosystem, a new user portal was made available for self-service, and a new soft client and a new WebRTC softphone was launched — the two will merge soon. Also, 2600Hz continues to evolve its voice-only Call Center Pro application.

The platform has received some renewed attention related to Cisco's acquisition of BroadSoft. Larger provider customers include Avaya and Ooma. PGi was also in attendance this year. Kazoo has roots as an open-source platform, but most of its new services are closed.

#Flex19 was a #FutureofWork thought leadership event in Boston hosted by **Fuze**. It was a one-day event that focused on the emerging opportunities and challenges of flexible work. The majority of vendor events I attend are promotional, but Fuze only moderated (well, a few presenters didn't get the memo). The speaker lineup was impressive and included a UN Director and Samsung's US President. The sessions are available online here.

I find it odd that many people still go to offices to work. Clearly, my reality is skewed as a self-employed, tech entrepreneur. The change from offices to homes/other is really as big as the change from farms to factories. Below, in the section on other news, Mary Meeker says that only 5% of the US workforce works remotely, and that number is higher than in other countries.

Distributed and flexible work is not about technology. This brings me to a video interview with **Bill Gates** posted by The Verge earlier this month. Around the 52:50 mark, Gates addresses online education and shares that several majors are easily self-taught such as physics and computer science. Books and other self-education solutions are good, but don't foster motivation. "We have to solve not just the cost thing through digitization, but also the framework of motivation." I believe this equally pertains to distributed work. Office workplaces provide both a social motivation to work as well as to not work too much. See my Flex19 post on NoJitter.

Visual Communications

Lots of video news this month related to InfoComm taking place in June...

Poly announced the G7500 mid-large room solution featuring advanced audio features, wireless content sharing, and Ultra HD 4K video. It also features infinite whiteboarding, where users can write over content, use the screen as a whiteboard space, and capture for later use. The G7500 is a long overdue update to the Group Series portfolio, with a nod toward market shifts with USB support. A single USB connection to a laptop turns its A/V capabilities into USB peripherals. The box has some interesting specifications which suggest some future features are coming. Poly released the Studio in March, so that's two new room solutions in 1H19, and I expect there will be more.

Logitech introduced a new video device management platform called **Sync**. The solution simplifies large-scale video deployments. It is a cloud-delivered service accessed from a browser. Sync provides firmware updates and will support insights and analytics. Sync also integrates with popular platforms from video cloud vendors, system integrators, and other large enterprise management tools. Logi has enjoyed spectacular growth, largely associated with Microsoft and Zoom, by selling dumb USB peripherals. That was cloud; today's cloud increasingly leverages intelligence at the edge. For example, Logi's recent support of auto-framing requires powerful hardware and software — and that leads us to a need to upgrade, manage, and report with scale. Of course, some of those responsibilities exist within Microsoft and Zoom, so Sync must add distinct value without duplicating effort.

BlueJeans unveiled the next generation of its BlueJeans Events livestreaming. The new platform for large presentations, webinars, training events, and executive town halls can host up to 15K participants — who do not need to download an app, but also works with BlueJeans mobile apps and room systems. Livestreaming is a critical, but generally overlooked enterprise communications capability. Thirty years ago when I worked at IBM, they installed the IBM Network on televisions throughout the campus. Employees had to stand in hallways to see and hear company views. Other than in-person meetings, livestreaming is the most effective and cost-efficient means to communicate internal news.

Separately, BlueJeans announced improvements to its mobile experience. BlueJeans added **Dolby** Voice audio technology to its mobile clients. The update is intended to address background noise that is common with mobile use cases. BlueJeans claims the upgrade offers improved noise reduction and support for spatial audio.

Dolby and LogMeIn's **GoTo** also announced a new partnership and the GoToRoom System. The collaboration will combine the GoTo meeting service with Dolby's room system equipment and audio processing technology. The partnership also creates a new Room-as-a-Service (RaaS) OpEx offer for the necessary hardware and software. Dolby's brand extends nicely to its advanced conferencing capabilities. It helps its partners create a differentiated experience. Dolby has partnered with other UCaaS and video providers, but GoTo is the first combined UCaaS/video provider. That could signal more services coming from GoTo that are enhanced by Dolby Audio.

Lifesize Go is a new, free video conferencing service for up to eight participants. No downloads required (desktop) and no restrictions on meeting length. Participants can generate a one-time meeting link from the Lifesize Go web

app and invite others via email, SMS text message, or chat. It's a freemium model that offers more advanced features for a fee. Upgrades offer support for up to 300 participants, team directories, streaming and recording options, 4K video systems, and wireless screen sharing. It's a reasonable response to Zoom, but Zoom's free plan does not restrict features — only the length of the meeting.

Jabra announced PanaCast as a panoramic-4K plug-and-play video solution. It offers 180-degree panoramic vision powered by three 12-megapixel cameras working as one. It also features built-in people detection technologies to capture usage and occupancy information. An upcoming Jabra PanaCast API will allow developers and partners to query the system for real-time information, such as people count data. The announcement follows the February acquisition of Altia Systems. The Panacast MSRP is $895 US. I can't say I've tried it (yet), but the 180-degree field of view seems unnatural.

Pexip announced new branding related to its acquisition of Videxio. The new logo is]Pexip[. The new brand pivots around the concept that Pexip is a portal for communications and connections. The new logo is a graphical representation of said portal and is intended to communicate that Pexip connects people, places, and technology. If you have any further questions, contact }TalkingPointz{ (brace for it!).

Intel announced a cloud-delivered version of its **Unite** content-sharing application. The content-sharing industry and the video conferencing (AKA meeting) industry are on a collision path. Companies that turn to both have different solutions for sharing content if all participants are local. The barriers between the sectors started to fall with Webex and Lifesize Share products — small HDMI solutions designed for wireless sharing. The meetings industry has the wind in its sails as more and more meetings are distributed and the licensing/consumption becomes flat rated.

Intel hired Jason Goecke as its new GM (Cisco/Tropo), partnered with cloud providers, and repackaged Unite as a service. The goal is to be a universal connector to all room devices and apps such as whiteboards, cameras, and calendars. Think of it as a universal remote disguised as a room. Yet another giant company moving into enterprise collaboration. Intel brings with it a strong brand and channel.

AV1: Cisco unveiled its real-time, high-quality AV1 encoder this month. AV1 is positioned to be the next-generation codec. The next generation tech comes at a cost, so we have been stuck between VP8/VP9 and H.264/H.265 for some time now. The Alliance for Open Media (AOM) was founded in 2015, and unlike WebRTC efforts, included the support and sponsorship of all the major players including Google, Mozilla, Cisco, Microsoft, Netflix, Apple, Amazon, and Intel. The new AV1 specification enables royalty-free codecs for streaming and conferencing that are optimized for real-time communications. This month, Cisco publicly demonstrated AV1 on commodity hardware including 720p30 camera video at half the bandwidth of H.264.

Learn more about AV1 in this TalkingHeadz (video) interview. Expect to hear a lot about AV1 in 2020.

Verizon now offers **Zoom** meeting services. There are no data or LTE minutes charged to access Zoom from a Verizon mobile device.

Amazon Chime achieved HIPAA eligibility. Chime can now be included in HIPAA-eligible workloads if a Business Associate Addendum (BAA) is in place with AWS. Meeker's 2019 Internet Trends report points to an emerging trend in digitization in healthcare. I expect Vonage and CenturyLink to drop Chime, and Mitel to add it.

Customer Engagement

Talkdesk unveiled Boost to allow customers with premises-based ACDs to leverage its services. It keeps the existing ACD on site, and supports access to a range of advanced cloud-delivered CCaaS features via SIP trunks. Boost creates a low-friction entry to the cloud in a way that also makes use of existing (sunk) PBX and/or ACD investments. The approach also may allow customers to bypass structured purchase/upgrade processes.

It always seems strange to me to separate the ACD from the contact center, but it's not uncommon. This goes a step further by linking the existing, onsite ACD to Talkdesk services via SIP trunks over the Internet. It's cleaner to keep the ACD in the contact center — in the cloud or not. It's certainly clever and there are situations where it could make sense. Customers/channel partners need to carefully evaluate the complexity/benefit trade-off.

New with Amazon Connect: Amazon announced several new capabilities for Connect. A new feature makes it easier to preview, modify, publish, and rollback versions of flow. Amazon has bundled its Transcribe, Comprehend, and Translate APIs into AI-Powered Speech Analytics for Connect.

Edify, a startup provider that launched at Enterprise Connect, announced GA of its Huddle platform. Huddle puts an emphasis on agent collaboration and omnichannel communications. Edify stands out in many ways: hosted across both AWS and Google Cloud data centers, strong SLA, low-cost omnichannel services, and a freemium model with the first 5 users free. The company has a broad vision that includes UCaaS and CCaaS. The company has not yet announced any customers. Both Ovum and DMG Consulting have published endorsing reports associated with the launch of Huddle.

Cyara launched an Accelerator for Amazon Connect that can assist companies with migrating their contact centers to Amazon. A free trial is available. I expect automation companies such as Starfish, VOSS, and Unimax to reinvent themselves as cloud-migration specialists.

8x8 launched a stand-alone CCaaS. 8x8 was early with hosted contact center services. It was back in 2011 that it acquired Contactual, and then bolstered that service with its 2015 acquisitions of DXI and Quality Software Corp. It has been steadily ramping its contact center sales, and has been attracting staff from Five9 and Talkdesk.

The new offering includes ACD, IVR, omnichannel, dialer, reporting, customer journey analytics, quality management, speech analytics, surveys, and knowledgebase. The plans include minutes for each agent, and offer several pre-built CRM integrations. Additionally, 8x8 announced Customer Journey Analytics and an Expert Finder feature. Expert Finder demonstrates how several components come together. On the surface, it is team messaging, but it uses AI/ML (from acquisition of MarianaIQ) to improve the search and ranking of interactions (rooms and experts) and extends to external messaging platforms (via Sameroom acquisition).

Avaya expanded its integration with Afiniti to apply behavioral pairing to outbound campaigns and digital customer notifications. The partnership has benefited both firms and gives customers a low-risk method to trial behavioral pairing. Meanwhile, the Afiniti-Genesys partnership seems to have ended. Genesys was heavily promoting its own behavioral pairing technology as a part of its Intelligent Cloud. Afiniti was not at the Genesys Xperience19 conference earlier this month.

Selligent announced a partnership between its Marketing Cloud platform and Genesys. The integration offers AI-powered personalization based on past interactions, consistency across touchpoints, and improved customer engagement with proactive data and care. For the past decade, marketing cloud services have been watching CC solutions battling with CRMs over customer engagement. It was just a matter of time until the marketing cloud got in on the act, and Selligent is backed by former CC professionals.

Apple iMessage and Shopify: Apple's iMessage-based Business Chat feature is now promoted through Shopify. More specifically, the Shopify Ping app for customer communications gets iMessage support (it already had Facebook Messenger). Apple Business Chat will be available to all of its 800,000-plus storefronts around the world. The answer is more islands, not a boat.

UC and UCaaS

Yamaha UC announced the YVC-330 that features "SoundCap technology" for masking background noise in open workspaces. It features USB (with PoE), Bluetooth, and NFC.

Voyant announced a number of customer experience enhancements to its UCaaS customer and partner portals. Customer portal updates include wildcard number blocking and FTP support for faxes and call recordings. The partner portal updates include improved import function and the ability to restore deleted users.

Konftel won a Product Design Red Dot Award for the Konftel 800 conference phone. The beamforming saucer device was unveiled earlier this year and will go on sale in the third quarter of 2019.

Messaging News

Teams updates: Microsoft releases updates to Teams at a regular pace. Teams is now included in more installations by default. Office 365 Business and Office 365 ProPlus users get Teams installed by default because "working together on projects is important to pretty much every company."

That is, unless working together is bad. Teams is also introducing Information Barriers that limit which individuals can communicate with each other. Also, admins and team owners can now control if private teams are discoverable.

Meeting organizers get improved control over lobby settings. A new unified toolbar reduces in-meeting screen clutter. Meetings in Chrome now support content share. Other updates include the expansion of group chats to 100

people, new Announcement messages stand out, updates are streamlined with reduced network impact, and there's an improved integration with GitHub.

Workplace by Facebook continues to evolve from a social tool into a workstream tool. The company continues to add features that separate it from its consumer/social heritage. Workplace now offers rich integrations (Dropbox, Box, SharePoint, OneDrive, and GDrive) and many other content-related features via its new Workplace Experience UI. Also, Search was improved, a new DnD setting was enabled, and a new tab was added for shared content. Workplace can also manage profile attributes from Azure and G Suite.

I am not a user of Facebook and question its contribution to society. However, I am increasingly impressed with Workplace. With the removal of advertising goes the incentive to track, harvest, and abuse personal information. The platform, as a tool for business communications, is very robust. It sits somewhere between Yammer and Teams which somehow makes more sense than Yammer AND Teams. The team is doing an impressive job of building out enterprise requirements (SSO and app integrations) while still maintaining the familiarity of Facebook (meaning reduced training and increased adoption). There's a strong contrast between Slack and Workplace, allowing both to flourish while Teams conflicts with both.

Mio published its Workplace Messaging Report 2019 which provides survey results about messaging solutions. Two notable data points: 65% of Office 365 users said they use Slack. I always thought Slack's strength came from outside Microsoft's base. Also, Slack and Webex Teams tied (31% each) for preferred UI, where 22% of respondents favored Teams.

Skype mobile clients got screenshare in June. Screenshare is a very popular desktop feature, so I had assumed it was already in the mobile apps. On the other hand, I've never had a need to share my mobile screen. Perhaps this change now, in 2019, further validates that mobile devices are increasingly being used as desktop replacements.

Slack opened its beta for shared channels. I am not a fan of shared channels and consider it a limitation for Slack (and MS Teams). Multi-organizational collaboration is stronger today for Webex Teams and Atos Circuit, and is expected to be strong with Google Chat.

Line hosted its annual conference in Japan and made several new announcements. Line is one of the most prominent tech companies in Japan, with a chat app that virtually everyone there uses and that is expanding into a platform for a variety of services from ride-hailing to personal finance. Line continues to diversify from its messaging service heritage with several new announcements. In terms of fintech, Line Pay is a popular digital wallet, and Line Score is a new AI-driven social credit rating system tied to Line Pocket Money lending services.

With regard to AI, Line Duet, a virtual assistant bot similar to Google Duplex, is already making reservations at popular Japanese restaurants. Line Brain, which powers some Line services, will be available to license for chatbot, OCR, and speech-to-text products. Other news includes Line's Mini App platform that lets companies provide cut-down apps that don't have to be downloaded. OpenChat is a new feature designed to let people use and manage multiple group chats more easily. Lastly, Line is expected to launch its own cryptocurrency in Japan later this year.

Vonage partnered with **Sendinblue**, a leading provider of cloud-based email marketing and marketing automation technology. The partnership brings rich email communications to the Nexmo portfolio. Also, Nexmo becomes the exclusive SMS provider for Sendinblue (which sends over 5M messages a month). Sendinblue is currently sending over 100M emails per day to +80K users. Ironically, solutions like Slack are making email more useful as they remove internal chatter from the inbox. Despite all the "Email is Dead" nonsense, this move makes a lot of sense as did Twilio's move/integration with SendGrid.

Freshworks integrated messaging via **Nexmo**, the Vonage API Platform, directly into its Freshdesk customer support software. The integration enables business messaging with customers on SMS, MMS, WhatsApp, and Facebook Messenger through the existing Freshdesk ticketing system.

RCS Chat, hosted by Google, is starting to roll out in the United Kingdom and France. It requires Google Messages (Android only) as the default messaging app. Evidence of the rollout is appearing in various articles and Reddit discussions, but there is little information available from the carriers or Google. Rich universal messaging is a game changer. Unfortunately, RCS still lags in the rich department, and the universal aspect isn't even on the horizon.

Gmail gets dynamic: Google announced that Dynamic Email will start to roll out to Gmail users on July 2. The goal of Dynamic Email is to allow app actions within Gmail. First, this less app-switching goal is consistent with changes with Slack, Teams, and others. Second, Google is consistently approaching comms/collab from a Gmail-centric perspective.

West Corporation is now Intrado: The company has made so many acquisitions that a rebranding is reasonable. The new brand came with the tagline "Information to Insight." The Company has also realigned its operating segments into four categories: Life & Safety, Enterprise Collaboration, Digital Media, and Health & Wellness.

Twitter came up with a Trump policy. As enterprises connect more of its employees with messaging-centric tools, the open/censor point will become a common concern. Twitter's contain-not-censor policy is an interesting option.

Other News

Is the cloud over? For years, it's been all cloud, all the time. Companies with premises-based solutions were happy to sell them, but publicly positioned them as a path to the cloud. However, it seems that pure cloud is losing its mojo. The hybrid announcements keep coming: Azure Stack, AWS Outposts, Google Cloud Anthos, SAP HANA. In enterprise comms we saw RingCentral introduce Persist and Talkdesk Hybrid Spaces. This month may be the tipping point. First Google acquired Looker, and then Salesforce acquired Tableau.

The "legacy" sentiment against vendors such as IBM, Dell, HPE, and SAP seems to be neutralizing. The pendulum always swings, but the timing is hard to predict. The Salesforce news may be the inflection point. After all, Salesforce was established as the anti-software company (meaning all SaaS).

Realistically, prem vs. SaaS is too simplistic. Tech has changed, and new equipment is designed for cloud services. Also, improvements in technologies such as Kubernetes bring cloud benefits to traditional software. The premises-based vendors are still adapting to the cloud, but most of the cloud providers haven't even started their journey toward premises-based.

Mary Meeker did her annual presentation on Internet trends. She presented 333 slides at the Code conference. Way too much for me (or her) to adequately summarize, but here's what I found relevant to enterprise communications:

- 51% of the world is now connected. That's up from 49% last year and represents about 3.8B people.
- 7 out of 10 of the most valuable companies (market cap) are tech companies. Microsoft*, Amazon*, Apple*, Alphabet*, Berkshire Hathaway, Facebook*, Alibaba, Tencent*, Visa, and Johnson & Johnson. Note, that 6 (*) of the top 10 most valuable companies are active in enterprise communications. Also, Samsung ranked at 20, Cisco 22, AT&T 24, and Verizon 25.
- Customer acquisition costs are going up — in some cases higher than the long-term revenue they can deliver. Cheaper methods to acquire customers are necessary and include cross-vendor promotions, freemium models, and free trials. (Note: This year's starts Slack and Zoom use Freemium.)
- Images are increasingly associated with communications. More than 50% of Twitter impressions have an image or video.
- 87% of Internet traffic is now encrypted, up from 53% three years ago.
- Remote workers are increasing, and currently account for about 5% of the US workforce.

Vendor callouts:

- Slack and Hello Fresh were called out for team-first, organization-first approach to communications as opposed to individual first. Hello Fresh uses Slack bots to monitor social media.
- Twilio and Shopify for multi-channel communications. Customers can interact via phone, text, chat, mobile apps, WeChat, WhatsApp, and Facebook Messenger. Twilio enables one tool, and Shopify uses them to create a consistent experience.
- Zoom for success with its freemium model. "We make our freemium product work so well...if they like our product, very soon they are going to pay for the subscription."
- Google for a different variant on freemium, adapting free Google Apps to paid G Suite subscriptions.

iPadOS was one of the more interesting announcements at the Apple WWDC developers conference this month. Up until now, the iPad and the iPhone shared the same operating system. This reiterates my general position that we are entering a new era of mobile-first. Mobile devices are replacing desktops, but still lack basic capabilities.

A desktop-optimized version of Android or iOS can offer things like mouse support, support for large displays, a full-blown desktop browser, native support for USB devices, printers, SD cards, multitasking/windowing, and more. There's supposedly a secret next generation operating system at Google called Fuschia that blends ChromeOS and Android.

T-Mobile and Sprint: It's hard to keep up with this one. On one hand DOJ is supposedly edging closer to approving the $26B merger. The FCC announced it would approve the merger based on the companies' promise that the combined entity would quickly roll out 5G services.

On the other hand, the DOJ has concluded the merger should be blocked without significant concessions (the two have promised to sell off Boost). If it's approved, we go into the lawsuit phase. Nine states and WA DC have filed a lawsuit to block the proposed merger including CA, CO, CT, MD, MI, MS, NY, VA, and WI.

Privacy matters: Google is beginning to roll out its location history auto-delete feature previously announced in May. The feature is not on by default. Users can set the tracking preferences to delete in 3- or 18-month intervals. Google and Facebook are both attempting to mine a middle ground for heightened privacy concerns. These companies, and many more, use this history to better target users for advertising.

The bigger conflict that few are discussing is how data collection improves experiences with AI. I am seeing more business apps and use cases where user data drives helpful AI-powered enhancements. This enterprise trend is in conflict with employee and customer consent. At the Fuze Flex Summit, IBM presented how it uses Watson to improve employee engagement. Watson monitors all types of employee behaviors and can suggest training courses (nice) and identify if an employee is likely seeking new employment (creepy).

Sprint Intelligent Virtual Office will be powered by **Ooma**. This was not announced by either company, but tweeted during the #SprintAnalystDay conference. The service is not currently listed on the Sprint website. Sprint currently partners/provides Cisco, Dialpad, Office365, and G Suite.

Twilio named former GE CEO Jeff Immelt to its board of directors.

Maviner hosted analysts for a day of updates on OpenRAN and 5G. The company believes that the double-punch of virtualized technologies and its OpenRAN architecture will disrupt the 5G ecosystem. They may be right, or at least in the right place at the right time, if the west turns against Huawei. OpenRAN allows operators to deploy whitebox radio units controlled by virtualized cloud infrastructure. The day included a tour of 'the first compelling case for Virtualized RAN in the UK' with Mavenir at BT.

Arabian Business, in partnership with Bombardier, listed 57 of **The Most Powerful Arabs in the World 2019**, and included **Nidal Abou-Ltaif, President of Avaya International**. "Abou-Ltaif is a champion of diversity in the technology industry; almost half of his leadership team are female, and his belief in expanding the role of young talent in driving transformation resulted in the creation of the Avaya Academy... Under his leadership, innovation is co-created between Avaya's representatives and their customers and partners, with the resulting solutions solving real business challenges."

West/Intrado gave **Flowroute** an international boost. Telephone numbers are now available in 160 countries.

Financial Quipz

Slack completed its direct listing on NYSE (WORK) and saw its shares temporarily surge on its first day of trading. The stock closed at $38.62 per share, slightly above its opening price. This gave the company an impressive first day valuation of $20.6B — that's about 34 times this year's expected revenue (cheap compared to Zoom's +50x).

I do not buy into the end-of-email chatter. Email is so crowded that Slack seems more effective — at least for internal communications. But as Slack becomes more crowded, it becomes less effective. Plus, it doesn't handle external traffic without an invitation. It reminds me of the Yogi Berra quote, "Nobody goes there anymore because it's too crowded." Email is crowded because it works, it's reliable, it's universal, it's free, and it's interoperable.

There are no lockout restrictions on Slack's direct listing. Early trading could be particularly influenced by four investors — Accel, Andreessen Horowitz, Social Capital, and SoftBank — which together (pre-listing) were holding more than half of Slack's outstanding shares.

Troops detects sales management details through a slackbot and uploads the information to Salesforce. Troops has raised $12M in Series B funding in a round led by Aspect Ventures, with participation from the Slack Fund. The round brings Troops' total raised to $22M.

Vonage announced it will offer $300M convertible senior notes due 2024 in a private offering; the notes will be offered to qualified institutional buyers. Vonage intends to use the net proceeds to pay the cost of the capped call transactions, repurchase up to $10M in shares, and repay a portion of the outstanding principal balance under its credit facility.

Spike offers a conversational email app for team collaboration. Spike clears the clutter (subject line, headers, and signatures) for more efficient productivity. The app also enables voice and video calls directly from the email app. Users can preview or drag-and-drop files without downloading them. The company recently closed a $5M round of funding led by Wix, Koa Labs, and NFX, which it plans to use to expand its stronghold among small businesses. Spike Pro accounts start at $5.99 per month.

Acquisitions

Calabrio acquires Teleopti: The combination creates one of the larger workforce management companies. Industry consolidation in this space makes sense. We are likely already past the peak of this sector as the services are addressed in other ways. For example, QM is undergoing rapid disruption with new AI-powered tools. Scheduling too will be squeezed by broader enterprise scheduling apps. Augmented agent technologies will change training. That said, this is not a fast-moving sector, and the combination reduces costs and competition for a longer ride.

BI acquisitions: We saw two big **business intelligence** (BI) acquisitions this month. **Google** announced its intent to acquire hot analytics startup **Looker**. It's paying $2.6B to make Looker a part of Google Cloud. "The combination provides an end-to-end analytics platform to connect, collect, analyze, and visualize data across Google Cloud, Azure, AWS, on-premises databases, and ISV applications," said Thomas Kurian, GM of Google Cloud.

Salesforce announced it is paying $15.7B in an all-stock deal to acquire **Tableau Software**, whose products let companies build charts and lists from their business data in order to better understand it. It's by far the largest acquisition in Salesforce's 20-year history, and the company is paying a premium of more than 40% based on Tableau's closing share price on Friday. It could be argued that Salesforce is overpaying for Tableau, but the deal gives it a leadership role in BI software. *Microsoft is also investing heavily in this area.*

This Month's Goodreads

1. A Quantum Revolution Is Coming

2. Google is reportedly arguing that cutting Huawei off from Android threatens US security

3. The Catch-22 that Broke the Internet

4. Why The 8-Hour Workday Doesn't Work

5. It's Time You Learned About Quantum Computing

6. Hey Alexa, Why is Voice Shopping So Bad?

7. Google Chrome has become surveillance software. It's time to switch

8. Enterprise-Technology Companies Trigger Investor Zeal ($)

9. U.S. Considers Requiring 5G Equipment for Domestic Use Be Made Outside China Sure! It might even be cheaper than paying the tariffs.

10. Bill Gates on making "one of the greatest mistakes of all time" Yes, we can all agree on Ballmer. There are many nuggets in this interview unrelated to mobile. Around 55 minutes, he talks about the necessary social aspects of education. This is also applicable to the workplace.

11. Microsoft turns off aging PBX phone platform, completes move to Microsoft Teams It is hard to believe that Teams replaced its PBX and SfB didn't (but SfB remains in service).

12. Work-Life Balance Is a Myth. Do This Instead

Upcoming Events

July

- Microsoft Inspire, Las Vegas

August

- Twilio Signal, San Francisco
- Adtran Connect, Huntsville

- Glance Analyst Event, San Francisco

Upcoming Research

Look for the July TalkingPointz Research Note on the first-line dynamic for enterprise communications.

This is a paid monthly newsletter on enterprise communications. Want your own copy? Click here.

Subscribe to the **TalkingHeadz podcast** on your favorite player.

. . . .