

F R O S T & S U L L I V A N

# 2024 ENABLING TECHNOLOGY LEADER

*IN THE GLOBAL  
EXPERIENTIAL  
TECHNOLOGY  
SOLUTIONS INDUSTRY*

F R O S T & S U L L I V A N

BEST  
2024 PRACTICES  
AWARD



## Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. AVI-SPL XTG excels in many of the criteria in the Experiential Technology Solutions space.

AWARD CRITERIA	
<i>Technology Leverage</i>	<i>Customer Impact</i>
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

### *Reimagining the Employee and Customer Experience*

Today, businesses of all sizes are rethinking the workplace from the ground up. The massive shift to hybrid work has amplified the relevance of creating innovative and meaningful workplace experiences that keep employees engaged and leave a lasting impression on customers.

In a world where people and teams are truly distributed, the role of the physical workplace has evolved significantly. When people go to the workplace today, they have a clear sense of purpose and a pre-

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**- Roopam Jain**  
**VP of Research, Information and Communications Technology**

defined set of expectations. It is more than a space where employees show up to get work done. It is a hub for creating human connections, driving the corporate culture, and building a sense of community—a place where creativity and productivity are at their best. However, most workplaces today have not kept pace with these transformational shifts. To bring more people back into the office, businesses are investing in high-impact spaces that meet the changing expectations of

employees and customers.

AVI SPL’s Experience Technology Group (XTG) has responded effectively to the increased demand for immersive workplaces. XTG recognizes the symbiotic relationship between people, physical space, and

technology. By leveraging cutting-edge modern technologies, it is focused on delivering high-impact, immersive experiences that elevate the employee and customer experience for better business outcomes.

### ***Designing the Modern Workplace***

Over the last year or more, business leaders have hoped that a wave of new corporate initiatives will reignite a faster return to the office. The results have been tepid so far. Millions of square feet of office space remain unused. Commercial real estate vacancies stand at 21.0%, the highest since the Great Recession, according to data from [JLL](#). The numbers are even higher in many major cities including Chicago, Los Angeles, New York, and San Francisco. The reasons are obvious. Employees don't believe the office is worth the commute. They need more compelling reasons to be back in the office.

At the same time, Frost & Sullivan surveys show that remote work is not without challenges<sup>1</sup>. 92% of businesses surveyed have made hybrid work a business priority. Yet, 77% of employees suffer from meeting fatigue when working remotely and 73% of participants feel disadvantaged when attending meetings remotely compared to joining in person. 80% cite a lack of bandwidth and internet issues when working from home. 79% of employees report weakened relationships with coworkers and loss of business culture/mentorship opportunities as a result of remote work. Given these difficulties with remote work, there is an even stronger reason for businesses to make the office a magnet that draws the employees back.

Similarly, in the post-pandemic world where digital and online buying has become rampant, there is a strong need among businesses to recreate in-person experiences that draw customers back into the physical workplace. By creating high-tech, interactive, and immersive environments that deeply engrain the brand on visitors, businesses can elevate the customer experience. With one foot or hand in the actual world and the other in a virtual experience, users can manipulate and interact with virtual elements, using a mix of high-definition displays, holographs, 3D models, sensing and imaging technologies, and content-based interactions.

By creating modern spaces that re-energize employees and customers alike and inspire teamwork, creativity, and networking, businesses can take advantage of the many opportunities provided by the new hybrid future. Every aspect of the physical workplace, from the lobby to the boardroom, must be reimaged and redesigned. Experiential technology solutions are becoming fundamental to creating memorable and innovative experiences that deepen the connections between the business and its employees and customers.

### ***Demonstrated Leadership through a Broad Solutions Portfolio***

AVI-SPL is a leading system integrator and managed services provider of audio-visual (AV) and unified communications (UC) technology solutions. The company helps businesses digitally transform their hybrid workplace by deploying, managing, and supporting AV and UC solutions that are simple, scalable, and manageable. The company's comprehensive portfolio includes integration, deployment, training, management, and monitoring services for various industries.

<sup>1</sup>Frost & Sullivan Annual IT Decision Makers Survey on Investment Priorities, January 2023

AVI-SPL stands out in the enterprise communications market with a portfolio that effectively implements technology enablement from small teams to large spaces and events. Today, the company's customer base includes 86 of the Fortune 100 companies alongside 7,000 other organizations and employs 4,300 people globally. Moreover, it has continually expanded its global reach and, in recent years, has added new offices in India, Mexico, and Germany, bringing the total count of AVI-SPL offices worldwide to 69.

XTG (Experience Technology Group) is a business unit of AVI-SPL. Launched in 2022, it is a fast-growing business that works with businesses globally to create immersive brand and employee experiences. It consolidates and streamlines AVI-SPL's existing investments in advanced technology solutions to deliver focused and scalable high-touch, immersive customer and employee experience environments. By using a mix of audio-visual communications, digital signage, virtual/mixed reality, advanced visualization, and AI; XTG is helping some of the largest organizations in the world transform their workplace by supporting two key activities:

- **Employee-Centric Experiences:** XTG enables businesses to re-design, manage and support their modern workplace transformation by building intelligent, immersive work environments and best practices that boost employee creativity and productivity while reducing waste and cost.
- **Compelling Customer Engagement:** XTG empowers its customers to re-imagine and operationalize high-touch, immersive customer experience environments (e.g. EBCs) that allow them to tell their story and engage their customers in deeper, more profitable relationships.

### ***A Strong Partner Ecosystem***

XTG delivers an end-to-end portfolio of experiential technology solutions by continually growing its ecosystem of partners. Its strategic partnerships with a broad ecosystem of architects, experienced designers, brand agencies, fabricators, consultants, and top technology providers allow it to offer pre-sales design services, advanced engineering, and project management as an integrated solution with a single point of contact.

Of particular mention is XTG's alliance with Commercial Real Estate (CRE) firms like JLL, CBRE, and Cushman Wakefield which work with global enterprises to turn their real estate into digitally immersive workplaces. As the technology partner of choice for the largest CRE firms, XTG has a unique reach and can influence decision-making on workplace transformation strategies in conjunction with the customer.

### ***Growing Customer Momentum and Expanding Use Cases***

In the short span of time since launch, XTG has seen tremendous business success and customer adoption. Its differentiated solutions are positioned for accelerated growth in the future, driven by the long-term, secular demand to drive digital workplace transformation.

- Despite a challenging economic climate, XTG's CY 2023 bookings registered an impressive YoY growth of 30%.
- XTG ended 2023 with a pipeline that stands at 4x of its CY 2023 bookings.
- Regardless of the disruption and uncertainty in corporate real estate over hybrid work, the partnerships with JLL, CBRE & Cushman yielded impressive 25% growth fueled by a surge of

experiential workplace projects.

- Today, 50% of XTG’s business comes from the enterprise sector. However, the company’s reach in many other market segments is growing at a fast pace. These include higher education, entertainment, retail, and healthcare.
- Among the emerging use cases, XTG is pioneering the market opportunity for “enterprise broadcast” by applying many of the techniques and technologies of virtual production and streaming within film and television to raise production values and impact of employee and customer communications for global enterprises.

### **Experiences that Matter: Sample XTG Projects**

There is a strong need today to augment the one-dimensional online and virtual experiences with in-person, meaningful connections.

*The past few years have revealed how digital technologies and experiences can forever transform the way we work and live. The next iteration of the workplace is truly people-centric. As such, businesses realize the relevance of maintaining deep, collaborative connections with employees and customers. By harmoniously blending leading-edge digital technologies with human-centric approaches, XTG is helping businesses lay the groundwork for innovation and success in the hybrid workplace.”*

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As a result, businesses are building unique brand experiences that enable them to tell their story better and drive deeper relationships with their stakeholders. Corporate offices, retail showrooms, visitor centers, museums, and executive briefing centers are a few examples of spaces where XTG is transforming the employee and customer experience.

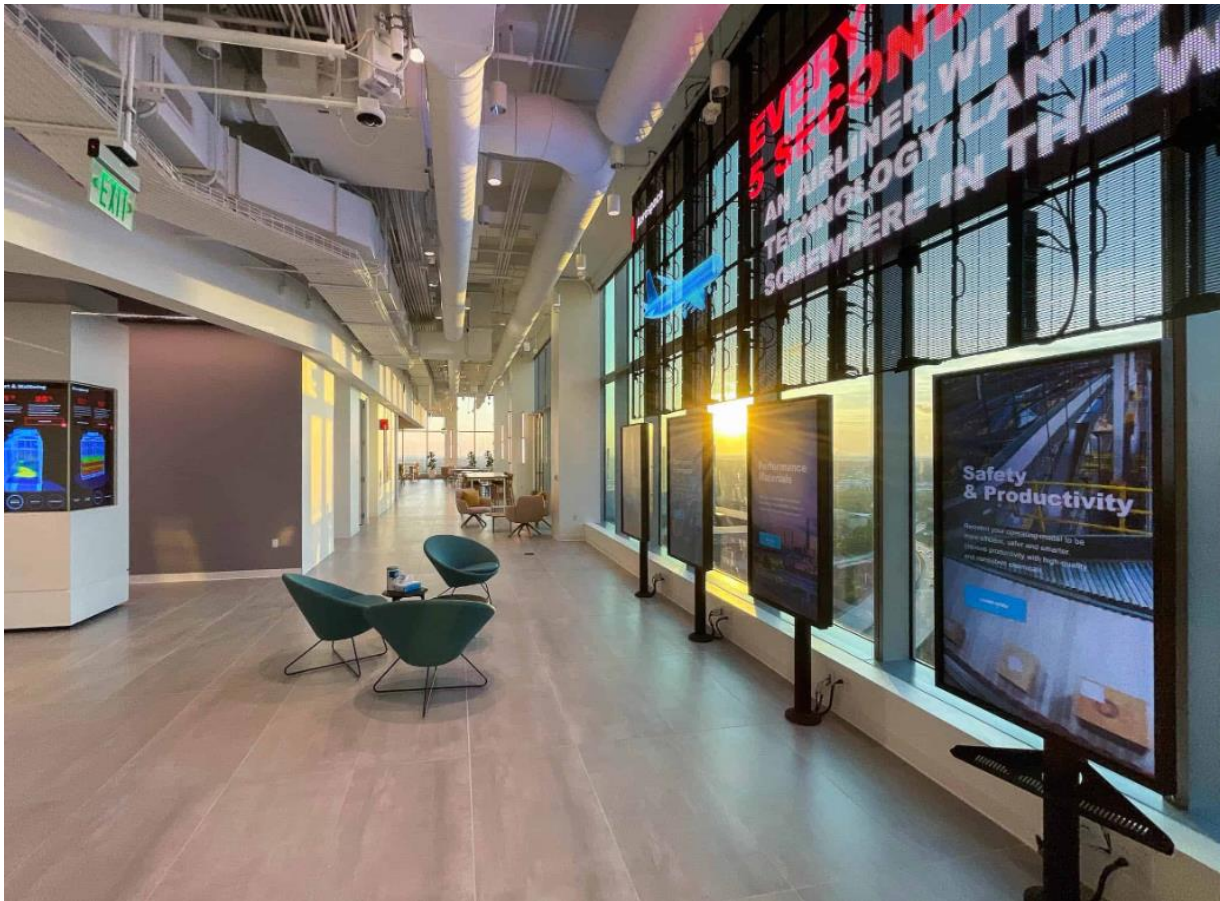
"A guiding principle for the Dell Technologies Executive Briefing Program is providing future-ready customer engagements that include the ability to host remote customers seamlessly and powerfully. A critical element is having innovative and enhanced tools to support our hybrid experiences. The better the technology, the better the experience. Having better and better technology than our competitors is like an arms race. AVI-SPL’s XTG team has helped design and build solutions that will scream innovation ensuring the customer experience is memorable. The AVI-SPL XTG team includes some of the most skilled people in the industry. They listen intently and deliver solutions that help us stand out among giants."

**- Bonnie Bryce, Director, CX Strategy & Programs, Dell Technologies**

Among its many successful implementations are:

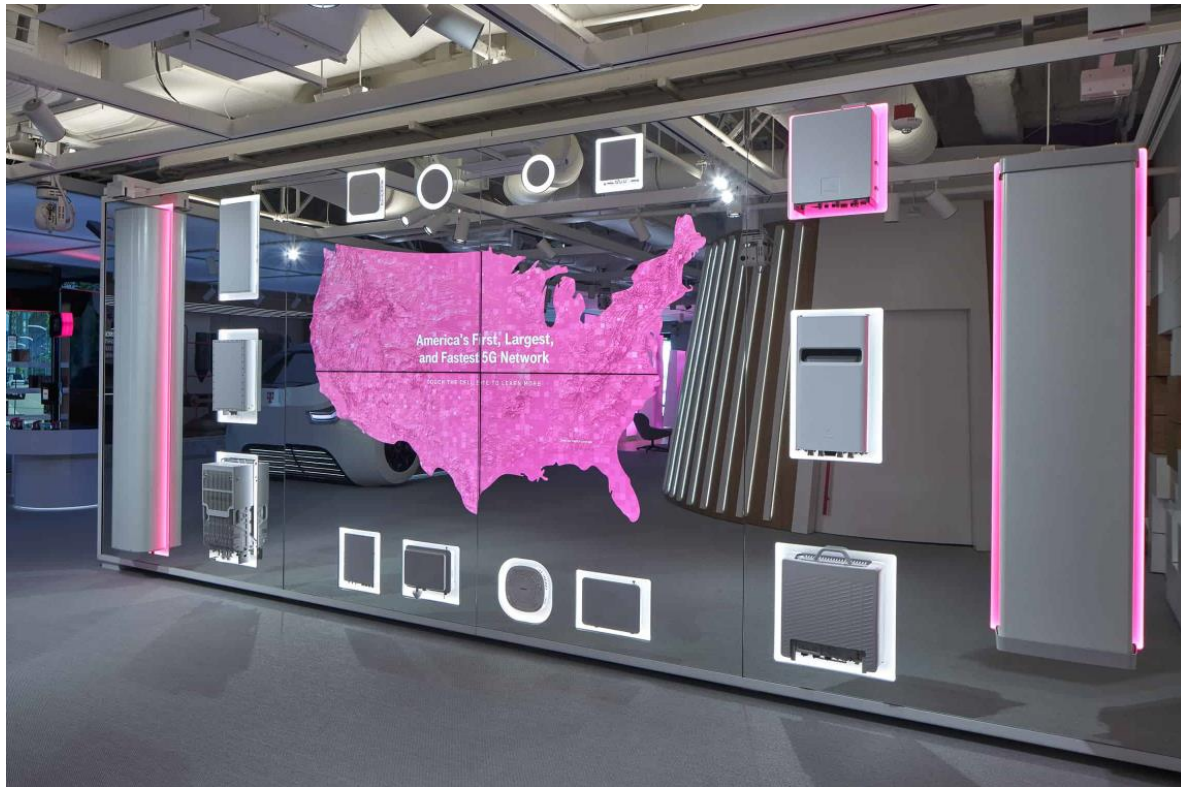
**Honeywell’s Customer Experience Center: Charlotte, NC:** Honeywell wanted their impressive new Headquarters in Charlotte, to be a shining example of innovation at work. The purpose-built office building is a living showcase of modern building design and Honeywell’s own cutting-edge building technologies, which optimize the efficiency, comfort, and safety of buildings. The Customer Experience Center (CXC) includes an interactive video wall, sensor-driven signage, and interactive

displays. Holographic displays enable visitors to interact with information and 3D models of Honeywell's technologies. The installations are a real-life demonstration of Honeywell's commitment to innovation and digital transformation.



Honeywell

- **T-Mobile, Bellevue, WA** : XTG and its creative design partners helped T-Mobile engage its most valued customers and stakeholders to explore a variety of future business applications for 5G wireless technology at their 5G&me Experience Center. Through a range of playful and interactive exhibits, cohesive storytelling and immersive audio, customers are able to not only explore, but co-create leading to higher levels of affinity and brand loyalty. Additionally, XTG has extended this relationship with T-Mobile's flagship immersive retail locations across the USA.



T-Mobile

- Illumina, San Diego:** When the global leader in genomics and RNA/DNA sequencing wanted an “art of the possible” experience center at their recently refurbished HQ, XTG working alongside its creative design partner crafted a compelling narrative, curated engaging content, and incorporated interactive elements to inspire, foster trust, and ignite excitement among customers, partners, and genomics industry leaders.



Illumina

- **Edmonton Public Library:** At two stories tall and 40 feet wide, the interactive wall on the public floor at the Stanley A. Milner Library is the centerpiece of learning and imagination. Its immense scale and unique touch-interactive opportunities offer a uniquely interactive way to foster interest in STEM (Science, Technology, Engineering, and Math) learning. Through interactive activities, visitors can take a journey to explore a pre-historic world, a marine world, buoyancy, and aerodynamics. The double-sided LED interactive visual experience consists of a Planar 1.8mm TVF LED solution, along with 26 MultiTaction MTD-556XNB ultra-narrow bezel touch video wall displays. The solution is effective because it empowers the library to showcase eye-catching and educational content on a massive scale.





Edmonton Public Library

- **Amazon, The Spheres:** Amazon remodeled its Seattle headquarters, adding The Spheres, a cutting-edge structure for employees and the general public. It hired AVI-SPL as the AV designer and integrator for the Understory, a center to engage visitors with the science, engineering, and plants that make up the Spheres so they can learn about plant life and the overarching Amazon brand. The goal was to create an immersive, 360-degree experience in the lush environment of the rainforest floor and canopy. With self-guided and automated capabilities, XTG incorporated interactive technologies that create a personalized experience for each visitor. The most prominent feature is the large number of curved LED displays that create a circular environment and deliver an immersive view of the habitat. The experience also includes ultrasonic speakers at four locations with spotlights that trigger the audio recordings as visitors stroll along.



Amazon, The Spheres Visitor Center

- **The Museum of the Future, Dubai, UAE:** The Museum of the Future is a world-renowned architectural landmark. It enthralls visitors from all over the globe through its digital marketing. In person, it allows visitors to see, touch, and explore first-hand the opportunities and challenges for the future of Earth. AVI-SPL integrated space, content, and technology to create an interactive experience and immersive exhibits. It deployed more than 30 employees from three continents to engineer, oversee, and implement the installation of experiential solutions. By integrating a total of 48 displays, 44 projectors, 300 speakers, and 76 media servers across five stories in the iconic 320,000-square-foot building, AVI-SPL allows visitors to engage with an array of next-generation technologies, including massive projection walls, augmented reality, multi-sensory exhibits, and human-machine interaction.



The Museum of the Future

## Conclusion

The past few years have revealed how digital technologies and experiences can forever transform the way we work and live. The next iteration of the workplace is truly people-centric. As such, businesses realize the relevance of maintaining deep, collaborative connections with employees and customers. By harmoniously blending leading-edge digital technologies with human-centric approaches, XTG is helping businesses lay the groundwork for innovation and success in the hybrid workplace.

The company has effectively leveraged emerging trends in the digital workplace. Through technological innovation and an unwavering focus on meeting customer needs, it is transforming the workplace with memorable, engaging experiences. For its strong overall performance and differentiated offerings, AVI-SPL XTG is recognized with Frost & Sullivan's 2024 Global Enabling Technology Leadership Award in the global experiential technology solutions industry.

## What You Need to Know about the Enabling Technology Leadership Recognition

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Frost & Sullivan's Enabling Technology Leadership Award recognizes the company that applies its technology in new ways to improve existing products and services and elevate the customer experience.

### Best Practices Award Analysis

For the Enabling Technology Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### *Technology Leverage*

**Commitment to Innovation:** Continuous emerging technology adoption and creation enables new product development and enhances product performance

**Commitment to Creativity:** Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

**Stage Gate Efficiency:** Technology adoption enhances the stage gate process for launching new products and solutions

**Commercialization Success:** Company displays a proven track record of taking new technologies to market with a high success rate

**Application Diversity:** Company develops and/or integrates technology that serves multiple applications and multiple environments

#### *Customer Impact*

**Price/Performance Value:** Products or services provide the best value for the price compared to similar market offerings

**Customer Purchase Experience:** Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

**Customer Ownership Experience:** Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

**Customer Service Experience:** Customer service is accessible, fast, stress-free, and high quality

**Brand Equity:** Customers perceive the brand positively and exhibit high brand loyalty

