

## MarketScope for Emergency and Mass Notification Services

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The emergency/mass notification market is growing fast: 2009 revenue is estimated at \$570 million, with median revenue growth of 37% and 29% for 2008 and 2009, respectively. Our first emergency/mass notification MarketScope focuses on enterprise-level offerings and has an overall Positive rating.

## WHAT YOU NEED TO KNOW

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This document was revised on 1 February 2010. For more information, see the [Corrections](#) page on gartner.com.

The emergency notification service (ENS) and mass notification (MN) market is growing fast. Many vendors exist, and barriers to entry are few. In fact, many vendors expressed their concern about the lack of barriers to entry and the competitive pricing tactics that follow. Our first ENS/MN MarketScope focuses on enterprise-level offerings and has an overall rating of Positive.

There are six main use cases of notification messaging:

1. Emergency/crisis events that require stakeholder notification (workforce, customers, partners and so forth)
2. Business operations notifications, such as workforce management roll call or mustering, call-outs to parents for absentee students, upcoming and special event announcements, important meeting reminders, and so forth
3. Business context-based alerting that gets triggered from another business process (for example, checking account overdraft, late payment, flight delays, work availability options by locale — "Send Work Now," grade delivery, incoming injured patient and so forth)
4. IT service alerting support (see Note 1)
5. Reverse 911 and enhanced 911 (E-911; see Note 2)
6. Public safety (for example, student tracking on a college campus)

No vendor has an offering that supports all use cases. The ENS/MN market addresses messaging use cases 1 through 3, with emergency/crisis event alerting being the primary reason for the use of these tools. Given the business evolution of a few of the ENS/MN vendors, some have their use cases and associated message volume just the reverse — business operations and context-based alerting are the primary use of their tool. At present, there is some vendor overlap between the ENS/MN and communications-enabled business process (CEBP) markets (see "Hype Cycle for Enterprise Communication Applications, 2009") through an ENS/MN product application programming interface (API) for integration to a triggering business application.

Gartner forecasts a growing relationship between the ENS/MN and CEBP markets within the next five years as alerting and notification of all kinds become routine. Many firms use multiple products to address all their alerting/notification needs. In some cases, these firms are looking to consolidate their vendor portfolio; however, when it comes to alerting that is triggered from a business application, it is not always possible to consolidate because of the complexity of the integration between the business application and the ENS/MN tool.

Overall, the following are summary points from our ENS/MN market analysis:

- Vendors focus on the following main markets: higher education (K-12 vendors specific to this market are not covered in the MarketScope), healthcare, government and private enterprise — regulated and not. Choosing a vendor that has experience in your market will mean a more-aligned offering to your business operations.
- All the vendors can perform the basics of ENS/MN — that is, sending messages to a variety of endpoints, including phone messages, e-mail, SMS, pagers and so forth. Some can also integrate with physical security alerting systems, such as LED panels

and Really Simple Syndication (RSS) feeds. A few can send a message to the desktop — usually through a partner's product offering.

- Some customers feel that emergency alerting via SMS is not a good notification endpoint due to the volume of SMS messaging done today for "chat type" communications.
- Customers prefer a subscription-based or hosted solution, which means that the software and hardware necessary to operate the ENS/MN system are located off-site and accessed via a Web portal, desktop API or handheld device.
- No vendor can ensure/guarantee message delivery — all they can prove is that message volume levels are leaving their system.
- Almost all vendors offer two-way communications, or what is referred to as a survey or questionnaire.
- Few vendors support routing phone messages through the organization's internal PBX.
- Few vendors support a message being intercepted by an internal live, telephone operator.
- Support for a temporary change of contact information varies from dealing with it as a temporary versus permanent change in the contact database.
- Opt-in and opt-out options for message types vary by vendor.
- Most vendors do not support text-to-speech language translation, because the translation is not considered good enough for crisis communications.
- Few vendors support the Common Alerting Protocol (CAP) or the national emergency alerting system (EAS).
- Tracking of people physically on campus, in a building and so forth is a future capability.
- Only a few vendors support social media. Most are working on it as a future enhancement.
- Few vendors obtain third-party auditing of their data center operations. It was not clear to us that the ENS/MN vendors asked their data center hosting partners for such validation.
- Most prospect leads come from the existing customer base or from the Internet.
- Few ENS vendors market through any means other than tradeshow and company-sponsored seminars. All have user/customer groups. None use focus groups for product strategy development. The main ways that vendors determine product development needs are through user/customer groups, RFIs/RFPs, and tradeshow/conference participation.
- There is no one ENS/MN buying center that represents a majority of the contract awards. The buying center breakdown follows:
  - Business continuity management (BCM)
  - IT disaster recovery

- IT operations
- Physical security/emergency management
- Facilities management
- First responders
- Supply chain
- Business executives
- Human resources
- Some EMS/MN vendors use resellers, such as telecommunications companies, to resell their products. For customers looking to expand their use cases beyond emergency notification, these resellers might be of interest, because some have an ENS/MN offering with unlimited messaging for all endpoints. However, the price may be beyond what some firms are willing to pay.
- Deployments tend to be fast — within days, in some cases, if all project activities line up exactly on the customer and vendor sides.

Regarding message capacity, ENS/MN prospects *and* vendors need to set realistic expectations regarding message volume for each endpoint — phone call, e-mail, SMS and so forth — and in the aggregate, for the following reasons:

- There has been no regional or national test on the total capacity of emergency alerting by the vendors as a whole. Many vendors have had to send emergency messages for individual customers, or those grouped in one area, but few (if any) have tested their ENS/MN services for the full contact database count.
- As usage increases, so will message delivery degradation, due to the inability of the vendors' telecommunications infrastructures, as well as that of the regional or national telecommunications infrastructure, to handle the increased volume of messages. Competition with government agencies may further degrade message delivery when nongovernment entities are relegated to Tier 2 (that is, nonemergency) status when using the national EAS, proposed by the U.S. Federal Communications Commission.

Regarding failover and recovery, if you want 24/7 availability of a service — meaning if the vendor has a business interruption such as a disaster, scheduled maintenance that runs over time, unscheduled maintenance and so forth, and a documented service-level agreement (SLA) to go along with it — then you must validate your needs against the ENS/MN vendor's capability and delivery of that capability. At times, you might have to contract for it in addition to what the vendor provides in its base offering. Service interruptions can happen to any ENS/MN vendor. The lesson for ENS users is to realize that incidental factors not spelled out in an SLA may affect system availability. Many vendors responded that their customers haven't asked for an SLA — something we find difficult to believe. These vendors are in the BCM business, and they should make this type of access available as part of their core/basic offerings, and there should not be an extra charge for recovery of their own data center infrastructure. ENS users should apply a holistic analysis to SLAs and look for potentially unrecognized factors. Specific points to review for each vendor's failover/recovery support include:

- Locations of their production and recovery data centers
- Locations of their operations staff

- The number of cell phone aggregators they use
- The number of telecommunications firms that they contract with and the redundancy of connections to their data centers
- Automatic versus manual failover

ENS/MN pricing is competitive, but pricing models vary. Most are based on the number of contacts in the contact database, plus additional charges for message volumes by endpoint. E-mail messages tend to be unlimited, phone messages are usually restricted to a certain volume and price point, and proprietary SMS messages are priced like a cell phone call. We will be conducting additional analysis on ENS/MN pricing in future research.

## MARKETSCOPE

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The interest in and need for ENS/MN tools continue to grow among all markets. The business benefits of using an ENS/MN tool include:

- Many key personnel can be notified in minutes.
- Management can focus on critical decision making and exception handling, instead of message delivery.
- Human error, misinformation, rumors, emotion and distraction, so often found during a crisis, are reduced through automated ENS/MN communications.
- A documented notification audit log can be provided for real-time and post-event management.

Gartner includes the following three markets as part of the business continuity management (BCM) software marketplace — ENS/MN, BCM planning and crisis/incident management. (see "How to Understand and Select Business Continuity Management Software"). We are starting our BCM software market analysis by issuing the ENS/MN MarketScope, because the majority of customer inquiries we receive are for the ENS/MN market. Some vendors offer a suite that includes all three markets. For the near future, we will not do a market analysis of vendors that offer a BCM software suite. Finally, U.S.-headquartered ENS/MN customers who have staff located outside of the U.S. are not looking for a vendor in Europe, the Middle East and Africa (EMEA) or in Asia/Pacific. Rather, the U.S.-based vendor supports emergency notification to all locations. Therefore, this MarketScope is largely for the U.S. marketplace.

As part of this MarketScope, we analyzed the revenue for the market based on vendor-supplied information, publicly available information, and projections based on our understanding of the market and the vendors. Our revenue estimates for the past three years follow:

- 2007 revenue estimate: \$300 million
- 2008 revenue estimate: \$420 million
- 2009 revenue estimate: \$570 million

We also calculated revenue growth for 2007 and 2008. The percentages below are median growth rates and, therefore, when applied to the above revenue estimates for 2007 and 2008, do not exactly match the reported revenue estimates for 2008 and 2009. All vendors reported, or had estimated, revenue growth:

- 2007/2008 average growth: 37%

- 2008/2009 average growth: 29%

## Market/Market Segment Description

Emergency or mass notification is defined as the automated call-out to notify groups or individuals — disaster recovery teams, employees, citizens, residents, students/parents, customers, suppliers or government officials — and is critical for managing a crisis. In other words, these tools automate the manual call tree. Not everyone is on duty when the incident occurs, but they must be notified to take action. ENS or MN offerings are tools focused on the electronic activation and management of notification messages, thus streamlining an organization's mass communications capability. The software can be used to organize contacts into an unlimited number of groups or subgroups, to send emergency messages (for example, announcing fires, power outages, natural disasters, severe weather conditions, terrorist attacks, hostage crises, bridge collapses, child abductions or criminal activity), and then to track receipts or responses for message delivery confirmation.

Activation can be accomplished by logging onto a Web portal or accessing the system by a telephone and then securely sending a custom or previously crafted voice or text message to multiple endpoint devices, such as phones, PDAs, desktops, e-mail systems, fax machines, physical security systems or public announcement systems. ENS/MN software can send thousands of messages to endpoint devices simultaneously. However, there is no guarantee that the person to whom the endpoint device belongs actually receives the message due to the telecommunications infrastructure being used, as well as recipient issues — for example, not being properly trained to use the service, information overload during an event, not wanting to participate in the service and so forth.

## Inclusion and Exclusion Criteria

Inclusion in the ENS/MN MarketScope was based on the product's ability to be:

- In general availability for at least a year, as of 15 May 2009
- Deployed in at least three customer production environments with contact databases larger than 1,000 contacts (preferably one from North America, one from EMEA, one from Asia/Pacific and one from Japan), and with references available as of 15 May 2009; for implementations in one or two regions only, we still asked for three references — one being outside of the U.S.
- Determined by Gartner to be a significant player in the market via market presence and/or technology innovation
- Specifically targeted and marketed as an ENS/MN product

Excluded from participation in the ENS/MN MarketScope are:

- IT service support alerting (see Note 1)
- Products that provide reverse 911 or E-911 capability (see Note 2)
- K-12-only vendors (see Note 3)
- Products that are geared for the consumer market
- Public-safety-oriented offerings
- PDA-specific alerting, such as BlackBerry-only support

- Medical device alerting
- Value-added resellers (VARs)
- Vendors that provide endpoint products, such as visual alerting products (for example, LED panels) — some of these vendors market that they are in the ENS/MN market, but they are really part of the communication intelligence market; these vendors partner with ENS/MN vendors to provide message delivery to those specific endpoints

We started our MarketScope analysis by contacting 25 vendors, including those we have been following for the past five years, and those that have been noted in our Hype Cycle for BCM research for 2008 and 2009. After the initial contact, 18 vendors remained. The following vendors were not included this MarketScope:

- Database Systems — declined to participate
- Emergin — provides alerting for medical incidents and medical devices only
- Enera — declined to participate
- FirstCall — declined to participate
- OnSet Technology — no longer in the ENS/MN market
- Transformyx — is a new vendor, and the product is not 1-on-1 comparable to the rest of the ENS vendors
- Wallace Wireless — complementary to the ENS market, but does not provide the telecommunications infrastructure for MN

A few notes on how we rated the vendors follow:

- Gartner provided vendors with a survey resembling an RFP, and requested access to comparative and competitive information. Vendors were evaluated on the basis that they were responding to an RFP, and were ranked on their ability to document and quantify their strengths and features. Vendors that did not provide responses to critical questions were ranked, wherever possible, from other sources of information — supplemental public information sources, public records of projects and clients, and the opinions and experience of the Gartner analyst community.
- Some vendor products are geared toward small and midsize businesses (SMBs) and do not provide all the functionality that a larger organization would need or want. Therefore, their ratings on those particular evaluation criteria were low. However, these vendors should not be excluded from evaluation by SMBs. Functionality might be adequate, and certainly pricing and terms may be more competitive.
- Our review was for the ENS/MN business only. Therefore, a vendor that is in multiple notification markets might have a better overall company rating when taking all products into account versus what has been provided for just the ENS/MN portion of their business.

The ENS/MN product is a complex set of functionality. No weights were assigned to specific features/functions in our analysis. However, we focused our attention on the following criteria for this MarketScope:

- The technical telecommunications infrastructure of the ENS/MN process

- The failover and recovery capability of the vendor so that it provides 24/7 availability to the customer — no matter where the crisis occurs
- Third-party data center auditing
- Message templates for a variety of crisis scenarios
- Emergency alerting standards support — for example, CAP, EAS, the National Incident Management System (NIMS) and the Incident Command System (ICS)
- Partnerships within and outside the BCM marketplace
- In support of mass mobility demand, support for message formats and delivery domain expertise, such as Telecommunications Device for the Deaf/TeleTYpewriter (TDD/TTY), and text-to-speech capability, so that written messages can be sent as audio to phones
- Auditing of message delivery status
- Integration with contact data management systems, such as government, student or HR directories, e-mail programs, and so forth
- Geographic information system (GIS) support
- Market understanding
- Multilingual support
- Social media support

## Rating for Overall Market/Market Segment

### Overall Market Rating: Positive

Given the growing interest in this market and the offerings already in place, we rated the overall market Positive. The vendors reported the following peers to be the top five competitors: Everbridge, MIR3, Send Word Now, DCC and Dell/MessageOne.

## Evaluation Criteria

Table 1. Evaluation Criteria

Evaluation Criteria	Comment	Weighting
Customer Experience	Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), the availability of user groups, SLAs and so on.	High

<b>Evaluation Criteria</b>	<b>Comment</b>	<b>Weighting</b>
Market Understanding	Ability of the vendor to understand buyers' wants and needs, and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.	High
Product/Service	Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.	High
Offering (Product) Strategy	The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.	Standard
Sales Execution/Pricing	The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.	Standard
Sales Strategy	The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.	Standard

Source: Gartner (January 2010)

**Figure 1. MarketScope for Emergency and Mass Notification Services**

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
Amcom Software			X		
Amtelco			X		
AtHoc				X	
Blackboard				X	
Cooper Industries				X	
DCC				X	
Dell			X		
Everbridge				X	
Federal Signal				X	
Global AlertLink			X		
MIR3				X	
Omnilert			X		
ReadyAlert Services			X		
Send Word Now				X	
SpectraRep			X		
SunGard				X	
Twenty First Century Communications			X		
Varolii				X	

As of 29 January 2010

Source: Gartner (January 2010)

## Vendor Product/Service Analysis

### Amcom Software

#### At a Glance

1. **Vendor name:** Amcom Software, a subsidiary of 2ndWave Software
2. **Headquarters:** Minneapolis, Minnesota, with offices in London and Perth, Australia
3. **Ownership:** Private
4. **ENS/MN business employee count:** 70 (230 enterprisewide)
5. **ENS/MN product name:** e.Notify 4.5.1
6. **ENS/MN offering in place since:** 2005
7. **Number of reported customers:** 64
8. **Key markets supported:** Healthcare, higher education, government, casinos and hospitality
9. **Offering architecture:** Hosted (e.Notify)

10. **Claimed core competencies:** Vertical expertise in healthcare, hospitality and government; communications backbone with one database that interfaces with other business systems to stay current and enables communication to and from a broad spectrum of mobile devices; 40 years of experience with mission-critical communications

### **Strengths**

- The healthcare market is Amcom Software's primary market, and it has built out an ecosystem of healthcare-related products and services, such as E-911.
- It provides on-premises and hosted offerings.
- Notification activation is via mobile application.
- Customers have dedicated ports so when a crisis occurs, telecommunications bandwidth is guaranteed (see challenges).
- When responding to a survey/questionnaire via its Web portal, Amcom Software provides single sign-on through Active Directory, Shibboleth, Sun and Pubcookie.

### **Challenges**

- Data centers are not geographically dispersed — Minneapolis and Grand Rapids.
- Data centers and partners are not regularly audited by a third party.
- English is the only supported language.
- There's no TTY support.
- There's no GIS support.
- No partnerships exist with other BCM offerings, such as BCM planning or crisis management tools.
- If an interruption occurs during a message transmission, the service is not able to resume at the point where it stopped. Messages that failed are resent.
- Dedicated ports can be more expensive than shared ports — the cost is spread across multiple customers.
- When responding to a survey/questionnaire via the phone, the responder must know the message ID.

### **Typical Use Cases**

- Healthcare for critical life/safety medical patient alerts
- Higher education for day-to-day activities and emergency events
- Government — emergency notifications

*Ranking: Promising*

## **Amtelco**

### **At a Glance**

1. **Vendor name:** Amtelco
2. **Headquarters:** McFarland, Wisconsin
3. **Ownership:** Private
4. **ENS/MN business employee count:** 135
5. **ENS/MN product name:** Red Alert v1.0.044
6. **ENS/MN offering in place since:** 2002
7. **Number of reported customers:** 100
8. **Key markets supported:** Healthcare, higher education, government, military, utility and private enterprise, and K-12
9. **Offering architecture:** Hosted and on-premises
10. **Claimed core competencies:** Real-time monitoring and reporting, as well as mapping capabilities; a variety of call-center-based systems and software applications

### Strengths

- Amtelco offers hosted and on-premises Web-based models with an easy-to-use graphical user interface (GUI).
- It offers prerecorded voice, text-to-speech and on-demand recorded messages to landline phones and devices.
- Its solution is adaptable to the monitoring availability of networks worldwide.
- Amtelco offers multilingual support (26 languages) for IVR and text-to-speech conversion.
- Its healthcare-specific focus and interfaces include HL7, LDAP and on-call scheduling.
- Amtelco is an R&D company that develops and supports the entire solution, including hardware and software. It does not rely on third-party vendors.

### Challenges

- Amtelco is seeking accreditation in other areas, such as CAP.
- Because it relies on outsourced data center partners to provide its 99.99% uptime capability, examination of SLAs must be done with its data center partners.
- Its software development process adheres to strict but internal processes that essentially replicate customary iterative development based on software development methodologies and cross-functional teams.

### Typical Use Cases

- Roll call or mustering first responders and the workforce for recovery and accountability (real-time account of safety and status of all personnel)
- Regulatory compliance
- Business communications

*Ranking: Promising*

## **AtHoc**

### **At a Glance**

1. **Vendor name:** AtHoc
2. **Headquarters:** San Mateo, California
3. **Ownership:** Private with venture capital backing
4. **ENS/MN business employee count:** 55
5. **ENS/MN product name:** AtHoc IWSAlerts 6.1.8
6. **ENS/MN offering in place since:** 2005
7. **Number of reported customers:** 200
8. **Key markets supported:** Large government entities (primarily U.S. federal government), private enterprises, healthcare organizations and higher education organizations
9. **Offering architecture:** On-premises, hosted, software as a service (SaaS) and hybrid
10. **Claimed core competencies:** Use of net-centric technology for implementing large-scale enterprise-class ENS/MN to transform an organization's IP network into a unified emergency notification system, to include personal devices as well as on-premises public devices, defense sector and facility market expertise, and innovative and cohesive technical and operations teams

### **Strengths**

- AtHoc has a steady commitment to R&D and reinvestment.
- It has a very good understanding of data center security and privacy needs.
- It is Federal Information Processing Standard (FIPS) 140-2-compliant.
- It is well-versed in the Department of Defense's (DoD's) physical security building standards and requirements, such as DoD Unified Facilities Criteria (UFC) 4021-01 Network-Centric Alerting System (NCAS), National Fire Protection Association (NFPA-72) requirements for mass distribution, as well as others for National Weather Service and U.S. Navy weather alerting.
- It supports CAP.
- AtHoc partners with MIR3, another vendor in this MarketScope, for direct dialing offerings. It easily integrates with a variety of unified communication vendors, as well as a mature line of system integrators.
- It integrates with enterprise user directories (for example, HR, LDAP and Active Directory), providing operator user management tools and supporting end-user self-service. In addition, it displays accountability information for the entire organization, specific departments and individuals.

### **Challenges**

- Competitive marketing is not practiced because of narrow specialization; word of mouth seems to work well enough, yet this is a barrier to growing to other markets.
- AtHoc lacks a mobile device interface, a road map position for mobile devices and a product-to-service architecture.
- AtHoc's geographic scope is mainly limited to North America, and its primary source of clients is government.

### Typical Use Cases

- Unified emergency mass notifications for force/personnel protection
- Roll call or mustering regulatory compliance

*Ranking: Positive*

## Blackboard

### At a Glance

1. **Vendor name:** Blackboard (formerly NTI Group)
2. **Headquarters:** Washington D.C., with additional office locations in Sherman Oaks, California, with branch or affiliated partner locations in Phoenix, Arizona; Indianapolis, Indiana; Lynnfield, Massachusetts; San Francisco, California; Vancouver, Canada; Sydney, Australia; Beijing, China; and Amsterdam, Netherlands
3. **Ownership:** Public
4. **ENS/MN business employee count:** 119
5. **ENS/MN product names:** Blackboard Connect, Blackboard Connect for Teachers and XO Connect
6. **ENS/MN offering in place since:** 2001
7. **Number of reported customers:** 1,600 in K-12, 500 in higher education and 400 government clients dispersed across multiple market segments
8. **Key markets supported:** Financial, K-12, higher education, government and healthcare
9. **Offering architecture:** Hosted and SaaS
10. **Claimed core competencies:** Providing capacity for reliable notification delivery with no single point of failure; Blackboard Connect was one of the early adopters offering the SaaS model

### Strengths

- Blackboard offers 99.99% uptime, which includes scheduled maintenance.
- It has a good understanding of data center security and privacy needs.
- It offers good capacity for inbound and outbound messaging.
- It has a steady commitment to R&D and reinvestment.

- Blackboard's dual-call authorization capability initiates certain types of messages (after-hour calls, agencywide calls and emergency calls).
- It employs, not contracts, support team staff.

### Challenges

- Blackboard recently launched a business continuity solution. In the past, it relied on its SaaS offering. It does not use channel partners other than SunGard for its disaster recovery services, and it does not offer other related services, such as for incident management or BCM.
- It is catching up with its global marketing efforts for its ENS service in the Caribbean, Canada and the U.S., and it is launching ENS services in parts of Asia and Europe in 2010.
- It needs to improve its SMS offering in Canada and beyond.
- It is not yet viable in Web 2.0 user interface offerings.

### Typical Use Case

- Workforce continuity and employee accountability — BC and disaster recovery (DR)
- Citizen alerting and communication
- Business operation and compliance communications and reporting
- Unified emergency and mass notifications
- Personnel roll call or mustering

*Ranking: Positive*

## Cooper Industries

### At a Glance

1. **Vendor name:** Cooper Industries (CI), formerly Roam Secure
2. **Headquarters:** Houston, Texas, with branch locations in Florida, New Jersey and Virginia
3. **Ownership:** Public
4. **ENS/MN business employee count:** 500 (31,000 worldwide)
5. **ENS/MN product names:** Roam Secure Alert Network (RSAN) and Roam Secure Information Exchange (RSIX)
6. **ENS/MN offering in place since:** 2002
7. **Number of reported customers:** 200
8. **Key markets supported:** Higher education, government, military, healthcare and private enterprise
9. **Offering architecture:** Hosted, SaaS and on-site

10. **Claimed core competencies:** CI has been around since 2002 with a 100% client retention rate; it leverages its acquisitions to offer a wide variety of indoor and outdoor messaging options

### **Strengths**

- CI has dedicated public safety gateway agreements with three partners to allow direct connections to wireless network providers.
- Its desktop notification is bidirectional, allowing monitoring and tracking.
- It offers RSIX to interface with external data source systems to connect to a variety of local sources of information, such as weather and traffic.
- Its rapid enrollment feature allows users to register via SMS.
- RSIX provides interoperability with computer-aided dispatch and emergency alert warning systems.
- It has a steady commitment to R&D.
- CI allows users to control and receive various data feeds.
- It integrates with Google and Microsoft Bing Maps for Enterprise.
- During the presidential inauguration, CI successfully sent 1.2 million messages over a 12-hour period.

### **Challenges**

- CI needs to improve its ability to integrate with social-networking technologies beyond Twitter account messaging.
- Information security audits and procedures are performed based on customer requests.
- It is in the early stages of developing formalized mechanisms for client feedback on product enhancements or improvements.
- It only offers text-to-speech conversion capability in English, French and Spanish. Its global communications capability requires another product (CooperAlert), which was not reviewed.
- It does not offer a full spectrum of incident command or BCM services.

### **Typical Use Cases**

- Workforce continuity and employee accountability (BC/DR)
- Citizen alerting and communication
- Business operation and compliance communications and reporting
- Alternate/backup system for primary radio communications channels

*Ranking: Positive*

## **DCC**

### **At a Glance**

1. **Vendor name:** Dialogic Communications Corporation (DCC), a wholly owned subsidiary of PlantCML, an EADS North America company
2. **Headquarters:** Franklin, Tennessee (North America), and Bremen, Germany (EADS corporate), plus other operating locations in Romania, France, Germany, Finland, Spain and Mexico
3. **Ownership:** Public
4. **ENS/MN business employee count:** 120
5. **ENS/MN product names:** Communicator! NXT v.4.1, GeoCast Web v.1.6 and Frontwave
6. **ENS/MN offering in place since:** 1982
7. **Number of reported customers:** No response
8. **Key markets supported:** Public safety; local, state and federal government; military; K-12 and higher education; finance; healthcare; retail, oil/chemical; transportation and utilities
9. **Offering architecture:** Hosted, on-premises and hybrid
10. **Claimed core competencies:** Flexible (including list and map-based notifications), secure (including Joint Interoperability Test Command [JITC] certification) and experienced

### Strengths

- DCC has been in the ENS market the longest of any vendor, and it has a good understanding of the needs of ENS prospects and customers.
- It has customers in a wide variety of industries. Besides emergency notification, DCC customers use the service for workforce mobilization for daily work scheduling, supply chain notifications (such as shipping delays) and product recalls.
- It is ISO 9001:2008 and JITC certified.
- DCC guarantees 99.9% uptime with replication every four hours and automatic failover to another data center if DCC or its partners experience a disaster. Clients restart their emergency notification event from that data center.
- U.S. and Canadian 1-800 numbers are on reserve.
- Pretty Good Privacy (PGP) encryption is used to secure contact information.
- Multilingual support includes Italian, Russian, Mexican, Spanish, Dutch, German, Brazilian, Portuguese, English and French.
- DCC operates seven Tier 3 data centers in the following locations: Tennessee (2), Arizona, New Jersey, Virginia, Oregon and Texas. Each data center is assessed against NIST SP 800-14 and Controlled Access Protection Profiles Series 5 "Functional Requirements." Each also undergoes SAS 70 Type II audits.
- Its telecommunications infrastructure is provided by multiple telco service providers with redundant routing of message traffic.

- It provides good physical and network security in its data centers.

### Challenges

- Data replication occurs every four hours, so if a data center outage occurs during a customer emergency event, data might be lost between the failed data center and the recovery data center.
- DCC's last recovery test was conducted in August 2008 — a 12-month testing cycle is too long for an emergency notification vendor.
- SLAs are negotiated by customer — no standard/baseline is provided.

### Typical Use Cases

- Mass notification
- Workforce mobilization
- Business continuity

*Ranking: Positive*

## Dell

### At a Glance

1. **Vendor name:** Dell
2. **Headquarters:** Round Rock, Texas
3. **Ownership:** Public
4. **ENS/MN business employee count:** 250
5. **ENS/MN product name:** Crisis Management & Alerting
6. **ENS/MN offering in place since:** 2001
7. **Number of reported customers:** 5,000
8. **Key markets supported:** Enterprise
9. **Offering architecture:** Hosted and SaaS
10. **Claimed core competencies:** Its SaaS solution is hosted in top-tier, disaster-recovery-class data centers; collaboration and team services speed decision making and accelerate recovery times

### Strengths

- Dell is a Fortune 50 company with global reach and the ability to provide local support in many countries.
- Data centers are situated in three different countries on different continents.
- Dell partners with many BCM companies. The system architecture is easily integrated with third parties using a series of APIs.
- Message notification infrastructure can send more than a million messages in 24 hours.

- Gartner receives generally positive client feedback on Dell.

### Challenges

- Given its vast resources, Dell might be expected to dominate the ENS industry; however, its estimated growth for its share of the ENS market is positive, but at a percentage that is comparable to a small vendor.
- Dell is the only company for which a client reported an interruption in vendor service that led to messages not being delivered (during the evaluation period). The issue was related to maintenance schedules and was resolved. Service interruptions can happen to any ENS vendor. The lesson for ENS users is to realize that incidental factors that are not spelled out in an SLA may affect system availability. ENS users should apply a holistic analysis to SLAs and look for potentially unrecognized factors.
- Some important features need to be added, including inbound calling override, workforce tracking (including graphical displays of workforce locations), the ability to print out a call tree, and the ability to dynamically discover the location of the contact once receipt of message is confirmed.
- Dell did not conduct external audits of its data centers during the study period. An external auditing program is under consideration.
- Dell does not disclose or report to its customers on the status of its global operations recovery plans and test results.

### Typical Use Case

- First-responder notifications

*Ranking: Promising*

### Everbridge

#### At a Glance

1. **Vendor name:** Everbridge, formerly 3N Global
2. **Headquarters:** Glendale California
3. **Ownership:** Private, venture capital-backed
4. **ENS/MN business employee count:** 143
5. **ENS/MN product names:** Everbridge Aware, Everbridge Matrix and Everbridge GIS
6. **ENS/MN offering in place since:** 2003
7. **Number of reported customers:** 1,000
8. **Key markets supported:** Healthcare, state and local government, financial services and higher education
9. **Offering architecture:** Hosted
10. **Claimed core competencies:** Everbridge claims to have nimble product innovations, broad and deep knowledge of ENS across industries, and superior client service with high retention rates; it delivers tens of millions of messages annually and offers localized services internationally

## Strengths

- Everbridge develops deep knowledge within vertical industries to provide relevant added value. Presales activities emphasize consulting and in-depth needs assessment.
- The company is exclusively endorsed by the American Hospital Association to provide ENS services to hospitals.
- Everbridge has a long-term investment in GIS messaging.
- It offers a 4-9's SLA, which simply and directly states its commitments on KPIs, including the minimum number of messages it can deliver within standard time frames.
- Standards include security — FIPS-199 (in progress), NIST 800-53, CAP and NIMS/ICS compliance.
- Client advisors can participate in new feature designs and pilot new releases.
- Entry-level pricing and quantity pricing are extremely attractive.
- Everbridge demonstrated best-in-class marketing plans.
- It presented an excellent sample SLA.

## Challenges

- Everbridge has spread its sales staff efforts thinly by pursuing in-depth specialization of many market segments. Although it sells well into its primary markets, an "all-things-to-all-people" strategy could divert resources from reputation building in the core client base.
- It needs to deliver the ability to geolocate message delivery and to add more support for SMS.
- It should support the use of strong access authentication (for example, two-factor solutions) for client access through its SSL VPN user portal.

## Typical Use Cases

- Workforce continuity and employee accountability (BC/DR)
- Citizen alerting and communication
- Business operation and compliance communications and reporting

*Ranking: Positive*

## Federal Signal

### At a Glance

- **Vendor name:** Federal Signal
- **Headquarters:** University Park, Illinois; Barcelona, Spain; and Queensland, Australia
- **Ownership:** Public
- **ENS/MN business employee count:** 54

- **ENS/MN product names:** Codespear Smartmsg 5.2 and Service Pack 2
- **ENS/MN offering in place since:** 2007
- **Number of reported customers:** 100
- **Key markets supported:** State government, healthcare, higher education and financial
- **Offering architecture:** Hosted, on-premises and hybrid
- **Claimed core competencies:** Operational presence in multiple countries

### Strengths

- Federal Signal's customer list includes some very large citizen alerting contracts — each with more than 1 million designated contacts.
- It has been well-known in the public and traffic safety business for more than 75 years.
- Federal Signal provided a thorough disclosure on its SLAs, pricing, resources and personnel, and demonstrates good organization in its responses regarding technical capabilities.
- It has a direct presence in six countries and an indirect presence in 25 countries.
- Its entire system is undergoing an update/rewrite/refresh. Federal Signal pursues an aggressive 12- to 14-month system refresh schedule.
- Four product configurations provide buyers with a range of options from fully insourced to fully outsourced.
- The entire product offering is available as SaaS.

### Challenges

- Federal Signal is a recent entrant to this market and has relatively few customers at this time.
- It has few partnerships (BCM or non-BCM). Partnerships are helpful for growing visibility and improving sales opportunities.
- It lacks an import facility for contact data management.
- Inbound calling and bridging functions are incomplete.
- Message management is not offered.

### Typical Use Cases

- Urgent notification of personnel critical events
- Interoperable emergency communications
- Citizen alerting and notification

*Ranking: Positive*

## Global AlertLink

### At a Glance

- **Vendor name:** Global AlertLink
- **Headquarters:** Charleston, West Virginia
- **Ownership:** Private
- **ENS/MN business employee count:** No response
- **ENS/MN product name:** Global AlertLink
- **ENS/MN offering in place since:** 1999
- **Number of reported customers:** 128
- **Key markets supported:** Manufacturing, education and financial
- **Offering architecture:** On-premises or SaaS with dedicated hosting options
- **Claimed core competencies:** Innovative use of technology, broad integration of ENS-related functions (including planning and risk management) and a simple customer service interface

### Strengths

- Global AlertLink offers an integrated system that will appeal to buyers who want a single-vendor solution, including planning tools, incident management and emergency notification.
- Its notification system provides dynamic status updates and task assignment updates.
- Its options for message delivery and receipts, activation, call management and escalations are very complete.
- Besides its internal notification platform, Global AlertLink leverages the DCC Communicator! NXT delivery platform for inbound and outbound emergency notification messages — resulting from a partnership announced in February 2009.

### Challenges

- Global AlertLink's service can't dynamically discover the location of a contact after confirmation. A GPS location facility is planned for the future.
- It offers unlimited users and a 100% uptime guarantee. Actual messaging delivery is negotiated as an SLA. Buyers should inquire about the actual performance of the ENS under real-life scenarios and should plan carefully — they should not assume that the unlimited user policy and uptime guarantee will translate into successful message deliveries.

### Typical Use Cases

- Business continuity disruptions
- Crisis management

*Ranking: Promising*

## **MIR3**

### **At a Glance**

1. **Vendor name:** MIR3
2. **Headquarters:** San Diego, California
3. **Ownership:** Private
4. **ENS/MN business employee count:** 60 (the entire company)
5. **ENS/MN product names:** inEnterprise and TeleAlert v6e
6. **ENS/MN offering in place since:** 2003
7. **Number of reported customers:** 387
8. **Key markets supported:** Higher education, government, military, healthcare, utility, finance and retail
9. **Offering architecture:** Hosted/SaaS, on-premises and hybrid
10. **Claimed core competencies:** Innovation with examples being in call bridging and notification preferences

### **Strengths**

- MIR3 offers a mature channel and partnership program, as well as OEMs for its products.
- It offers Level 3 integration with WebEOC, which means there is no separate login required to use products concurrently.
- It can detect and react to answering tones and voice mail.
- It has documented its entire message delivery and receipt process.
- MIR3 offers a 99.99% hosted service-level availability and operates out of six data centers, with four located throughout the U.S., one in Canada and one in the U.K.
- It offers SAML 2.0 authentication/session management capability.
- It offers three tiered levels of support: (1) a 24/7 team for general questions and product issues, (2) a dedicated team focuses on complex problems and key customer accounts, and (3) an advanced team focuses on customization issues.
- Standards include OASIS CAP, communications aspects of BS 25999-2:2007, and ISO/PAS 22399 for BCM and MN respectively, as well as Information Technology Infrastructure Library (ITIL) standards for incident, problem, and change management in the IT alert notification area.

### **Challenges**

- Pricing is based on a transaction-subscription model, such as the number of telephone, e-mail or SMS transactions. Organizations that use the system frequently will have increased costs. To reduce these costs, MIR3 offers volume discounts that range from

250 to 10,000 users. However, these discounts do not include add-ons such as self-registration portals, data loaders and GIS modules, which are priced separately.

- Its international service is localized or limited to telephony in some instances. Its international text-to-speech translation support is limited to Dutch, French, German and Spanish. Product text screens are only in English.
- The integration of alerting and business continuity platforms is maturing and includes (among other continuity systems) SunGard's Paragon.

### Typical Use Cases

- Workforce continuity and employee accountability (BC/DR)
- Citizen alerting and communication
- Business operation, compliance communications and reporting

*Ranking: Positive*

## Omnilert

### At a Glance

1. **Vendor name:** Omnilert
2. **Headquarters:** Leesburg, Virginia
3. **Ownership:** Private
4. **ENS/MN business employee count:** 42
5. **ENS/MN product names:** e2Campus v.3.0 and Amerilert v.3.0
6. **ENS/MN offering in place since:** 2004
7. **Number of reported customers:** 1,200
8. **Key markets supported:** Higher education, government and SMBs
9. **Offering architecture:** Hosted
10. **Claimed core competencies:** A user interface design that is clean and user-friendly, multimodal support, true connections and integrations with a number of third-party telecommunications end-parties that span beyond RSS posts, and a higher education product that was first to market

### Strengths

- Omnilert has a good understanding of its markets and buyer profiles.
- CAP protocol support is available.
- It offers good cell phone carrier coverage through aggregators, plus numerous direct links in specific geographic areas.
- It supports social-media messaging for Facebook and Twitter.
- Omnilert is one of the few vendors with a formal system integrator program.

- Its SmartCode technology platform is unique in the market, and provides for a rapid and flexible message delivery mechanism.
- It offers mobile device activation through a BlackBerry or iPhone-specific application or call center.
- Prebuilt message templates are available through its online user group.
- It has seven data centers. If one data center fails, the others can automatically pick up recovery — real-time failover and recovery.

## Challenges

- Omnilert's reporting needs to be improved.
- English is the only supported language for product configuration purposes. Omnilert believes that voice messages should be recorded by someone fluent in the language to avoid confusion due to a misinterpretation of a translated message during an emergency. Therefore, automated text-to-speech language translation is not supported.
- It can't attach files to an e-mail.
- It has a limited call escalation capability.
- No message management reporting exists.
- Contact data changes are not logged.
- Omnilert has limited reporting options.
- It doesn't offer GIS support (but is in the process).
- It provides an SLA for message delivery to third-party, endpoint service providers, but it does not provide an SLA from the third-party provider to the client.

## Typical Use Cases

- Weather-related closings and cancellations
- Time-sensitive information dissemination
- BCM support

*Ranking: Promising*

## ReadyAlert Services

### At a Glance

1. **Vendor name:** ReadyAlert Services
2. **Headquarters:** Largo, Florida
3. **Ownership:** Private
4. **ENS/MN business employee count:** 10
5. **ENS/MN product name:** Alert Notification Service 3.2

6. **ENS/MN offering in place since:** 2004
7. **Number of reported customers:** 50
8. **Key markets supported:** Local, state and federal government, and nonprofit organizations
9. **Offering architecture:** Hosted/SaaS and on-premises
10. **Claimed core competencies:** Voice-to-text conversion, automatic cell number/carrier detection and confirmation of message receipt

### **Strengths**

- ReadyAlert Services has a good understanding of its markets and buyers, which have been primarily first responders.
- Although a number of features need to be added, it is successful in its target market of SMBs.
- It uses a third-party, data-center-managed service provider, and it operates out of four data centers in Louisville, Kentucky; Tampa, Florida; Atlanta, Georgia; and Charlotte, North Carolina. If one data center fails, the others can automatically pick up recovery with no data loss.
- It has social-media support for Twitter, Facebook and others.
- ReadyAlert Services' pricing is highly competitive.
- Activation of an emergency notification can be done through a CAD system.

### **Challenges**

- ReadyAlert Services does not have a GIS capability.
- It doesn't prefer to respond to RFPs.
- Only English-language support is available.
- It does not support Active Directory.
- It doesn't have skill tracking.
- There are no prebuilt message templates.
- There's no support for a multiple-choice questionnaire/survey.
- There's no secure call-in for message pickup.
- There's no call bridging or escalation.
- There's no message management.
- It does not support TTY.
- It does not provide an SLA.

### **Typical Use Case**

- Distribution of time-sensitive information

*Ranking: Promising*

## Send Word Now

### At a Glance

1. **Vendor name:** Send Word Now (SWN)
2. **Headquarters:** New York, New York, and London, England
3. **Ownership:** Private
4. **ENS/MN business employee count:** 85
5. **ENS/MN product name:** Send Word Now
6. **ENS/MN offering in place since:** 2003
7. **Number of reported customers:** 550
8. **Key markets supported:** All industries and sectors
9. **Offering architecture:** Hosted
10. **Claimed core competencies:** Scalability and strong performance at competitive prices; low cost of entry

### Strengths

- SWN's SIP platform is fast, scalable and efficient for sending notification messages. Outbound voice notification is done entirely in SIP. SWN has demonstrated expertise in recognizing and avoiding attacks against SIP and the underlying real-time transport protocol (RTP).
- Pricing is extremely competitive — it provided the most attractive pricing examples of any vendor responding to the survey.
- It can detect and react to answering tones and voice mail.
- It documents the entire message delivery and receipt process.
- It offers a friendly, low-risk customer test plan for new functions and new revisions.
- Deployment for large installations appears to be fast and requires the involvement of few staff.
- SWN does a good job of analyzing the competition. Its response in this category was best in class.
- It offers many features for managing contacts through traditional telephony infrastructures, such as detecting the answering tone of voice mail.
- It offers support for NFPA 72 National Fire Alarm and Signaling Code through a Siemens partnership.

### Challenges

- SWN is pursuing all industry sectors at the same time. Using a broad strategy can help to discover the best markets for SWN, but being a small company, this spreads internal

resources very thin with respect to developing expertise in any one industry. The success of this approach will weigh heavily on the quality of its VARs.

- SWN describes its service as offered globally, but only has offices in the U.S. and U.K., and has only shipped an English-language version.
- During the evaluation period, two out of three operations centers and all critical staff were located in adjoining states on the eastern U.S. seaboard. Critical resources will be repositioned in the future.
- Text-to-voice translation was rather poor in quality in demos evaluated by Gartner analysts, which could impact understandability over impaired lines.
- SWN needs to add the ability to dynamically discover the location of the contact once receipt of message is confirmed.

### Typical Use Cases

- Emergency preparedness
- Emergency notification
- Day-to-day business-critical communication

*Ranking: Positive*

## SpectraRep

### At a Glance

1. **Vendor name:** SpectraRep, a subsidiary of BIA Financial Network
2. **Headquarters:** Chantilly, Virginia
3. **Ownership:** Private
4. **ENS/MN business employee count:** 30
5. **ENS/MN product name:** AlertManager and Active Access
6. **ENS/MN offering in place since:** 1998
7. **Number of reported customers:** 83
8. **Key markets supported:** K-12, higher education, government and private enterprise
9. **Offering architecture:** Hosted and on-premises
10. **Claimed core competencies:** Desktop alerting capabilities (ActiveAccess) and MN via broadcast EAS, e-mail, SMS, voice and other electronic means (AlertManager), as well as initial product launches for ActiveAccess (1998) and AlertManager (2004)

### Strengths

- SpectraRep offers hosted ENS, real-time alerting, incident management, and equipment for digital television and satellite communications.
- It documents the entire message delivery and receipt process.

- It offers network-centric servers to relay alerts via text, e-mail and SMS, and these servers are EAL4+-certified, Federal Information Processing Standard (FIPS 140-2) certification for data encryption.
- SpectraRep offers a friendly, low-risk test plan for new functions and new revisions.
- It offers a command-center-style incident interface that is GIS-based to deliver CAP messaging.

### Challenges

- SpectraRep pursues multiple industry sectors at the same time, such as media, education, public safety and homeland security. Using a broad strategy can help to discover the best markets for SpectraRep, but being a small subsidiary, this spreads internal resources very thin with respect to developing expertise in any one industry. The success of this approach will weigh heavily on the quality of their partnerships.
- It describes its services as advanced interoperable alert and warning capabilities, such as broadcast EAS, text, e-mail, voice, and electronic signage used as desktop notification tools used by broadcasters, campuses and government agencies.
- It maintains offices in the U.S. and has only shipped an English-language version.

### Typical Use Cases

- Emergency notification
- Day-to-day business-critical communication
- Managing Amber Alerts
- Weather-related closings and cancellations
- Time-sensitive information dissemination

*Ranking: Promising*

## SunGard

### At a Glance

1. **Vendor name:** SunGard Availability Services (its ENS/MN services were from the 2008 Strohl Systems acquisition)
2. **Headquarters:** King of Prussia, Pennsylvania, with 41 branch or affiliated locations or facilities in such areas as Atlanta, Georgia; Denver, Colorado; Dallas, Texas; Brussels, Belgium; and London, U.K.
3. **Ownership:** Private
4. **ENS/MN business employee count:** 250 (its entire BCM software business)
5. **ENS/MN product name:** NotiFind v.3.0.0.004.11; prior to the acquisition, SunGard partnered with MIR3 and MessageOne (now Dell) to provide ENS/MN services to its customers
6. **ENS/MN offering in place since:** 2008
7. **Number of reported customers:** 270

8. **Key markets supported:** Private enterprises, financial government, higher education and healthcare
9. **Offering architecture:** Hosted
10. **Claimed core competencies:** Offering or updating product features; NotiFind is exclusively offered as a hosted product, and no inside-the-firewall implementations exist

### Strengths

- SunGard Availability Services offers deep and broad expertise in business continuity, as well as colocation and managed hosting business with pricing about average for these services.
- It performs regular third-party security audits to maintain SAS 70-Type 2 compliance of its platform communications.
- It offers Web-based message tracking.
- Its text-to-speech translation is good.
- It offers best practices and message templates in the areas of business continuity training and planning; crisis/incident response; and action-tracking capabilities, including workforce, expenses and response actions, but these features are generally geared toward larger enterprises.
- SunGard Availability Services offers improved support for interfaces to external data resources, such as GIS, emergency notification and situational emergency message alerting systems to expand usage outside its traditional client base.
- It is one of the few vendors to support message delivery through an operator.
- Best practices are given to each user — guidance and message templates.

### Challenges

- SunGard Availability Services' technology is based on Varolii's underlying telecommunications infrastructure — mandating that it continues partnering with Varolii to improve its product portfolio in the areas of critical incident management and disaster recovery services to capably manage a broad range of requirements. For example, Varolii recently introduced .NET support to enable richer user interface features and additional APIs that SunGard adopts. This testing and development-dependent approach may create confusion between multiple operation groups when addressing clients' specific technical issues. Examine SLAs between Varolii and SunGard for support.
- Varolii is the underlying telecommunications infrastructure. As a result of the SLA between SunGard and Varolii, all technical questions are referred to Varolii.
- It needs to improve its integration with building/facility security systems.
- The NotiFind Team product (the out-of-the-box version) cannot be customized. NotiFind Professional and Enterprise have more features, availability and customization, and are used for larger organizations.

- SunGard Availability Services offers a near-term cloud infrastructure road map focused on business continuity capabilities, yet it still struggles to manage high-growth, high-change environments.
- It has to get its dedicated implementation team up and running.

### Typical Use Cases

- Day-to-day business-critical communication
- Emergency notification
- Workforce continuity and employee accountability (BC/DR)
- Business operation and compliance communications, and reporting

*Ranking: Positive*

## Twenty First Century Communications

### At a Glance

1. **Vendor name:** Twenty First Century Communications (TFCC)
2. **Headquarters:** Columbus, Ohio
3. **Ownership:** Private
4. **ENS/MN business employee count:** 94
5. **ENS/MN product name:** Universal Communication System (UCS) v3.0. and CRISCOM 3.0
6. **ENS/MN offering in place since:** 1989
7. **Number of reported customers:** 302
8. **Key markets supported:** Higher education, government, healthcare, utility and private enterprises
9. **Offering architecture:** Hosted and SaaS
10. **Claimed core competencies:** Delivering highly complex solutions and offering reliable customer service

### Strengths

- TFCC offers dynamic cross-carrier call routing/redirecting to overcome challenges of diverse and multiple carriers to alternative devices and locations.
- It understands data center security and privacy needs.
- It offers Web-based command and control, as well as a tracking capability to detect and react to answering tones and voice mail messages.
- It has deep knowledge within vertical industries in government, education and utilities to provide relevant added value. Presales activities emphasize high call volume and outage reporting from a highly competitive data center.

- TFCC offers call throttling to determine call volume capacity limits and staggers calls in volumes appropriate to local network capacities to maximize call throughput.
- It offers a good selection of advanced call-handling features, such as detecting and reacting to answering tones and voice mail. It offers TTY detection without preregistration and message delivery and a bridge conferencing, on-the-fly capability.
- It documents the entire message delivery and receipt process.
- It offers GIS-based support.
- TFCC offers a 4-9's SLA, which simply and directly states its commitments on key performance indicators, including the minimum number of messages it can deliver within standard time frames.
- Clients can participate in new feature designs.
- TFCC offers one of the largest automated call-handling capacities in North America.
- It has a mature program of value-added resellers and OEMs its product to others.

### Challenges

- Training has been described by client references as somewhat laborious and time-consuming, and both complaints have been addressed.
- It needs to improve its capability to build contact and workgroups more dynamically.

### Typical Use Cases

- Unified emergency and mass notifications for government/force/personnel protection
- Personnel roll call or mustering
- Workforce continuity and employee accountability (BC/DR)
- Citizen alerting and communication
- Business operation and compliance communications, and reporting

*Ranking: Promising*

## Varolii

### At a Glance

1. **Vendor name:** Varolii
2. **Headquarters:** Seattle, Washington
3. **Ownership:** Private with venture capital backing
4. **ENS/MN business employee count:** 300
5. **ENS/MN product names:** Varolii Express Communications Platform (sold directly); Profiles 4.15 is the core product contained in and sold through partner applications under names such as NotiFind (SunGard), Verizon Notification Services, Instant Alert Plus (Honeywell), as well as applications such as 1st Responder, Enterprise Business Continuity, Pandemic Planning, Employee Accountability, Critical Communications for

Utilities and Higher Education, Higher Ed Basic, Higher Ed Premium, Critical Communications for Utilities, Flight Team Management, and Contact Center Agent

6. **ENS/MN offering in place since:** 1999 (as Envoyworldwide, acquired in 2005 by PAR3 and subsequently in 2007 by Varolii)
7. **Number of reported customers:** 300
8. **Key markets supported:** Financial services; energy and utilities; higher education; healthcare; local, state and federal government; retail; and pharmaceuticals
9. **Offering architecture:** Hosted
10. **Claimed core competencies:** Performance — message delivery technology and experience; reliability through contractually guaranteed SLAs (availability and delivery); global delivery in 180 countries; voice messaging qualification process; and multiple Tier 1 SMS aggregators

### Strengths

- Varolii has strong partnerships with telecommunication firms, facility management vendors and other ENS/MN providers.
- It has good data center operations with geographical disbursement — Massachusetts (Tier 4) and Chicago (Tier 3) — and a good failover strategy.
- It has a strong telecommunications infrastructure — more than 6,000 phone lines, six production T3 lines and three T3s on standby reported in 2009.
- It possesses five patents in the ENS market.
- Varolii reported 99.9% or better uptime in 2009.
- It supports 15 languages and 25 dialects, with gender included, and offers more than 40 different language options.
- It provides message templates.
- Its largest customer used Varolii to send 3 million voice messages and 1 million e-mail messages in one day.
- Varolii offers good data center physical security.
- Customer communications PCI data is FIPS 140-2 Level 3 compliant; other customer communications are FIPS 140-2 Level 2 compliant. SSL connectivity is FIPS 140-2 Level 1-compliant for both sides.
- Guaranteed 99.99% SLAs are available via contract — Message Trust Guarantee.

### Challenges

- Varolii doesn't have a GIS offering, but an API to link to one is planned for a 2010 product release.
- It doesn't have a product-based audioconferencing capability, but it can use an API to link to a partner or customer service.

### Typical Use Cases

- Crisis communications
- Event notification for education
- Pandemic planning
- Employee accountability
- Employee scheduling
- Utilities outage and demand curtailment notifications

*Ranking: Positive*

## **RECOMMENDED READING**

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"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Hype Cycle for Business Continuity Management, 2009"

"How to Understand and Select Business Continuity Management Software"

"Hype Cycle for Enterprise Communication Applications, 2009"

"Effective Communications: Stakeholder Analysis"

### **Note 1 IT Service Alerting Support**

IT service alerting support is not just another group to be notified. The difference is that these tools specialize in building the integration/adapters to the IT operations management tools that are the source for the notifications. Only a handful of tools specialize in the IT operations alerting/notification — AlarmPoint, MIR3/Telalert and Attention Software. Other vendors that provide some capability in the IT service alerting support area offer traditional IT infrastructure monitoring tools, such as BMC, CA Unicenter, HP OpenView and IBM Tivoli. The Telalert product, now owned by MIR3, used to be the leader, but AlarmPoint has definitely usurped that position. AlarmPoint and Attention have both developed additional modules or products to try to get in to the adjacent ENS/MN space. However, we haven't seen any success for them as stand-alone products in that space. We have seen them successfully "upsell" an existing IT operations alerting/notification customer who also purchases them for emergency/disaster notification.

### **Note 2 Definitions of Reverse 911 and E-911 From Wikipedia**

**Reverse 911** is a communication system that allows emergency services to quickly contact members of a community or organization with information. It is so named, because 911 is the telephone number used for members of the community to communicate with emergency services (police, fire and EMS) in the U.S. This system allows emergency services to do the "reverse," usually to inform the public of a known hazard. Reverse 911 is designed to provide a map or list-based communications with key audiences. Geographic calling zones are created based on immediate circumstances (for example, Amber Alerts) or ahead of time based on anticipated needs (for example, flood plains). Reverse 911 may also target specific lists of people (for example, first responders and a neighborhood watch group).

Reverse 911 is used in hundreds of communities, counties, commercial businesses, schools and nonprofit organizations. The system has been used to solve and prevent crimes. Reverse 911 systems are a component of the Silver Alert system to locate missing seniors.

**E-911** is a North American telecommunications-based system that automatically associates a physical address with the calling party's telephone number, and routes the call to the most appropriate Public Safety Answering Point (PSAP) for that address. The caller's address and information are displayed to the call taker immediately on call arrival. This provides emergency responders with the location of the emergency without the person calling for help having to provide it. This is often useful in times of fires, break-ins, kidnappings and other events where communicating one's location is difficult or impossible.

The system only works in North America if the emergency telephone number 911 is called. Calls made to other telephone numbers, even though they may be listed as an emergency telephone number, may not permit this feature to function correctly. Outside the U.S., this type of facility is often called *caller location*, although its implementation is dependent on how the telephone network processes emergency calls.

### **Note 3** **Definition of K-12 From Wikipedia**

**K-12** is a designation for the sum of primary and secondary education. It is used in the U.S., Canada and some parts of Australia.

The expression is a shortening of kindergarten (4- to 6-year-olds) through grade 12 (16- to 19-year-olds), the first and last grades of free education in the U.S., Australia and English Canada. It is often used in school website URLs, generally appearing before the country code top-level domain (or the state top-level domain in the U.S.).

By contrast, **K-14** education also includes community colleges (first two years of university) and **K-16** education adds a four-year undergraduate university degree.

## **Vendors Added or Dropped**

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

## **Gartner MarketScope Defined**

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

The various ratings are defined below.

## MarketScope Rating Framework

### Strong Positive

Is viewed as a provider of strategic products, services or solutions:

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

### Positive

Demonstrates strength in specific areas, but execution in one or more areas may still be developing or inconsistent with other areas of performance:

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

### Promising

Shows potential in specific areas; however, execution is inconsistent:

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.

### Caution

Faces challenges in one or more areas:

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's challenges as part of due diligence.

### Strong Negative

Has difficulty responding to problems in multiple areas:

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.

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