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2020 BEST PRACTICES AWARD

NICE®

2020 NORTH AMERICAN
PUBLIC SAFETY SOFTWARE SOLUTIONS
CUSTOMER VALUE LEADERSHIP AWARD

Contents

Background and Company Performance

Industry Challenges

Frost & Sullivan's own research indicates that a game-changing public safety paradigm shift is imminent. In the law enforcement sector, a critical industry challenge includes evidence spread across data silos, which requires time-consuming manual processes to collect, analyze, and share. Moreover, investigators lack streamlined tools that allow citizens and businesses to provide relevant case information; this is currently conducted through incoming tips via phone calls, emails, driving to business locations, or even seizing personal smartphones to retrieve data and recordings. Prosecutors also face difficulties surrounding evidence and case data procurement; such challenges include searching across numerous data siloes and sharing discovery packages on paper and removable disc drives, hindering a comprehensive case overview.

Detectives spend much of their time interviewing people, requesting and collecting evidence, and writing reports. However, a detective's priorities include gaining leads, finding criminals, and solving crimes; as such, it is imperative that they receive evidence quickly. This is especially true for time-sensitive cases that may be a matter of life or death. In law enforcement, the "48-hour rule" is the 48-hour window of time after a crime occurs and is the most crucial time in an investigation; current laborious, time-consuming practices significantly decrease a detective's chances of solving a crime. Moreover, crime investigators often do not receive crucial evidence until weeks after their initial request. Therefore, a system that enables investigators to obtain evidence faster will solve more crimes in less time.

To combat the challenges above, some law enforcement agencies require employees to work overtime hours and on-call shifts. However, this significantly reduces an investigator's ability to focus on analyzing evidence and other cognitive-intense tasks due to mental and physical exhaustion. Furthermore, such practices cause investigators to have an arduous and disproportionate work-life balance, which can bring a whole new set of challenges to the table. Alternatively, some law enforcement agencies do not allow crime investigators to work overtime hours, reducing the time available to analyze collected evidence, which contributes to lengthy crime-solving times.

In law enforcement agencies' struggle to balance labor hours with time spent preventing and solving crimes; many hire dedicated teams to sort and store evidence, review tips from the public, and conduct other tasks that an automated system can execute. Frost & Sullivan points out that such traditionally manual processes will only prove more time-consuming and lose their efficiency due to the ever-increasing volumes of visual and audio data facilitated through technology proliferation; e.g., police body-worn cameras, closed-circuit television (CCTV) cameras, and smartphones. As law enforcement agencies often deal with lean budgets and fewer resources, they are left with less experienced personnel to deal with an aging digital infrastructure that cannot thoroughly conduct the comprehensive investigations or analysis needed. Frost & Sullivan analysts conclude that any new digital public safety platform needs to overcome the complex challenges that law

enforcement faces regarding growing data and evidence types, legacy integration and case management, all while enabling employees to become more efficient and effective to make thin departmental budgets go further.

Customer Impact and Business Impact

With more than 30 years of experience in the field and over 3,000 customers globally, NICE Public Safety (NICE) is a first mover in the public safety digital technology and transformation arena. As a leader in emergency response, investigation and evidence management solutions for public safety and crime prevention, the company is known for leading the way with its cloud-based platforms.

Showcasing the company's ongoing commitment to innovation in the industry, NICE is developing Evidencentral, an open public safety cloud platform, leveraging advanced analytics, artificial intelligence (AI) and robotic automation, to empower law enforcement agencies to digitally transform their operations. Frost & Sullivan recognized the company as the 2017 North America Investigation and Evidence Management Solution Technology Leader and the 2018 Public Safety Answering Point Solutions Product Leader, and lauds NICE for its continued success, technology innovations, and customer support.

Getting in Front of Issues Starts with the 911 Call Managed Well

Reviews of high profile police cases tend to focus on the citizen-police interaction. But the fact is – most police responses start with a 911 call. 911 telecommunicators are the first point-of-contact citizens have with the police. Research suggests that how officers respond largely depends on the 911 telecommunicator's understanding of the situation, the accuracy of what was said, what was heard, and what was relayed. Officers must then act on the information they are given; inaccurate information increases the risk of errors and exposes officers to excessive scrutiny or negative press. With 911 telecommunicator annual turnover approaching 30% in the United States (US), overstressed, overworked, and inexperienced 911 telecommunicators must make these "life or death" judgment calls every day. They are also taught to dispatch for the worst case scenario, which can lead to police "over response."

Statistics show that 20-40% of all incidents are downgraded by police following the initial classification by 911. Over-response can expose citizens and officers to unnecessary risk, escalate incidents, cause reputational damage for 911 centers and patrol officers, as well as waste scarce police budget dollars. For these reasons, placing more focus and investment in 911 operations will ultimately help to deescalate tension between citizens and police.

NICE's Performance Management Suite NICE Inform can help 911 centers address these challenges to improve downstream police response. With NICE Inform, 911 centers can gain better visibility into how telecommunicators handle incidents to spot issues (e.g. over-response or under-response to calls) early on. By using NICE Inform to record the telecommunicators' interactions with the public, workstation data, and other revealing incident data sources (e.g. advanced location information from RapidSOS), and then automatically piecing this data together, 911 centers can get complete understanding of

what happened, how, and why. Using NICE Inform's Intelligence Center, they can also automatically isolate upgraded or downgraded incidents, and then drill down into metrics and listen to recorded audio to better understand root causes. Using data-driven Quality Assurance (QA), centers can also systematically pull and route re-classified calls to supervisors for QA review and timely remediation where warranted.

A Force Multiplier: From Investigation to Prosecution

As data grows and budgets decrease, police departments are turning to digital transformation to accomplish more with less. NICE's game-changing investigation and evidence management platform, NICE Investigate, can help police departments stretch their limited budget dollars without compromising service quality, by automating investigative processes. Departments are able to realize a ten-fold-plus savings in productivity, and use technology as a force multiplier to help officers spend more time in the community and investigating cases, without adding extra overhead and costs.

Comprehensive, End-to-end Investigation Solution with Real-time Connections

NICE Investigate uses advanced analytics through a cloud-enabled platform for investigators and prosecutors to collect, analyze, collaborate, and share investigative data for law enforcement cases. The solution facilitates cross-jurisdictional evidence sharing and leads to reduced case-solving time and labor costs. With its launch, the Investigate digital evidence platform revolutionized the court system, which was previously limited by the reliance on physically-shared evidence (e.g., paper documents and photographs) that were not centralized, easily accessible, or shared between districts or agencies. Investigate aggregates, synchronizes, and links up to 99% of a case's total evidence to provide investigators with a comprehensive view of case data in a single unified platform, enabling superior case analysis and shorter crime-solving times. Through NICE Investigate's integrated analysis function, investigators can cross-analyze evidence from multiple cases to determine any potential connections or overlaps that detectives could not previously detect, enabling investigators to solve crime sprees and cold cases.

NICE Investigate also automatically tracks who accessed digital evidence to protect evidence integrity and chain of custody. In addition to speeding up evidence sharing and saving time, this revolutionary way of sharing evidence also improves transparency, expedites disclosure, ensures complete evidence, and preserves chain of custody. A number of police forces and court systems across the US and the United Kingdom (UK), including the Crown Prosecution Service, are now adopting this new, more efficient method of sharing evidence.

NICE Investigate improves the entire continuum from crime scene to courts in the US as well. As one example, the Police Department and District Attorney's (DA's) Office for Nassau County New York are using NICE Investigate to accelerate digital transformation and disclosing growing digital evidence to ensure compliance with New York State's Article 245 of the Criminal Procedure Law. NICE Investigate's workflow and automation technology makes it easier for the DA's Office to disclose evidence to defense attorneys automatically

within the time limit required by law. Instead of copying case files and digital evidence onto DVDs, the DA's Office will be able to share the entire case by simply sending a secure link. Together, the Nassau County Police Department and the DA's Office investigate and prosecute approximately 30,000 criminal cases annually.

Customized Digital Transformation Services

NICE Public Safety serves police and sheriff's departments, prosecutors and courts, emergency communications centers, air traffic controllers, utilities, and more. The company's state-of-the-art product integrations include a wide variety of records management systems, body-worn and car dash cameras, computer-aided dispatch systems, phone and radio systems, video surveillance, and Text-to-911, among others. NICE works with customers to understand their specific challenges and applications before deploying its technology within a customer's environment. The company's solutions are off-the-shelf and ready-to-deploy with NICE's customer support team conducting the platform's configuration and customization onsite to ensure optimal operation throughout the life of a customer's solution.

NICE focuses on long-term customer retention through its ease-of-integration, continued solution updates, and flexible solution design to grow and adapt with a customer. With unlimited storage in the cloud, customers can scale up or down as needed, offering additional flexibility in addition to ensuring that its evidence collection remains vendor-agnostic, giving customers freedom to integrate other solutions to augment their operations further.

NICE's solutions help public safety agencies digitally transform their operations. Big Data analytics, AI and workflow automation capabilities power the platform and eliminate data siloes and aggregate data, search across data and evidence, and enable automated case building and collaboration with local and remote justice partners. Moreover, users can create clips and include notes on digital evidence and cases to help other investigators who view and work that case. Investigators involved with a case receive a notification whenever new evidence is uploaded, allowing them to remain up-to-date on all case developments - no matter where they may be.

Exceptional Customer Service and Impressive Partnerships Driving Company Growth

NICE boasts one of the largest industry research and development teams dedicated to public safety. The company maintains a mission-critical mindset backed by 24/7 operations and provides a differentiated customer experience that includes rapid and innovative service capabilities. Moreover, NICE has an internal "Impact Awards" competition that rewards employees for exceptional customer service and innovation excellence, facilitating employee retention rates by creating a culture that recognizes achievements.

Also proving NICE's competitive edge, the company acquired SiraView to enable investigators to view video footage in any format through their agency's system. With

video evidence playing a significant role in an estimated 80% of investigations, the company's technology, offered exclusively by NICE, simplifies the investigative process significantly, saving law enforcement personnel critical time.

The company bases its pricing on customer size (e.g., the number of sites and case load) as well as the integrations, and the analytics needed. Moreover, NICE quells customers' security concerns as the company selected the Microsoft Azure Government Cloud (the most secure cloud solution available) to host NICE's Investigate platform, offering clients a unmatched scalability. Furthering securing the solution, Investigate is compliant with the Criminal Justice Information Services' (CJIS) regulations, and earned the CJIS Audit and Compliance Experts certification, allowing clients to maintain the US Federal Bureau of Investigations (FBI) CJIS Security Policy compliance.

In addition to Microsoft, NICE's partner network consists of other world-renowned organizations, including the APCO, NENA, FBI National Academy Associates Training Academy, Major Cities Chiefs Police Association, Major County Sheriffs Association, Police ICT, and other prominent industry associations to augment their public safety and crime-solving efforts. The company is also a founder and an active participant in the first-ever public safety industry user group, which drives an in-depth understanding of customer challenges and successes and promotes close collaboration through in-person and online customer meetings.

NICE's global expansion and success demonstrate the company's game-changing technology and extraordinary customer service. NICE achieved double-digit growth and reported revenue of $1.57 billion in 2019, with an operating income of $239 million; 21% growth from 2018. Moreover, NICE's cloud services revenue totaled $596 million in 2019, representing 29% year-over-year growth. The company expects its cloud advantage over competitors will drive even faster growth for NICE in the near future.

How NICE Customers are Transforming their Policing Practices

Digital Transformation made possible with NICE Investigate pushes the boundaries of what is possible in policing from crime to justice.

- **NICE Investigate Enables Expedited Charging Decisions and Increased Guilty Pleas**

After an arrest is made, it's a race against the custody clock to obtain evidence for a charging decision. Without compelling evidence, suspects are invariably released under investigation. If the evidence involves CCTV video it can be especially problematic. Al Stringer, former Senior Project Manager for Merseyside Police explained:

> *"Audio recordings or body-worn video can make or break domestic violence cases, but it can take up to two to three weeks to get a copy of a 911/999 call. And even when body-worn video cameras have been docked and the footage has been uploaded, it's still not immediately viewable and accessible to investigators. The investigating officer needs to request this evidence manually from specialized units or external agencies. If redaction is required, or specific clips*

need to be pulled, this adds more steps and time to the process, during which a suspect can walk free."

NICE Investigate solves these challenges by making evidence of all types more easily accessible to investigators, potentially eliminating weeks of waiting. Instead of driving to the site to obtain surveillance video and waiting around while the business employee tinkers with the CCTV system, the officer can use the digital evidence management software (DEMS) to send the contact an electronic request with a secure link to upload the requested video. As it is uploaded to the cloud, the video is automatically virus scanned and transcoded into a playable version. The officer now has the convincing evidence he needs to charge the suspect, long before the custody clock runs out. What is more, now faced with the irrefutable CCTV evidence, a perpetrator confesses during the interview. His confession is captured on the digital interview room recording system and ingested into the DEMS' system. This is sent electronically to the prosecution to obtain positive charging decision and he is bailed straight to court, minimizing his impact on the community.

- **Electronic Evidence Sharing Promotes Justice**

Successful investigations and prosecutions require evidence sharing on many levels. The public needs to share information with the police, investigators need to share information with each other, case evidence needs to be shared with defense attorneys for discovery, and of course with the prosecutor, who ultimately uses it in court. This often involves long wait times, driving from location to location to hand off folders and media, and uploading files into different systems, but sometimes justice cannot wait.

Such was the case recently in Merseyside, UK. As a case was being heard in court, further evidence that was held 60 miles away (at a neighboring police force) came to light and the judge requested to see it. Ordinarily this would have required adjourning the trial to allow sufficient time for Merseyside's investigating officers to formally request the evidence from their other force colleagues, drive 60 miles to the neighboring county, wait while the evidence was copied, and then make another two hour return trip back to court. However, as both police forces use NICE Investigate, they were able to request and securely share the evidence electronically in less than 15 minutes during a court recess. The case was able to continue that same day unhindered, a development that the judge praised as "ground-breaking."

- **Police Departments Can Better Keep Up with Evolving Crime Trends**

As criminals change their mode of operations, law enforcement technology must keep up. For example, take the dramatically increasing County Lines drug dealing in UK – the process whereby drug dealing gangs from cities draft unwitting children to expand their criminal enterprises to other areas. During the pandemic and lockdown, gangs (who could no longer easily conduct business on the street) took to social media platforms to entice children to carry out their illicit activities. Investigating these types of crimes requires detectives to leverage new evidence sources. Using NICE Investigate, Merseyside Police was able to easily integrate to LongArm (a tool for social media scraping). Essentially, this made any

content and metadata captured in LongArm immediately searchable and accessible to investigators for use in obtaining arrest warrants and charging decisions. Merseyside Police Chief Constable Andy Cooke said:

> *"We have seen considerable success through this kind of targeted action in recent months and it is vital that we keep up this relentless level of activity targeting criminals and protecting the young and vulnerable who they groom to do their dirty work. Here at Merseyside we have arrested 137 people and shutdown 61 County Lines between November 2019 and March this year [2020]."*

Commitment to Customers during the COVID-19 Pandemic

As the COVID-19 crisis deepened, NICE held series of roundtables with customers to determine how it could help. Short-staffed departments and changing patterns of criminal activity were some of the issues customers reported facing; thus, the company launched NICE Investigate Xpress, which provides free-of-charge evidence management deployable within 48 hours for investigators working remotely in 2020, with the option for customers to renew at the end of this period to a paid license or to be given all of their data after the year's end with no penalty. A version of free NICE Investigate Xpress was also made available to emergency dispatch centers, enabling officers to remotely request and collect 911-call related evidence from citizens and businesses without the need for physical intervention. NICE also offered a cloud-based call handling solution, free-of-charge for 90 days, to protect 911 call takers. This service is Federal Risk and Authorization Management Program certified and includes everything that at-home telecommunicators need to handle non-emergency calls remotely, including ACD, audio recording, integrated softphones, and data storage.

For example, North Wales Police, UK has reinvented the way it collects and shares evidence with help from NICE Investigate, to better support the community and its criminal justice partners, while also minimizing in-person contact and handling of physical media. Jason Devonport, Superintendent for North Wales Police, explained:

> *"Here at North Wales Police, we're always thinking of better and more efficient ways that we can be working, but this has become really important in these challenging times during the COVID-19 pandemic. We're transitioning our processes from officers traveling to collect digital evidence on a disc or USB to being able to do all of this online. This means that our officers will be able to review vital evidence faster as well as reducing any risks around disc handling and visiting premises unnecessarily, while giving criminal justice partners and the Department added security. We can also share this online evidence with our partners such as the Crown Prosecution Service and in turn the courts, allowing them to review it sooner and with less risk. The feedback from officers has been really positive. They see this change being here for good and really helping them to become more effective in what they do."*

Conclusion

Law enforcement agencies are reluctant to use digital investigation and evidence management solutions due to a range of concerns, such as evidence security, initial financial costs, and return on investment. However, due to slow manual practices and the exponentially increasing data caused by technology advancements and increasing data sources, law enforcement agencies must implement automated solutions to solve crimes faster.

NICE Investigate, NICE Public Safety's digital evidence management solution, is a comprehensive, brand-agnostic, and end-to-end software that aggregates case evidence and data in a centralized, cloud-based platform. The solution enables detectives to solve cases quickly through advanced analytics capabilities and streamlined citizen to investigator to prosecutor workflows. Thousands of law enforcement and public safety officials worldwide rely on NICE Public Safety's time-saving products to help investigators solve crimes and serve the public more efficiently. Frost & Sullivan recognizes how the company and its market-leading cloud-hosted solution have revolutionized incident intelligence and digital investigation by offering game-changing digital evidence management and investigation capabilities, such as artificial intelligence and cross-jurisdictional evidence sharing and collaboration. NICE Public Safety brings real customer value and support to often overwhelmed law enforcement investigators and prosecutors, allowing them to increase public safety.

For its ongoing commitment to public safety through superior technological innovation, outstanding continuous customer service, and overall strong performance, Frost & Sullivan is proud to present NICE Public Safety with the 2020 Customer Value Leadership Award.

Significance of Customer Value Leadership

Ultimately, growth in any organization depends on customers purchasing from a company and then making the decision to return time and again. Satisfying customers is the cornerstone of any successful growth strategy. To achieve this, an organization must be best in class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.

Understanding Customer Value Leadership

Customer Value Leadership is defined and measured by two macro-level categories: Customer Impact and Business Impact. These two sides work together to make customers feel valued and confident in their products' quality and performance. This dual satisfaction translates into repeat purchases and a lifetime of customer value.

Key Benchmarking Criteria

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated Customer Impact and Business Impact according to the criteria identified below.

Customer Impact

Criterion 1: Price/Performance Value
Criterion 2: Customer Purchase Experience
Criterion 3: Customer Ownership Experience
Criterion 4: Customer Service Experience
Criterion 5: Brand Equity

Business Impact

Criterion 1: Financial Performance
Criterion 2: Customer Acquisition
Criterion 3: Operational Efficiency
Criterion 4: Growth Potential
Criterion 5: Human Capital

Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan analysts follow a 10-step process to evaluate Award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP		OBJECTIVE	KEY ACTIVITIES	OUTPUT
1	**Monitor, target, and screen**	Identify Award recipient candidates from around the globe	• Conduct in-depth industry research • Identify emerging sectors • Scan multiple geographies	Pipeline of candidates who potentially meet all best-practice criteria
2	**Perform 360-degree research**	Perform comprehensive, 360-degree research on all candidates in the pipeline	• Interview thought leaders and industry practitioners • Assess candidates' fit with best-practice criteria • Rank all candidates	Matrix positioning of all candidates' performance relative to one another
3	**Invite thought leadership in best practices**	Perform in-depth examination of all candidates	• Confirm best-practice criteria • Examine eligibility of all candidates • Identify any information gaps	Detailed profiles of all ranked candidates
4	**Initiate research director review**	Conduct an unbiased evaluation of all candidate profiles	• Brainstorm ranking options • Invite multiple perspectives on candidates' performance • Update candidate profiles	Final prioritization of all eligible candidates and companion best-practice positioning paper
5	**Assemble panel of industry experts**	Present findings to an expert panel of industry thought leaders	• Share findings • Strengthen cases for candidate eligibility • Prioritize candidates	Refined list of prioritized Award candidates
6	**Conduct global industry review**	Build consensus on Award candidates' eligibility	• Hold global team meeting to review all candidates • Pressure-test fit with criteria • Confirm inclusion of all eligible candidates	Final list of eligible Award candidates, representing success stories worldwide
7	**Perform quality check**	Develop official Award consideration materials	• Perform final performance benchmarking activities • Write nominations • Perform quality review	High-quality, accurate, and creative presentation of nominees' successes
8	**Reconnect with panel of industry experts**	Finalize the selection of the best-practice Award recipient	• Review analysis with panel • Build consensus • Select recipient	Decision on which company performs best against all best-practice criteria
9	**Communicate recognition**	Inform Award recipient of Award recognition	• Announce Award to the CEO • Inspire the organization for continued success • Celebrate the recipient's performance	Announcement of Award and plan for how recipient can use the Award to enhance the brand
10	**Take strategic action**	Upon licensing, company is able to share Award news with stakeholders and customers	• Coordinate media outreach • Design a marketing plan • Assess Award's role in future strategic planning	Widespread awareness of recipient's Award status among investors, media personnel, and employees

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry participants and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages more than 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit http://www.frost.com.