FROST & SULLIVAN

2024

CUSTOMER VALUE LEADER

IN THE GLOBAL CERTIFICATE LIFECYCLE MANAGEMENT SOLUTIONS INDUSTRY

SECTIGO®

FROST & SULLIVAN

2024 | BEST PRACTICES AWARD

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best-practices criteria across two dimensions for each nominated company. Sectigo excels in many of the criteria in the certificate lifecycle management solutions space.

AWARD CRITERIA

Business Impact	Customer Impact
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

Automated Certificate Lifecycle Management: No Longer a 'Nice to Have'

In modern enterprises, organizations manage an unprecedented number of digital certificates with varying renewal cycles. This is due to the increased number of machine and human identities as well as growing eCommerce use, online services, business applications, DevOps, and the proliferation of IoT devices, all of which demand more digital certificates to ensure data security, integrity, and authentication. To add to the complexity, maximum lifespans of TLS certificates are likely to get shorter, and developments in quantum computing will require organizations to migrate to quantum-safe algorithms sooner than expected. This reinforces the need for a high level of crypto agility.

Manual certificate deployment, revocation, and tracking are error-prone, labor-intensive, and inefficient. Expired or rogue certificates expose organizations to security and operational risks like outages, service disruptions, unplanned downtime, and data breaches. With the interoperability of modern business systems, a certificate-related outage can easily lead to a negative cascading effect across the organization. Even the largest enterprises are known to experience certificate management flaws, and these issues cost organizations substantial amounts in lost revenue, customer churn, decreased investor confidence, as well as legal and compliance problems.

Adopting automated certificate lifecycle management (CLM) nearly eliminates such risks by providing full visibility into organizations' cryptographic assets and removing the potential for human error. All digital certificates are identified and integrated with certificate metadata including type, expiry date, protocols, and trust chain managed automatically. Beyond providing organizations with peace of mind, automated

solutions offer reduced costs, operational efficiencies, and full compliance with industry and regulatory standards.

Bringing CLM to Wider Audiences

With over 20 years of experience, Sectigo offers the combined benefit of being a trusted SSL/TLS-issuing public certificate authority (CA), and a CA-agnostic CLM company. This means that Sectigo offers a wide range of digital certificates, PKI solutions, and automated CLM capabilities under one roof. The company's flagship product, Sectigo Certificate Manager (SCM), is a single-pane-of-glass platform to manage the lifecycles of all public and private digital certificates across an organization's network. It enables digital certificate discovery, issuance, renewal, and management in a cloud-based, coherent offering and integrates several automation protocols such as ACME. SCM was designed to bring 'all pillars of CLM' in one offering, without the need to license separate, bolt-on products or tools to discover, monitor, and automate certificate lifecycles while providing interoperability in complex IT environments.

Across different industries and organization sizes, enterprises will always have varying needs and requirements when it comes to implementing and managing their PKI. The demand for and the necessity of heavy, bespoke, and on-premises PKI is likely to stay, especially for large organizations and governments. Today however, a natural alternative to this PKI architecture is looking very similar to the other software offerings in the security space, which are cloud-based and have become productized. Whereas automated CLM solutions were traditionally aimed at larger organizations, the proliferation of digital certificates and PKI use cases have led to increasing CLM needs for small and large enterprises alike. With its highly productized offering and flexible pricing models, Sectigo has greatly extended CLM to smaller organizations, eliminating on-premises efforts and the need for additional professional services.

> *"Whereas automated CLM solutions were traditionally aimed at larger organizations, the proliferation of digital certificates and PKI use cases have led to increasing CLM needs for small and large enterprises alike. With its highly-productized offering and flexible pricing models, Sectigo has greatly extended CLM to smaller organizations, eliminating on-premise effort and additional professional services."*
>
> *- Özgün Pelit*
> *Sr. Industry Analyst*

Full interoperability is supported by SCM's integration with more than 50 technology partners and vendors, including Google, Microsoft, AWS, ServiceNow, HashiCorp, and Apple, enhancing customers' network architecture and establishing digital trust across the organization. These include cloud providers, DevOps tools and platforms, enterprise mobility management (EMM) solutions, key vaults, email security, IT service management (ITSM) solutions, and firewalls and load balancers. SCM's integrations allow deployment flexibility and customization in customer environments.

Targeted Growth and Marketing Strategies

Over the past year, Sectigo's brand equity has significantly increased, with the company's marketing and media outreach share against its core competitors up by 106%. The company serves 700,000 customers, including 36% of the Fortune 1000. Sectigo's targeted growth strategies have greatly contributed to its success, offering separate and segment-specific product lines to large enterprises and SMBs. For small

businesses, Sectigo provides a suite of fully packaged website protection services; as part of this strategy, the company acquired website security and monitoring company SiteLock in 2021. In addition to its comprehensive product offering, Sectigo expands the industry's knowledge base around key issues through its regular production of webinars, Root Causes podcasts, and whitepapers.

> "Sectigo's management and product teams are comprised of industry veterans in PKI and enterprise security solutions, with decades of experience and a comprehensive understanding of customers' needs. From the initial inquiry to onboarding and continued account management, Sectigo offers industry-leading white glove customer service 24/7/365"
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> Sr. Industry Analyst

Sectigo's management and product teams are comprised of industry veterans in PKI and enterprise security solutions, with decades of experience and a comprehensive understanding of customers' needs. From the initial inquiry to onboarding and continued account management, Sectigo offers industry-leading, white-glove customer service 24/7/365. The company offers a free trial and preview of SCM, providing potential customers with the certificate management system to run the platform's functions and discover certificates available in their environments. Greatly simplifying the pre-purchase experience, the quick trial enables organizations to see how SCM behaves in their environments. Sectigo is also one of the few CAs that offer subscription-based pricing models to its customers. With options to either transact directly or through a large ecosystem of partners and resellers, Sectigo makes it easy for customers all over the world to issue digital certificates and deploy CLM solutions.

Conclusion

Traditionally aimed at large organizations and governments, automated CLM solutions are a key requirement for businesses of all sizes today. Extending automated CLM solutions to wider audiences and smaller enterprises greatly improves security and digital trust globally. In doing so, Sectigo distinguishes itself from its competitors with its highly productized solution offering, addressing a wide range of needs in a single, coherent platform. With its strong overall performance, Sectigo earns Frost & Sullivan's 2024 Global Customer Value Leadership Award in the certificate lifecycle management solutions industry.

What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership Award recognizes the company that offers products or services customers find superior for the overall price, performance, and quality.

Best Practices Award Analysis

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Business Impact

Financial Performance: Strong overall financial performance is achieved in terms of revenues, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

Customer Impact

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

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

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

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

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

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**