



Q2'20 ALL HANDS CALL

ENTERPRISE SALES, PRODUCT & MARKETING

AGENDA

 Frontier Chapter 11 Update

 Enterprise Direction 2020-2021

 Q2 Results

 Key Wins, Q2

 Product and Marketing Updates

 President's Club Standings

 Q&A



CHAPTER 11 UPDATE

MARK NIELSEN, EVP & CHIEF RESTRUCTURING OFFICER



ENTERPRISE DIRECTION 2020-2021

CHRIS ANCELL, ENTERPRISE BUSINESS LEADER

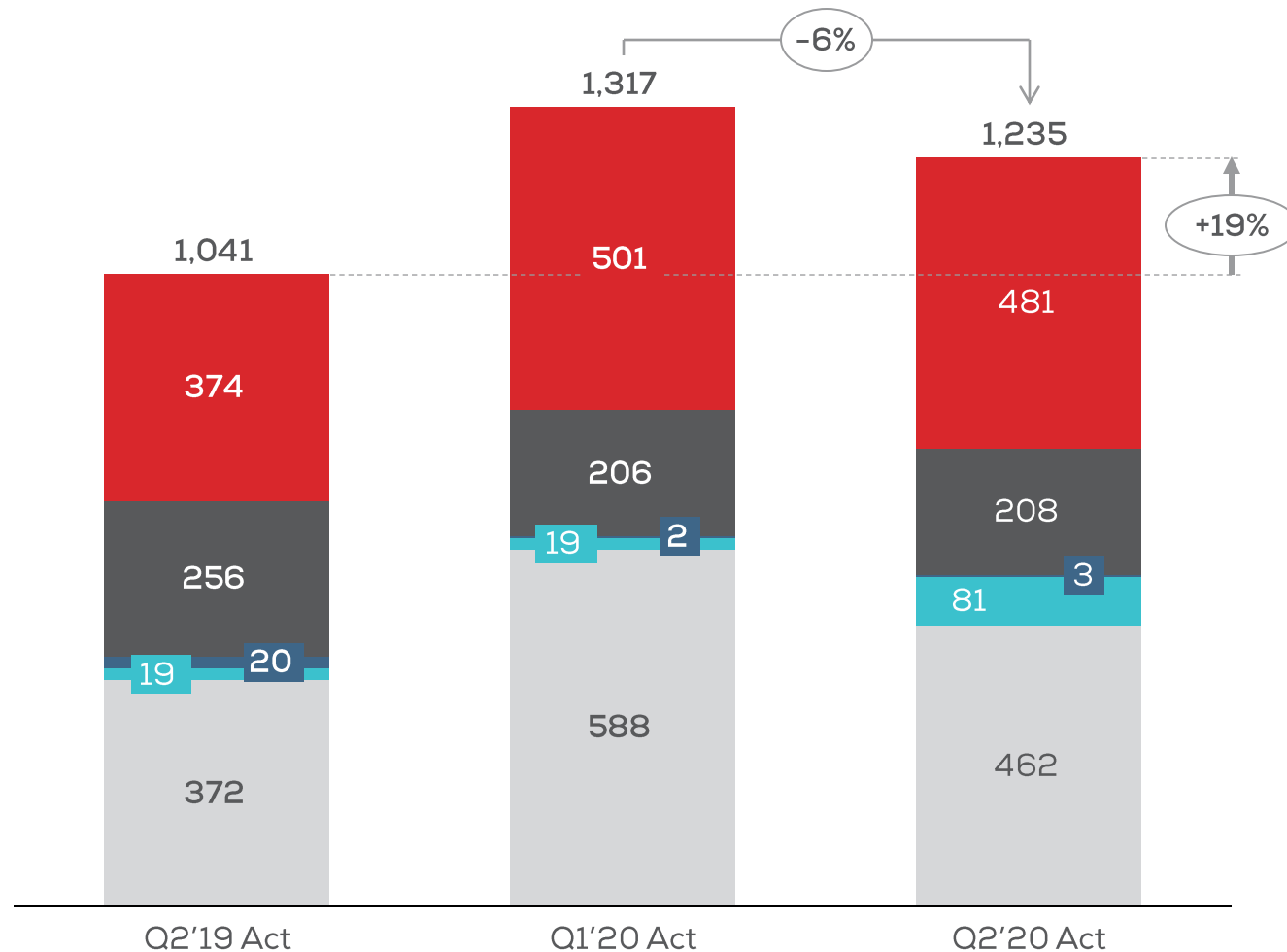


Q2 SALES RESULTS

BORIS KLUCK. SVP. ENTERPRISE SALES

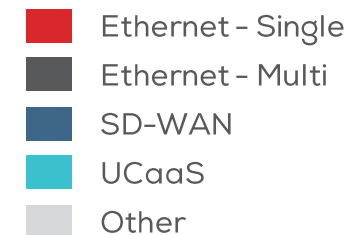
Q2 BOOKINGS

\$ in Thousands



Hi-Lites

- Strong year over year growth, with new channels (BAE, BAM) contributing
- In spite of COVID, total bookings of new MRR are down only 6% in Q2 vs Q1
- Strong headwinds remain:
 - New opportunity creation is tepid
 - Deal flux extremely high



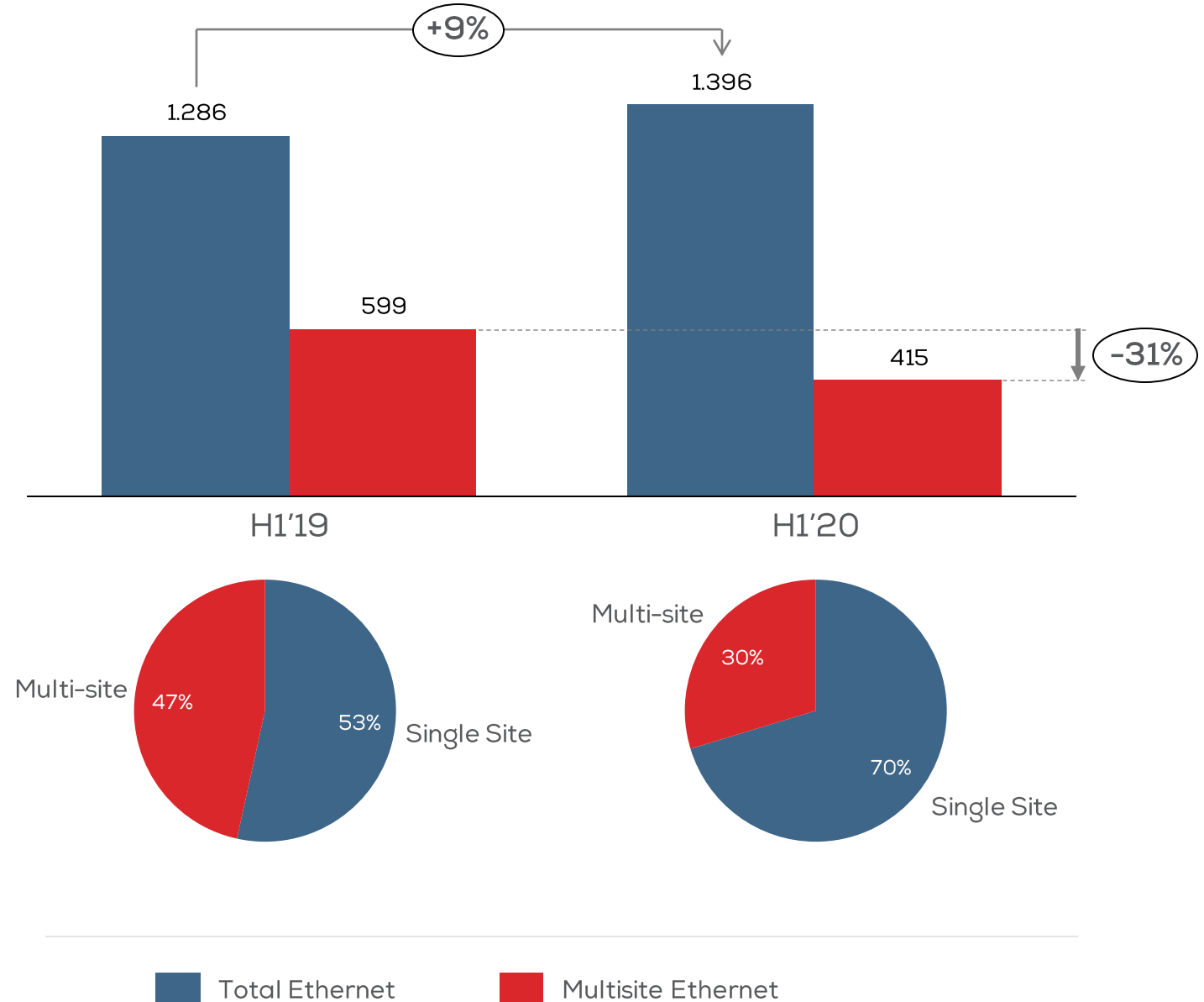


ETHERNET SALES RESULTS

\$ in Thousands

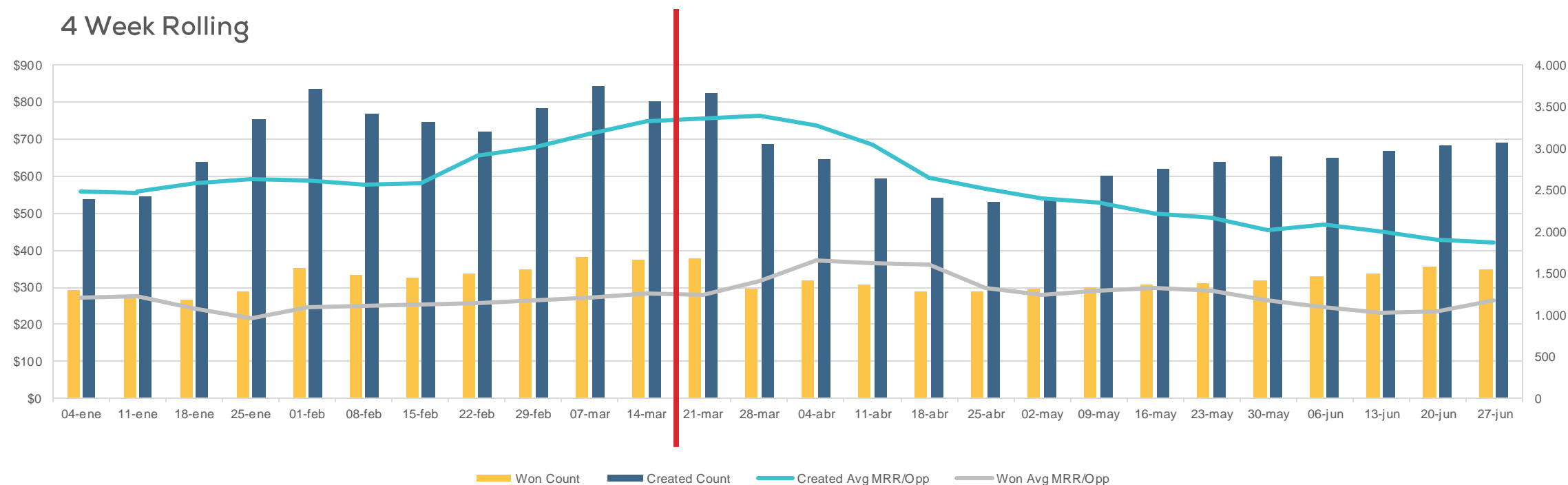
Hi-Lites

- Ethernet bookings are up 9% in H1'20 vs H1'19 reflecting increased Sales focus, improved pricing and process improvements
- Decline in Ethernet multi-site sales H1'20 vs H1'19 and lack of traction in SD-WAN is the basis for a go-to-market "reboot" for multi-site connectivity solutions in H2'20



ENTERPRISE SALES COVID IMPACTS

- COVID impact period begins ~3/21/2020. Weekly new opportunity creation value is down ~40% vs. Pre-COVID period.
- Won surge through March/early April as organizations prepared for WAH.
- Lock-downs resulted in steep decline in April/May, with signs of recovery starting in June.
- Created opportunity ARPU decline a reflection of mix shift to upgrades and service augmentation vs new acquisition.



"Won": Deals where the customer has signed a contract as a sale

"Created": Opportunities created in the pipeline that Sales has identified as a future potential sale



KEY WINS

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CUSTOMER SUCCESS: GSA REGION 1

National Sales Team

- Deal Details: PRI, B1s, Centrex as well as EIA for hundreds of sites across CT
- Deal Value: \$990,000 per year or \$3M contract value. 36-month contract
- Sales Rep: Stafford, Rhett

Company profile: GSA provides centralized procurement for the federal government, offering billions of dollars worth of products, services, and facilities that federal agencies need to serve the public.

Business challenges: Special billing requirements, needed to obtain TDM services since the govt had legacy systems in place. Needed EIA for future projects

Key Members of the Team: SAM- Marissa Magliaro, RFP Support – Alicia Robinson, SE – Jake Smith, Billing Guru – Rane Power, and Denise Goree, Cindy Padgett, Jaryl Northrop, Jennifer Owsley, Pam Bryant, Sheila Wilcox and others



CUSTOMER SUCCESS: WALTER CLARK LEGAL GROUP

Mid-Market Inside Sales

- **Deal Details:** SD-WAN. 4 sites
- **Deal value:** \$1,128.00 MRR, \$40,620.00 TCV. 36-month contract
- **Sales Rep:** Everett Benze | **Manager:** Sean Pickens | **CSA:** Tim Severns

Company profile: Law firm specialized in handling a variety of personal injury cases throughout the California High Desert communities for over 30 years.

Business Challenge: Client needed better visibility into network and traffic with fail over and remote accessibility. COVID exacerbated the need for stable centrally managed solution to enable work from home scenarios

Key Members of the Team: Ken Blackwell, James Korbeck, Scott Irwin, Ron Leighton.



CUSTOMER SUCCESS: CITY OF LONG BEACH

West Region

- Deal Details: Competitive displacement for their voice infrastructure
- Deal Value: \$6,500.00 MRC.
- Sales Rep: Jordan Bramble (EAE)
- Solution Engineer: Joel Godiness

Company profile: City of Long Beach is one of the Top 10 digital cities in the United States. They play a key role as one of the largest cities in Southern California and County of Los Angeles.

Business challenge: solving for inconsistent billing, poor engagement from the incumbent provider on a critical piece of their infrastructure

Jordan's engagement, and Frontier continuing to earn the cities trust over the past couple of years positioned us well to earn the right to compete for this business. The solution was with Windstream, so a competitive take out for us.

CITY OF
**LONG
BEACH**



CUSTOMER SUCCESS: GENERAL DYNAMICS / ELECTRIC BOAT

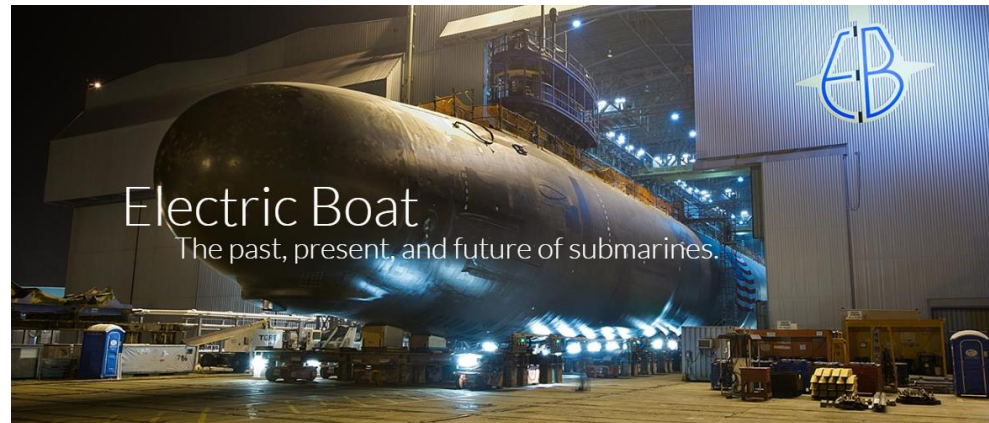
East Sales Region

- **Deal Details:** AnyWare. 5,300 new seats,
- **Deal value:** \$57,000.00 Net New MRR. 77,000 Total MRR
\$11,277.000 TCV, 84-month contract
- **Sales Rep:** Mike Rogers | **Manager:** Pat Lurato

Company profile: The primary builder of submarines for the United States Navy for more than 100 years. The company's main facilities are a shipyard in Groton, Connecticut

Business Challenges: they needed the flexibility to efficiently change their phone assignments. Experiencing tremendous growth with new contracts and won the initial sale from DXC and their Cisco Platform. They migrated to the Mitel Suite of advance call controllers. They had an existing UCaaS of 7,200 seats for a 75-building campus

Key Members of the Team: Greg Klein, Lori Garvey & Shani Emel, Michael Carlone & Rick Thomas



CUSTOMER SUCCESS: COMMUNITY RENEWAL

Alt Channels

- **Deal Details:** 1G for \$1k Promo - 3 Locations in the Harford, CT area
- **Deal Value:** \$3,000 total MRR, 36-month agreement with a total contract value of \$108,000.
- **Channel Manager:** Gregory Wells

Company profile: Community Renewal Team is the largest nonprofit human service agency in Connecticut, offering a broad-based network of innovative, high quality programs and services to support their local communities.

Business Challenges: With C-19, they needed reliable performance and increased bandwidth at an affordable rate. They had recently experienced a network outage that lasted over a day, crippling their only means of communications.

Agent along with our Channel Manager Gregg Wells was brought in to consult with the technology team to look at possible solutions and we presented the Frontier 1G for \$1k promo as the most reliable, cost effective solution and that the service could be deployed at all their locations. FTR was able to expedite the installation, and Parnter was able to close 3 of the 4 locations and will potentially add the 4th as we complete the installation of the first 3.





PRODUCT & MARKETING UPDATE

TOM LOFRISCO. GVP. PRODUCT & MARKETING

DASHBOARD



June Revenue and EBITDA roughly on plan, but we have net-losses between legacy and new products.

Financial Performance	MO	YTD	Comments
Revenues	● \$63.6M	●	Under -1.4% for June, under 1.7% YTD
EBITDA	●	●	Over +2.4% for Jun, over 1% YTD
Market Performance	MO	YTD	
Voice WIN / LOSSES (units/mo)	●	●	TDM + VoIP losing -4K lines per month YTD
Data WIN / LOSSES (units/mo)	●	●	Copper + Fiber losing -300 per month YTD
Operational Performance	MO	YTD	
Ethernet intervals (bus days)	● 62	● 61	
Ethernet % On Time (CDD)	● 93.3%	● 91.3%	

PRODUCT AND MARKETING: KEY PRIORITIES

Meet financial commitments

Improve market performance

Hold and grow share

Transform the portfolio

Delight our customers

Make selling effortless

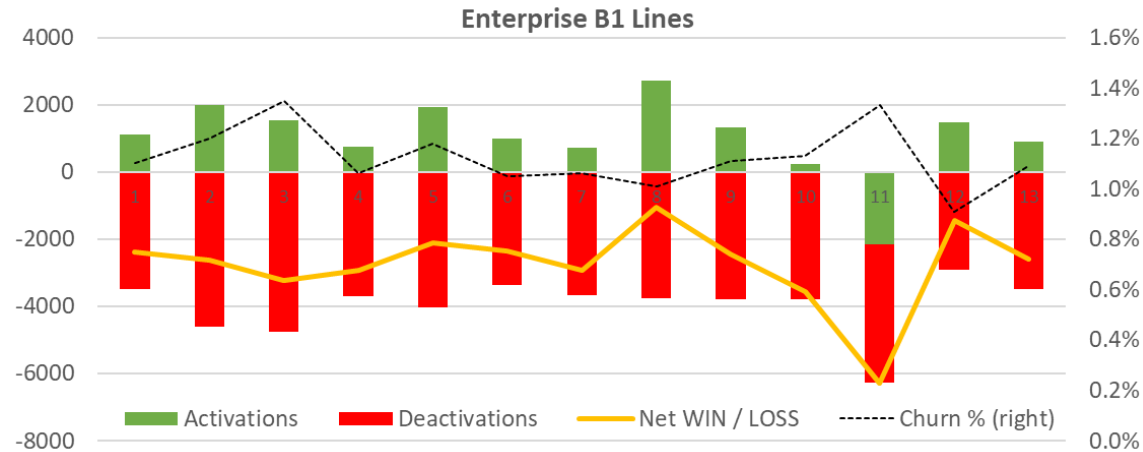
Deliver digital first experiences

Operate with excellence in everything we do

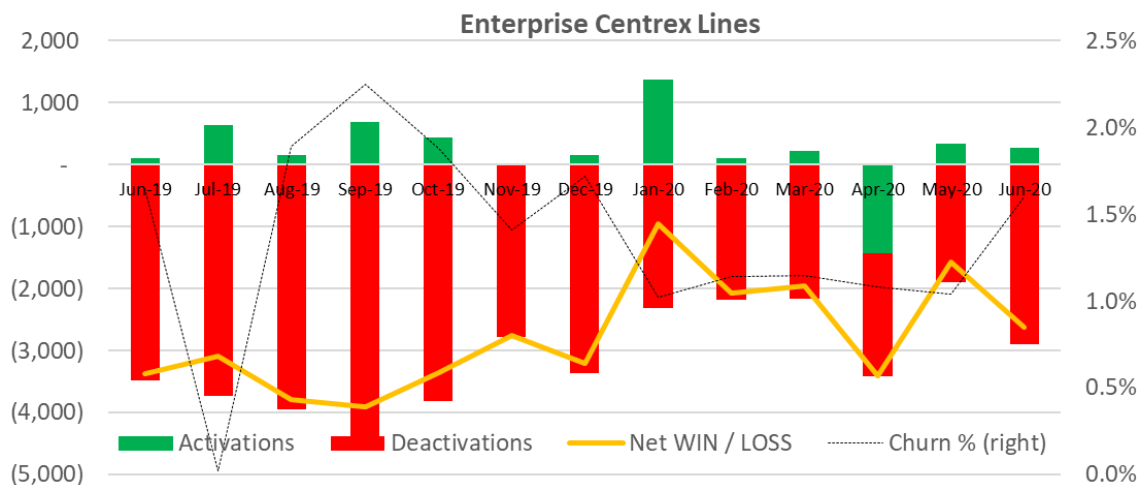


PRODUCT-SPECIFIC MARKET INDICATORS | VOICE

Must understand competitive and non-competitive churn, determine how to stop comp. churn



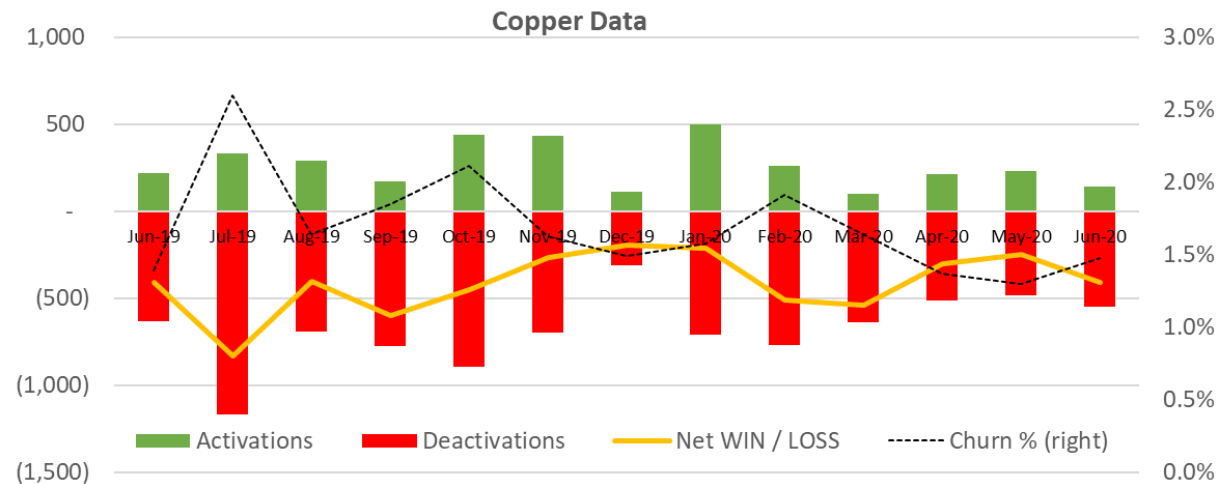
- Losing ~3K / mo
- Catch product Smart Voice is growing 21 / mo



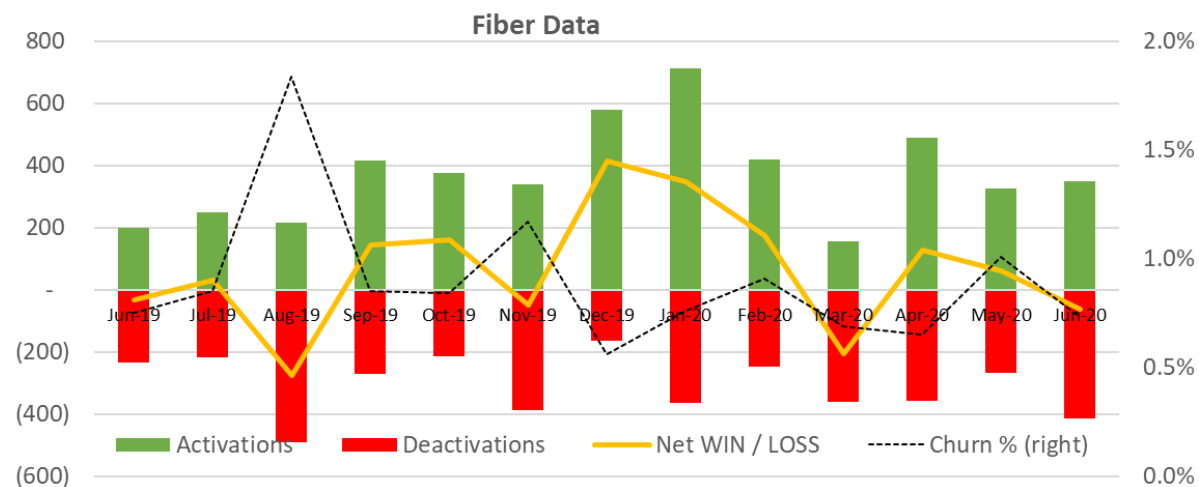
- Losing ~2K per month
- Catch product FAW is growing 233 / mo

PRODUCT-SPECIFIC MARKET INDICATORS | DATA

Must increase Fiber wins, understand and stop losses



- Losing ~400 per month NET...



- ...not winning enough, and losing too much

PRODUCT AND MARKETING: 2H20 KEY INITIATIVES

- Obtain and act on clear churn stats, win/loss rates & competitive intel
- Targeting Lead Gen / Demand Gen
- Relaunch external website
- Drive down Ethernet intervals
- Launch UCaaS 2.0 & Make VoIP services more transactional
- Reboot SD-WAN
- Position products in solution-packs & speed deal-reviews/approvals
- Initiate purposeful migrations
- Establish investment cases for Digital Customer and Sales Experiences





PRESIDENT'S CLUB STANDINGS

BORIS KLUCK. SVP. ENTERPRISE SALES

ENTERPRISE | PRESIDENT'S CLUB LEADERBOARD

YEAR-TO-DATE AS OF JUNE 2020



ENTERPRISE ACCOUNT EXECUTIVES				
MRR Rank	Name	Region	MRR Attainment	Module Attainment
1	Matthew Kallsen	Central	192.4%	100.4%
2	Valerie Collins	West	130.9%	101.0%
3	John White	Northeast	115.5%	100.5%

BUSINESS ACCOUNT EXECUTIVES			
MRR Rank	Name	Region	MRR Attainment
1	Karim Dagher	West	115%
2	Enrico Fernandez	West	101%

BUSINESS ACCOUNT MANAGERS			
MRR Rank	Name	MRR Attainment	Module Attainment
1	Taylor Starling	241%	n/a
2	Carlos Ramirez	102%	n/a

TERRITORY ACCOUNT EXECUTIVES			
MRR Rank	Name	Region	MRR Attainment
1	Donald Eldridge	Northeast	227%
2	Jack Childs	West	167%
3	Thomas Norys	West	133%
4	Barbara Groot	West	128%
5	Nicole Ariola	West	123%
6	Salvatore LoGiudice	Northeast	122%
7	Joseph Grimaldi	West	117%
8	Sheri Stillwell-Shephard	Northeast	109%
9	Jennifer Zegarra	West	104%
10	Cassandra Hammond	Central	102%

ALT CHANNEL MANAGERS			
LEADERSHIP			

Includes Closed/Won & Approved by 7/6/20 AND pulled from Xactly on 7/7/20

Module Billed Revenue - One Month in Arrears



Q&A

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