CHOOSING THE BLUEPRINT FOR YOUR DIGITAL CUSTOMER EXPERIENCE

INTRODUCTION

Many telcos realize that to succeed in today’s business environment (as well as keep their margins from shrinking any farther), they must radically improve their time to market, reliability, mean time to resolution, and other fundamental measures. To enable themselves to compete in the digital world, they must also substantially improve their customer experience, whether relating to customer care, bill accuracy, service reliability, or any of the journeys that a customer will undertake with them.

This white paper briefly outlines the need for digital transformation, provides examples of the KPIs different telcos use to measure that transformation, and outlines the necessary features of a transformation strategy as well as the IT solutions needed to effect it. Finally, it reviews the various models telcos use to migrate from their legacy systems to modern transformed systems to enjoy the business, technical, and customer benefits of the transformation.

WHAT IS DRIVING THE URGENCY FOR DIGITAL TRANSFORMATION IN THE TELECOM INDUSTRY?

The global telecoms industry landscape is changing faster than ever. Disruptions in technology and business models open exciting new opportunities, but also highlight critical challenges to telcos’ future as high-value service providers. They battle high costs, shrinking margins, and high churn rates while struggling to find new sources of growth.

Overall, the industry’s customer experience scores are improving, but only gradually. Advanced digitalization of services in other industries has raised customer demands for ease of use, self-care, personalization, and interaction with whatever channel they are most comfortable with at any given time and for any given need. McKinsey has recently found that mobile operators make a smaller share of their sales online than do insurance and retail banking, and that providing customer service through digital channels improves customer satisfaction. For most telcos, time to market is orders of magnitude slower than their digital competitors: GlobalData’s interviews with telcos indicate that it generally takes three to six months to create a new service, and not not that much less time to create a new tariff. Many operators run multiple, duplicative legacy systems that require high OPEX to keep going, but prevent them from keeping up with market demand for new services: globally, telco OPEX averages around four times CAPEX. Given that much of that CAPEX is devoted to regular network upgrades, spectrum, and so on, little of the telco’s revenue is left for innovation. And surveys consistently show that digital transformation projects are difficult: a 2017 Bain study found that, across industries, only 5 percent of companies involved in such efforts achieved or exceeded their transformation goals.

Telcos must evolve rapidly to take advantage of opportunities, reverse revenue declines, and launch more services to more customers quickly and efficiently. This often requires new technology, but also a transformation of their business models and an overhaul of operational processes.

WHAT ARE THE KPIS FOR DIGITAL TRANSFORMATION?

The most basic rule of digital transformation is that all technology projects must now be judged by whether they improve the business. Different telcos use different business-level KPIs to judge that transformation:

Figure 1: Key Business-Level KPIs for Digital Transformation

- **Customer Journeys.** The processes embedded in the solution should be designed around efficient customer journeys that embody best practices in telecoms customer experience. Focus on how the customer experiences your services and all the other aspects of your brand experience is one of the most important factors in gaining market share, not just in traditional telecoms services, but in a wide variety of digital experiences. Focus on improving user experiences can keep customers loyal even when a competitor is less expensive. Digitalization can also help with customer acquisition: One European carrier that GlobalData interviewed said that before transformation, onboarding at Point of Sale took an average of 20 minutes to create a new subscription, whereas after the transformation it took less than 8 minutes.4

In picking their top-level KPIs, telcos should evaluate the local market characteristics — in some regions customers are much more likely to establish strong digital relationships with their service provider than in others — and decide whether it wants to be the strongest competitor in the connectivity products market, or whether it wishes to focus on value-added services. Currently, many telcos are working on the former strategy; some will use 5G in particular to try to move toward the latter and capture a higher place in the value chain.

DOES YOUR SOLUTION CHECK THE RIGHT BOXES?

While there is more than one possible architecture that can aid a business transformation, the following features should be considered strongly as possible components of a truly agile, future-proof solution:

- **Openness and APIs.** As telcos increasingly collaborate with third parties — and even their own customers — on innovations and service creation, open APIs will increase their ability to work with a broader ecosystem to bring more services to market, more rapidly, and to enrich customer-facing touchpoints. In a recent survey conducted by the writer, 84% of the telcos surveyed thought that an open API was critical to a transformative revenue system. Since open APIs make it easier for internal staff to collaborate on new capabilities, all telcos should include them into their plans, even if they are not planning to open their infrastructure to outsiders.

- **Customer Journeys.** The processes embedded in the solution should be designed around efficient customer journeys that embody best practices in telecoms customer experience. Improving customer experience has a direct effect on the business: one multinational pay TV provider in Latin America has found that promoters (customers that score the telco 9 or 10 on Net Promoter Score) have a 2.5x higher lifetime value than detractors (those that score the telco 0-6). Detractors, meanwhile, are 110% more likely to churn than promoters.5 Technology design must be driven by experience design, which in turn must be driven by the target customer journeys.

Some telcos are most interested in service adoption and agility, some in new financial metrics, and some in customer experience. This last is perhaps the most revolutionary KPI in the telco context: whether measured via Net Promoter Score, CSAT, or another metric, a focus on how the customer experiences your services and all the other aspects of your brand experience is one of the most important factors in gaining market share, not just in traditional telecoms services, but in a wide variety of digital experiences. Focus on improving user experiences can keep customers loyal even when a competitor is less expensive. Digitalization can also help with customer acquisition: One European carrier that GlobalData interviewed said that before transformation, onboarding at Point of Sale took an average of 20 minutes to create a new subscription, whereas after the transformation it took less than 8 minutes.4

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• **Unified Data.** Combining product, tariff, and customer data into a unified data lake, common data layer, or single product catalogue — and connecting it to a unified set of resources — simplifies service creation and fulfillment as well as sales and customer care. A single source of truth smooths the collaboration of different departments and can aid resolution of trouble tickets across the company.

• **Prepackaged Processes, Client Applications, and Interfaces.** Products with customizable, out-of-the-box service and interface elements that embody best practices can speed implementation of new use cases while still allowing the telco to overlay its own brand feel. The best practices also reduce risk of both errors and commercial failure.

• **Analytics.** While AI platforms and data lakes are useful platforms, transforming telcos should prioritize analytics capabilities that quickly enable improvement in a specific functional area. Depending on the specific application, embedded intelligence can help with customer segmentation; discovering customer journeys, modelling customer experience; recommending next best actions in customer care, marketing, and operations; or automating tasks and processes. A major current trend is predictive analytics, where problems are identified before they cause service failure or poor experience. Implementations of data analytics should also encompass regulatory compliance, for example GDPR and related legislation in Europe.

• **Automation.** One of the major uses for analytics is automation. Telcos are automating systems, tasks, and processes to increase speed, decrease errors and outages, and to operate at a level of complexity beyond manual capabilities. The predictive analytics we mention in the previous bullet can fuel predictive fixes and closed-loop operations in the network and IT systems. Revenue systems should both accommodate these predictive systems via standard interfaces and data formats and make use of automation to reduce errors in areas like order fall-out and service provisioning. More generally, automation can save OPEX by reducing manual tasks and error handling. It can also dramatically improve customer experience by reducing mis provisioning, network element failures, and misconfigurations.

• **Configurability for Business Users.** Whether it is a tariff or service, modern telcos should strive to cut down on creation time. New systems can address this need by enabling non-technical users to do more design and configuration whether via easy-to-use admin interfaces or via simple business-level configuration languages.

• **Cloudification.** For maximum future-proofing, and to match the dynamic service creation, scalability, and flexible operations that will characterize microservice-based, API-enabled infrastructure, business systems should be based on virtualization, microservices, and containers as well.

• **Public Cloud and XaaS Architecture.** As an optional feature, business systems should consider systems that are hosted on — or at least burstable into — the public cloud. As-a-Service provisioning can provide similarly flexible capacity and visibility into future license costs, and a managed services model can also assist cost efficiency while freeing the operator to focus on its business transformation.

In addition to these technical features, the telco should also make sure that the solution partner has the consulting personnel, training capacity, and library of best practices to help the telco get the most out of its new technology implementation.

**WHAT IS THE FUTURE THAT DIGITAL TRANSFORMATION MUST ADDRESS?**

In a survey of 71 telcos about future priorities, GlobalData found that over half named not only expected elements like protecting market share and improving operational efficiency, but also new product development, gaining cost leadership, and expansion into new markets.  

Figure 2: Telco Business Priorities

Q. How much of a priority are the following over the next six months for your organization? Those who said "high" or "very high" (November 2018–April 2019)
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Telcos will need to charge for all of this, developing new tariffs and rate schemes rapidly as the entire ecosystem works on a new technological revolution. They will thus need to reach a new level of agility across their infrastructure and operations. It is a matter of reducing costs: not only the development cost of creating a new service, tariff, or campaign, but the opportunity cost of doing one thing as opposed to something else. As one telco we interviewed for this report put it, “The phone itself is becoming a utility; the differentiation really comes from what runs on top.” The new system must increase efficiency and granularity to handle additional capabilities and greater volume.

WHAT DRIVES DIGITAL TRANSFORMATION SUCCESS?

Regardless of the deployment model, there is one characteristic that every transformation success has in common: Everyone feels the urgency.

In situations when the organization is not already burning you need to light the fire under it. Universally, the management of telcos that have successfully executed digital transformation projects say that you need a C-level officer to drive it. One operator described the role as a “dictatorial CIO,” but there is no requirement for the role to be punitive: it just needs to motivate the staff, not just once but over a minimum period of 18 months. There are a few different ways to do this, and they can be used in parallel:

- **Staff and Processes.** As stated above, the fundamental rule of digital transformation is that the business drives the technology. Reorganizing employees to enable them to collaborate more effectively and perform their jobs more efficiently quickly brings not only cost benefits but, done correctly, customer experience improvements as well. It is not enough to automate a bad process; the whole process stack should be reimagined. Telcos that have rationalized and automated their processes report benefits in customer onboarding, and provisioning. Small improvements can add up to big benefits: in simple, individual processes, we have seen benefits in the ten to twenty second range; in aggregate they can save one to five minutes per customer interaction.

- **Governance and Budget.** Some telcos make things simple: any budget for projects beyond simply “keeping the lights on” goes to projects which include a transformation aspect. This allocation is sometimes done by a dedicated transformation budget committee, and sometimes is signed off by the C-level officer in charge of transformation. Flexibility and focus are essential: as one operator we interviewed put it, “We’re in a sector with a lot of smart people, and that’s a problem. You need to keep your focus on what’s truly relevant.”

- **Small but Frequent Improvements.** This is an organizational benefit of agility: by rolling out frequent small improvements, you can keep the benefits of the new approach front of mind and make steady progress toward the new architecture while decommissioning parts of the old. This is especially useful for business users, who a) are controlling an increasingly larger share of innovation budgets, and b) lack the patience of engineers, who are often capable of working on a project for two years in the faith that their expenditures of time, energy, and money will pay off at the end of the project. The most agile telcos today are rolling out new features on a two-week cycle; this is more than enough to demonstrate benefits and spread new functionality around all the budget stakeholders. Telcos that have put at least some of their systems on a cloud-native basis are already shortening that cycle by releasing features into production on an ongoing basis.

- **Systems Decommissioning.** Any decommissioning of a legacy system brings an OPEX benefit, and switching off systems need not wait until the end of the project. Especially in cases where mergers and acquisitions have resulted in duplicative systems, it is often possible to progressively decommission those systems as users, services, and functions move to the new platform.
• Growing On What You Know. When we examine cases of failed transformation, we often find that telcos placed their bets on me-too digital services rather than develop new opportunities that build on their connectivity services and brand. All telcos must focus on continual prioritization of excellent digital experiences.

WHICH DEPLOYMENT MODEL IS RIGHT FOR YOU?

Each telco has its own goals and starting point, but legacy systems are problems for most. In the same survey we referenced earlier, GlobalData found that legacy systems were cited as a barrier to transformation by 62% of those telcos surveyed, 27 percentage points higher than the second-place option, cybersecurity and privacy at 37%. 6

In this section, we describe the four basic project structures that complete the journey from the current state to the desired end state, and the situations for which they are best suited.

Greenfield / Parallel Stack

Best Chance of Success: Telcos in high-churn markets or markets with untapped demand for a digital native-type experience.

Not for: Telcos undergoing technical or OPEX emergencies that must be addressed today.

Pros: Easiest model to implement since it carries the lowest implementation risk. There are few limits on the customer experience you can design with the new system. The telco can adjust the speed of migration to the new stack based on technical and business factors.

Cons: Doesn’t directly address the cost and agility problems of the legacy system.

Building a completely new IT system in parallel to the existing environment and using it to serve new users and new services can enable better customer experience and lower costs. It can enable better online and omnichannel customer interactions, ease the development of a new service or tariff, and lower costs through automation and streamlined processes.

This parallel stack can underpin a separate brand with digital native values – or, where appropriate, multiple brands serving different segments and value propositions. If the brand is successful – if it offers an experience that appeals to most users – then after a while it can even supersede the legacy brand. The remaining customers are then migrated to the new system. We last saw this happen when mobile became the dominant paradigm, and legacy fixed brands were sometimes folded into the mobile brands. With 5G, the smartphone as the dominant interface paradigm, and the convergence of communications and datacenter services, there’s a good chance this brand transition could happen again – if it is underpinned by a genuinely superior experience.

Establishing new brands in markets with high churn works well, since the churn makes it natural to move people off the old brand/stack to the new. And as 5G and cloudification create the flexibility for the operator to provide different experiences to different customers, the ability to operate multiple sub-brands will become increasingly useful.

A common variation of the Greenfield model is the Soft Migration approach:

Soft Migration

Best Chance of Success: As with other Greenfield strategies, carriers that must turn around their business and technology extremely rapidly.

Not for: As with other Greenfield strategies, telcos in high-churn markets. Especially well-suited for telcos that want to transition to a new brand.

Pros: Fewer disruptions as business processes and capabilities gradually migrate from old to new.

Cons: Can take a long time to execute when old systems are decommissioned gradually. If done poorly, can make some investments obsolete in the meantime. Can be hard to move data from the old system to the new.

A variant of the Greenfield strategy, this strategy spins up a new Greenfield digital stack, but integrates the new system with the legacy stack and migrates users and services gradually.

Serving customers who are used to the digital economy can take advantage of this strategy. In many parts of the world, omnichannel and instant access are just the way things are; even people in their 50s and 60s are digital natives nowadays. Serving them with a digital, omnichannel, instant experience similar to the best experiences they get from the Web will make them more likely to trust you as the go-to provider of new, high-value services.

It is also necessary to acknowledge the downsides: as compared to a more dramatic rip-and-replace, it saddles the operator with higher OPEX for longer due to duplicate systems. It can also lull those resistant to change into thinking that they can stay on the old system forever. And if your legacy systems are truly falling apart, then the luxury of a gradual transition is no longer an option.

**Big Bang**

**Best Chance of Success:** Telcos with systems that are falling apart or end of life, those with OPEX structures that are out of control due to multiple duplicate systems, or those that want to leapfrog competitors to adopt state-of-the-art practices and technology.

**Not for:** Telcos that do not face imminent system or business failure, or those that lack rock-solid transformation partners.

**Pros:** Instant savings as well as improved customer experience and business processes.

**Cons:** Risky; requires an experienced partner and that the organization embraces new processes quickly. Telcos also must evaluate the gap between old processes and new, and design sufficient training for the staff.

Colloquially known as “rip-and-replace” transformation, this option is the most dramatic. The potential downside is obvious: your telco could lose millions of dollars on a system that doesn’t work.

- So why do telcos choose this model? For the same reason that patients with heart problems choose open-heart surgery in the first place: If they have an experienced and skilled surgeon, surgery is the quickest way to bring them back to health. Telcos face similar cost/benefit calculations for big bang transformation. **First, with strong project management and mature, packaged IT solutions, successful “surgery” is possible. Second, it brings dramatic benefits:**

- By executing a wholesale migration, you can immediately improve OPEX by shutting off the legacy systems. Many transformation efforts get stuck at around 80% completion, with many users on the new system, but a few departments or customer groups remaining on the old systems, which means you’re running duplicate systems in parallel, sometimes for years. This removes the profit margin, which in turn often leads to a dramatically reduced innovation budget.

Putting everyone on the new system means that you can actually start enjoying its benefits. Any new system should improve cross-silo collaboration by presenting a single view of the truth, simplifying and automating processes, making everything quicker, and by enabling digital interactions that would not have been available in the old environment. But the only way to realize those benefits is to actually get everyone using the new system.

Risk must be respected, but caution will cost you. As one experienced project manager puts it, “Any migration will bring pain,” but if you keep the focus on the benefits of the new system, it is best to get everyone on it as quickly as possible. Generally the minimum amount of time required for this type of deployment is 18 months – enough time to plan the migration while installing the new system.

This option works well for both telcos that are experiencing significant pain because their current systems are so inadequate, and those that have strong project skills and/or have strong partners. Keeping the staff looking toward the future will keep the focus positive.

**Gradual Stack Replacement (Piecemeal)**

**Best Chance of Success:** Telcos with exceptionally strong governance, executive sponsorship, engineering culture, and cross-silo collaboration. This could include local licensees that are evolving toward a strong set of group-level standards.
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Not for: Most telcos – including almost all Tier 2 and Tier 3 telcos – that lack the governance and engineering resources required. Telcos with bad existing architecture also run the danger of reinforcing the current negative state of affairs.

Pros: New features and capabilities with minimal disruption to the existing environment.

Cons: Adding new features and components to a complicated legacy stack can just make the IT confusion and spaghetti code worse. Can be hard to set priorities because every component depends on every other component. Multiple vendors and extensive systems integration can also increase total cost of ownership dramatically.

This is the most natural, least disruptive and easiest approach to budget for...as well as the one most likely to fail: a telco gradually changes components of the IT solution as they reach end of life, and/or as it finds that it has spare budgetary and staff capacity. This model is most likely to lose the urgency we describe above as an essential component of a successful digital transformation. As staff turns over and economic cycles affect budgets, a gradual transformation will often be derailed.

Nevertheless, there are operators for whom this model can work...or at least ones for whom it is the only option. Sometimes there are so many moving pieces that the telco is unable to handle a more dramatic IT transformation. We sometimes see this when a telco is carrying out a major network upgrade that takes up most of the transformation budget and focus of the senior management team, so IT systems are forced to transform more gradually.

We also see this model work in operator groups that are trying to unify multiple opcos around a common set of processes and architectures: with a well-defined set of target states and best practices, and with very strong group governance, each telco can address the IT needs and customer priorities in that country, and feed its experience back into the store of best practices so that other country operations can use them to transform more efficiently. But this only works with exceptional oversight, motivation, and vendor relationships.

Conclusion: Where Do You Start?

The process for choosing an IT transformation partner should roughly follow the structure of this paper:

First, make sure that your senior stakeholders are on board with not only the need to change, but with the same vision of the telco you want to be. Customer experience should be one of your main KPIs, no matter how you measure it. Then, design your project to create among your staff a need to transform, not just a desire. Redesigning compensation goals is a quick way to do this.

Second, ensure that your proposed new IT stack will support the business changes you want to make. This step extends to your transformation partner: in addition to supplying the technology, it should also provide the consulting and training to make sure that you can take advantage of the new system to improve your business no matter your chosen KPI.

Third: Pick the deployment model that fits your circumstances the best, whether one of the models we present above or a hybrid version, or a stage in between. Since you should be able to trust your partner as much as you do your own employees, make sure that it has the experience and personnel to not only make its system work with your current environment, but that it can deploy it successfully in the model you choose. As one experienced project manager noted, “There will always be suffering in a migration; the point is to know what you can do quickly so you can show it works.” For the best chance of success, the new business system should include related tools out of the box: webshops, point of sales systems, self-service interfaces, and similar components. The vendor may also provide functions such as testing as a service, or even host the solution for the telco.
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ABOUT US

GlobalData

GlobalData is the leading data & analytics company who, for over 40 years, has been helping over 4,000 organizations worldwide to make better and more timely decisions. The GlobalData mission is to help our clients to decode the future, enabling them to be more successful and innovative. Our aim is to provide our clients with innovative solutions to complex issues delivered via a single online platform, which leverages our unique data and expert analysis across multiple markets and geographies. We help our clients with their strategic planning, market intelligence, innovation & new product development and sales & channel management, together with insight into latest developments in their markets and views of leading opinion formers. Within each industry sector our proprietary data, human insight, and innovative technologies create trusted, actionable, and forward-looking intelligence. Our content and expert insights are tailored to serving our clients’ major value creating activities and become embedded into key workflows and decision making processes.

Qvantel

Qvantel is a pioneer in the Telecom industry with over 15 years of experience leading digital BSS transformations for Communication Service Providers. With a proven track record of many successful and varied full BSS-deployments and solutions, we help telco operators maximize their business efficiency, provide superior customer experiences, and reduce operational costs.

Qvantel offers Digital-Native CRM: a comprehensive business platform to run a highly automated, personalized, self-care focused business required compete in today’s fiercely competitive marketplace.

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