



Zen chief urges industry to boost service levels p18

AWS Marketplace architect ramps up channel build p24



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This month's movers and shakers



# Union Street in Aurora merger

**SERIAL** tech entrepreneur Matthew Riley has struck a deal to merge his Aurora business with Union Street, creating a billing powerhouse in the channel.

**EXCLUSIVE**

The new entity processes almost £2.5bn in retail billing per annum, employs over 250 people and serves circa 900 partners – and Riley is pitching the organisation as a force for industry change with the capacity to redefine channel billing.

Union Street's Sales and Marketing Director Vincent Disneur (pictured) is now overall MD of the enlarged business – and he plans to double the size of the firm within three years.

Kevin O'Brien has been appointed Chief Finance Officer and Union Street founder Tony Cook remains as an advisor to the board.

"Our immediate priority is to ensure our partners know that it's business as usual without any disruption to service whatsoever," stated Disneur.

"One of the most exciting aspects of this deal is the combination of Union Street's and Aurora's software, bringing together complementary features such as Union Street's billing

capabilities and Aurora's solutions for supplier integration."

The organisation, which is chaired by Riley, will retain the Union Street Technologies brand. With significant new investment Aurora will operate as the firm's development arm.

Riley first signalled an interest in investing in Union Street early this year. The outreach came as Covid-19 hit and Union Street's PE plans, which at the time were well advanced, became obstructed by the lockdown. **Continued on page 12**

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EDITORIAL COMMENT



Nigel Sergent

ON THE surface, it was a normal summer morning. Nick Dutfield, Sales Director at Fusion Voice & Data, got up, took his dog for a walk, came back to his house, made his wife Lisa a cup of coffee and then went to his garage and tragically decided to take his own

life. Lisa, their teenage children and the paramedics who attended the dreadful scene resuscitated him, but he died the next morning in hospital. These were heart-breaking words to write, but when an industry colleague ends his life so needlessly, it highlights a serious issue. I never want to write a comment like this again. Ever.

Nick was mildly bi-polar, and no-one will ever know the turmoil inside his head which drove him to take such a drastic step and put an end to the pain he was clearly suffering. And that's the nub of the problem. In our community there could be many more people like Nick who are too ashamed, proud or scared to admit they have mental health issues. In these troubling times the problem has magnified fivefold. Lisa tells us that the uncertainty and stress caused by the Covid pandemic was responsible for the sudden downturn in Nick's mental health.

Industry veteran Peter Orr has suffered from the 'Black Dog' for years. He decided something had to be done to prevent more tragedies and has set up a new charity called Mental Health Associates.

Specifically focused on the ICT industry, it aims to help people when they need it most. But money is needed to fund the charity and pay for counsellors to be trained. Comms Dealer is putting its full weight behind this initiative, so this is a call to all ICT businesses, large and small. If you can help in any way, please contact Peter [peter.orr@ntlworld.com](mailto:peter.orr@ntlworld.com) or myself [nsergent@bpl-business.com](mailto:nsergent@bpl-business.com)

In Nick Dutfield's memory, we must help anyone in our industry suffering in silence. Keep watching.

**Nigel Sergent, Editorial Director**

# Babble seals CMT snap up

LDC-backed Babble has snapped up Corporate Management Telecom (CMT), its third acquisition of the year with more in the pipeline.

Braintree-based CMT began life in 1998 and provides business telephony and cloud-based services to 500 customers.

LDC linked up with Babble in 2017 since when the firm has delivered double digit organic and acquisitive growth. In addition to CMT, Babble has so far acquired Arden Group, Direct Response Plus, Diva Telecom and Lake Technologies.

Babble CEO Matt Parker commented: "As we continue to expand through acquiring businesses we are getting closer step-by-step towards our £100m revenue target."

Chris Morris, Investment Director at LDC, added: "When we partnered with Babble we had a clear plan to grow the business through a targeted buy and build programme.

"Over the last three years we helped the management team to scale the business and the latest acquisition will bolster its offering across the UK."

Since July 2018, LDC-backed businesses across the UK have acquired more than



Matt Parker

45 companies with a total enterprise value of over £275m.

CMT shareholders were advised by Knight Corporate Finance which ran a competitive sales process to a select number of parties and Babble emerged as the preferred buyer.

"CMT is the latest graduate of Knight's Vendor Assist programme to go on to successfully complete a transaction," stated Adam Zoldan, Director of Knight.

"Taking the business through a dry run diligence process, Knight provided recommendations to implement ahead of starting a formal process and to ensure the business was prepared for the transaction."

CMT MD Firas Bilbeisi said: "We were able to negotiate an agreement that met the expectations of all our shareholders."

# Ridgewall combines five firms

INFLEXION-backed Ridgewall has consolidated its five group companies and geared up for additional acquisitions.

Early last year the business kicked off a buy and build strategy and snapped up Connecting London, Telnet International and Nomis Connections.

In November 2019 Inflexion Private Equity invested in Ridgewall and backed the simultaneous acquisition of QDOS-sbl. The combined group now employs over 100 people and has circa 1,800 customers and is operating under the Ridgewall Group brand.

Simon Catterick, Chief Commercial Officer, said: "Our clients nationwide will now be served by one team. This should help us deliver improving levels of service and support, and we will achieve more for our clients and stakeholders."

CEO Dominic McAnaspie added: "In bringing together five specialist IT and communications companies we believe we have a fit-for-purpose, scalable and efficient structure for Ridgewall to prosper.

"Working with Inflexion we are looking to develop the business further with several acquisitions underway."

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# Kaseya: A guardian of emails

KASEYA'S security capabilities have received a boost following the firm's acquisition of automated phishing defence platform Graphus, which is based on patented AI technology.

The platform is designed to defend Microsoft Office 365 and G Suite inboxes from email threats such as phishing, business email compromise, account takeover, identity spoofing and malware and ransomware.

Manoj Srivastava, CEO and co-founder of US-headquartered Graphus, will lead Kaseya's cloud email security practice.

"At a time when workforces are nearly 100% remote and cloud email adoption is at an all time high, businesses have a greater need for strong cyber security defences," commented Fred Voccola, CEO of Kaseya.

"Graphus has protected our circa 3,200 inboxes for nearly a year, processing over 22 million of our emails. We've eliminated about 250,000 unsafe emails, quarantined nearly 15,000 phishing attacks and blocked 3,400 executive spoofing and 2,400 impersonation attacks."

The deal builds on Kaseya's acquisition of the ID Agent dark web monitoring and security awareness training solution.

# Firstcom's poised for new buys

FIRSTCOM Europe is primed for more M&A activity having secured a 29m euro acquisition war chest from Kartesia.

The cash boost also enables Firstcom to refinance its existing debt arrangements.

Firstcom has completed eight acquisitions to date and generates over £35m revenues.

The company operates in the UK, Germany, Sweden, Denmark and Poland, and future acquisitions will expand its geographic footprint.

Nick Holman, Director at Kartesia, stated: "With its proprietary product portfolio across on-premises and cloud-based solutions, Firstcom Europe is in a position to support its clients in the ongoing transition to digital telephony."

Firstcom CEO Christian Bleakley added: "Firstcom will continue to develop cloud-based products that will be embedded into business practices."



Christian Bleakley

# Securus nets cloud player

GROWING demand for UCaaS has been cited as a prime driver for Securus Technology Group's acquisition of Cheshire located cloud comms reseller voxnet.co.uk.

The deal significantly boosts Hampshire-based Securus's voice proposition and creates a platform to spur growth through new cloud sales.

voxnet.co.uk's owner Stephen Dykes joins the Securus Voice Solutions division as Sales and Marketing Director.

"This acquisition adds a great deal to the business, not least of which is the experience and market knowledge that Stephen brings," stated Rob Derbyshire, Director of Securus Technology Group.

"UCaaS has been a growth area for us in recent years and we now have the tools and expertise to take advantage of the market opportunities."

Based in Cheshire, voxnet.co.uk has been providing cloud telephony solutions to small and medium businesses across the UK since 2016.

"We have been working with Securus for some time as our connectivity requirements have grown so the opportunity to join forces and combine resources



Rob Derbyshire

was too good to miss," added Dykes. "Cloud telephony and cloud UC&C is set to experience massive growth in the UK so the timing to become part of the Securus Technology Group was ideal."

## NEWS ROUNDUP

NORTHAMPTON-based IT reseller Kingsfield Computers aims to exert a greater influence in the public sector, investing in internal systems and personnel to build on its status as a supplier to NHS Trusts, local and central Government. Nitesh Ganatra, MD, said: "Many resellers talk about enabling digital transformation for their customers and others are moving towards managed services. But there is still a need for good, honest and simple IT product supply. That is what we focus on doing and we make no apologies about that." The firm has over 400 customers and is listed as a supplier on five technology frameworks. Ganatra expects 40% sales growth this year.

## comms dealer

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# Knight thrives despite Covid



Adam Zoldan

DESPITE restrictive Covid-19 pressures ICT sector dealmaker Knight Corporate Finance has secured two more transactions taking its lockdown total to five.

The company advised the shareholders of DoubleEdge and Foehn in a three-way merger alongside Metaphor IT to create MSP Kerv, which is backed by LDC and tech entrepreneur Alastair Mills.

“With valuations maintained by continued demand for acquisitions in the sector, the deals see the shareholders of both companies realise a premium

for their business and take an ongoing role and equity stakes in the enlarged business,” stated Adam Zoldan, Director and co-founder of Knight.

“The dynamism of the channel is exemplified with this deal, and the emergence of Kerv brings an exciting new player looking to disrupt the market.

“The deal also shows the confidence of private equity investment in the sector which looks set to continue.”

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## NEWS ROUNDUP

ASTRO Technology Group CEO Steve Hodges has been selected as a finalist in the IoD's Director of the Year Awards 2020 for the London and south region. He was shortlisted in the Director of the Year – SME up to £5m category. “We have been undergoing an exciting transformation programme for the last few years, both with the team and the services we deliver to our customers,” commented Hodges. “To have the stewardship of this recognised by the Institute of Directors is rewarding.”

CISCO shares fell 5% on reporting its fiscal Q4 earnings and the company issued downbeat guidance for the current quarter, the start of its new fiscal year. Revenues fell 9% to \$12.2bn with declines across all regions. Security was again a bright spot with a 10% gain but its core infrastructure platforms business dipped by double digits. Revenue by region came in at: Americas, \$7.19bn (down 12%); EMEA, \$3.11bn (down 6%); and APJC, \$1.86bn (down 7%).

# Gigaclear sets out plan to recruit 120 field engineers

BROADBAND provider Gigaclear is set to boost its engineering capacity and expand its employee base by over 20% with plans to hire 120 full-time field engineers by the end of March 2021.

The recruitment drive is designed to improve the rural broadband provider's technical skills, accelerate build speeds and increase agility.

Nathan Rundle, Delivery Director at Gigaclear, stated: “We're recruiting externally at a time when many other businesses are putting staff on furlough and making redundancies.



Nathan Rundle

“It goes to show how essential our work is as we continue to expand our network, helping families to stay in touch, allowing people to work from home, keeping communities connected, and more.

“Investing in our in-house field engineering team will help us become more responsive and also drive standards by setting a benchmark for our contractors to match in terms of quality and customer experience.”



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NEWS ROUNDUP

DELL'S shares rose 2% on the back of a strong Q2 despite the Client Solutions Group missing revenue estimates, reported at \$11.2bn versus the \$11.52bn expectation. Consumer sales were up 18% and Infrastructure Solutions Group revenue totaled \$8.2bn with \$4bn in storage revenue and \$4.2bn in servers and networking. VMware sales increased 10% to \$2.9bn. Recurring revenue rose 15% to \$6bn.

SCANSOURCE reported a 22% sales dip in Q4, primarily due to Covid-19. The Intelisys master agency business saw net sales up 15%. Operating income decreased to \$113.4m. "We've taken actions to strengthen our balance sheet, improve our cost structure and drive investments in our higher margin, VAR cloud platform and agency business," said CEO Mike Baur. Pointing to positive trends in the VAR business John Eldh, Chief Revenue Officer, said: "Our top selling products included mobile computing, mobile printing, networking, video surveillance cameras and UC hardware, software and services. The new normal is driving more mobile use cases such as applications in e-commerce, delivery, curbside pickup and warehouse expansion."

# DSP pockets Explorer UK



Ian Thomason with Simon Goodenough

DSP's data infrastructure skills received a boost following its merger with fellow Oracle Platinum partner Explorer UK, creating a £20m group.

DSP was founded in 1999 and registers almost £10m revenues. The firm has circa 40 staff and offices in London, Nottingham and Basingstoke.

Based in Leeds, Explorer also generates £10 turnover, has 50 staff and over 25 years experience of providing database and infrastructure solutions, with particular expertise in Oracle systems and cloud.

Both organisations will continue to operate under their own brand names from DSP's three offices and Explorer's Leeds head office. Explorer

founder Ian Thomason joins the board of the DSP Group.

In August 2018 YFM Equity Partners backed DSP's £10m MBO led by CEO Simon Goodenough.

"This is a case of one and one makes three," said Goodenough. "As a group we will look to realise our joint objective of being the UK's primary provider of enterprise grade database and data platform services, whether on-premise or cloud, Oracle or Microsoft."

Since the 2018 management buyout DSP has doubled turnover and profitability and grown its contract base by 300%.

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# Scots firm completes network

EDINBURGH-based Commsworld has confirmed its status as a new entrant to the national high capacity backhaul market following the completion of its UK-wide optical core network which is built on over 2,000 kilometres of dark fibre.

The enablement of a PoP in Huddersfield marked the completion of the £10m project.

CTO Charlie Boisseau said: "One of our key objectives is to operate our own true, cohesive, end-to-end optical network. We have now achieved it."

Dark fibre was leased on a long-term basis from CityFibre (London and Bristol up to Manchester and Leeds) and Zayo (Manchester and Leeds up to Edinburgh and Glasgow).

Commsworld is extending its DWDM footprint throughout the metro networks it operates in London, Newcastle, Edinburgh, Glasgow and the Scottish Borders. It plans to use Openreach's new DFX product to extend its optical capabilities into the north of Scotland.

CEO Ricky Nicol said: "All corners of Britain should have access to the same ultrafast connectivity as businesses in cities like London, Manchester, Leeds, Glasgow and Edinburgh."

NEWS ROUNDUP

DWS has scooped O2's Distribution Partner of the Year gong for the second year running. Hosted by Gary Hill, Head of Partners at O2, the awards were held via video conference. DWS CEO Terry O'Brien said: "This award is a testament to the multiple areas of our business that engage with O2." Hill added: "DWS and O2 have a strong and trusted relationship across all levels. DWS's teams have a robust CSI plan for their stockist network and have made significant investments to strengthen the desk-based account management team and improve customer value and retention."

INGRAM Micro reported a 'solid' second quarter despite witnessing a \$1bn-plus annual drop in sales, partly due to the pandemic. But operating profit jumped from \$156m to \$206m and net profit stood at \$142m. The company said it delivered a 'robust performance' in the Technology Solutions and Commerce & Lifecycle Services business. Worldwide quarterly sales came in at \$10.48bn with a gross profit of \$821m, or 7.83% of sales. At the same time last year, Ingram reported sales of \$11.53bn and a gross profit of \$809m.



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# Lockdown compliant golf events swing into action

NEWS ROUNDUP

DIGITAL Wholesale Solutions (DWS) swung into 'creative' partner engagement mode when the Government lifted lockdown restrictions on golf courses across the nation.

The company staged a cross-nation socially distanced event, called Big Tee for Two, where DWS representatives linked up with partners at top level courses, playing in groups of two, three or four.

"For a company based on strong partner relationships Covid-19 has made things difficult, forcing us to reconsider our approach to partner engagement – but there was never any doubt that we would find a safe way around it," said DWS Sales Director Garry Growns.

"When the Government gave golfers the green light we decid-



Terry O'Brien with Edge Telecom owner Stephen Finnegan and Arrow Communications CCO Simon Wort

ed to run with it, adapting our events approach to work within the guidelines."

Partners also received hampers with beverages and snacks for a virtual pub night with other golfers, dubbed the Big Night Inn and opened by 'landlord Garry' via Teams.

Awards were handed to John Forde, founder of Airphone Telecom Solutions and Jon Dunn, Sales Director at Mint Telecom who picked up a Tiger Woods of the Channel gong.

Other prizes included the Better Luck Next Time award, the Tez's Threadies award pre-

sented by DWS CEO Terry O'Brien to the snazziest dresser, and the Snap Happy gong for the golfer who took the most photos and videos.

"Following the success of last year's Oktoberfest we were planning to hold a DWS SummerFest in July," added Growns. "Of course, Covid-19 had other ideas and, like many other businesses across the globe we were forced to put our plans on hold.

"But a worldwide pandemic can't stop us from celebrating our partners, which is why we decided to do things a little differently. For those who couldn't attend or perhaps are not interested in golf, we continue to work on new ways to engage and are already coming up with ideas for our next event."

AVAYA has set a 'personal best' with 89% of revenue coming from software and services according to its Q3 financial results. The company also reported GAAP revenues of \$721m with recurring revenues of 64%, up five points year-over-year. Its Cloud, Alliance Partner & Subscription revenue increased from 23% to 30% of revenue.

ALCATEL-Lucent Enterprise and RingCentral have entered into a strategic partnership to introduce a new co-branded cloud solution – Rainbow Office powered by RingCentral. The deal sees both companies contribute resources towards the development and sales and marketing of the offering. RingCentral will pay Alcatel-Lucent Enterprise \$100m in cash for exclusive access, a minimum seat commitment and future commissions.

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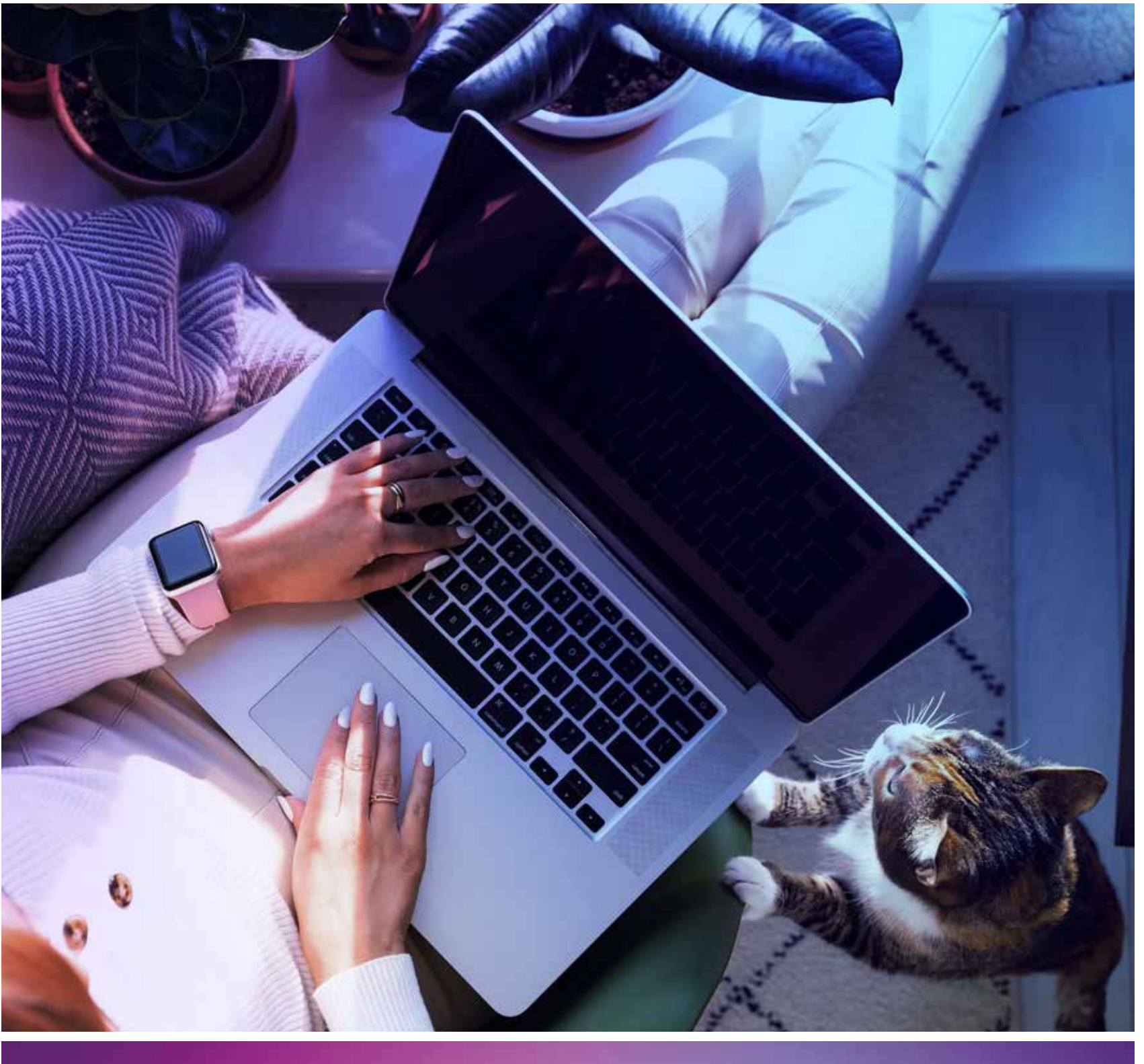


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NEWS ROUNDUP

ZOOM'S Q2 results for fiscal year 2021 show revenues of \$663.5m, up 355% year-over-year. The number of customers contributing more than \$100,000 in TTM revenue is up 112% year-over-year; and the firm has on-boarded circa 370,200 more customers with 10-plus employees, up 458%. "Organisations are shifting from addressing their immediate business continuity needs to supporting a future of working anywhere, learning anywhere, and connecting anywhere on Zoom's video-first platform," said founder and CEO Eric S. Yuan. "Growth in Q2 enabled us to increase our revenue outlook to approximately \$2.37bn to \$2.39bn for FY21, a 281% to 284% increase year-over-year." See page 44

RESEARCH conducted by Comms Dealer in association with Zen found that just 10% of interviewees rate the impact of current service levels from carrier partners on their business as positive; and that partners are setting a low customer satisfaction bar when they need to be more demanding of a better service considering their reliance on the relationship. "Our industry has consistently failed to get service excellence right," stated Zen CEO Paul Stobart. See pages 14-18

# SCC reports record year

SERVICES and data centre growth continues to spur IT group SCC's revenues to record levels. In its full year results for the year ended 31st March 2020, SCC EMEA posted a record £2.3bn revenues and EBIT of £30.7m.

The firm registered turnover growth of 5.5% and EBIT growth of 8.8% year-on-year. The group achieved 11% growth in services across EMEA.

The UK performance was again strong despite only a marginal increase in turnover – up 0.2% to £723.4m – with growth in operating profit of 5%, now at £15.4m.

SCC UK grew its services business by 9% in the year, with data centre services turnover up 17%.

James Rigby, SCC EMEA CEO, said: "Understanding our customers' needs continued as the cornerstone of our success and never before has this been so important.

"We are helping customers adapt to the current health and economic challenges, quickly deploying solutions to support workplace productivity and remote working.

"Investment in people and in technology remains essential



James Rigby

to a healthy future and we have continued to invest for the long-term over the past year.

"Innovation in services is also important to our future.

"In response to recent events, new solutions in thermographic technology and document management solutions have supported customers alongside our specialisms in connectivity and remote working solutions.

"Our history is of adapting to change. Our financial plans are in place, our financial position is secure, and we are well prepared for the coming year."

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# Rise in as-a-service predicted

THE coming two years will see a significant shift to as-a-service models driven by greater investments in cloud (32%) and AI based (30%) networking, according to a global study of IT decision makers from Aruba.

The need for widespread but prudent investment is pushing decision makers towards new models of consumption, with subscriptions, managed services and financial leasing rising up the agenda, noted the study.

"The emergence of the hybrid workplace is pushing IT leaders to deliver a delicate balance between flexibility, security and affordability at the edge," said Morten Illum, EMEA Vice President for Aruba (a Hewlett Packard Enterprise company).


"The workplace has significantly changed and to support new norms such as social distancing and contactless experiences, campuses need to have the right technology in place to offer enterprise-level connectivity, security and support.

"All this must be done in an increasingly challenging financial environment which is spurring the trend for IT decision makers to opt for the reduced risk and cost advantages offered by a subscription model."

NEWS ROUNDUP

TELECOMS and data circuit reseller Viegli has moved into distribution following a deal to supply Qunifi's Call2Teams across the UK and Europe. The Cambridgeshire-based company intends to 'disrupt the current distribution model', and the primary driver for the transformation is a sharp focus on support and building channel relationships, according to Viegli owner Robert Nunn. "Viegli is already rocking the boat by delivering the Unify OpenScape Business Platform for resellers with handsets included, offering PAYG with no minimum contract," he stated.

US-BASED distributor Telarus is aiming to replicate the significant sales performance it has seen with 8x8 on home territory in the UK. "We've witnessed the transformation of 8x8 into a channel-first company and experienced sales growth participating in the 8x8 Open Channel Program, made possible by the strong performance of our network of sales partners in the US," said Scott Forbush, Senior Vice President of Global Sales at Telarus. "We now have a great opportunity to take the partnership to the next level and replicate this success for our sales partners in the UK."



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# Daisy focuses on indirect

Partners will gain a market lead if they join Daisy Communications' new channel programme which, says Director of Business Partner Sales Julien Parven, has the potential to drive exponential growth.

**D**aisy Communications is a circa £140 million turnover business of which 90 per cent revenue is on a recurring basis. "Our indirect channel represents 10 per cent driven by 270 partners – we want to double the monthly recurring revenue contribution and I see the indirect channel contribution increasing and business growing exponentially," stated Parven.

He aims to increase recurring revenues via a new indirect partner channel recruitment campaign which operates under the Daisy Preferred Partner programme banner. "It's a vehicle for partners to go to market and gain leverage from our brand while maintaining their identity," added Parven. "Our size and scale, our vendor relationships and our exclusive propositions, combined with our product portfolio mean we're ideally positioned to lead the channel into dealing with any changes over the coming months. Our rationale is about responding to a surge in demand of changing business needs. With emerging technologies such as VoIP, we offer resellers the best of both worlds and help them deal with market conditions.

"There's no set profile of partner business we're seeking to attract, but the benefit to all our resellers is the ability

to switch between an upfront commission model and the residual revenue model, and being able to do that down to individual product level."

With established telecom resellers, the onboarding process is one of familiarisation with Daisy Communications' products because they know the market. "For sales agents we provide business support and manage the customer service and interaction through life," explained Parven. "They simply take the commission fees. The contact and call centre approach is hands-on. One of our business development managers would spend time in the business and our physical presence not only helps accelerate the learning curve, but also accelerates their revenue generation.

"We try and make doing business with us as easy as possible. Currently we have a portal based-system and a workflow process but our short-term ambition is to relaunch a new, more user-friendly portal alongside a new workflow that gives partners a slick new process. We have a 19 year legacy in channel: Partners can leverage our brand, experience, vendor relationships and effectively make themselves an extension of Daisy."

Parven noted that there will be 'good people' without

jobs who've come from telco businesses and one of his priorities is to give them an opportunity to create their own business by working with the new programme. "Breaking into new markets is also a priority and the main opportunities are with the proliferation of VoIP," he added. "Other opportunities are to get closer to the end customer, understand their needs more and to develop a consultative approach via our partners to get them through this period of recovery followed by a prolonged period of sustainability and growth."

Daisy Communications' channel strategy is agile and keeps pace with industry change. "The market dynamics and changes are so rapid that the strategy will constantly be under review, tweaked and subject to change," added Parven. "Our approach has shifted over the course of the last year and I see the strategy evolving to something which brings together our different product areas to create a compelling end-to-end proposition for partners."

Parven also noted that growth is coming from technology changes and shifts, driven by multiple influences. "In turn, the growth is driving increased demand for new products and service lines and the channel is ideally positioned



"We have a 19 year legacy in channel: Partners can leverage our brand, experience, vendor relationships and effectively make themselves an extension of Daisy"

*Julien Parven*

to meet those changes," he added. "Some macro forces would be around legislation such as the PSTN switch off and the Government's published ambition of having a fibre-enabled Britain. With engagement it's about taking them on the journey with us and giving them insight so they know these changes aren't something to fear, but to be embraced."

According to Parven, the reseller role is becoming more about helping customers see the future and helping them navigate towards that, perhaps in a more competitive environment. "There'll be new entrants from IP specialists who'll see the PSTN switch off as being a huge opportunity and, if resellers don't start having conversations with their customers about the technology evolution, then those IP sellers will," he warned. "Our proposition helps ease some of those challenges because we're

on the Openreach steering community leading the way towards the PSTN switch off and can share information and insight."

Against this backdrop, anything 'As a Service' is going to explode, believes Parven. Artificial Intelligence is another key trend as it drives efficiency and improves the user experience – both of which aid with customer retention. "These technologies will unlock new markets so we'll keep close to them and plot their evolution until we feel they're fit for channel consumption," commented Parven.

"Right now, a partner's biggest opportunity is being on the front foot and responding. By working with us they can position themselves as an expert, go out with market share which then cascades up. Our biggest opportunity is leading the charge towards such changes and taking our partners with us by building a channel and a supply chain where everybody wins.

"We have large ambitions and we're looking to double the size of our business but we can only do that with the support of our partners. In three years time we see ourselves having a greater reach, having more end customers that are being delivered and managed by our partners and we see the channel as being our key acquisition route.

"The channel is the place to be, and we feel we're uniquely positioned to take it forward, to be the channel champion and to work across multiple partner segments to deliver real growth into businesses." ■

For more information visit: [www.daisycomms.co.uk/partners](http://www.daisycomms.co.uk/partners) or call 03330 609 105

# Union Street boosts expansion plans with Aurora merger deal

Continued from page 1

As a prominent figure in the close-knit comms channel with many industry transactions under his belt Union Street bosses knew Riley well and that he could potentially be helpful in taking the company to the next level.

When Riley made a concrete proposal a deal materialised, creating an independent and significantly strengthened cloud-based billing and provisioning software business for the channel, which came into effect late last month.

“I’ve known Tony and Vincent for a long time and seen them take Union Street from strength to strength – that’s going to continue,” said Riley.

“Union Street’s strong historic profile and brand equity combined with Aurora’s development muscle will add value to the telecommunications and IT reseller markets.

“There’s a significant opportunity in the channel for the right cloud-based billing and provisioning solution.”

The securement of an emphatic presence in the comms billing sector marks the latest push by Riley to target a bigger share of the country’s grow-



Matthew Riley

ing ICT partner community and exert a telling influence on the channel billing landscape.

The addition of Union Street’s capabilities and market presence gives the combined organisation greater size, scale and flexibility with a wider channel reach, which is key to Riley’s and Union Street’s pursuit of more partners.

According to Riley, the number of comms channel firms will grow and combined with IT resellers the market sits at approximately 14,500 prospective partners.

“By combining Union Street and Aurora, I see enormous potential to digitally enhance how the channel not only bills end users, but also how it pro-

visions services,” said Riley. “Getting your bills out right first time, on time, every time is the goal and to do that you have to effectively provision services and get the sales paperwork correct at entry.

“We intend to revolutionise the sales-to-bill process for the benefit of the channel.”

Disneur is eager to further distinguish Union Street Technologies by focusing on strengths made more significant in these times of market and economic uncertainty.

“We see opportunities and lessons learned from Covid-19, with customers and partners emphasising the need for resilience and stability in uncertain times,” said Disneur.

“Lockdown has provided time and space for many channel businesses to look at their billing operations, and this crisis has exposed actual or potential vulnerabilities.

“Furthermore, many business owners are getting to grips with the ‘new normal’ with online sales, remote teams and teleconferencing, and they’re asking themselves if they could do better than the services provided by the big incumbents.

“Billing and cashflow are the lifeblood of any business, so business owners and senior managers need real-time billing information at their fingertips.

“Our combined track record of innovation, longevity and stability is reassuring for the

channel, which needs continuity and the ability to scale up quickly and smoothly.”

According to Disneur the rise of the subscription economy and advances in technology are having a transformative effect on consumer expectations and could potentially drive greater levels of consolidation in the comms billing space.

“The channel will need to evolve to keep up, particularly in the way it supplies and bills services,” he added.

“It’s not just technological challenges at play. Providing SLAs and support that resellers can count on while adhering to best practice for data security and accuracy is increasingly becoming a challenge.

“Beyond this, there’s many more disruptive technologies impacting the market.

“Blockchain, 5G, public cloud and the move to all IP telephony are just a few.

“Each will bring its own challenges and opportunities to the channel. We are going to develop our solutions to assist partners in all of these market and technological requirements.

“The objective is simple – to help partners become bigger, better, and more profitable.”

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# Channel study: Building po



perform optimally – a marriage of insight, good decision making, people, processes and their ongoing management and improvement. Achieving operational and service excellence is a top leadership priority for almost all respondents (90 per cent), and a second level priority for the remaining 10 per cent. A strong correlation exists between customer loyalty and the reasons for wanting to improve operational and service excellence, which was cited by 62 per cent of interviewees, ahead of the next most important outcome which is to achieve productivity benefits and cost savings through being leaner and more efficient operationally (26 per cent).

The elevation of an excellent service experience above a poor one boils down to how organisations deliver it, and according to most respondents they could do better: 64 per cent say their operational and service functions need improving with almost five per cent requiring a total overhaul. The remaining 31 per cent are fully optimised and firing on all cylinders.

To help achieve their service goals, 62 per cent of those interviewed have a communication and governance structure that is intended to support and encourage continuous improvement within their business, 17 per cent plan to introduce one and just over 20 per cent do not have such processes. We have already noted that these governance structures, in the main, require improvement, a total revamp or setting up from scratch – therefore these statistics suggest

## This paper exposes a high degree of operational and service level stasis in the channel. What are the root causes? And how can they be overcome?

**T**he data which forms the basis of this comms channel research study was derived from extensive telephone interviews with 150 executives of channel organisations during June and July 2020 (ICT resellers, SIs, MSPs and ISPs of all sizes, the majority up to £5 million revenue firms ranging up to £20 million-plus). This paper is based on over 5,000 statements and the distillation of these responses form what we believe to be the most thorough research into the current state of service in the UK comms channel.

The intention of this paper is to determine a better understanding of the dynamics that influence operational and service levels and identify ways to improve standards. We found that service excellence has no single determining driver and is achievable only by actioning strategies linked to the interrelated transformation factors that feature prominently throughout this report.

### Interconnected priorities

This research document sheds light on the comms channel service-scape in many ways: It emphasises the inter-relation

of multiple factors that underpin service excellence; it identifies the service and operational challenges that channel organisations face; it points to the root cause factors that impact service level status; and identifies new opportunities for channel organisations to improve the effectiveness, efficiency and the relevance of service extended to partners and end customers when the following interrelated transformation factors are actioned.

### Key transformation factors

- Overcoming legacy mindsets and processes

- Optimising strategy and agility
- Improving leadership and decision making
- Nurturing organisational culture
- Achieving operational excellence
- Restrategising channel partnerships
- Meeting opportunities with intent

### Strategic enablement

For the majority of respondents the quest for operational excellence involves leadership and cultural transformation, which provides the strategic enablement required to

# Powerful service strategies

that maintaining customer loyalty is a weakness for many organisations, an Achilles heel, because despite loyalty being singled out as the primary driver behind efforts to improve service, the processes designed to nurture it are acknowledged as sub-standard, totally ineffective or non-existent.

It is clear that many business excellence models may lack an effective structural architecture, including areas such as the alignment of strategy with outcomes. This also has implications for long-term sustainability.

## Excellent service by definition

The survey indicates that the scenarios outlined above could be due, in part, to confusion and a lack of focus among leadership and staff about what excellence means for their organisation. There needs to be clarity about an organisation's definition of service excellence in order to strategise it and leave staff in no doubt that service excellence is a top priority, especially in the wake of the Covid-19 crisis which has prompted over 50 per cent of respondents to look more closely at their company's performance in terms of culture, process management and its capacity to deliver operational and service excellence.

According to 42 per cent of interviewees in this study, Covid-19 has steered them to look at raising their operational and service excellence bar, which could include becoming more flexible and orientated towards supporting home users and remote workers. An opportunity exists for the vendors and carriers

which can help partners achieve their service goals.

## Culture and excellence

Service has an emotional impact as well as a rational one. We know naturally whether we have received a good or bad service experience, and how it makes us feel, which is what influences our loyalty or detachment. Yet despite this universal 'sense of good service', service excellence is too often difficult to deliver, so where do we need to focus our efforts? Business leaders would be doing themselves a big favour by focusing on achieving operational excellence.

The link between operational excellence and service

excellence supports the requirement for process re-engineering and cultural transformation. The strategy should be clearly structured and made more tangible through culture and strongly advanced by business leaders. The primary challenge in achieving service excellence is its successful implementation. In this, leadership and managerial activities are clearly linked with a company's ability to develop and constantly improve a service-oriented business model within an agile environment that matches the needs of the market.

For the vast majority (78.5 per cent) operational and service excellence is described as a mindset, a culture

that should pervade the business. For 18.5 per cent it's understood to be more about a prescribed set of tasks that people undertake. Changing, reviewing and implementing processes and communicating them through the business is the main leadership requirement for a third of respondents.

## Challenges and barriers

For almost 95 per cent of interviewees the quest for operational excellence begins at the top, and the biggest leadership challenge in delivering excellence is improving the performance of decision making (44 per cent), which is a significant factor in the context of formulating and establishing service and

operational strategies, before they are communicated throughout the business and brought to life through cultural transformation.

Developing a culture of operational and service discipline is the next most important challenge (27 per cent), which is a logical statistic because cultural development follows the decision making process. And in another natural next step, aligning strategy and culture is the main challenge for 20 per cent, who may have already established the strategic and cultural preconditions for achieving operational and service excellence. Other underlying challenges in achieving operational and service excellence are cited as keeping pace with new and emerging technologies and innovation and having the agility to adapt fast to changing market conditions.

The survey revealed a correlation between these challenges and the capacity of upstream service providers to deliver innovation and operate with agility. The study found that the success of partner businesses is in varying degrees dependent on service provider/vendor relationships, which we will explore later in this report. But for now, the interconnectedness of many channel relationships is under stress from 'factors of detachment' that reside in those vendor and carrier organisations that are wedded to legacy, rigid, hierarchical structures and procedures – which alongside a perceived lack of innovation can prevent their partners from becoming more agile themselves and less able to

**Continued on page 16**



**Just 10 per cent of interviewees rate the impact of current service levels from carrier partners on their business as positive**

**Continued from page 15**

ride the wave of technology and market developments. For the channel to achieve its full potential these gaps must be bridged urgently.

**Do you measure up?**

The journey towards operational and service excellence also requires, as a priority, greater measurements of key performance metrics. But more than 20 per cent of respondents don't have official KPIs, 35 per cent partially monitor their operational and service performance and 17 per cent don't monitor it at all. Just 26 per cent fully monitor their operational and service metrics. That said, nearly 55 per cent rate the role of algorithms, ML, AI and analytics in measuring and monitoring KPIs as useful, over 15 per cent say they are vital.

With 70 per cent of respondents having no valuable insights into their operational and service performance levels there is little wonder that decision making on such matters is their biggest challenge. The survey establishes a strong link between data and its role in strategic decision making, suggesting that having a 360 degree view of how a business operates should become a leadership priority for organisations lacking the vital data and knowledge about themselves to underpin strategies that ensure customer loyalty and organisational longevity.

**Unravelling the partnership dilemma**

Economic and market uncertainty tests the capacity of all organisations to survive and thrive. In this context leadership, strategy, agility and service are ever more key. An agile, well-led enterprise is faster to adapt and execute, and another key determinant for our interviewees in meeting this imperative is



## Partners are setting a low customer satisfaction bar when they need to be more demanding of a better service considering their reliance on the relationship

the nature and success of channel partnerships.

Decisions to remain loyal or switch to another company should be significantly influenced by the attitude and actions of service provider partners, as well as other factors such as their capacity for innovation. But the research indicates that a general low-level expectation exists about what some channel service providers are able to achieve service-wise and product-wise, and their lacklustre performances can be begrudgingly, and forgivingly accepted as an industry standard.

Therefore, partners are setting a low customer satisfaction bar when they need to be more demanding of a better service considering their reliance on the relationship. This is reflected by 76 per cent of respondents who say their channel service provider partnerships are critical (26 per cent) or important (50 per cent) in enabling them to raise the service bar. Nearly three quarters say poor service from carrier

partners would undermine their business's long-term sustainability. But just 10 per cent of interviewees rate the impact of current service levels from carrier partners on their business as positive.

The impact of poor service is felt in varying degrees among 65 per cent (six per cent say the service they receive is very damaging; 59 per cent experience some impact; and 24 per cent registered no impact, the relationship is neutral, neither positive nor negative).

A partner's ability to deliver operational and service excellence to end customers is for almost 19 per cent of respondents completely reliant on the service they receive from service provider partners in the carrier space, and partially dependent for 62 per cent. This equates to 80 per cent dependency in varying degrees which again underlines the importance of the relationship. Furthermore, the biggest challenge in achieving operational and service excellence for nearly 17 per cent of interviewees is carrier partnerships that

fall short of the mark, overriding operational and service requirements within their own business.

According to 58 per cent of respondents the carrier-partner channel ecosystem is not geared up to the required level of customer value/satisfaction creation demanded by the market. And over 40 per cent say their service provider/cARRIER partners are not as committed as they could be to operational and service excellence. With a similar number believing that their carrier providers are not innovative nor agile enough.

**Process and cultural transformation**

This research paper makes clear that the link between operational excellence and service excellence creates the need for process re-engineering and cultural transformation within many partner and channel provider organisations. And it is evident that a challenging aspect for partners wanting to deliver a sublime customer experience relates to the positive correlation between

organisational agility factors and operational excellence, which are also linked to the quality and nature of service provider partnerships.

Furthermore, over 48 per cent say there is a lack of focus on process optimisation and automation among carrier partners. And nearly 65 per cent believe that carriers, if they haven't already, should implement new KPIs and performance measures to support operational and service improvement as part of a longer-term optimisation plan. Over 13 per cent said this should be done as an utmost priority.

As mentioned, only 10 per cent of interviewees rate the impact of current service levels from carrier partners on their business as positive. Yet, 68 per cent of our interviewees are nonetheless happy with the service they receive: 55 per cent rate it as good, 13 per cent think it's excellent, 28 per cent accept current service levels as 'average', and a mere three per cent said the service they receive is poor. In addition, nearly 60 per cent believe their upstream providers are as committed as they can be, and 58 per cent say carriers are innovative and agile enough to meet the needs of the fast-changing business environment.

This rather optimistic and forgiving assessment suggests that interviewees see some upstream providers as operating within a set of confines that are generally accepted as the standard, lacking scope for improvement. Any hope of room for improvement would of course prompt higher service expectations from partners.

The survey shows how the drivers and perceptions of customer satisfaction change across contexts and channels. Within the context of their own business,



partner expectations are higher, but expectations of vendor and carrier service providers are significantly lower. Under these conditions it is difficult to see how channel organisations can achieve strategic alignment, and make progress.

Handicapped by circumstances, a state of operational and service stasis exists within the majority of reseller organisations questioned, sustained by leadership and cultural challenges within their own business and the broad acceptance of current service levels from their upstream partners encouraged by the perception that 'this is as good as it gets'.

### Why perpetuate the status quo?

The success of operational and service excellence programmes depends in large part on how far they become embedded in an organisation's culture, and also on the state of channel partnerships. Creating a meaningful culture of service excellence is an operational priority, but it is too often the case that a strategy's potential value is lost due to shortcomings not only in execution, but also in the choice of channel partner. In particular, we can deduce that most business excellence models do not prioritise seeking a better service from alternative service providers.

Our survey shows that there are many examples of partners, in most cases, receiving poor service, including a lack of commercial flexibility and innovation in partner programmes; too much complexity in product and service portfolios; a lack of marketing, sales and tech support in bringing new products to market; a lack of effective process and automation as partners want the friction taken out of their journey; a lack of integration with partner organisations;

but the biggest bugbear is poor communication, culture and mindset.

Other factors perceived as restrictive to service excellence include legacy processes and infrastructures; no access to or visibility of key data; resistance to change; too much of a sales focus despite insufficient knowledge about the demands of the market; inflexibility and slow response times; a lack of effective account management; little understanding of the challenges faced by the channel; and conformity to legacy hierarchical structures and processes.

The survey also suggests that the growing scope of services offered by upstream providers calls for more structured portfolio management and support-centric approaches. In this context, service innovation and portals are becoming a competitive advantage for vendors and carriers, but a framework is needed that captures the roadmap early and shares data with partners so they know what to expect and when. Barriers that prevent information from flowing throughout the channel ecosystem must be removed.

### Strategic alignment is key

As with their own internal operational and service strategising efforts, partners must be clear on why a channel relationship exists and its direction. This approach, along with clear communication, timely problem solving and all-round closer engagement will create consistency of purpose and greater value for the partner – and more service providers will become easier to do business with.

But despite the criticality of their relationship with vendors and carriers many interviewees endure a status-quo-type arrangement with upstream service providers and don't switch to an

alternative, even though 90 per cent of respondents do not have a relationship with a provider that offers a positive influence on their business. In fact, below par channel partnerships could pose a challenge to a partner's operational and service excellence ambitions.

With this in mind, you would be forgiven for thinking that there should be more churn in the channel. However, decision making has already been highlighted as a major challenge, so most interviewees opt to support the status quo, reluctant to seek an alternative provider mainly on the basis of 'better the devil you know' (over 37 per cent). Concerns over migrating an entire base hold back 31 per cent; for 21 per cent the process is too complicated; and nine per cent believe all service providers deliver poor service, so why change?

The setting of low service and support expectations as being the standard benchmark brings into view an opportunity that exists in the space between customer/partner 'satisfaction' and 'delight'. It is in the experience received during problem solving that an opportunity exists to raise the service expectation bar above current levels. Therein lies an opportunity for upstream providers to stand out through good recovery; and because problem handling is a key driver of people's perceptions of excellent or poor service, good account management and processes are critical for vendors/carriers seeking to differentiate through excellent service, and thereby support partners' growth ambitions with a positive impact that helps them to achieve their objectives.

### Overcoming apathy: It's decision time, so become a catalyst for change

Our research tells us that operational and service

excellence is the outcome of optimised leadership, organisational culture, shared values, people and partnerships – there is therefore no industry standard. The quest for service excellence will require a change in paradigm and efforts to align strategy, objectives and culture may be met with resistance from staff and upstream service provider partners – again highlighting that decision making and cultural agility are critical to the success of service excellence strategies. But first there must be motivation.

A catalyst for change could reside in widespread recognition of the importance of an integrated partnership ecosystem with ideal process/service flow leading to resellers being able to offer Operational Excellence as a Service to their end customers. The importance of this concept to the future sustainability of the channel and partner businesses is recognised by nearly 59 per cent of interviewees, and for an additional 28 per cent it is vitally important. By far the biggest pre-condition is a change of mindset in leadership that would bring about the development of a single cross channel culture that strives for operational and service excellence.

The survey also points to a strong link between leadership credentials, motivation and the potential interconnectedness of channel businesses, with almost 40 per cent of interviewees identifying a change of mindset as the most important factor in driving change, double the next most important precondition, a need for more simplified product portfolios (20 per cent); followed by simplifying and automating customer journeys with stringent KPIs and monitoring (over 18 per cent); and greater investment by service provider partners in modern IT architectures (16 per cent).

This study tells us that the principles of 'excellence' must be accepted as integral to day-to-day operations. Operationally excellent companies gain most and pursue continuous improvement by doubling down on the needs of customers, motivating staff and continually improving processes – all of which prepares an organisation for service excellence and growth. The acid test of service excellence in the channel also rests on this question – is the provider easy to do business with? A partner that has optimised its operational and service functions certainly will be – and if all others follow suit the opportunities for business growth and long-term sustainability in the channel will be near endless. ■

Zen CEO responds – page 18

## ACTION POINTS TO CONSIDER

- Define what operational and service excellence means for your company, identify key focus areas and communicate the plan clearly across your business.
- Make the important decisions that will determine the sustainability of your company, and motivate your teams to exceed expectations.
- Be clear about the criticality of organisational culture and shared values and objectives to your agility, performance levels and future success.
- Understand your primary operational and service excellence challenges.
- Focus on the process, that way you will get to the root cause of your challenges.
- When planning for operational and service excellence a review of channel relationships must form part of the process.

# Time to raise the bar

The general state of service level stasis implied by the channel research report (see pages 14-17) shows a perpetual trend that must be urgently addressed – and there is no time to waste, urged Zen CEO Paul Stobart.

Customers have made it clear that they want a great experience. That means they want their suppliers to get the basics right – be responsive, provide a high quality service, be technically proficient, deliver what is promised, communicate updates regularly and follow through until everything is complete. None of this is complex. It's about doing the basics, but doing them really, really well. However, many of us – channel partners and service providers – fail to get this right.

The survey is a reminder to all of us that we should redouble our efforts to ensure that we are delivering the best possible customer experience. If we do that, our customers will stay loyal, buy more from us and recommend us to others. It therefore makes good business sense to be brilliant at delivering an excellent customer experience at every touch point.

## A culture of service excellence

But providing excellence in customer experience is not just something you 'demand' of your people. That clearly won't work. What does work is setting up a culture of service excellence at the top of the organisation. And if your people believe that the leadership team is genuinely committed to the pursuit of customer service

excellence, and if your people feel recognised, appreciated and rewarded for doing the right thing by the customer, then the delivery of service excellence becomes easier to achieve. If you don't have your people on side, then delivery of service excellence becomes almost impossible.

You could argue that this is all fairly obvious, yet our industry has consistently failed to get service excellence right. Why should we expect our channel partners to tolerate indifferent service? As an industry, we need to do better. It starts with listening to the market and using that feedback to evaluate and evolve the service offering. The better we are at providing the kind of service our channel partners want, then the more likely our channel partners will be able to serve their customers to the level required. At Zen we have a Partner Advisory Board whose remit, among other things, is to provide us with brutally honest feedback on how we are doing and where we can improve what we do. We take this feedback and use it proactively to enhance all aspects of our business offer.

## An ever changing market landscape

The survey also revealed a need for service providers to adapt fast to changing market conditions and keep pace with new and emerging technologies.



Paul Stobart

## If you don't have your people on side, then delivery of service excellence becomes almost impossible

Again, this is not a revelation. At Zen, we are investing in people, technology and our infrastructure both to adapt to the challenges that lie ahead, and to take advantage of new opportunities. Take SoGEA, as an example which is, in our view, certain to make a big impact on the telecoms market in the UK. We recently launched our own SoGEA offering and will continue to invest in this evolving opportunity over the coming months.

Another point of note for me from the survey was that 70 per cent of respondents admitted to having no valuable insights into their operational and service performance levels. Such a

dearth of insight can really hamper decision making at management level. Our Circle of Excellence Award, launched this year, rewards Zen partners who provide customers with superlative levels of service. The independent research (paid for by Zen) that underpins the Circle of Excellence awards offers participating partners invaluable insight into the quality of the customer experience they are offering their own customers.

## The road to success

2020 has been challenging for everyone but in a sense that's as good a reason as any to raise standards of quality even further. If there was ever a time that

customers needed to receive the best possible experience from their suppliers, it is now. Those providers that get customer experience right will prosper in the future. Yes, of course, providers need to have the right technology, products and propositions, but it's quality of service and excellence in customer experience that will always be the key differentiators.

At Zen, we are big believers in the potential of ultrafast – indeed, the Covid pandemic has created a whole new working environment, at home and in the office, where reliable and fast connectivity has become an essential without which we are lost. In response to this, we have been investing heavily in infrastructure and network capacity to prepare the way for a fast emerging ultrafast generation. We are one of the few players to offer ultrafast propositions to channel and wholesale partners, and we intend to remain at the forefront of the ultrafast world. But all this effort will be for naught if we don't also maintain and enhance the quality of service we provide.

Overall, my personal take out from this survey is that we all have a lot more work to do. This is no time to rest on any laurels. On the contrary, we need to re-invent everything we do to surprise and delight our customers. That's the path to true long-term business success. ■



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# Seeing the Bigger Picture

**What are the best steps for resellers to take during post-lockdown and recession hit UK? As NEC make final preparations for the ground-breaking cloud platform UNIVERGE BLUE, Andrew Cooper advises 'The New Normal creates new opportunities'.**



## Which is best for business communications – on-premises or cloud?

In 2019 UK Business Telephony licenses were 49% cloud-based and 51% on-premises, so you'd have to say both. Many customers are 'born in the cloud', others prefer building on their existing on-premises investments, others a combination of the two.

## The UK is officially in recession for the first time in 11 years. What advice would you give resellers?

Many businesses are facing tough choices, re-thinking their premises costs and looking to stream line their operations. In times of change also come opportunities. Budgets are of course tight but approaching a customer with a strong business case of saving money, consolidating resources and IT costs and working more efficiently will always resonate.

## ...And regarding the Coronavirus Pandemic?

As the nation returns to work, furlough schemes have ended and businesses address the 'new normal' – they have to remain competitive. The spike in remote working has led many to many quick fix conferencing solutions which lack the features, reliability and security of a business-grade collaboration.

Customer experience is still an essential. 89% of consumers begin doing business with a competitor following a poor customer experience. Also – according Gartner - when it comes to making a purchase, 64% of people find customer experience more important than price. This means businesses must quickly put customers in touch with exactly who they need.

## What can NEC offer resellers regarding these changes?

Our upcoming launch of UNIVERGE BLUE provides a unique cloud communications platform. This, along with our on-premises solutions provides both resellers and end users choice. We have no agenda here - we won't push

anyone into a solution they're not comfortable with.

## What should resellers be looking for when expanding their cloud solution portfolios?

The UK is a highly competitive marketplace with a bewildering number of vendors so it's important to have a USP. Beyond this - choosing a good partner program is essential. Many resellers have a fear of simply 'becoming an agent' with a cloud provider so customer ownership is also important.

Easy integration is another key factor as many customers have existing platforms they wish to continue using such as MS Teams and other web services – avoid the 'closed shop' vendor.

## How else can NEC and their partners provide cost savings for businesses with limited budgets?

Looking at the bigger picture, most businesses use and pay for a multitude of IT services – telecoms, collaboration, back up, security, webinars, file sharing, the list goes on. At NEC we refer to this as the 'crazy / simple' factor. All these have their own costs along with the resources to maintain and integrate them. If these are consolidated and streamlined, the cost of ownership is lowered considerably.

UNIVERGE BLUE cloud services is arguably one of the broadest cloud platforms available. CONNECT provides telephony, MEET provides collaboration, SHARE provides document sharing, ENGAGE provides contact centre along with many other cloud solutions on the roadmap. Resellers and end users have the option of adding further cloud services with no integration worries. And the reseller benefits as their customers get 'stickier'.

## How else can UNIVERGE BLUE enable resellers to stand out?

Despite the numerous cloud vendors in the UK we are seeing some of the bigger names using the same vendors' technologies. NEC's cloud partnership with Intermedia is a global

exclusive, so resellers are less likely to compete against the same solutions when quoting. This enables resellers to stand out and generate healthier revenue streams.

## What's NEC's take on billing?

We are taking a different approach to many other vendors with monthly billing as opposed to longer tie-ins. For business communications – UNIVERGE BLUE users only pay for what they use and user licenses can be altered month by month. This makes on-boarding new customers easier for resellers. We also back this with the confidence of our own solution, business partners and support are strong enough to keep them. We offer flexible growth for customers and easy ability to 'burst' capacity during campaigns and seasonal busy periods, another additional revenue stream for resellers.

## What makes the NEC Partner Program different?

'We work for you' is another NEC mantra. On-boarding new partners should be empowering, not burdening. For example, our online partner portal is designed to get our resellers up and running as quickly as possible. Along with this – it also provides effective selling techniques and strategies of how best to approach a wide variety of prospects. ■



**"Most businesses use and pay for a multitude of IT services – telecoms, collaboration, back up, security, webinars, file sharing, the list goes on. At NEC we refer to this as the 'crazy / simple' factor. If these are consolidated and streamlined, the cost of ownership is lowered considerably."**

# Dailey delivers growth

**Cloud comms provider NFON has set its sights on achieving market dominance across Europe and key to realising its big ambition is partner growth, according to UK Channel Director Jon Dailey.**

**N**FON's big ambition is to become the top cloud telephony provider in Europe and according to Dailey growth will, in large part, be fuelled by its partner strategy, of which he is a chief architect. He joined NFON as UK Channel Director in 2017 with a remit to build out a new channel programme and establish the systems and processes to advance the firm's strategic intent. "Since then we have grown and improved the programme and hired a great team," he stated. "We now have over 50 UK staff split between our Manchester and London offices. My focus is on expansion of the channel programme."

Dailey has worked in comms for over 30 years and within the channel for all but five of those years, with experience in all verticals from reseller through to vendor – and he started selling comms kit early in life. "When I was a teenager I bought a huge Motorola 85 from a phone shop and all my friends wanted one, so I started buying them in bulk and reselling," stated Dailey. "The manager was so impressed he offered me a job."

"At the age of 21 I opened my own successful mobile phone shop in Liverpool. The market was new and growing and, with a flush of youth I used the revenues to live a high life with friends and family while Charles

Dunstone went on to build an empire and become a billionaire. Being self-employed teaches you to be cash driven and savvy, so I am always thinking commercially – whether I am putting myself in partners' shoes or the end user. A grounding in sales also teaches you that the most instrumental tactic in building a relationship is learning to listen."

In the wake of Covid-19 Dailey's priority has been to work closely with existing partners to help them on their road to recovery and ensure they make the most of the opportunities that arise. "Technologies that enable and streamline remote working are crucial, so the market demand is high," he added. "As we look ahead and adjust to a new working model, businesses will continue to invest in technologies that will enable them to implement smarter working practices and have a more agile workforce. They should be looking at their business communication strategy to ensure they have a plan should a Covid-19 scenario happen again."

According to Dailey, NFON's recurring revenues are significantly above the industry standard and, as long as the customer is live on the platform partners will continue to earn monthly revenues. "It's a simple formula and we believe our partners deserve to have both the



Jon Dailey

## Businesses will continue to invest in technologies that will enable them to implement smarter working practices and have a more agile workforce

choice and autonomy over how they want to work," he explained. "NFON's cloud telephone system, Cloudya, is independent, which means partners aren't locked into an ecosystem that takes away their control. We know that many vendors try and take control from partners – to control the relationship with the end user. Vendor partners need to ensure that they are partners as much as possible and it has been important to live by these values."

### Control matters

In giving more control to partners NFON also provides business planning, qualified leads, demo support from the pre-sales teams, potential

sales funding, sales incentives and business rewards along with marketing and bid support to help partners drive sales. The company's centre of learning, called NFON Academy, provides online modular sales and technical training courses. "Despite these strange and difficult times we have continued our growth trajectory," stated Dailey. "We are now actively recruiting new partners. We are not focused on a particular sector as we have seen success across an array of specialities."

In particular, noted Dailey, there is a big opportunity to sell wrap around and managed services with

collaboration offerings, which is reflected in NFON's Teams integration (Nvoice for Microsoft Teams). "Many resellers don't just sell telephony, they sell IT services into customers," he commented. "Also, most of the larger vendors sell via the channel from a license perspective, so the channel can still be involved in the sale."

"The classic communications resellers sometimes struggle to get their heads around the agility of the new cloud environment. However, a lot of smaller brands and IT resellers can easily integrate this new offering into their product portfolio. NFON is even exploring the possibilities of the master agent model, by taking over billing and other tasks that partners don't want to deal with."

"Contact centre technologies also represent significant opportunities. Ultimately, the contact centre is the hub for customer engagement, it's where relationships start, get supported, and end. Businesses know that acquiring a new customer can cost five times more than retaining an existing one. In this economic climate it's crucial to enhance customer retention. Customer experience has never been more important, and many businesses don't have the technology to support multiple customer contact channels." ■



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## Positioning your MSP for the 'next normal'

**In our previous article around the challenges of 'chasing your promised land' we highlighted the need for telecoms services providers to achieve differentiation in a competitive and commoditised marketplace.**

As Covid-19 accelerates change for everyone, telecoms service providers have been forced to review their strategy to remain relevant and competitive whilst still benefiting from a certain amount of resilience compared to other segments of the market, where a complete pivot on business model has been necessary to just remain in business.

In the Fortinet MSSP team we actively encourage our broad base of MSP partners to challenge us (and their other incumbent vendors) on how we are going to help them serve their customers, help grow their business, be leaders in the market and have a positive impact on their financial performance. It builds trust quickly and allows our MSP partners to open up and give us the honest feedback we need in order to be 'business relevant'.



## Why do anything?

As traditional connectivity business models become more commoditised and contribute to significant revenue erosion, it is essential for telecoms providers to broaden their capabilities and sell new services to counter this erosion.

In addition, our MSP partners are being driven to change by the evolving requirements of their customers. These requirements include simplicity of engagement, scalability & flexibility of service as well as high speed connectivity & ubiquitous secure access to any type of application to maintain the best user experience. As a result, our MSP partners are turning to us to provide assistance with embracing this change.

“For years Fortinet has been a leading proponent of the importance of converging networks and security to enable our managed service providers to deliver 'secure networks' rather than 'networks with security', which in turn provides the ability to seamlessly integrate new managed service offerings and unlock additional recurring revenue streams. The MSPs who were the earliest adopters of this convergence are naturally the leading way in markets such as SD-WAN.” says Greg Gyves - Regional Manager, MSSP - UKI at Fortinet.

To do this successfully MSPs have to work to a consolidated set of operational building blocks underpinned by developer capability that allows them to introduce new services and functionality or unlock greater scale without significant infrastructure upheaval, otherwise they become too slow to respond to change resulting in a loss of competitive edge.

## Why now?

The world changes quickly anyway but in a post COVID-19 world we're being forced to change quicker than ever, meaning that the MSPs who are slow to change end up standing still, then inevitably fall behind and in some cases disappear completely. Having a clear view on how strategies need to evolve over time will enable MSPs adapt over the coming years, to be prepared and be proactive with regards to change.

In the short term (2020) the response to COVID-19 forced a rush to facilitate home working presenting a spike in non-recurring revenue from demand for laptops/tablets, peripherals like webcams and incremental licensing for unified communications tools, all underpinned by the need for extra capacity for VPN and 2FA.

Moving into the medium term (throughout 2021), as organisations embrace a more liberal attitude to flexible working reinforced by a pleasant surprise at remote productivity, focus will shift to strategies to improve the security posture for a more distributed workforce. This will present opportunities for MSP's who are well positioned to offer OPEX based managed security services focused on identity and access management, advanced endpoint detection and response along with security services for web and SaaS applications.

Also, a more even balance of home /



office working solidifies the need for consolidation and simplification of branch office infrastructure, further accelerating the demand for 'thin edge' Secure SD-WAN solutions which regularly manifest as an OPEX based managed service offering.

Looking longer term (2022 and beyond) we will see the convergence of both networking and security functions incorporating multiple solutions emerge as part of move towards a Secure Access Service Edge (SASE) model. However, despite regularly being referred to as a cloud-delivered service, there

are situations where an organisation may require a combination of physical and cloud-based solutions for a SASE approach to work effectively.

By 2024, according to Gartner "at least 40% of enterprises will have explicit strategies to adopt SASE, up from less than 1% at the end of 2018". So, with customers already applying pressure to incumbent MSPs to share their SASE strategy, it is essential to be laying the foundations now to be well positioned for the future years and the 'next normal'.



## Why Fortinet?

To realise the full potential of a SASE service capability, MSPs must first consider all of the essential security elements such as a fully functional Secure SD-WAN, scalable NGFW (physical) and/or FWaaS (cloud-based) firewall, zero-trust network access (ZTNA) including network access control (NAC) and micro segmentation, a Secure Web Gateway offering to protect users and devices along with a Cloud Access Security Broker (CASB) for SaaS applications and shadow IT. Then this needs to be implemented and applied across the customer's WAN edge, LAN edge and Cloud edge.

Fortinet is the only vendor who offers the broadest portfolio of proprietary hybrid solutions across on-premise and cloud, augmented by our Security Fabric Alliance Program - A comprehensive selection of technology alliance partnerships to help MSP partners deliver even more value out of their managed service offerings.

Finally, we complement this industry leading portfolio with our engagement methodology specifically built to help accelerate the whole service enablement process with our MSP partners and subsequently their time to market with new managed service offerings.

There is a small window of big opportunity for MSPs that set and execute a strategy to drive change now to lead the way in delivering security services. So, whether you need to look at a cornerstone of SASE such as SD-WAN today, or help building a roadmap of security services as part of a broader SASE strategy Fortinet is well positioned to help you on the road to your 'promised land'.

For more information contact the Fortinet UKI MSSP team at [mssp\\_uki@fortinet.com](mailto:mssp_uki@fortinet.com) or visit <https://www.fortinet.com>

# AWS architect ramps up

On the topic of cloud comms Amazon Web Services is ever more a prominent talking point. Here, Marta Whiteaker, Managing Director for AWS Marketplace EMEA, turns up the volume on why it's becoming the talk of the town.

**W**hiteaker's career kicked off in systems integration consulting working for a boutique SI in Europe on large telco billing projects. The attraction was more about an opportunity to travel than responding to the magnet of billing software. "But that launched me into the world of hi tech," commented Whiteaker. "I never looked back and have worked for some of the largest hi-tech companies since. This experience helped me to launch and build out the AWS Marketplace operation, initially in the US and then in Europe to develop the business internationally. Building AWS Marketplace from the bottom up has been the most challenging and most rewarding part of my career. Working in hi tech has given me the opportunity to immerse in fast-paced environments over the years, but none as exciting as what we are witnessing today with the transformation to the cloud."

Whiteaker manages the AWS Marketplace business across a broad GEO spectrum and as of June 2020 it reached more than 290,000 monthly active customers and has more than 1.5 million current subscriptions. Its channel is also growing substantially, allowing all partner types to serve commercial and public sector customers of any size. "Since 2014 AWS



Marta Whiteaker

**Building AWS Marketplace from the bottom up has been the most challenging and rewarding part of my career**

Marketplace has more than tripled the number of ISVs we partner with from 500 to over 1,600 and reached a total of more than 8,000 product listings," added Whiteaker. "We also have 300-plus CPs on AWS Marketplace and many data providers. We've expanded to 24 different regions, meaning that anywhere

customers want to access AWS Marketplace they are able to find, buy and deploy the software they need."

#### Global opportunity

AWS Marketplace supports both the supply side and demand side of the business. It works across different customer segments to enable the procurement, deployment

and management of software as customers move to AWS. On the supply side it supports software vendors in listing and selling their product portfolio through this channel to AWS customers. Whiteaker sees a significant opportunity to help global customers modernise their software supply chain with the support

of channel partners. "Customers, from start-ups to enterprises, face challenges in their software supply chain, such as the high costs of legacy software licensing and maintenance, drawn out procurement cycles that inhibit innovation, and a lack of visibility into organisational software usage," she commented.

"Channel partners are taking a strong role in transforming the market and modernising the software procurement process. They are taking a more active role in consulting and supporting the architecture of the cloud environment, suggesting and recommending software, purchasing on behalf of the client and managing the end-to-end cloud environment of the customer.

"Modernising the software portfolio is an inevitable part of business transformation. The AWS Marketplace vision is that it will not just be a software catalogue but an essential tool for enabling modernisation and business transformation. This is why we have made substantial investments to make it easy to provision, configure, and integrate third party software products across AWS services and govern these resources to meet internal policies and controls."

In 2016 new features and programmes were introduced to provide greater flexibility in how enterprise



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# channel build

customers transact via AWS Marketplace, including working with channel partners. The following year it launched Seller Private Offers which enables both AWS customers and Consulting Partners to negotiate custom pricing and contract terms with ISVs, and develop ongoing relationships. In 2018 AWS Marketplace launched Consulting Partner Private Offers which enables Consulting Partners to resell software solutions directly to customers from AWS Marketplace.

In 2019 the company introduced Solution Providers Private Offers (SPPO), a programme targeting AWS Solution Providers by helping them to create Private Offers proactively and then extend them to all AWS customers under their management.

## Key trends

Whiteaker noted a number of other trends that are emerging in the cloud landscape, especially regarding cloud marketplaces. "First, we are seeing a decentralisation of procurement decision making within organisations," she added. "As customers disperse purchasing decisions to different cost centres throughout their organisation, ISVs and Consulting Partners, in conjunction with AWS Marketplace, need to shift the standard selling approaches to align with new business processes. The role of the Consulting Partner will continue to expand.

"We are also seeing customers prioritise quality over price. Organisations are no longer willing to make a long-term purchase commitment due

## About AWS Marketplace...

**AWS Marketplace is a curated digital catalogue for customers to find, buy and deploy third party software. It simplifies software discovery, licencing, procurement and management with thousands of software listings from more than 1,600 software sellers in categories such as security, networking, storage, business intelligence, databases, machine learning and media.**

to a temporary monetary incentive, but rather, they focus their large, long-term decisions on the fit of the product to the specific needs of their business. These changes are driving ISVs and Consulting Partners to invest more in the quality and differentiation of their products and offerings rather than a race to the bottom approach seen in prior markets."

There are three main factors that influence the evolution of AWS Marketplace, pointed out Whiteaker. "The first is business planning, by understanding the needs of our ISVs and Consulting Partners and their business model we can help them with GTM planning and offerings and introduce ISVs to the right set of Consulting Partners that can take their offering to the customer. The second is investing in automation so we can offer a full self-service experience that alleviates the operational burden and takes care of the billing and disbursements

on their behalf. And the third is bringing the relevant software products to customers."

To help achieve its goals AWS Marketplace identified four key areas it sees as change drivers. The first is worldwide expansion to enable ISVs and Consulting Partners to reach more than 290,000 AWS Marketplace customers across the globe. Next, a focus on building automation features that provide a seamless self-serve experience to partners. Thirdly, the company is seeking to recruit right-fit partners across both the ISV and Consulting Partner categories. Fourthly, enhanced AWS integration allows ISVs and Consulting Partners to offer more simplified and seamless experiences to their customers. "Deeper understanding of customer needs, especially as these needs continue to change, enables our ISVs and Consulting Partners to build more useful and supportive services," added Whiteaker. ■

## Lessons learnt...

**GIVEN my strong desire to live internationally, I would have started much sooner and worked much harder on learning additional languages. You cannot underestimate the power of communication and that only happens when people speak the same language. While I benefit from the growth of English language adoption, I also miss out on not being forced to speak the language of colleagues. I manage people across 20-plus countries, speaking many different languages and I am continually impressed by what they are able to deliver in this multi-cultural environment.**



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# This global channel chief

Cloud evangelists have long chanted the virtues of their beliefs – with their efforts often falling on deaf ears. But now it is loud and clear that the rise of XaaS and the impact of Covid-19 as a catalyst for remote working have changed the business comms landscape forever, according to Dropbox Global Head of Channels Simon Aldous.

**D**ropbox's global channel chief is one of the industry's most experienced leaders, but he originally imagined himself as a secondary school sports teacher, so went to university to qualify with physics as his second subject – then decided that computing was the next big thing and after leaving university took his first job as a junior tech support engineer at a small reseller. "I quickly gained experience and moved to a few different resellers and distributors and finally into the vendor community with Microsoft, Polycom and Dropbox," explained Aldous. "When I joined Dropbox I was tasked with building a channel business from scratch. This was an exciting proposition, especially after 25 years of working at distributors, resellers and vendors."

Aldous's bravest career move was starting his own business with a group of friends. They secured funding, built the technology and started transacting all based on an idea scrawled on the back of a napkin. "We thought we could address a market niche and bring real value to a problem (excess and obsolete inventory) that we had all struggled with in previous roles," he added. "We took a punt and it changed my life."



Simon Aldous

## Covid-19 has accelerated the consumerisation of IT and changed its dynamic. It's never been more important to have a seamless experience when logging in remotely

This experience of a hands-on entrepreneurial project was part of what made Dropbox and its offer of building a channel business so appealing. Moreover, it has given me insights into all elements of business and a complete understanding of the channel."

Dropbox enables teams to sync, organise content and collaborate in the cloud, making it accessible from anywhere. "There's an opportunity to make work easier for groups of individuals who historically

may have encountered difficulties – whether that's mothers returning to work or people with disabilities," commented Aldous.

### Agile platform

"We want to drive a product that doesn't care about what device or application you're using, and provide a platform that enables people to access anything they need from wherever they need it. Our partners play a crucial role in wrapping that technology around customers' requirements and integrating it with other tools."

According to Aldous, the shift to a cloud-first model has, and continues to have, big implications for the channel. "That change is still in progress," he commented. "Previously, resellers and SIs were quite product orientated, but it has become clear that partners need to better understand their customers and offer bespoke bundles. It is so much easier for customers to move suppliers in a SaaS dominated market. Instead of having to uproot their entire digital ecosystem, they can switch with a mere click of a button."

Customer service teams are the sales people nowadays. If you can service your customers in the way that they want to be serviced then satisfaction is higher, retention is solid and a sustainable business is a far more likely outcome."

In the context of this evolving market the role of a distributor is often overlooked from a supply chain perspective, believes Aldous. "It needs to be overhauled," he stated. "In today's market with XaaS becoming more and more prevalent, the distributor needs to reinvent itself to find where it can continue to operate and add true value. I still see many distributors operating in the same way they have for the last 20 years without recognising the shift that has occurred. The traditional channel hasn't taken the step forward to address this through the supply chain."

In contrast, Dropbox has a policy of shifting focus to keep pace with the fast moving market and advance with agility. For example, when the company launched its partner programme four years ago its primary focus was to add as many partners as possible to build a steady run-rate of business. "This meant that our initial programme was

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# 's boxing clever

lean and just focused on three tiers of partners," commented Aldous. "This strategy underpinned our first three years of operation as a channel business and has enabled us to develop a strong bedrock of partner business."

The Dropbox partner programme has proved its value in the last few years, making its channel GTM the fastest growing engine for business development. But the company has now redirected its focus and changed how partner success is measured, diverting away from the conventional seats under management approach and replacing it with a new measurement – teams under management.

"This model moves away from looking at raw sales numbers that can be skewed by one large single enterprise sales success, and instead incentivises partners to work with their customers and identify different teams that could benefit from collaboration and content tools," explained Aldous. "Originally, Dropbox spread virally among people looking for easy file sharing solutions, and this shift looks to do the same for teams that need to bring together a variety of different cloud-based tools and have one centralised place where they can work together.

"We're now transitioning from a breadth strategy to one based on depth. We are therefore focusing on developing our relationships with a smaller subset of partners within a selection of key verticals, including media and communications, construction and education. Dropbox can play a huge

role in taking on the digital challenges facing these sectors, and we're working with partners to develop strong propositions for organisations and build stronger vertical and SMB partnerships."

Covid-19 has put this requirement into a sharper focus and thrown many businesses into a 'back-to-basics' mindset where the priority, from a technological perspective, is to ensure that everything is functioning smoothly and to maximise whatever tools and systems they already have in place. This is particularly the case for SMBs that often outsource their IT departments or don't necessarily have easy access to technical skills, believes Aldous.

#### Transformational times

"Covid-19 has both accelerated the consumerisation of IT and changed its dynamic," he stated. "It's never been more important for people to have a smooth and seamless experience when logging in remotely, yet not all businesses have found it easy to provide their workers with the tools and infrastructure they need to operate efficiently in a distributed environment. We aren't going to go back to work in the same models as before. Whether it's working from home more, going to the office in staggered shifts or even the imposition of distancing rules, all teams will be physically distanced to at least some extent and technology must play a key role in enabling them to work within this new environment.

"There is a further opportunity for the channel to prove its value by helping

customers ensure that they're getting the most out of their current digital solutions, enabling them to streamline their business operations without the need for a complete digital overhaul or, in the case of SMBs, hiring an IT department." ■

#### Just a minute with Simon Aldous...

**The biggest risk you have taken?** Starting my own business with three colleagues.

**Name one thing you could not do without in your job:** A consistent broadband or 4G connection.

**Best piece of advice you have been given?** Treat people as you would wish to be treated yourself. Over time this has become the foundation of how I work in my teams.

**Who do you admire most in the channel:** Scott Dodds, a fantastic leader to work for, as I did at Microsoft, who has done an amazing job in his time at Ultima. He has transformed it into a market leading customer-first MSP, a tough ask in the current IT climate.

**If you weren't in the ICT industry what would you be doing?** A secondary school sports teacher. It would be a great place to let my love of sports and competitive spirit shine!

**Top tip for resellers:** The best way to build a business is to orientate it around target customers, rather than serving your own interests first. It's a shame that customer-centricity seems to be more of a marketing term rather than the basis upon which businesses are constructed.

**How do you relax when not working?** Swim, bike, run: I exercise everyday and race triathlons when possible. Keeping active helps me keep my head clear and alert.



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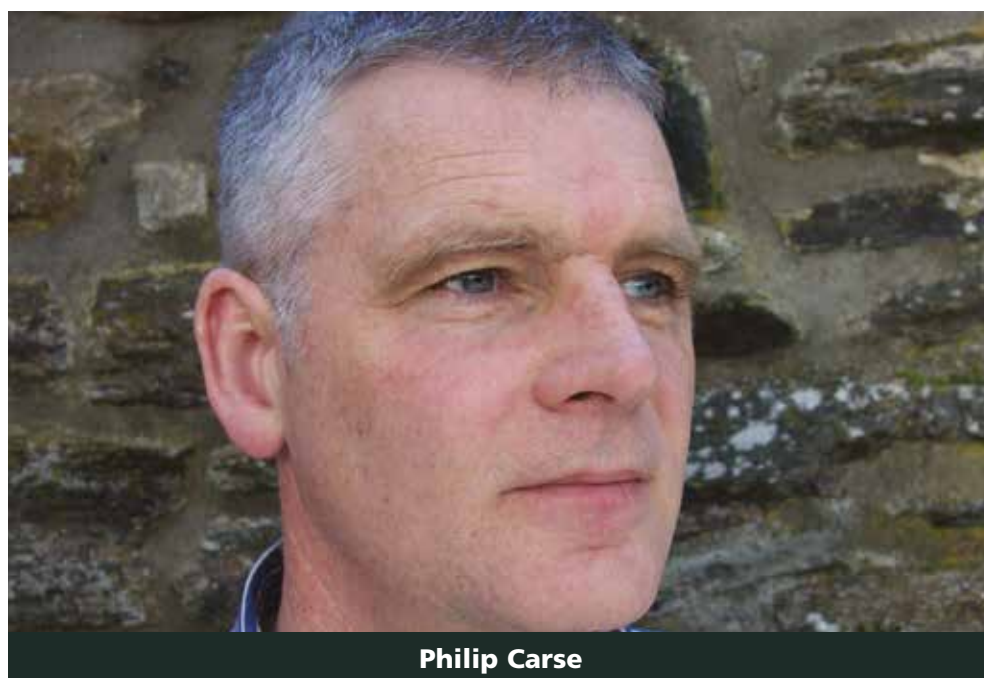
# UK telcos confirm Covid-

**Flat is the new up, according to Philip Carse, Analyst at Megabuyte.com, who reports on the Covid-19 impacted trading performances of the UK's primary telcos.**

All of the major UK telco operators have now reported on the coronavirus impacted quarter to June 2020, with Covid-19 revenue impacts (from lower sports TV, roaming, B2B and other factors) of 3-4pp for Virgin Media, 1.9pp for Vodafone and 7.6pp for O2UK, while BT and TalkTalk both reported revenues down circa 7%. However, in a sign of stability, Vodafone and Virgin reiterated full year EBITDA guidance while TalkTalk quietly nudged up the outlook, with all expecting EBITDA within a range of up to 5% down to slightly up on the prior year (flat is the new up). The gloomiest outlook came from BT, with new full year guidance of 6-7% revenue and EBITDA declines, in line with the recent quarter.

## BT

BT reported its first quarter 2021 revenues and EBITDA both down 7%, to £5,248m and £1,813m respectively (but 1.2% and 3.2% ahead of consensus), reflecting lower sports TV, roaming and B2B revenues. Covid-19 revenue pressures were broad spread in all but BT Openreach, with 7-9% declines for Consumer (to £2,362m), Enterprise (to £1,352m) and Global (to £990m), while Openreach was up 1% at £1,286m. EBITDA-wise, Consumer and Enterprise fell 13-15% (to £501m and £406m respectively)



Philip Carse

## Within B2B, enterprise and public sector led the way, and SMEs even within hard hit verticals have been kept afloat by Government support schemes

and Global and Openreach rose 1-2% (to £141m and £717m respectively).

Enterprise suffered from lower SME call volumes and lower Wholesale, and the company expects continued impacts in future quarters. The biggest Enterprise swing factors were Retail Mobile (-13% in the quarter versus -1.2% in fiscal 2020), Managed services (-3.8% versus +0.2%) and Broadband (-7.7% versus -0.6%). Global's revenue decline, in contrast, was mainly a result of ongoing

moves away from low margin business, as well as disposals. Openreach growth came from fibre (+19%) and Ethernet (+10%), partly offset by reduced legacy volumes and volume-related price discounts.

The company had refrained from issuing guidance back at the full year results in May. With a Covid-19 impacted quarter under the belt, it has issued new guidance for the fiscal year to March 2021: 5-6% revenue declines, EBITDA of £7.2-7.5bn (versus current £7.53bn consensus

and £7.9bn in fiscal 2020), capex of £4-4.3bn (fiscal 2020: £3.9bn, reflecting investment in FTTP and 5G) and FCF of £1.2-1.5bn (fiscal 2020: £2bn). However, the company expects to return to EBITDA growth next year.

## Virgin Media

Virgin Media (which during the quarter announced a proposed merger with O2UK) reported a second quarter 2020 1.4% fall in EBITDA to £528m on a 3.5% decline in revenues to £1,234m, with Covid-19 impacts by way of lower

TV sports, mobile roaming, B2B fixed and mobile, mobile handset, and late-pay charges reducing most revenue lines by 3-4pp. The EBITDA impact was lower as most of the revenue shortfall was in low margin areas. Residential cable fell 2.4% to £891m, Residential mobile fell 8.8% to £146m and B2B fell 1.0% to £188m.

The cable fall reflected a 1.8% decline in monthly ARPU to £50.46 due mainly to lower sports revenues, while lower churn resulted in a small increase in customers (by 24k to 5,983k). Mobile was impacted by a 9% decline in monthly ARPU (including interconnect) to £10.17m. Finally, the 1.0% B2B decline as usual masked two distinct trends – a 10% increase in SoHo revenues to £24m (from a 9% increase in customers) and a 2.4% decline in larger business revenues to £164m. However, the company highlighted significant B2B wholesale contracts to be delivered over the next 12-18 months, including 5G backhaul for 3UK.

Given manageable Covid-19 impacts, parent Liberty Global reiterated full year 2020 guidance for the Group (of which Virgin Media is 55-56% of revenues and EBITDA) of mid-single digit declines in EBITDA and mid-single digit growth in operating free cash flow, assuming no reversion to March/



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# -19 resilience

April/May lockdowns and a gradual economic recovery.

## Vodafone

Vodafone reported a 'resilient' in-line performance in its first quarter 2021 with service revenues down 1.3% organically to 9,110m euros, reflecting a -2.9pp Covid-19 impact, within which the UK was down 1.9% at 1,193m euros. In the UK, 1.7pp of the 1.9% decline in service revenue (to 1,193m euros) was attributed to Covid-19. There was quite a UK contrast between Mobile (-4.3% to 846m euros) and Fixed line (+4.8% to 347m euros), a pattern repeated in Italy and Germany, highlighting the mobile-specific roaming impact. Mirroring service provider feedback, contract churn reached an all time low of 11.4% in the UK (down 2.8pp).

Vodafone reiterated its full year guidance from mid-May – EBITDA to be flat to slightly down on a rebased 14.5bn euros for 2020 (versus the 14.9bn euros published, mainly forex changes), with roaming and other economic impacts broadly offset by underlying growth and cost savings. This would result in free cash flow (pre spectrum payments) of at least 5bn euros, versus 5.7bn euros in fiscal 2020

## TalkTalk

Telco TalkTalk issued a broadly positive first quarter 2021 update, noting that although revenues (excluding Carrier and Off-net) were down 7.5% year on year at £358m due to lockdown restrictions, lower live sports and lower voice usage, the company remains confident in delivering stable to growing EBITDA due to

cost savings with strong cash conversion, an apparent upgrade on the stable EBITDA outlook in June.

The company also described its assumed full year Covid-19 bad debt impact of £15m (1% of revenue) as still cautious given current normal payment trends. June and July has seen trading recovery and significant ARPU improvement, driven by fibre adoption across both consumer and B2B, with its Direct B2B business now above pre-Covid-19 levels.

## 3UK

For the first half of the year (no quarterly figures were provided) 3UK EBITDA fell 25% to £251m on revenues down 4% at £1,116m, while capex expanded 24% to £192m. Compared with December 2019, Active Customers declined 7% to £9.562m, driven by a 27% decline in pre-pay to £2.303m – the change in mix mitigated the blended ARPU decline to 3%, to £17.77m. Brief accounts commentary referenced regulatory impacts and continued IT transformation spend and, suggesting that recent management changes weren't entirely voluntary, noted 'Senior management in the UK operation has been replaced during the year and meaningful improvements have been seen'.

## Megabyte view...

**THESE results reflect the resilience of the UK telecoms industry to Covid-19. By segment, Consumer has held up well with households loathe to get rid of broadband and mobile services while, within B2B, enterprise and public sector have led the way, and SMEs even within hard hit verticals have been kept afloat by Government support. However, the latter are most at risk when Government support is withdrawn. The EBITDA outlook also remains strong (flat is the new up), with lower operating costs (sales commissions, G&A etc) and ongoing cost programmes helping to mitigate revenue impacts.**

## O2UK

Telefonica reported O2UK EBITDA down 8.2% (4.1% excluding a one off last year) to 496m euros on revenues down 3.8% at 1,632m euros, with core mobile revenues down 4.8% at 1,566m euros. The Covid-19 impact was put at 7.6pp for revenues (130m euros) from lower roaming and calls, and 11.4pp for EBITDA (62m euros). Capex fell 16% to 185m euros. Interestingly, the 7.6pp revenue impact for the UK was higher than in Spain (6.1pp) or Germany (2.1pp). Telefonica reiterated the Group (of which UK is 16%) full year outlook of slightly negative to flat FCF (versus -2.3% outturn in the first half).

## Sky

Comcast reported Sky's second quarter EBITDA up 0.2% constant currency at \$749m on revenues down 13% at \$4,079m, aided by a 16% decline in operating costs. Core TV revenues fell just 7% to \$3,524m, but advertising was down 41% to \$321m and Content down 36% to \$234m. The company lost around 1% (214k) of its 24m customer base in the quarter. The cessation of live sports drove both the lower subscriber revenues and operating costs. These numbers are for Sky's UK, Germany and Italy operations. ■

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# A safe pair of hands in c

**CHH CoNeX's commercial life was borne more from a successful rescue mission than the seeds of a traditional start-up, and the business continues to thrive as ever more critical projects in key sectors such as rail come to fruition, according to Managing Director Tim Hughes.**

**H**ughes was training as a Chartered Accountant with Grant Thornton when the company his brother worked for collapsed. His mother asked him to step in with possible help, a move which led to a conversation with the stricken company's largest customer, GEC Avery, where production was virtually on stop with the loss of its cable assembly supplier. "We said that if they paid us on delivery we would hand select the best operators who knew how to build their product, speak with the liquidators and the landlord about materials and space and crucially, guarantee they didn't lose a single day of production," stated Hughes. "They gave us a chance and we did what we said: Coley Hughes and Humphries partnership was born (later to become CHH), each of the four new owners put £5,000 capital in – and the rest is history."

Thus CHH CoNeX was established in September 1990 by Mick Hughes, Tim Hughes, Alan Coley and Malcolm Humphries, specialising in rack and cabinet integration, cable assembly design and manufacture and managed services. The company kicked off with eight employees and grew steadily over the years, reaching a maximum of 120 people with certain



**Tim Hughes**

**Previously we would wait for projects to happen and then try to jump aboard the moving train. Today, we are focused on being on the train before it leaves the station**

labour intensive projects. This has balanced out at 60-ish employees for the past few years. Its highest turnover year was 2004 with £12 million, the rolling average has since been circa £7

million but Hughes is aiming for up to £13 million in the current financial year. "Our biggest target is always to maintain our quality, delivery and flexibility in every project," added Hughes.

"That's the KPIs that we measure ourselves against."

**On track in the rail sector**  
CHH CoNeX operates in sectors such as telecoms, nuclear, highways and

medical, with recent strides made into the rail sector where it has become an approved supplier for Siemens. "We have spent a number of years scoping out the opportunity in this sector," noted Hughes. "Securing approved supplier status with Siemens is the beginning and has galvanised us to further push on and take advantage of opportunities in rail.

"With the current focus on 5G and digitalisation, the rail sector holds lots of opportunities for CHH CoNeX and we are already finding that our polycarbonate cabinets are in demand for trackside services, where they are increasingly being selected over glass reinforced polyester. Polycarbonate offers a host of benefits such as improved weather resistance, lightweight design, a lower carbon footprint, zero interference and a longer lifespan than alternative materials.

"We are also increasingly focusing on any smart technologies, for example anything that is 5G or IoT related – they are the future and they are all here today. CHH CoNeX is already working with these technologies to add value for customers. Our longer term priority is to establish CHH CoNeX as a leader of projects, operating at the

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# critical projects

heart of the telecoms supply chain and enabling greater communications networks for the entire country.”

In five years time Hughes expects the business to be larger in all respects, a greater number of employees, delivering more projects every year and providing a greater number of services. “As we have developed our service offering to include managed services, we benefit from being involved earlier on in the business development conversations of our customers,” he added. “We’ve made steps to shout louder about the things we are good at through increased

customers in every market to manage risk, but this is a challenge for any SME. As we continue to explore new market opportunities there is a big new business challenge in order to achieve this but our marketing work and networking is enabling us to succeed.”

Another lesson learned is linked to CHH’s exclusively organic growth to date. “Though rewarding, our growth has taken lots of time, preparation and hard work to achieve,” commented Hughes. “If I could do this again I would be tempted to make acquisitions in a new market to quickly take advantage of fresh opportunities with

## Our aim is to have a range of customers in every market to manage risk, but this is a challenge for any SME

marketing, which is getting us through the doors of potential customers sooner.

“One of the lessons we have learned from the past is not to be too reactive and unambitious. Previously we would wait for projects to happen and then try to jump aboard the moving train. Today, we are focused on being on the train before it leaves the station – or even driving the train and choosing the direction it goes in. We are keen to collaborate with other supply chain businesses to deliver complete solutions.

“We are also increasingly reviewing new technologies and opportunities with an open minded approach to business growth. Our aim is to have a range of

the infrastructure, legacy and experience in place that you simply don’t have immediately when you grow organically.”

In the short-term and before any potential acquisition targets come into view, the company’s aim is to ensure it gets through the current pandemic, and ensure the safety of employees. “Covid-19 will be with us for some time, and this means adapting to the new normal,” said Hughes. “As we bring colleagues back to CHH we have made sure our premises are set up for social distancing, and where possible we still have people working from home. Remote working is likely to become the norm for most businesses post-pandemic.” ■

### Just a minute with Tim Hughes...

**Role model:** My late mom, a total legend and still the strongest person I’ve ever met. I learned all my values from her.

**What talent do you wish you had?** To make things and do DIY. Give me a 200 page legal document and I’ll devour it with my eyes closed. Ask me to hang a picture on a wall and I’m a puddle.

**Best piece of advice you have been given?** Don’t let anyone tell you that you can’t do something. Their expectations are irrelevant.

**Industry bugbear:** Everything seems to take too long, be too last minute and feel totally haphazard. Basic organisation would make the world of difference.

**Your greatest strength, and what could you work on?** Resilience, fairness and willingness to help are strengths. I could work on my control freakery – I’m a bit of a ‘one page’ nerd. Totally logical to me but it does seem to annoy people!

**What could you not do without in your job?** My pencil case: I am an accountant by training and this is classed as a vital organ so it goes everywhere with me.

**Who do you admire most in the channel?** Claire Greenwood at GComms. We worked together when she started GComms and has achieved great things. Her ability, energy and can-do mentality are inspiring.

**Biggest achievement:** Qualifying as a Chartered Accountant while being an active part of creating CHH, at the same time as having our first child. The rest has been a doddle!

**Top tip for resellers:** Don’t compromise on your values. Without them we are nothing.



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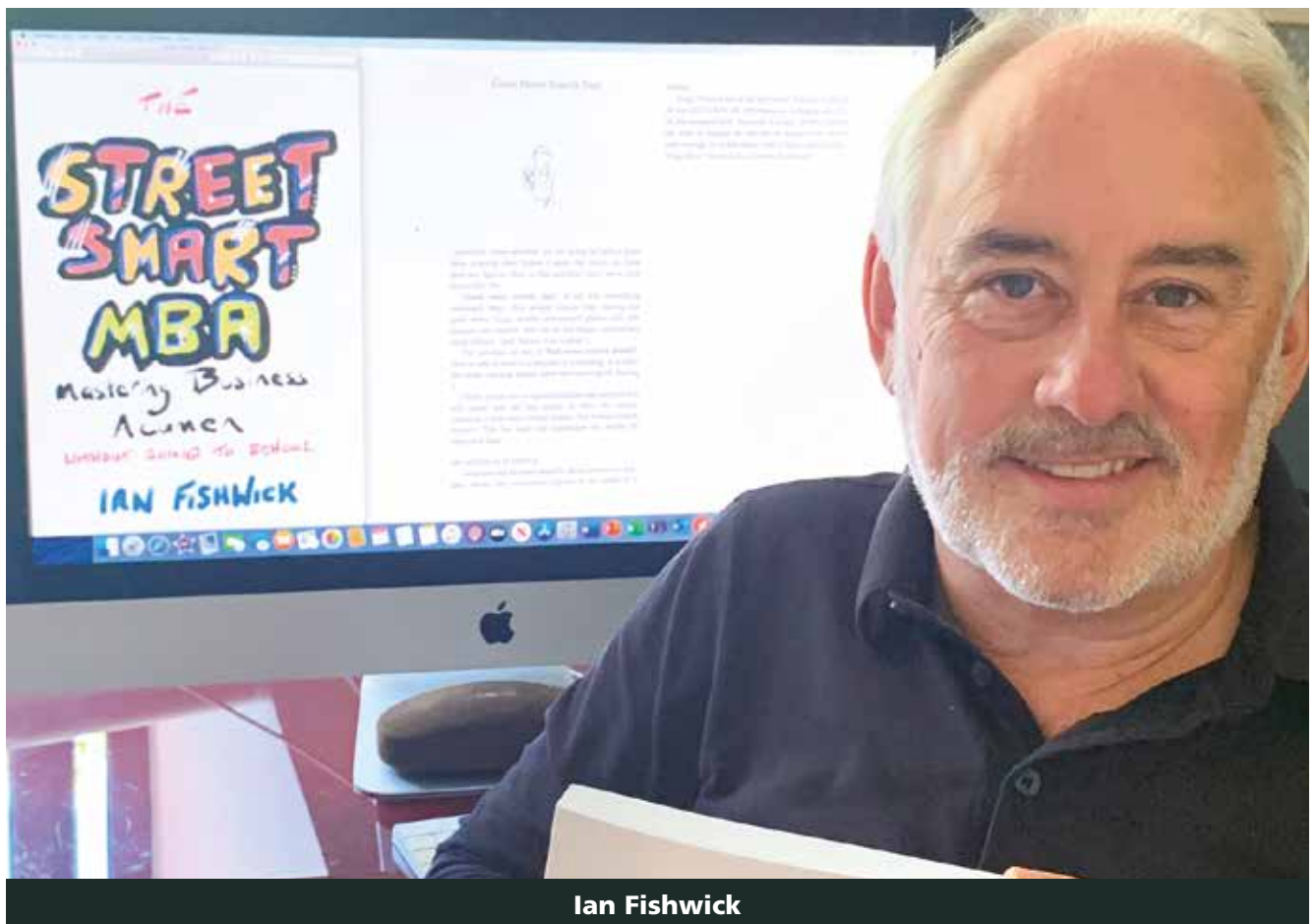
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# Fishwick on his biz tip pa

Sometime in the future if a young relative of Ian Fishwick asks him what he did in the 2020 Covid-19 lockdown he'll simply say, 'I finished writing a book to inspire people like you'.

That's not to say the former Adept PLC CEO has written a child's book. Far from it. His self-published thought leadership tome entitled 'The Street-Smart MBA' is aimed at anyone starting an enterprise right up to business leaders who need to hone up on their day-to-day business skills. The subheading on the cover, 'Mastering Business Acumen without going to school', neatly summarises the contents within. Basically, it's a manual for business management with 107 concise stories, each deftly illustrated by Fishwick's 'doodles' which cover almost every issue a leader will face during the life of their business, from cash flow forecasting to managing people and dealing with banks. During the course of each chapter, the author shares stories and anecdotes about what he has learned from being a managing director and CEO for almost three decades.

Fishwick published the book on Amazon and the reviews it has received have all been five star which says something for its appeal. Here are couple: 'This is a fantastic tool for anyone who wants to remind themselves of the bleeding obvious. Well written and in nice bite size chunks without a load of industry jargon'. And, 'This book is written in a way to help everyone understand what makes a business tick. Whether you



Ian Fishwick

**People remember stories better than instructions, so I have told business-related stories all through my 29 year career as an MD or CEO. It dawned on me that I had over 100 stories, so I thought I would write them down before I forget them**

are running a business or working in one, the book will give you a general understanding of the trials and tribulations involved. This is a great reference to keep on the desk, not the shelf'.

Each chapter is tail pieced with a simple message based on the experience Fishwick

has gained over many years at the top. One, chosen at random, is particularly valuable to any junior executives struggling to make their voice heard: 'Be brief and get straight to the point. Once you have learned that skill don't lose it. The best leaders are the ones who can speak in simple English. And

never try to make someone look foolish because they do not understand the latest buzzwords or management speak. This is especially true if you work in IT or technology companies'.

Another covers the performance of people on a daily basis: 'If we are honest

with ourselves, we all have good days and bad days. We perform at our best when we are interested and motivated. A group or team is simply a collection of individuals, so, do not be surprised when this happens with them as well. The same people can be good, bad and average and if you are the boss then you are

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# age-turner

possibly the reason why they are what they are at present'.

So, what inspired the three times winner of the UK CEO of the Year Award (and others) to share such pearls of wisdom with the world? "I think people remember stories better than instructions, so I have told business-related stories all through my 29 year career as an MD or CEO. It dawned on me that I had over 100 stories, so I thought I would write them down before I forget them. Technology changes, but many aspects of business do not. After being the boss for so long I hoped that I had something to share with the next generation of business leaders."

#### Five-star reviews

Although Fishwick readily admits he won't be troubling J.K. Rowling on volume sales yet, he is 'humbled' by the feedback he has received from the public and ICT industry leaders. "To date all the reviews have been five-star and that has included a wide range of people," he added. "At one end there are students reviewing it and, at the other extreme, some of the most successful people in our industry like Matt Riley (Daisy), Christian Nelleman (XLN) and Ralph Gilbert (Focus) have recommended it."

Fishwick stepped down as Adept CEO at the end of 2018, becoming what he describes as a 'two day a week Chairman' which gave him more time to concentrate on planning the book and the Covid-19 lockdown presented the perfect opportunity to finish it, with the help of long term mentors and a group of business colleagues at

Adept. "I gave the draught initially to my long-term mentor Roger Wilson and Alex Birchall, a serially successful entrepreneur," he explained. "Starting with some very experienced business people was both daunting and ultimately very encouraging. To get a wider range of views from people of all ages and experience I asked if any of our 300-plus employees would like to help. Over 40 people agreed to join my project and they jokingly became referred to as the Street-Smart MBA proof-readers club.

"I'm not a fan of business textbooks and I didn't want to write a biography. By making each anecdote just one key point I could keep them very short. I hoped that way people might remember them better. It also helps if you can pick the book up, put it down again and then pick it up again later. In a way I found the whole process quite cathartic. I feel like I have tried to pass on some of my knowledge to the next generation of leaders and that feels quite nice."

Whether this will herald the start of a new lucrative career for Fishwick as an author remains to be seen, but he does admit to being bitten by the writing bug. "I have enjoyed writing, but I cannot decide whether to write another business book or change to a novel, or even children's stories," he said. "I used to make up stories when my kids were young called 'Graham the Duck'. I just need to remember them!" ■

The Street-Smart MBA is available on Amazon (paperback £12.99) and Amazon Kindle (£9.99).

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# Triton boss gears up for

The impression given by Triton Telecom owner Dean Billington throughout his career has been constant – of a man guided by experience, focused on the customer, seeking growth and achieving success – and it all happened, literally, by accident...

**T**wo motorbike accidents, the second rather more serious than the first, prompted Billington to get on his metaphorical bike and seek a career move that met with the aftermath requirements of his injuries. Thus he entered the comms sector following the shortest spell as a motorcycle courier. "I fell off my motorbike and broke my wrist on the first day," said Billington. "I needed a job that allowed me to work with a broken wrist and BT was recruiting. I had previous experience of selling in a few roles and found that I was pretty good at it. I treated people as I'd wish to be treated, and only ever sold people things they needed."

"I've been accused of being too honest in the past, but I've always found that this is the best and only approach that works if you want longevity in a sector. Telecoms and I just fit together. No day is the same, and it's never boring."

A more serious motorcycle accident in October 2010 led to the setting up of Triton Telecom in 2011 with a business partner. "I was extremely fortunate to come back from that accident, and I needed a job that I could do around attending several medical appointments every week," added Billington.



Dean Billington

**I've been accused of being too honest in the past, but I've always found that this is the best and only approach that works if you want longevity in a sector**

"In establishing Triton Telecom our aim was to put into practice the things we'd learned after years of

working for BT and we both wanted to put excellent customer service at the heart of the business."

Triton Telecom experienced early success and within three months secured its first significant order, which was

for a Government agency. This set the company on the right path financially. "I bought my business partner out of the business in October last year and we moved to new premises in a much better location in February this year, directly before the pandemic hit," added Billington. "We still haven't been able to operate from the office or organise it properly."

**Investment areas**

"This year we also invested in a new billing platform, a new website and a new CRM system. And we changed priorities on product sets given the impending changes in the network. Within three to five years I aim to have Triton employing twice the amount of staff, including IT support, which will involve persistence in the face of adversity, optimism in the face of negativity, and a shedload of hard work."

Billington expects a shrinkage of turnover and profit this year, but with a 'huge' bounce back next year. "Unlike other comms companies that focused just on one sector, our customer base is varied so the pandemic impact on us has been somewhat mitigated," he commented. "Two new members of staff started in August and I aim to recruit new sales people later on in the year."



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## How discovery will be key to the recovery



Tamsin Deutrom-Yue

Let me take you on a voyage of discovery. It will only take a minute.

In a typical customer comms project, the discovery phase of obtaining detailed, multi-site PBX settings information could take days or weeks.

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Gaining accurate site data is crucial when planning extensive upgrades, system migrations and consolidations. Even with lockdown restrictions making it easier to get onsite, all the time and expense really eats into margin.

Our automated data discovery service remotely interrogates all existing settings of any connected PBX with no need to visit sites. And it's about time!

Comms partners targeting a rapid recovery through faster client acquisition, onboarding and migration can look forward to plain sailing, without complicating new customer relationships with requests for detailed information or risking delays caused by third parties.

In the most complex technical environments, we can reduce the discovery phase from 6 weeks down to just 1 hour – delivering complete, real-time data collected, collated and cross-referenced without human error.

But that's not all.

We understand partners that need to shore-up revenue aren't solely looking at customer acquisition or switching customers to new platforms. The new normal means innovating new services and responding quickly to changing customer demands.

For example, many customers shaken by 'the Covid experience' are concerned about business continuity, making sure future events don't cause disruption to their comms. Our system allows

partners to benchmark and then constantly monitor the present state of customer setups, and conduct remote audits efficiently, quickly and regularly.

And what about supporting customers' objectives around asset management and governance? With our system, partners can provide regular health checks and inventories. Plus, from a pre-sales perspective, they can spot upsell opportunities for replacing or novating end-of-life components. Every quote and proposal will be fast, accurate and business relevant.

The recovery is also going to mean a lot of change in the channel, with some businesses ascendent and others in decline. That means that, whether looking to exit or expand through M&A, knowing what a customer base is operating will have a big say in determining asset values.

This is yet another application in the Swiss Army knife of use cases for automated data discovery. There's no way that kind of due diligence would be possible using manual, non-automated processes dependent on visits to every customer site.

What's more, the discovery engine will have produced a ready to roll migration or consolidation plan that the acquirer can act upon once the transaction goes through.

So whichever way you look at it, discovery is already a big part of your business – especially in how you support and provision customers. But only through automation can discovery deliver a strong ROI. Don't be left in the slow lane letting faster competitors overtake you on the road to recovery.

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# growth phase

Triton Telecom presents itself as a one-stop-shop for all B2B telephony requirements. It has a range of key partners in technology, IT, marketing, telemarketing and SEO. "Social media and online marketing are key," noted Billington. "With businesses closing offices in favour of home workers, it's going to be one of the main ways of getting messages across. We are a fantastic company to work with, but getting this message out has always been a challenge. We are probably one of the best kept secrets in comms,

It's about referral-based marketing, and it's been invaluable to my business."

Another way forward lies in maximising every opportunity and making exceptional customer service the beating heart of the business, believes Billington. "Stop selling on price, sell on benefit to the customer," he emphasised. "It's a race to the bottom on prices at the moment, and it's unsustainable. Countless businesses in our sector would have gone under, or are going under, because they just

**I aim to have Triton employing twice the amount of staff, including IT support, which will involve persistence in the face of adversity, optimism in the face of negativity, and a shedload of hard work**

so we are putting a lot of investment into digital and social media marketing."

### Business networking

Such activities will build on networking opportunities that are already well advanced, especially through BNI (Business Network International) which Billington has been a member of for four years. "The organisation has a plethora of business professionals to support and influence positive change in any business," he explained.

"This support can come from a marketing manager at a firm of solicitors, the owner of a social media company or even an author who writes books on how to use LinkedIn, for example.

don't have the financial resilience to withstand any form of hit, never mind a global pandemic that shuts all organisations down."

Against this backdrop the market potential of hosted VoIP is more significant, but only as part of a broader Unified Communications platform, according to Billington. "PBX-based infrastructure is quickly disappearing and with the ceasing of the traditional networks, announced by Openreach and due to start in 2025, VoIP and SIP will be the main target market," he added. "There always has been a crossover with IT and telephony, and it is common sense to broaden our IT abilities and products."

### Just a minute with Dean Billington...

**Role model:** Caroline Waters OBE, the Deputy Chair of the Equalities and Human Rights Commission, and on the board of many other organisations like Project Fortis. I count myself very blessed to call her a friend.

**What talent do you wish you had?** To be in two places at the same time.

**Your biggest opportunity:** Getting up in the morning! Every day is an opportunity to do better than you did the day before. Every day is a new start. You only have so many days, so make the most of them and enjoy it!

**Tell us something about yourself we don't know:** I am a qualified PADI rescue diver.

**Your greatest strength, and what could you work on?** Fortitude and willpower are strengths. But being strong willed can come across as a little too direct or tactless. I need to keep working on the balance.

**The biggest risk you have taken:** Buying my business partner out. I did this because I truly believe in my staff and my business.

**Who do you admire most in comms?** Peter Jones.

**Biggest career achievement:** My business network. The people I have had the good fortune to meet and build a relationship with are very important to me.

**Name three ideal dinner guests:** My Grandmother, for her advice and to ask her what she thinks of the choices I've made; David Attenborough, he has so many pertinent stories; and Peter Jones, he has a wealth of experience in telecoms and I'd like to ask him for some pointers.

**Top tip for resellers:** If you can do a good job and you enjoy it, then carry on. If not, do something else.

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# SD-WAN sales unlocked

Software Defined Wide Area Networking (SD-WAN) is tipped as one of the fastest growing comms markets, but it's also perhaps one of the least understood. Enter the panelists at last month's Markets Unlocked educational video event hosted by Comms Dealer in association with Virtual1, which sought to unravel the channel opportunity.

**W**ith a value expected to top \$5 billion by 2023 according to IDC, the managed SD-WAN area is experiencing a staggering 59 per cent CAGR and likely to accelerate as organisations seek ways to accommodate more remote workers. Although SD-WAN technology has previously been regarded as only useful to larger organisations with lots of branch sites, SD-WAN is heading rapidly into the mid-market driven by several factors. "In the early days of SD-WAN it was all around cost reduction in terms of reducing the circuit type," stated Simon Cranford, CIO at SAS Global Communications.

"Whereas the real benefit that's emerged as products matured is that, in the UK at least, the argument over the cost of comms is not true – it's actually coming from capabilities such as central orchestration, the way that you can basically deploy policies, make changes, control, adapt multiple services all into one solution, which is really the key driver and benefit in helping organisations to simplify their estate."

The panelists agreed that the focus on replacing costlier MPLS circuits with broadband was only part of

SD-WAN's appeal. Instead, digital transformation and the cloud is proving a greater driver for change. "If I think of ourselves – we're using Office 365, that's in one cloud location," said Neil Wilson, Head of Products and Marketing at Virtual1. "We're using Salesforce, that's another cloud location. We've got aspects of our network throughout other locations. So our single office is actually now multiple distributed offices with different workloads and data stores within a multiple point network with critical traffic running between lots of different locations. The need to control all this complexity has now hit the mid-market because of the way that all businesses are changing."

Even as the UK ramps up its fibre roll out and with 5G on the horizon, application accessibility is still key. "You have a lot of customers that are geographically diverse, we have a number of them ourselves, and no two sites are the same," explained Martin Riley, CTO at Timico. "You come across challenges where you can get Ethernet in one site but not in others, you get 4G in one area, but not another, but customers always want to be able to access their applications."

"If you think of a retail customer, if they can't



take a payment they are critically stopped in terms of being able to function as a business. So being able to gain central control and have three, four or five different policies or designs that you can just push out on a whim without having to send a technical engineer to site is a major benefit."

#### High potential

The panel agreed that SD-WAN is still a harder sell than traditional comms but potentially more valuable. Getting in the door early is the key according to Riley, "Start with a list of four things that SD-WAN can offer, and have an IT business related conversation with the customer rather than a network conversation," he said. "Understand what they are looking to achieve in the immediate term but also over the next few years

because many have larger business transformation projects that you have to be able to support."

Channel revenues come from multiple avenues, noted Cranford. "We've talked about how it's an upsell layer – you've got additional clients with licenses that makes the customer sticky," he said. "Although it's very much promoted as a self-install product, most corporates will not look to adopt it themselves. They will look to partners to actually have that specialised knowledge and consultancy to design and deploy the networks and to manage or co-manage it on the customer's behalf."

With managed SD-WAN the fastest growing part of the market, Wilson reflected: "We brought our solution to the market exactly off the

back of those conversations that Martin and Simon describe. To try and make it as straightforward as you can to go from a conversation about comparing connectivity prices to a conversation about how it works in your organisation."

The panel agreed that SD-WAN is still in its infancy, but Wilson points out that customer adoption is growing rapidly especially with the shift towards working from home. "I know from a technical point of view there's still a lot of people who are strongly behind private MPLS type connectivity," he stated. "But customers are actively looking and researching this technology – SD-WAN is a threat if it's not an opportunity. If you can't have an informed conversation with customers you'll start to miss out." ■

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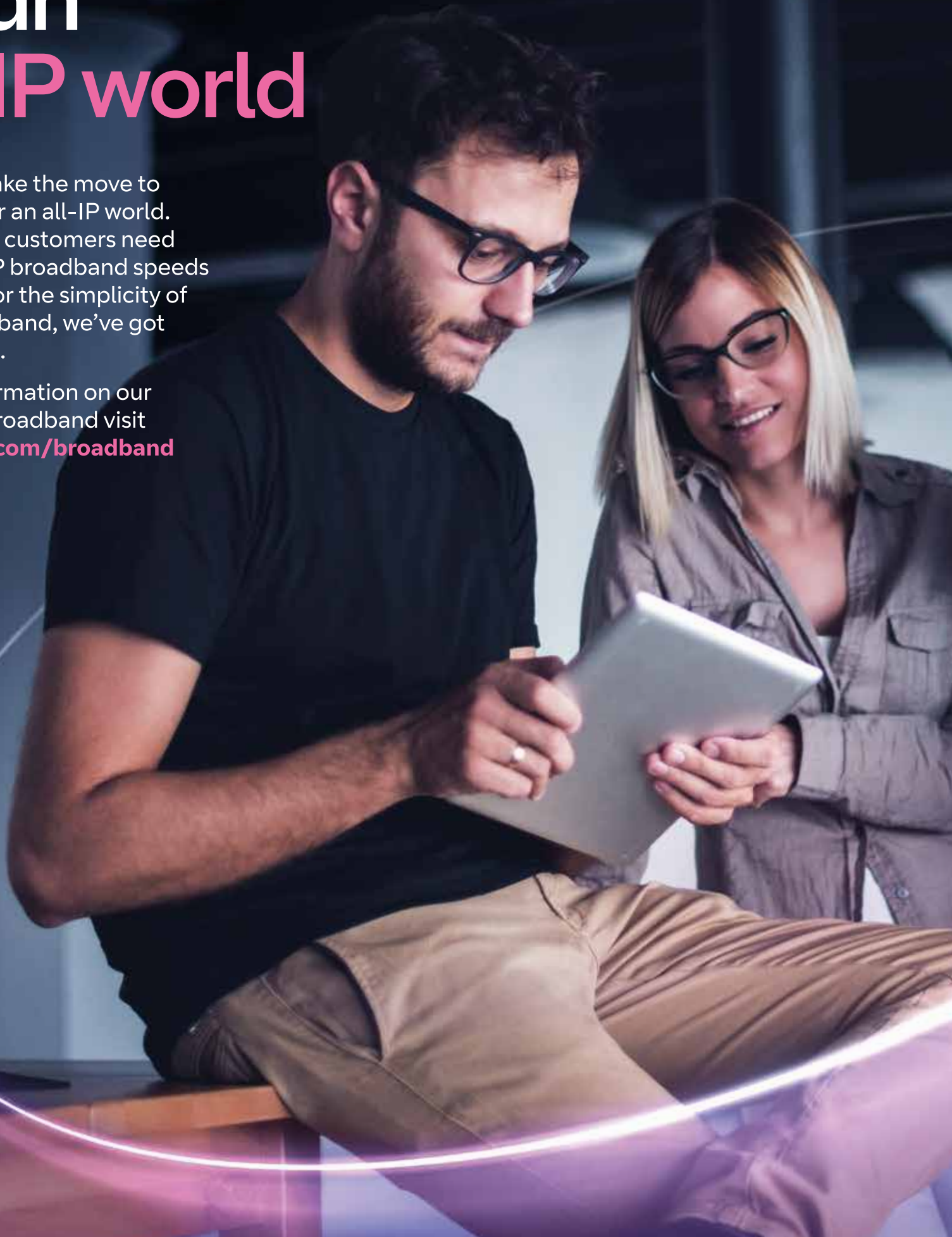
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# Thompson on full fibre and

## be more tight-knit

**Comms Vision Platinum sponsor TalkTalk Business's strategic focus is to help partners navigate and thrive during a period of unprecedented comms industry transition, with full fibre at the vanguard of the transformation, according to Wholesale Managing Director Richard Thompson.**

**We've always been the disruptor – calls, broadband, Ethernet. Now, we're delivering fibre for every business as the enabler for FTTP delivered through Openreach and altnets**

**W**holesale channels are, and will continue to be, the growth engine of TalkTalk Business. They represent 80 per cent of our revenue, and we will continue to grow market share and expand the market, and pivot from copper to fibre. We've always been the disruptor - calls, broadband, Ethernet. Now, we're delivering fibre for every business as the enabler for FTTP delivered through Openreach and altnets to provide full UK geographic coverage. We're focused on supporting our partners as they navigate through the changing landscape from copper to fibre. Our strategy and all the changes we are making have a focus on delivering the fibre future and supporting our partners as they make this transition.

Our strategic approach is to work with multiple fibre networks such as Openreach and CityFibre, and other altnets. And we're going to work much closer with our partners to run campaigns together. That means a change in engagement. The difference will be the need to work with our partners on how we transition customer bases over to the new technology, and how we unlock geographic capability as the footprint unfolds. We will maintain our challenger mentality and commercial flexibility to provide the right coverage in the right places at the right pricing using alternative operators and supporting our partners.

Looking at the great transformative companies (not just in UK) they are quite narrow in their focus. It's all about doing what you do – brilliantly. TalkTalk's focus is on delivering great connectivity, and being focused, disciplined and highly automated to deliver this. We want to be the wholesale connectivity provider of choice. That's our vision. The wholesale business will effectively be the cornerstone of TalkTalk Business.

We all need to be driven by how well we can work together and how quickly we can jointly adapt and exploit the opportunities that become available. The market changes rapidly and partners need to be thinking with a 2025 mindset now in order to design their capabilities and processes to set up for future success. Our ambition is to navigate partners through the changing landscape and help prepare them for future success with a view to 2025. This brings a sharper focus on how we support partners in jointly going to market. For example, we've been working hard to implement a more agile approach to service and support.

### Significant change

Covid-19 has accelerated the transition from copper to fibre and we are going through a period of significant change in which the need for fast, reliable connectivity is more important than ever before. While working from home we need to deliver presentations and have video calls. This requires more bandwidth and greater reliability – FTTC has 40 per cent less faults than MPF (TalkTalk data) and FTTP has 50 per cent less than FTTC (Openreach data). The mass adoption of remote working means that there is a business grade connectivity option for the home, and that touches every industry and every customer that you have. You can create packages to support that.

Businesses need affordability – and they see improved productivity as an enabler for cost efficiency. Organisations are also thinking a lot more about the 'need' for daily journeys to the office. Not only is home working a win-win for the environment, but also for businesses. This all brings into focus a fundamental change in the underlying access technology, and whenever there's a period of change, there's a period of opportunity. All existing customers are requiring more and more bandwidth to

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# and why partnerships must



ability to build a great website with a fantastic customer experience and leverage all of the APIs that we are developing for FTTP could come into the market and create a great proposition that could be disruptive. So it is key for partners to keep abreast of the times.

Nor is that all: More new technologies are in the pipeline. 5G is highly complementary to wired full fibre connections. Fibre will always be the better option but it may not extend to the whole of the UK, so 5G has its place in the overall connectivity landscape. Then we have Wi-Fi 6, the next generation of Wi-Fi coverage. It brings back into focus Wi-Fi itself, not only because there's an explosion of connected devices in a premises, but if you've got a FTTP connection that's running at 500 megabits per second, but your Wi-Fi is still running at less than 100, then you're not delivering the full benefit of the connectivity that you have for your business. Wi-Fi 6 is a complementary technology as we move to higher bandwidth. Satellites could play a vital role as the world's mobility patterns change from driver-operated to autonomous vehicles. Some scenarios to build FTTP may not make commercial sense, and satellites might be a viable alternative to a mobile connection.

run more and more applications. Through Covid, we saw that connectivity is part of the critical infrastructure. It is fundamental to everything that end customers are running in terms of their organisation and digital strategies.

Covid-19 and the shift to home working has driven adoption of cloud services and collaboration technologies such as Slack, Teams or Google Chat; and video conferencing technologies like Zoom, Cisco WebEx or GoToMeeting. We're all adopting these technologies to ensure we get exactly the same experience at home as we do in the office. This move to the hyperscale players with globally hosted and managed infrastructures has been critical and underlines the shift to cloud.

### User experience

Businesses also want a simpler, frictionless customer journey that is highly automated end-to-end, allowing them to offer the best digital experience to their end customers. AI capabilities and robotics are huge trends at the moment – so it's important for us to understand how we plug into that to deliver the best possible user experience for our end customers. There is also the aspect of consumerisation of IT, and people are now wanting a simplistic commercial structure that they can offer to their own customers. As a carrier, it's important that we have an understanding of the customer experience that they're trying to deliver and support them in that journey. So things like APIs, portals etc become important. We've also implemented a more agile approach to service and support with our own customer desk.

Digitisation gives people a way of accessing new markets and connecting customers to solutions in a much easier way for a better experience. It does reduce barriers to entry, so somebody with a great idea and

There is a huge role for resellers, SIs and VARs to successfully operate within the evolving market. Businesses need to simplify their operations and focus on doing a few things brilliantly. The role of the SI and reseller is knitting together all of the complexity and delivering something very simple to the end customer. The channel exists because it provides a brilliant service, it combines lots of individual elements to offer a brilliant solution to the end customer. The primary challenge for partners is that they are going through a period of transition. The underlying infrastructure which supports their business model is changing. But change can be viewed as a challenge, and an opportunity. That is how the channel grows.

Our role is to support partners through that transition and to support their go-to market. We're engineering our sales, marketing, and product functions to execute that go-to market in the best possible way. At TalkTalk Business, we don't really see transitioning to a new normal as a challenge. We see it as an opportunity to work differently, and look at how we can maximise this opportunity. It also comes back to engagement, and how we work together through this period of transition. New market segments will open up which partners will be able to identify because they know the market better than anyone. They can focus on specific parts of the market and during this period of change adopt, adapt and exploit with our help. Since Covid we have become much closer with our partners. In five years time, we'll be even closer than we are today because we have jointly navigated our way through this changing landscape. ■

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**We all need to be driven by how well we can work together and how quickly we can jointly adapt and exploit the opportunities that become available**





# Grasping the opportunity to harness innovation

**The art of any business is that of connecting efficiently and reliably to customers and staff, and at this point the issue for the channel is ensuring that organisations benefit from the advanced connectivity infrastructure that enables this, writes Diego Tedesco, Commercial and Marketing Director at Comms Vision Platinum sponsor Virgin Media Wholesale.**

**C**ovid-19 has undoubtedly accelerated digital transformation, forcing businesses and the public sector to rapidly implement remote working and meet online customer demand. McKinsey found that organisations have leapt forward five years digitally in just a matter of weeks, rapidly supporting remote working and meeting customer needs across multiple channels. To sustain and build on this progress over the long-term, investment in infrastructure is needed now.

In the wholesale connectivity market, we are seeing a pressing need for solutions that bring wider coverage, higher speeds, lower latency and improved security. By deepening relationships with channel partners, and supporting their drive to meet customer demand, our industry can play an integral role in powering the economic rebound and preparing Britain for the next wave of digital technologies.

#### Meeting today's challenges

Several household names have announced permanent remote working policies, including Facebook, Siemens and Twitter. While these companies are probably going to be exceptions (universal remote working is unlikely to be ever-present), we will definitely see hybrid working become the norm for large enterprise and public sector organisations.

This refers to a mixture of office-based and remote working, with employees connecting with each other across multiple locations. The concept is supported by UK employees – 77 per cent say that this model is the best way forward.

A continued reliance on remote working, even as part of a hybrid model, will involve a massive expansion in data. All of this will need to be managed by corporate and public sector IT systems.

The evidence suggests that this is presenting challenges for end customers. A recent survey found that 69 per cent of IT professionals are finding it challenging to ensure there is enough network bandwidth to avoid service disruption for employees working remotely, with 70 per cent reporting that it is difficult to adapt to the new responsibilities of supporting a remote workforce. Inadequate infrastructure is not just having an impact on remote and hybrid working. It is also affecting some organisations' ability to serve customers and citizens. Bain has noted that the pandemic has reshaped how customers and businesses interact permanently and is calling for a reconfiguration of the digital journey.

But not every enterprise and public sector body has the infrastructure capable of delivering this experience. These organisations risk being left behind in the race to rebound unless they quickly show a willingness to invest and seek the right technology advice from specialist partners. This climate presents channel partners with unprecedented opportunities to make the case for advanced connectivity infrastructure.

To meet remote working and customer needs, there will be a spike in demand for solutions that can move large volumes of data at speed and scale. National High Capacity Services, Dark Fibre and advanced Ethernet solutions can improve flexibility, agility, and

**Advanced infrastructure will prove critical in future proofing businesses and public sector organisations up and down the country**

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# y: Powering the rebound



resilience. These technologies will support end customers in meeting current challenges and will ultimately enable them to press ahead and ensure they thrive in the future.

### Seizing tomorrow's opportunity

The pandemic has heightened the value of technology in the boardroom. Business and public sector leaders are keenly aware of the fundamental importance of technology to success. A survey of business decision makers by techUK found that 71 per cent felt that businesses would become more dependent on technology as a result of Covid-19. This means they are more likely to

invest in emerging technologies capable of transforming the world around us – from the provision of goods to built environments – recognising the massive potential of the Internet of Things (IoT), 5G and Artificial Intelligence.

These technologies, and the shifting network architectures for home working, are underpinned by increased connectivity bandwidth requirements. With the pandemic having altered consumer behaviour and operating conditions, these technologies will allow end customers to navigate the new landscape's complexities and gain an edge on competitors.

To take advantage of these new technologies, large enterprise and public sector organisations will need to put the right connectivity infrastructure in place. This is because of the enormous volumes of data these innovations demand and the need for instant and secure processing. For example, there are growing calls within manufacturing to make the sector 5G-ready, as it will alleviate many of the inefficiencies and wastage that systems reliant on 4G still create. Advanced infrastructure will prove critical in future proofing businesses and public sector organisations up and down the country. This will ensure they are ready to seize on the next wave of emerging technologies and emerge from Covid-19 with greater agility, resilience and flexibility. In providing these solutions, the wholesale connectivity sector has a unique opportunity to play. It can prepare UK plc and the public sector for the technologies of tomorrow, ushering in a new wave of innovation, economic dynamism and prosperity.

### Winning relationships

Collaboration between wholesalers and partners is central to ensuring that UK business and public sector organisations flourish amid economic and social uncertainty. This can be achieved by going beyond purely transactional approaches. Deeper and long-lasting connections need to be built through open and transparent feedback processes and dedicated account service teams – at every stage of the partner journey. There should be a constant willingness to adapt to partner needs. At Virgin Media Wholesale, we are constantly striving for excellence in our partner journeys and are hugely excited at the opportunity to help end customers realise their potential through advanced connectivity infrastructure. ■

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**Deeper and long-lasting connections need to be built through open and transparent feedback processes and dedicated account service teams – at every stage of the partner journey**



# Cutting back on marketing could



MATT DYKES  
ABZORB

"Lockdown has forced all businesses and organisations to remote work and there has been a dramatic change in culture, processes and day to day work. The COVID-19 crisis will deliver a paradigm shift in remote working and more employees will request to work at home having discovered the benefits it delivers to work life balance. Businesses will discover, they can reduce costs for real estate and improve productivity and efficiencies. Resellers now have the opportunity to educate businesses on how technology can improve their communications, remote working and business processes. At Abzorb we are continuing to invest in marketing by focusing on virtual networking and events and have recently invested in a new PR agency to increase brand awareness to build the prospect pipeline and develop the business. Now, is the time to focus on marketing, raise brand awareness, educate customers and prospects, and seize the opportunity."



DAVID SPARROW  
BLABBERMOUTH

"We've found that offering free advice and insight is currently the best way for businesses to show their value and build trust. As inbound marketing specialists, we already live by this strategy and our public sales advice has already been instrumental in helping businesses survive through the lockdown. For our clients, ensuring teams are 'digitally enabled' is vital and we've focused on optimising sales journeys, getting the right messages across with in-depth sales playbooks to help guide conversations. Having the right CRM integrations is also important to ensure prospects can book calls and sales teams can follow up in the same way the prospect enquired. Not only to build better relationships faster, but to optimise reaction times. Especially with workflow automation, sales teams can nurture prospects without sacrificing a significant amount of their own time, while also being quicker to respond and thus, closing deals faster and more often."

Over the past three months, the effects of Covid-19 have seen UK marketing budgets decline at their fastest rate since the 2008/9 global financial crisis. That's pretty depressing news, but here's the upside: The Institute of Practitioners in Advertising's says spending on marketing is poised to start recovering from the effects of the pandemic by 2021, with more robust growth in 2022.

The £64,000 dollar question is: should ICT channel marketers hunker down for the freeze ahead or spend their way through the downturn?

Indeed, the popular adage declares: "When times are good you should advertise. When times are bad you must advertise."

So, what should marketers focus on as the squeeze on budgets tightens? Here's five tips to consider:  
1. Focus on your brand. In



KAREN HEAVEN  
BT WHOLESALE

"Rather than cutting back on plans and budgets, we have redeployed and refocused our activities. It's been important for us to adapt to a virtual event model as we're event-dependent to drive pipeline and leads. We have moved budget away from more traditional channels and now invest in ways to reach our CPs through virtual roundtables and webinars. For example, hospitality is on pause – so we are continuing to do more virtually, investing in data, email automation tools and social media to enrich our reach. Our industry is growing and changing rapidly so we can't afford to rest on our laurels. We believe it's now more important than ever to keep the channel engaged, so continue to do more campaigns and PR activity to achieve this."



NATHAN MARKE  
DWS

"Overall, it will be status quo and then some at DWS, reflecting our continuing business growth. However, what we spend our money on is pivoting from traditional to digital, spurred by three drivers. Firstly, our addressable market is expanding. The convergence of comms, IT and cloud is driving non-telco reseller interest in comms, doubling our target reseller base from five years ago. Secondly, secular trends such as the PSTN withdrawal, 5G and fibre roll-out are disrupting the market, creating a reseller base hungry for education. Thirdly, COVID-19 has meant that every business has had to consider how to replace face-to-face with digital business; digital marketing is a powerful tool to enable us to do this intelligently. Communicating effectively with existing and future partners has never been more critical than in today's 'work from anywhere' economy; mastering the art and science of digital marketing is fundamental to every effective post-pandemic business."



CANDICE CUNLIFFE  
F6

"Our clients haven't just maintained their marketing through 2020; they've boosted it. With the Channel's central role in building the new normal with tech, and the opportunity to gain ground as others cut back their marketing, it was the clear choice. And it's worked! Through a heavy push on mid-lockdown and back-to-work solutions—along with marketing their bread-and-butter products—they're seeing new leads, making more sales, and enjoying business growth; despite the unusual circumstances. One client even underwent a full rebrand. The new coat of paint and alignment of values grabbed their customers' attention and positioned them to thrive, even as we enter uncharted territory. It's all testament that marketing isn't just a 'nice to have'—you can market your way through and out of economic downturns. There's no better time to start nailing top-notch email campaigns, consistent social media activity, powerful SEO techniques, and ace web development."



NIKI FOOTE  
FIDELITY GROUP

"I am going to say NO to cutbacks, but YES to being relevant and making S.M.A.R.T choices. The time for implementing fast and precise decisions is now and we are ensuring there is consistent communication with all our partners during such a fluid time. We are also making sure the new marketing investments we implement add value and cater to the current needs of the new working world. We have extensively reviewed our budget to ensure we are getting ROI out of existing campaigns, however with the post Covid19 new normal – stay alert, control the virus, save lives - this will have to have a varied aspect. As an example, big partner training days may not be possible right now and we need to work with our existing marketing partners to get real life experiences from them to offer our partners specifically targeted campaigns."



ANDY SMETHURST  
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# Could seriously damage your brand

past recessions companies with a strong brand presence have come out on top.

2. Talk to you customers and monitor their behaviour and outlook. By tapping into and appealing to their emotional side you have a better chance of persuading them to stick with you.
3. Go digital. Digital marketing has long been accepted as the best low cost, high-return marketing strategy, largely due to measurability and targeting capabilities.
4. Look back at campaigns that worked well in the past and repeat rather than experimenting with new ideas.
5. Finally, focus on current customers.

“Put your customers’ needs at the heart of everything you do today,” says Louise Abby, head of customer marketing at 9 Group. Never a truer word.



ELLIE ALLSEYBROOK  
INFORM BILLING

“Rather than cutting back or simply carrying on, we are adapting our strategy and re-focussing resources as the Covid crisis plays out. It is always prudent to review and contain costs during any recession but investing in marketing is absolutely critical to maintaining awareness, understanding the changing needs of your potential and existing customers and positioning your offering in response. In the past our events programme has always delivered an impressive ROI and without that we are focusing on different activities that may not have an immediate impact, but will yield long-term results and put us in a stronger position as the economy recovers. The immediate future is uncertain with little chance of a quick or full recovery in 2021 - another reason why marketing needs to focus on longevity and the ‘new normal’.”



CHERIE HOWLETT  
JOLA

“I think it is really important to maintain your marketing strategy during economic downturns. Non-essential spend is often put on hold, yet additional investment is often required to fund customer re-assurance campaigns and to promote new services. By staying visible and communicating with partners or end users, and helping out where you can, you develop trust and stay connected with the changing needs of your audience. Instead of removing your presence from the marketplace, I would recommend reviewing your messaging. Companies who can adapt to the new environment and help to meet demand without being opportunistic, are most likely to thrive post crisis. We continued our marketing strategy during lockdown and signed up record numbers of partners. By working together, we have the technology to help homeworkers, keyworkers and students with the technology they need during this crisis and beyond.”



MARK CURTIS-WOOD  
VAIONI

“At Vaioni Wholesale, we’re maintaining our planned investment in marketing which is a 50% increase on last year. We’ve also invested in senior-level marketing expertise in the past month by bringing Jane Rigg into the business as Group Head of Marketing and Product. In the current climate, it’s more important than ever to respond rapidly to changing customer needs. Our commitment to marketing means we can do this through continued investment in new products and services, offering more flexibility through times of uncertainty and supporting evolving business priorities for our wholesale partners and their customers. The winners in the market are listening to their customers and evolving with them. For Vaioni Wholesale, investing in marketing puts us in prime position to do that.”



NEIL WILSON  
VIRTUAL1

“Changing market conditions will always dictate the need for a flexible marketing approach. Cutbacks are likely, especially with high uncertainty around physical events for the foreseeable future. The cancellation of these events constitutes an easy cost saving, especially as they are often the most expensive. That said, new customer acquisition is likely to be an even higher priority than normal in 2021. Many businesses are likely seeing higher churn as a result of the extreme pressures in the market. This revenue and profit loss will need to be addressed. Scaling back on marketing too far should be carefully considered. The absence of marketing activity or brand promotion could send out other negative signals about the health of that business. As UK business recovers, digital transformation might finally reach the mass market, creating opportunity for the channel and you would want your brand at the front of this trend.”



CHRIS WIDOCKS  
WWOW PR

“Marketing is the main route of customer communication and it’s more important than ever to maintain activities and work creatively; to not just survive but thrive, whatever the future holds. I have seen many companies navigate through stormy conditions by booting up marketing activities. It is vital to keep your brand in people’s minds and show that you are leading the fightback rather than drifting off the radar. In today’s digital age, marketing doesn’t have to be expensive. With some good publishing software and a database, you can quickly and easily send out pdfs informing new and old customers of your products and services. Social media is a great friend of the budget pressed marketer too and remember, you can easily create effective PR opportunities such as helping a local charity or sports club – or highlight how your own company continues to flourish in challenging times.”



CRAIG HOWELL  
XELION

“Business marketing plays a very important role when it comes to promoting and selling your business services. Unfortunately for many companies Covid19 has decimated this privilege with companies retracting all marketing spend to maintain operational levels and staff retention. For those financially stable, marketing should be a key focus to future proofing their business, by inspiring confidence in their partners and helping them win more deals. Studies show, companies that maintained or grew their ad spending increased sales and market share during the recession and afterwards. Here at Xelion, we’re in a very fortunate position whereby we are able to continue our marketing efforts by supporting the channel media through publications and events. We wish all our colleagues the best in these difficult times and we look forward to a healthy community when we reach the end of this pandemic.”

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# Zoom comes into focus

The most extraordinary upheaval in modern business communications was unleashed in March, ending a period of relative sluggishness in the business video collaboration space. Now, thanks to platforms like Zoom, the channel has inordinate scope to ride the wave of conferencing market potential, according to Phil Perry, Head of UK and Ireland, Zoom.

The Covid-19 virus may well be passed its first peak, but the video conferencing boom it sparked across UK plc (and beyond) is certainly not. "It's been incredible to see so many people use Zoom to stay connected in this time of social distancing, school closures and work-from-home routines," stated Perry. "From a more consumer perspective, the virtual happy hours, coffee breaks, pub quizzes, dance practices, yoga sessions, Broadway and TV shows and so many other events over Zoom are what has really struck me. Such creativity and resilience in these tough times is inspiring."

In its Q1 financial report California-based Zoom posted revenues of \$328.2 million, up 169 per cent year-over-year. The company added 265,400 customers with more than 10 employees, up 354 per cent. As we all know, the Covid-19 crisis drove unprecedented demand for distributed, face-to-face interactions and collaboration using Zoom. "Historically, Zoom was an enterprise communications platform but when the pandemic hit we were able to help people connect in all kinds of new ways," said Perry. "During the pandemic usage of Zoom ballooned overnight. I have come

across countless different ways Zoom is being used for work and social which continues to surprise me."

Other milestones cited by Perry, aside from the stellar rise in usage, include the launch of a new category called Zoom for Home as well as a partnership deal with F1 which sees Zoom recreate corporate hospitality as a virtual experience. "Covid-19 has completely changed how video communications technology is being used, and our vision is to ensure video communications can empower people to accomplish more and create a connected culture," he added. "The pandemic has been a catalyst for all companies to rethink how things are done on a larger scale. And traditional workplace barriers have disappeared as businesses were forced to broaden their thinking and redefine the day-to-day running of their company to keep things going."

Employees working from home and zero business travel have been a boost for the environment, which is reflected by Zoom's Green Leader customers announced in February – these are the 10 companies shown to be avoiding the most carbon dioxide (CO2) emissions by replacing face-to-face,



Phil Perry

## We're on-boarding a large number of new partners in the UCaaS space

in-person meetings with face-to-face Zoom video meetings. In total, the top 10 were estimated to have avoided 685,205 metric tons of CO2 in the 90 days preceding October 31st 2019, the equivalent of the annual CO2 emissions from 148,958 cars, and the equivalent of 11,420,077 trees planted. The level of CO2 emissions avoidance was calculated by Zoom's data science team.

### Agile workplaces

"The flexible concept of the workspace is no longer a nice-to-have," added Perry. "Being able to work remotely is business critical. And businesses are having to adapt and rethink their day-to-day operations to

ensure they can successfully continue. Even before the pandemic, advances in technology, interwoven with the new generation of the workforce, meant that workplace culture was already experiencing a paradigm shift with people opting for co-working spaces, coffee shops, to stay at home, or even go outdoors – more places are deemed acceptable work spaces, so long as the process works for individuals and the job gets done effectively."

Zoom was founded by Eric S. Yuan who, as a student at Shandong University of Science and Technology in China, would endure 10-hour each way trips to

see his girlfriend (now wife), prompting him to idealise a better way to meet face-to-face across distances. In 2011 he launched Zoom and put together a team of engineers. They spent the next two years building Zoom 1.0, a unified video and web conferencing software that ran across mobile and desktop devices. Since then they've developed the product into a full video-first UC platform, attracting a global team of over 2,800-plus employees, and (as of April 2020) 300 million daily meeting participants.

This growth trend is reflected in the increased levels of business development through the UK channel. At the end of June Zoom announced the expansion of its Referral Partner Programme in the UK and Ireland, allowing partners for the first time to propose and sell Zoom Phone. "As a result of this expansion we're on-boarding a large number of new partners and net new clients in the UCaaS space," said Perry. "Partners who are strong in UCaaS combined with end user application services stacks (VDI, conference room infrastructure and software, home office deployments) are well placed to take advantage of the proliferation of the 'working in the new normal' office environment." ■



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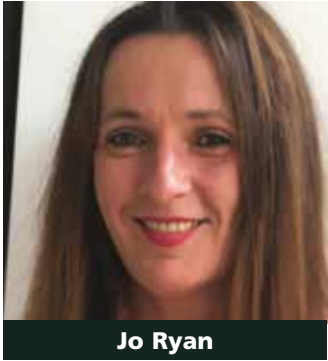
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# Pangea's key hires



Jo Ryan



Rich Crossingham

FORMER O2-ers Jo Ryan and Rich Crossingham have joined Pangea as Business Development Directors. Both will operate out of Pangea's London HQ and put their shoulders into helping partners make the most of the firm's 4G mobile L2TP and Pangea Protect, a new mobile content filtering solution.

Ryan brings 24 years ICT sector experience with a particular focus on the IoT and communications, and she was responsible for securing new business worth £1.5 million in 2019. "IoT is packed with opportunities for businesses ready to make the leap," said Ryan. "I will help partners tap into the lucrative IoT market."

Crossingham has 15 years channel experience under his belt and has secured partnerships with many of the UK's high profile restaurant chains, sports venues, retail outlets and more. "Pangea's focus on leveraging tech and delivering value is in line with my own," he said.

Sales Director Bernie McPhillips added: "Jo and Rich are both invaluable additions to the Pangea team, especially at a time when partners' IoT and connectivity strategies matter most."

## Also on the move...

NICK Shepperd has joined Windsor Telecom as Head of Product and Commercial. He brings 15 years sector experience and most recently spent 18 months at network aggregator FluidOne as Head of Product Management. Previous stints include spells at BT and KCOM.



Nick Shepperd

"Nick's experience in rapidly bringing new products to market and commercialising them for sales and customer benefit is a huge asset to Windsor," said Pete Tomlinson, CEO. "Nick's got exactly the right background to ensure that the products we develop and take to market deliver on our promise." Shepperd added: "We're at an exciting part in our growth having just secured our first round of funding and completed our first acquisition, which adds IT services to strengthen our communications and connectivity solutions."

VAPOUR Cloud has recruited James Hartley as a Key Account Manager, a newly created role. His experience includes a spell as a telemarketer with Virgin Media Business, his first job after leaving university.



James Hartley

He progressed to corporate account management and a business development position before moving to Gamma to become a data specialist. Vapour CEO Tim Mercer said: "We're now working with partners and their customers the length and breadth of the UK. It's therefore crucial that we continue to bolster our team so that we can respond to enquiries quickly, and deliver solutions with the level of quality and speed that fast paced organisations really need – not least in the current climate."

DELL Technologies has pulled in Rola Dagher as global channel chief following the exit of Joyce Mullen. She returns to Dell after three years as President of Cisco Systems Canada. Prior to Cisco, Dagher held sales and leadership roles in Dell's Enterprise segment and Infrastructure Solutions Group. "Partners are the foundation of our success and my commitment is to listen, learn and lead through our partners," she said.

SREERAM Visvanathan has been appointed as UK and Ireland CEO for IBM, taking over from Bill Kelleher who took the role in mid-2017 and is now Chairman of the operation. Visvanathan has been with IBM since 2002 and for the last five years has led the company's key public sector services business globally. Visvanathan commented: "We are at a pivotal point in shaping the future of our industry. The current global crisis is accelerating disruption and the need for digital transformation at scale and pace."

# Cop's nabbed by Converged

EX-POLICE Scotland cybercrime and cyber security expert Robbie Ross has joined Aberdeen-based IT firm Converged Communication Solutions as Chief Security Officer. Ross spent 20 years working in the police force, most recently as a cybercrime safety prevention and resilience liaison officer. Prior to transferring to the cybercrime prevention unit he was a counter terrorism security advisor.



Robbie Ross

"Cyber security is a hugely important issue," said Ross. "Its prominence has been heightened in recent months with the increase in home working and online shopping and will remain a significant business issue going forward. Everyone has a part to play in cyber security. It is important that organisations and their staff understand this, and everyone recognises how they can help to protect an organisation and themselves from a cyber attack."

Converged MD Neil Christie added: "Robbie has a vast knowledge of cybercrime and cyber security and an in-depth understanding of its impact on the nation. This means that our clients will receive a distinctive insight into the importance of having robust cyber defences."

# Lyons promotion a sign of Zen's intent

THE promotion of John Lyons as Zen Internet's Technology Director is a sign of strong intent, according to CEO Paul Stobart. "John's promotion comes as a great opportunity for the business with his experience



John Lyons

and ability to think outside the box proving an asset as we start to adapt and absorb new technology in the next phase of our development as a brand," said Stobart.

"It's imperative that we continue to grow and establish ourselves in ultrafast connectivity, cloud communications and cloud computing. To do this we are strengthening our core network in readiness for the digital age to come. Promoting John is a sign of intent of what we hope to achieve in the next phase of our development."

Lyons has worked at Zen for over eleven years, the last three years as GM of Cloud and Hosting in the Business division. "With ultrafast technology set to revolutionise the way we work and live, I'm excited to be given the opportunity to lead Zen's technical teams," he said.



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