

Openreach flexes PSTN closure muscle following delay to trials p10

New funding model emerges in 'post-leasing' world p14



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This month's movers and shakers



Wavenet poised to acquire Adept

GROWTH engine Wavenet is to acquire Adept Technology for £50.3m in an all cash transformational deal that creates a £200m-plus revenue group.

SPECIAL REPORT

The transaction is Wavenet's fifth acquisition in less than two years following Macquarie's initial investment in May 2021.

Wavenet joined the £100m revenue club in November that year with the key acquisition of Excell Group. And according to Wavenet CEO Bill Dawson (pictured) the Adept deal is also transformational. "The Adept team has created an AIM-quoted MSP delivering to a variety of top tier clients," he stated.

"There will be an opportunity to take best practice from both groups across all operational functions to enhance the way services are delivered to an expanded client base."

Adept Chairman Ian Fishwick said the deal mitigates the impact of a weak macroeconomic outlook placing pressure on many smaller quoted firms unable to raise new capital at attractive valuations due to their current market capitalisations.

"The Adept platform can deliver long-term growth and

profitability, but we recognise that uncertainties and risks exist in the short to medium-term that impact Adept's ability to optimise growth as a standalone quoted entity," stated Fishwick.

"Wavenet will enable the next phase of Adept's growth to be strongly supported."

Adam Joseph, Head of Private Equity, Senior Managing Director, Macquarie Group, commented: "Adept Technology's education presence in particular will add scale in an attractive end sector."







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EDITOR'S COMMENT



IN LAST month's comment I was, perhaps, too quick to display a small measure of mild surprise and pessimism over Openreach's new strategy to prompt customers in Salisbury and Mildenhall who remain wedded to their legacy services into ordering an

all-IP alternative by degrading their current broadband and voice services. This talking point emerged after Openreach was forced to delay its seminal PSTN shut down pilots in these areas planned for April (now October), as the pre-conditions had not been met due to a stubborn batch of users still on legacy systems.

Turns out that reducing their broadband speeds and auto-diverting outgoing calls to their CP is an inspired piece of strategic thinking. But it also points to a wider communication problem that needs addressing if we are to meet the 2025 PSTN closure deadline. Generally, larger CPs are on the case, whereas some smaller providers are less proactive. And as we have seen they can throw a spanner in the works.

It's easy to imagine the multiplication of this issue across the land during the coming threes years, and the ensuing chaos does not bear thinking about. So it's time for the industry to pull together and recognise Openreach's warning shot as a positive step towards achieving 2025 success. The infrastructure giant has been prodded, and it's flexing its muscle. See pages 10-13.

Meanwhile, battening down the hatches is Avaya which, as you can see opposite, has for the second time sought Chapter 11 bankruptcy protection. Both CEOs in charge at the time of filing described the move as a 'critical step' in the vendor's development. Whether it's a backward or forward step is open to question, but it does provide breathing room. We wish Avaya a swift re-emergence and keep our fingers crossed for its next strategic milestone to come from a position of financial strength.

Stuart Gilroy, Editor

Debt-laden Avaya files for Chapter 11

AVAYA and its US subsidiaries have filed for Chapter 11 bankruptcy and secured circa \$780m in committed financing.

The restructuring is expected to remove more than 75% of debt, from around \$3.4bn to \$800m, while boosting cash and liquidity. Avaya says the move will grease the wheels of its business development.

"Strengthening Avaya's capital structure is a critical step to fully realise our transformation," said CEO Alan Masarek.

This is the second time in six vears that Avava has resorted to bankruptcy protection, filing for Chapter 11 in January 2017. Avaya emerged from Chapter 11.1 in December 2017 before listing on the New York Stock Exchange the following month.

According to Vapour CEO Tim Mercer, Avaya has potential to bounce back stronger if certain preconditions are met.

"Avaya has an opportunity to instigate change," he said. "If the business pushes forward faster and delivers on what's expected of it in a leaner way, with a better leadership team, all roads lead to a brighter future."

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However, noted Mercer, Avaya's rivals are likely to leverage its financial restructuring to their advantage. "They'll do everything they can to further penetrate the market while Avaya doesn't have an equal footing," he added.

"The overriding challenge is trust. Many resellers and end users are jaded with some Vapour customers expressing concerns regarding an ongoing Avaya investment.

"Efforts therefore need to be made to alter perceptions that have evolved over the last few years if the firm is to return to the giant that it was.'

This latest financial restructuring sees RingCentral's preferred stock in Avaya eliminated, but the relationship continues on a new footing includ-

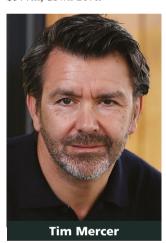
ing additional go-to-market constructs that enable Avaya to sell Avava Cloud Office to its installed base on a direct basis.

"Avaya will continue to act as the exclusive sales agent for direct and partner sales of Avaya Cloud Office," added Masarek.

"Our partnership with Ring-Central provides an efficient way to deliver a multi-tenanted cloud PBX offering to customers as part of our broader suite of communications solutions."

The North Carolina-based vendor said that its actions will not impact customers, channel and strategic partners, suppliers, vendors or employees.

In August last year Avaya reported O3 2022 sales of \$577m, down 20%.



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NEWS ROUNDUP

ORBITAL10 has acquired midlands-based IT managed service business Geek Guru, boosting its first line support service and extending geographical coverage. The deal, it's fourth acquisition in 14 months, builds on Orbital 10's prior acquisitions of PC Logix, Tantra and Think Rethink. "We are introducing additional services so customers can have one point of contact for their technical issues and requirements, acting as a technology partner not just a supplier," stated Orbital10 CEO Mark Salvin. "Different technologies require specialist knowledge and each acquisition has delivered expanded service capabilities and service delivery scales. We are already in talks with new potential acquisition opportunities."

BDR Group's acquisition of Colchester headquartered 3C Technology adds approximately £7m revenues and delivers vendor partnerships with Microsoft, HP, VMware, Sophos and Citrix. 3C Technology was established in 1991 and provides IT support, cloud, security, data and voice services. The business also has a regional office in Hemel Hempstead. BDR Group plans to secure more acquisitions this year.

IN A COMPANY update Excalibur Communications reported a 6% increase in turnover to £9.2m for the year end to June 2022. The uptick is attributed to a rise in mobile and UC revenues and new customer wins.

Mobile related revenues climbed by 9%, up from £4.4m in 2020/21 to £4.8m. Excalibur also signed its biggest ever mobile customer, twice the size of its next largest client.

The IT and fixed line business displayed a 2% increase in revenue to £4.4m.

Underlying EBITDA is £1.6m, 3% up on 2020/21, due to a combination of product mix and investment in operations and automation

CEO Peter Boucher stated: "These figures show that Excalibur is on a firm growth trajectory for revenue and customer numbers. A new endto-end CRM system goes live in the first half the year. As well as optimising day-to-day operations and productivity we expect it to free up the team's time and boost engagement.

"Our investment into underlying efficiency and automation positions us well for future growth and greater profitability this year." See page 30

Excalibur Fern unifies on growth trainctory fibre players



THE consolidation of Fern Trading's retail and wholesale fibre firms - namely Jurassic Fibre, Swish Fibre, Giganet and AllPoints Fibre - creates a single FTTP operating entity set to accelerate full fibre delivery.

The businesses will form a national wholesale network during this year, led by Giganet CEO Jarlath Finnegan.

"The unification of the four businesses will enable them to combine their resources knowledge and expertise to hasten and grow full fibre network access across the UK," he said.

John Browett, Chairman of Fern Trading's Fibre Division, added: "In the coming years the UK fibre market will experience exponential change, driven by the need to ensure homes and businesses in every part of the UK have access to a fast and fairly priced Internet service.

"We expect to see continued consolidation within the industry and by combining these businesses now we will be in a position to take advantage of those market opportunities as they unfold."

NEWS ROUNDUP

HAMPSHIRE-based comms provider FlexiNet has received an investment boost from Welsh serial acquirer Flotek, which launched last spring and has completed five acquisitions since with more in the pipeline. FlexiNet's brand will be retained as it takes new IT and cyber security support services to its customer base alongside telecoms services. The three founding directors (Anne-Marie Mackay, Craig Barker and Ryan Mariner) continue in their roles. Flotek Group CEO Jay Ball said: "We launched with a goal of ensuring SMEs have the technology and systems that allow for scalability and growth. Our investment in FlexiNet signifies our commitment to this mission."

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How mobile differentiates and grows competitive advantage

To what extent does the 2025 PSTN switch off play into the hands of resellers with mobile propositions? And how does a mobile and mobile data capability in the portfolio provide a distinct competitive advantage? What more can resellers do to create a winning longterm mobile strategy that works for them

and their customers? Where are the biggest opportunities, and how can resellers without a mobile strategy reimagine their capabilities to maximise the mobile opportunities in front of them? More broadly, what next for mobile in the channel? And should we be building 5G into our strategic thinking now?

Join the debate!

To participate in this editorial round table contact Heather Miles on 01895 454405 or hmiles@bpl-business.com for full details.



MSP bagged by FluidOne

FLUIDONE'S acquisition of Sheffield-based Microsoft Gold Partner Highlander Computing Solutions boosts group revenues by 35% and increases the contribution of IT services in its portfolio to almost 50%.

These services include a combination of enterprise IT infrastructure, SME IT managed services, enterprise IT cloud services and cyber security services.

The deal also expands FluidOne's northern presence and follows its investment in Microsoft Gold Partner Marathon Information Technology Services in 2022.

"Highlander's portfolio complements Marathon's focus on cloud transformation, modern workplace, security and contact centre services for the mid-market and enterprise marketplaces," commented FluidOne CEO Russell Horton.

Highlander will continue to be led by MD Steve Brown, who said: "When FluidOne approached us we weren't up for sale. We'd been approached



many times by other companies in the past but did not find the right fit for our future.

"When we had a conversation with FluidOne everything fell into place – the right cultural fit and the opportunity to invest in Sheffield as an HQ and growing hub for SME IT and enterprise IT infrastructure."

Horton becomes Highlander Chairman while FluidOne Directors Brendan Lynch, Chris Rogers and Roy Hastings join Highlander as Legal Directors.

NEWS ROUNDUP

GLASGOW headquartered Microsoft partner Akari Solutions has been acquired by US-based Woolf Partners. Former COO of Quantiq (now Avanade) Andrea **Bright becomes CEO of Akari** while company founder Margaret Totten takes the CMO role. Woolf Partners **Managing Partner Stuart** Fenton commented: "This is a strategic investment to build upon the potential of Akari's technical talent and ideas that have already made a positive impact."

BOURNEMOUTH-based 4Com bagged a brace of top gongs at Gamma's Partner Awards, collecting the Connectivity Reseller of the Year and **Fastest Growing Reseller** of the Year trophies. 4Com **Network Director Russell** Braddon noted: "Alongside an increase in our core business activities our growth over the past 12 months has been boosted by our acquisition strategy. Last year we purchased our first two companies and, with more on the horizon, we have Gamma's support in onboarding customers at scale."

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SI connects BT Wholesale to full fibre aggregation platform

STRATEGIC Imperatives (SI) has plugged BT Wholesale into its Fibre Café aggregation platform which provides unified access to the UK connectivity wholesale market.

Gavin Jones, BT Wholesale's Channel Partners Director, commented: "The Fibre Café supports how BT Wholesale caters to different customer requirements, from network operators to system integrators and channel partners. One size does not fit all, that's why we have interfaced into the Fibre Café, making it quicker and easier to access the fibre network."



Strategic Imperatives MD Wail Sabbagh commented: "Adding BT Wholesale's connectivity portfolio to the Fibre Café is a major step in delivering our vision of a unified national gateway into the UK connectivity ecosystem."

Sabbagh says the Fibre Café eliminates the 'spaghetti' approach to integration and addresses the challenges of multiple interfaces, technology stacks and long lead times.

"Underpinned by a unified API, common processes and supplier-agnostic order journeys, the Fibre Café provides a single and standards-based interface to the UK connectivity ecosystem," he stated.

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Copley back in the Fretblanket groove



ARMSTRONG Bell William Copley is rekindling the music career he enjoyed in the 90s with two live concerts and a new album.

Aside from running his Bromsgrove-based communications provider business, Copley is lead singer with Fretblanket which is reuniting for two live shows to celebrate 30 years since signing a worldwide major label record deal.

The band will also release their third album with songs originally recorded more than 20 years ago.

Fretblanket exploded onto the UK scene when the leading track from their first EP scored Single of the Week in the NME. At a mere 17 years old, and having established a reputation for blistering live performances, the band were wooed by multiple record labels before signing to Polydor in 1992.

The former school friends are gearing up for two reunion shows in London and Kidderminster (near their hometown of Stourbridge) and are putting the finishing touches to previously unreleased material.

"With half the band resident in the US rehearsal has been challenging, but we couldn't be more excited about getting back on stage and in front of an audience," said Copley.

Fretblanket's emotionally charged anthems were a hit with audiences on both sides of the Atlantic. US tours saw the band performing with the likes of Radiohead, Weezer and The Black Crowes, while MTV lapped up the videos, giving Into the Ocean the highest marks awarded on the 12 Angry Viewers show.

Their third studio album, The Distance in Between, is being finalised ready for release to streaming services to coincide with the live dates.

Fretblanket will appear at The Lexington, Islington on 12th April, and at 45 Live, Kidderminster on 15th April.

Burn scorches into topmost director position at Nimans

LONG-term Nimans-er Paul Burn has been promoted to the top role following a stint as Purchasing Director at the company he joined 22 years ago.

As Director of Nimans a primary focus is to lead the business through its next stage of growth and to bolster its position in the Unified Comms technology market.

The move comes a year after Nimans was acquired by



Midwich Group. "The acquisition was a strategic move aimed at expanding the group's footprint in the UK UC market and consolidating its position as a top player in the audio-visual, security and UC distribution marketplace," stated Burn.

"The combination of Nimans' customer relationships and Midwich's resources has led to increased revenue for the group.

"As we head into year two the focus is on expanding and integrating the product offering." See page 20

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NEWS ROUNDUP



NASSTAR'S SME customer base has been transferred to Horshambased channel partner Global 4 Communications. The move enables Nasstar (formerly GCI Group prior to a rebrand in March 2021) to focus on its medium and large enterprise client base. Global 4 MD Carl Barnett stated: "This acquisition increases revenues by 52% and our customer base to over

7.600." Dave Hawkins, Head of Sales for Nasstar Channel. added: "We will continue to work with Global 4 to realise the potential growth of this base. Nasstar can now focus on serving our mid-market and enterprise clients where our services, skills and capabilities can add greater value."



INTERCITY donated £91,600 to certain local and national charities in 2022. The Birmingham-based IT service provider also donated £10,000 to Ahead Partnership, sponsoring the Growing Talent West Midlands Programme which supports the career development of young people in the region.

Intercity Chief People Officer Christina Pendleton said: "Giving back is one of our key values."

VIATEL aims to create 50 new jobs over the coming 18 months across software engineering, systems development, network engineering, technical support and sales. Its headcount currently sits at 275. Group CEO Paul Rellis said: "We are preparing to launch our new security platform and the jobs are a result of those plans."

BABBLE'S ongoing buy-and-build campaign continues at pace with the acquisitions of Corporate Wardair (CWL) and Avandda announced last month. CWL bolsters Babble's mobile arm and strengthens its relationship with O2. Avandda provides telecommunication and IT services to 320 customers and expands Babble's footprint in the north west.

SMBs fail to Clear view act on all-IP

RESEARCH by Spitfire Network Services reinforces Openreach's decision to force businesses in its Salisbury and Mildenhall PSTN shut down trial areas to adopt all-IP by restricting certain services.

The PSTN closures planned for next month were delayed until October because of an intransigent contingent of users remaining on legacy services.

A study by Spitfire is reflective of this inertia, finding that circa 72% of UK businesses still don't view the PSTN switch off as a high priority despite being warned about the impact of failing to switch over before the 2025 deadline. And 42% of the businesses surveyed aren't aware of the shut down.

Spitfire Sales Director Dom Norton stated: "We have been engaging with customers and prospects to offer guidance





around the switch off because we know the impact inaction could have. Businesses could quite literally be cut off.

"To see that a significant number of business leaders are yet to consider the switch off as a high priority is concerning. Clearly, more needs to be done to make leaders aware of their need to act."

Spitfire MD Harry Bowlby added: "There is no escaping the fact that the SMB sector appears to be ignoring the rather large telecoms elephant in the room - the analogue and ISDN switch off in 2025.

"Our advice is don't let it creep up on you. Make the smart move and get the ball rolling today." See page 10

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of supply chain key

UNDERSTANDING the supply chain through a green lens is vital to providing a full circular procurement cycle, according to Stone Group Head of Sustainability Cheryl Moore.

"The supply chain can bring transparency to understanding costs, warehouse management, raw material impacts and logistics," said Moore. "We can only achieve our objectives with their input and support.

"Product development is also driven by the supply chain. Whether creating more environmentally friendly products for the market, increasing the amount of recycled components, reducing single use plastic, reducing ongoing energy consumption, or increasing extended warranties - all are driving the green agenda."

Stone Group is seeking to engage with local suppliers which saves on transportation costs, and work with suppliers that embrace sustainability in their ethos and processes.

"I see more working groups, greater transparency and shared best practice in the future," she added. "There are going to be economies of scale to benefit from sharing and tackling the same problem collectively."



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Openreach flexes PSTN sh

The delayed Salisbury
and Mildenhall PSTN shut
downs planned for April
were pivotal. And with
strong measures now in
place to ensure the new
October deadline is met,
two key questions have
emerged: Does Openreach's
new strategy signal
strong intent? Or is its
2025 planning flawed?
Here, Openreach Managed
Customer Migrations Director
James Lilley responds...

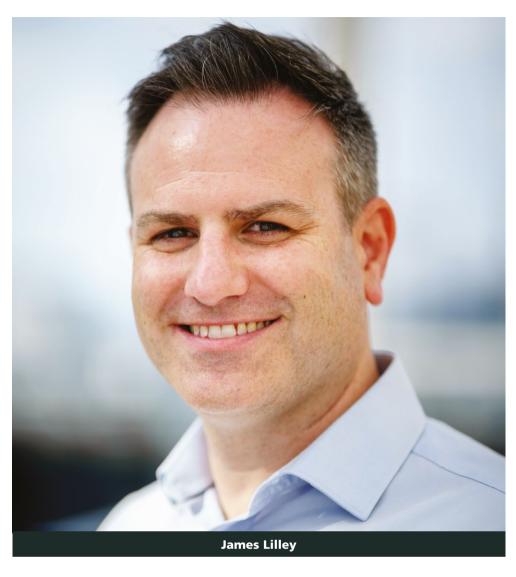
he postponement of Openreach's highly anticipated PSTN closures in Mildenhall and Salisbury from April 19th to October 9th raises a number of questions, especially when you consider the 'gentle measures' introduced to encourage customers still using analogue services (without an agreed exemption) to convert to digital alternatives by limiting broadband download speeds to around 2Mbps from April 24th and re-routing outbound telephone calls to CPs (not emergency services) from June 5th.

Why are these restrictive measures a necessary intervention?

We've decided to extend the trial period and give everyone more time to test and review further measures which

nudge customers to have a conversation with their provider about their future service. These measures are a gentle but firm reminder for them to get in touch with their phone or broadband service provider, who will then advise whether they should be exempt from the changes or need to upgrade to a new fibre-based service.

We've chosen to go with speed restriction first rather than jump straight to call forwarding, so customers can still do basic broadband usage but notice enough to contact their provider. We're testing these measures alongside providers so they'll be under review throughout the process. And it's important to underline that we're still exempting any vulnerable customers from the process.



Responsibility lies with the entire industry, and getting to the 2025 finishing line will need a massive collective and collaborative effort

Why did Openreach call these measures 'responsible adjustments'?

It's important to underline we've been working closely with CPs, local councils and industry throughout the trials to make sure all vulnerable customers – like people who rely on care alarms which use the old network – are exempt and won't be affected by the changes. And we're introducing these measures in a staggered way so we can monitor and review their impact – starting with

a reduction in broadband download speeds to around 2Mbps from April 24th, followed by a process of rerouting outbound calls to service providers from June 5th, in the same way that happens when customers don't pay their bill. Outgoing calls won't be stopped, they'll be auto-forwarded. This should prompt a conversation between the customer and their service provider about the need to upgrade and what needs to happen next. Incoming calls will still be

received as normal. Once an all-IP order is placed or an exemption request submitted, Openreach will return all call and broadband services back to normal within a 24 hour period.

What will be the impact on CP customer relationships when Openreach restricts their customers' services?

The impact will ultimately be positive as we've been working through what needs to happen with providers right from the very beginning

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ut down muscle

of both trials. None of this should come as a surprise for providers. We've engaged with them throughout this process via regular monthly industry forums which cover what this means for them and their customers, checked

At the start of this process there were over 15 million lines that needed to be upgraded to digital. To date we've converted around 30 per cent so we're making good progress

progress and clearly published the timelines involved. We've also kept Ofcom up to speed throughout.

During the trial process we've taken numerous actions to help CPs avoid the current scenario. We notified CPs about the cessation in both trial areas back in January last year to get them to identify and share with us those customers that should be exempt but also to contact and help upgrade those customers who aren't. We're now effectively giving an extra six month extension to carry on with this process and to test whether service measures can help to upgrade those last remaining customers.

What signal does Openreach's strategy send to the industry and end users?

The overriding message is that we all have a part to play in moving to this new digital world. It is something that will impact everyone – from consumers, to small businesses, suppliers of specialist services such as lifts, alarms, card payment readers, fax machines, health pendants etc. BT's deadline

for retiring analogue services is approaching fast, and we as an industry need to collectively respond and find the means to upgrade people off the legacy network as safely and smoothly as possible.

These measures signal that we're serious about helping our Communications Provider customers

find the right tools to help upgrade their customers - especially where those customers haven't responded to attempts by their CPs to contact them. These pilots are the initial phase of an ongoing programme, so it's about finding the right mechanisms to make sure everyone can be migrated safely and effectively. In terms of the adjustments, it's about trialling ways to gently nudge the last few customers in the trial areas to take action instead of leaving them cut off - something that was originally due to happen by April 19th.

What should the channel read from Openreach's decision to delay the trials?

It's important to say the trials have gone well with lots of collaboration across the industry. Most people in Salisbury and Mildenhall have now upgraded to a fibrebased phone or broadband

service but, at the same time, a small number of customers haven't upgraded yet, despite multiple attempts to contact them. This includes using all manner of channels like postcards, letters, emails, door knocking, drop-in clinics, calls and lots of local media coverage.

It's also important to remember that these trials are about working to help providers get ready for BT Group's 2025 deadline when, in common with other telecoms operators worldwide, it intends to retire the existing analogue system. We're doing what we can to facilitate the process and we'll be sharing our findings so providers can use them to inform what they might want to do in the future.

Where does responsibility for 2025 success ultimately lie?

Responsibility clearly lies with the entire industry, and getting to the 2025 finishing line will need a massive collective and collaborative effort. Everyone in our industry knows that the current copper-based technology is coming to the end of its lifespan and can't keep up with the new digital demands of today's end users, who demand more reliable, faster, future-proofed connections that fibre can provide.

It's interesting to think that despite the world undergoing immense digital transformation over the last few decades, telephone calls are one of the few analogue forms of communication not to be fully digitised. This is already happening all over the world, with countries like Germany, Japan and Sweden already well ahead of us in **Continued on page 12**

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At last a plan, says Rishbeth

The postponement of Openreach's trials speak of an industry very much finding its feet in the run up to 2025. Here, Focus Group CTO Vicki Rishbeth addresses the key questions facing many comms providers.



ere you surprised by Openreach's decision to delay the Salisbury and Mildenhall PSTN closures?

No, because the plan to restrict services at the end of the trial period had not been communicated prior to the end of January. This gave channel partners a short timeframe to communicate what the impact would be on businesses. Without a clear plan it has been difficult to encourage some end users to take the shut down seriously.

What will be the impact of service restrictions?

They are an enabler for us to help companies through the digital transformation. But success depends on the CP's approach to the PSTN switch off and their comms strategy with customers. We try hard to ensure we are contacting the right people with up-to-date messaging and advice via our Engagement Team, portal, email campaigns, website and webinars. And I'm passionate that our end users will not find out about

the changes via a loss or degradation of service. This is challenging due to the lack of API access to our Openreach data, which, similar to many other acquisitive channel partners, can be ambitious considering the number of assets remaining.

Where does responsibility for 2025 success lie?

The responsibility should be shared between Openreach,

I'm passionate that our end users will not find out about the changes via a loss or degradation of service

across multiple accounts, and due to the competitive nature of our thriving channel subject to churn.

Is the PSTN switch off delay a wake up call for the industry?

This is the biggest challenge our industry has ever faced. But it is also an opportunity to help transform the way the UK does business. Clear parameters from Openreach help us to take people on this journey. It should not be a wake up call or a surprise to an engaged CP. Yes, Openreach is taking the shutdown extremely seriously. But also, the time frame is

the CP community and DCMS to communicate and support the transformation. The onus is also on end users and the business community to actively engage. No single party can complete this transition without full participation of all the key actors.

Do Openreach's measures bring the 2025 deadline into sharper focus?

It's is an unprecedented project, particularly due to the way the telecoms industry is set up in the UK with a thriving channel.

Openreach is working hard to

Continued from page 11

upgrading lines to digital. So this is not something we can ignore or delay. Ultimately, the providers are responsible for making sure their customers are ready for the switch from analogue to digital services. The steps being introduced here are aimed at helping to facilitate a discussion between the CP and the end customer about the need to upgrade.

Are the delays and restrictive measures the result of failures in communication?

In December 2020 we stopped selling analogue services (WLR) and notified industry that we'd be ceasing these services in both trial areas in April this year. We consulted extensively with our customers who agreed that the trials would be an ideal test bed to try different approaches. Our largest CP customers are proactively engaged in upgrading their customers and have tried a number of communications approaches including letters to customers advising them about the need to upgrade, email campaigns, local advertising, calling customers' directly, knocking on peoples' doors and town hall drop in sessions, including another of our larger CPs who visited the trial sites with a branded 'battle bus' to help reach local people with information about what they need to do to upgrade.

Both the extension to the trials and the service measures we're putting in place are focused on testing safe, responsible and effective ways of moving a small minority of customers who are yet to upgrade and haven't responded to more traditional methods.

Are you confident that the 2025 deadline will be met?

Yes. At the start of this process there were over 15 million lines that needed to be upgraded to digital. To date we've converted around 30 per cent so we're making good progress. Stopping the sale of copper based analogue products and services across the UK in September this year should also help to speed up the rate of migration. Our stopsell programme is helping to push the digital migration and altogether we've notified industry of around 700 exchanges – covering around 6.6 million premises that have now stopped selling copper products and services or will go stop-sell over the coming months. More are being added every quarter as our full fibre build continues apace.

These trials have been a great opportunity for the industry to learn and these latest measures are an extension to this learning opportunity. The intention to retire analogue phone networks including the PSTN, was first announced back in November 2017, so the industry has been aware of what needs to happen for a good deal of time and, for the most part, we've seen CPs and other stakeholders respond positively to the challenge.

try to forge ahead but there is no blueprint to follow. Now, I am looking forward to more certainty around the proposals, a robust plan for exceptions, orphaned assets and assurances that when transitions begin to ramp up there is adequate support to migrate services and telephone numbers at volume. Anyone following the glide paths of the

conversions over the last few years would have seen the slow conversion rates. There are many reasons for this, but as we enter the phase of withdrawal in the two trial exchanges, and the subsequent tranches, we will have a better idea of whether the planning will be sufficient enough for the industry to move towards the 2025 deadline at pace.

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Beating 2025 inertia

The PSTN shut down in 2025 is a critical watershed moment for the industry but right off the bat we have a delay to the pilot switch offs in Salisbury and Mildenhall due to inertia among some CPs and end users. Here, Zen Head of Trading & Partner Experience Mark Howarth urges uncompromised action to ensure all Openreach targets are met.



vercoming the inaction that prevents PSTN shut down targets being met requires a change of mindset from stuckin-the-mud CPs and end users too slow to catalyse change, according to Howarth. "The responsibility lies completely at the door of the communications provider," he stated. "They must do everything they can to engage customers in the migration process."

Openreach's plan to push through the significant shift to all-IP requires the same degree of commitment from all CPs, believes Howarth, also noting that the delayed Salisbury and Mildenhall trials, from April to October, ring an alarm bell. "The channel should see this as a warning that as an industry we are not moving fast enough," he added. "Despite talking about these

pilots for a long time some providers have failed to engage with their customers.

"That is why Openreach has taken the decision to degrade services as opposed to turning them off in their entirety. While this may seem harsh, the alternative of turning them off would have been an even worse experience for the end user. The message is simple: As an industry we must do more to engage with customers and get the required services migrated."

According to Howarth,
Openreach's special measures
introduced to speed up
the migration process are
anything but controversial.
"We have been given
plenty of notice about this
change yet some providers
have failed to act," he
commented. "There will be
examples where providers
have attempted to contact

The message is simple: As an industry we must do more to engage with customers and get the required services migrated

their customers and simply not had a response, but in those situations this degradation and interruption should force the end user to engage with their provider which will help achieve the end goal. While the PSTN closure may be seen as a massive inconvenience to some in the industry, as a fibre-first organisation Zen is supportive of the withdrawal and the steps Openreach is taking to make the migration happen."

Positive action

The need for positive action on PSTN shutdown priorities comes through strongly in Howarth's narrative, and he urges communications providers to be transparent with customers when communicating the impacts of stop-sell, especially those not receptive to change. "Considering that the alternative option was for Openreach to turn their services off, which would have resulted in more damage than any degradation, this seems like a sensible middle ground," added Howarth.

"There is no denying the massive task we have ahead of us as an industry to ensure the smooth transition of all our customers to alternative products. However, with the right plan in place the timelines can still be met. All providers should understand this

and start working towards meeting these targets."

Change is happening, and Howarth noted that it would be 'irresponsible' for industry players to support the idea that 2025 is a pipe dream. "Openreach has been fully committed to this date for some time and reiterated that this is not going to change," he added. "Those that are not actively supporting their customers to migrate to alternative products run the risk of causing their own customers an unnecessary amount of disruption down the line. If this happens, customers will be quick to look around for a provider who can better support them through future change."



Celebrate and network in style



Immediate funding oppor

The criticality of working capital becomes ever more clearer in times of economic challenge, market disruption and the drive for business growth, according to B2B APM (Alternative Payment Methods) Director Dan Proctor. Here, he discusses a new subscription funding model that enables channel organisations to underpin cash flow and move further and faster on their growth ambitions.

s comms sector transformation continues to accelerate and cash in the bank becomes harder to secure, it's perhaps more important than ever to double down on cash flow management and push working capital optimisation to the top of the agenda, says Proctor. And as business models adapt to take advantage of new market developments and opportunities, he believes there's room for improvement in the key area of funding. In particular, he says, the traditional leasing model has entered a terminal tailspin, which is not surprising given the move towards cloud and the subscription economy.

According to Proctor, it's time for a new view of cashflow management

to drive working capital optimisation. "We live in what is to a large degree the post-leasing telecoms economy," stated Proctor. "Traditionally, we had on site PBXs, perpetual licences, handsets and the services needed to get systems up and running – all leasable assets. But in the subscription economy those assets no longer exist. True, there is still a number of resellers using leasing as a basis for hosted voice operations and signing customers on seven year lease contracts. But they are financing future recurring revenues and future services. It's not the right way to do it."

The factors that are negatively impacting working capital performance are clear, pointed out Proctor. "Access to working capital facilities



We're living in a post-leasing world and the opportunity in subscription funding is too good to miss. It's about financing growth

is expensive with onerous securities that sit alongside it," he added. "So what can the telco channel do? Sell part of their base to raise cash? Once you've done that you've lost your asset and diluted your equity."

Key objective

According to Proctor, providing a boost to working capital efficiency should be a key objective for comms resellers seeking to strike a balance between change management and restructuring activities that align with market changes and new opportunities. So for the past two years he

has focused on developing a product that funds subscriptions, and following a eureka moment he launched a new product to the channel in February, called Liquid Subscriptions, that allows resellers to accelerate the first 12 months worth of recurring revenue on customer contracts, removing the need for a lease.

"This is a timely solution to help comms resellers get cash into their business, enabling them to recruit, acquire, do whatever they need to do to ensure they make the most of the opportunities available to them," he commented. But first we must understand how the proposition works in the context of existing business models and wider market trends, particularly in relation to the subscription economy and move to all-IP. In practice, whether a reseller signs a 12 month rolling contract or a 36 month one, the 12 month upfront payment still applies. And on the anniversary resellers receive the next 12 months worth of monies.

The service will cost the recipient on average ten per cent of the advance. And it's down to the reseller's discretion to ensure they



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Evolve IP Partner Day

In a demonstration of our commitment to partnerships, Evolve IP is hosting a special Partner Day on Thursday 23rd March at the Tower of London. All Evolve IP EMEA partners and

prospective partners are invited to join our team and technology partners for a day of insightful talks, interactive workshops, and an evening of enjoyable entertainment.

The event provides guests with the opportunity to meet vendors, learn about the latest solution updates and collaborate with industry leaders. It will culminate in watching the sunset over the Thames as visitors enjoy an evening of relaxation and entertainment at the world-renowned venue.

The iconic location has been specifically chosen, as Evolve IP wants to make an impressive impact with its first event back since the pandemic. Our team has grown and the business has come a long way since we last hosted an Evolve IP Partner Day in 2019. Members of our Netherlands team are coming over too, reflecting our growing presence across the EMEA region.

Showcasing Solutions

A mix of high profile Evolve IP technology partners will also be in attendance, hosting talks and joining the exhibition space to help demonstrate their product suites and solutions. These include: Akixi, Enghouse, PRD, Dubber, Snom, Mondago, Poly and Tiger TMS.

Evolve IP spent 2022 streamlining the business, simplifying messaging and growing the team. 2023 is going to be a big year for growth for both the company and its EMEA partners. The Tower of London event provides the perfect platform to showcase strategies and plans for this year and beyond — reinforcing why partnerships take centre stage.

To find out more about the Evolve IP Partner Day, visit: www.evolveip.net/en-gb/partner-day-2023

rtunity emerges

put the right customers into an agreement. Proctor noted that B2B APM will launch a portal later this year to help manage the qualifying process.

If the customer stops paying, the reseller is obligated to return the amount of monies

This opens up a new way of getting cash into businesses and accelerating income

that haven't been used. For example, on a 12 month contract if a customer stops paying in month eight the reseller needs to return the last four months of unused monies. But they are not in a loss position as the service provision would have been halted. "This isn't a loan or a lease," stated Proctor. "This opens up a new way of getting cash into businesses and accelerating income."

The funding limit is based on a financial mechanism that takes into account the balance sheet net worth of the reseller, typically two to three times the value of the balance sheet. Those meeting the criteria benefit from the increased working capital available, and according to Proctor the potential to accelerate growth in the channel is significant. "We've identified, based on the SIC code for telecoms, over 3,000 companies in the UK that have a net worth of over £100,000," he explained.

Proctor is claiming a first in the telco channel with this

'breakthrough' alternative funding proposition. But it's far from a new concept: The model is tried and tested and backed by Premium Credit which has a £3 billion book in the insurance market. Moreover, a successful trading platform in the

SaaS space has fully proved the model. The big difference being that Proctor is accelerating 12 months worth of revenue rather than the SaaS sector average of three months.

> Proctor believes that the timing of the launch could not better, because

maintaining a strong level of working capital, without complexity, is essential if comms providers are to overcome barriers to their growth including the high cost of borrowing and a roadblock in the traditional leasing market, just two factors applying pressure on working capital and the liquidity required to run day-to-day operations - all at a time when the need for more cash flow has perhaps never been greater given the pace of industry change and crucial requirement for a sustainable competitive advantage.

Capital efficiency

In this context, capital efficiency has to be top of mind as we approach the 2025 PSTN switch off, emphasised Proctor. "The biggest opportunity for the telco channel is the BT switch off, but this comes at a time when most telco channels have scarce cash," he added. "So how are they going to get cash into their business to take advantage of the opportunities that

we have over the next three years? The telco channel is cash hungry, and this is an attractive way of accelerating active working capital."

Proctor is also on a mission

to help upstream providers tap into this tailor-made finance solution, and he hopes to attract interest from the likes of billing providers and distributors as well as resellers. He says the financing option has broad applications across the value chain, and to accelerate growth he intends to leverage B2B APM's experience to maximise these facilities and provide data on the billing history of clients, for example. "This is also a value added product for billing companies, distributors and aggregators," added Proctor. "Distributors constantly experience challenges with credit facilities for customers. This is a way to help maximise cash within these businesses and ultimately lower their debt, while bringing them closer and stickier with suppliers."

A combination of economic headwinds, rising costs, the rapid pace of industry change and the imperative for a competitive advantage, all call for the right level of working capital which for many in the channel is beyond reach. But Proctor argues that his next generation sustainable finance option will help to overcome the many pressures that could undermine working capital potential. "We are bringing alternative payment methods into the business lending channel," he stated. "We're living in a post-leasing world and the opportunity in subscription funding is too good to miss. It's about financing growth in the channel."

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Mansell drives CPaaS

Newly appointed TelcoSwitch CEO Matt Mansell aims to leverage his software knowhow and position the channel business at the vanguard of the burgeoning Comms Platform as a Service market.

ansell wasted no time in presenting his CPaaS vision to partners, taking the stage at Kings Place, London, just five weeks into his tenure. His appointment in January is reflective of the vendor's emerging software focus and signals a move into the growing CPaaS market which is said to have grown 20 per cent in 2022 and is set to be worth \$26 billion by 2025. "There will be a big transition as we move from UCaaS to CPaaS," he told partners at the company's Where's The Focus 2023 event. "Continued hybrid work structures and the PSTN switch off means there is a perfect storm to drive widespread adoption of these platforms. To make the most of this opportunity we need to think about software, not just telecoms."

Mansell's software pedigree is significant having worked on platforms Dreamweaver, QuarkXpress and GoDaddy. And key to TelcoSwitch's strategy is his latest SaaS platform, Yay.com, which was acquired by mutual backers Queen's Park Equity in November last year. The

platform handles 2.5 million API calls, 180,000 webhooks and one million VoIP packets. "The Queen's Park Equity family is now strongly placed to help partners leverage opportunities relating to the PSTN switch off," Mansell added. "The wider group is better placed to equip partners for conversations with the CIOs who are still burying their heads in the sand."

TelcoSwitch sits alongside technology partner Yay. com and provides a CPaaS platform that Mansell states can grow and scale. The platform, CallSwitch One, is due to be brought out next quarter. "We are introducing the 'next generation of IP' that is CPaaS ready and built with integration in mind from the beginning," added Mansell. "As a technologyled business, longevity is important. A cornerstone of this strategy is delivering a next-generation platform, empowering us to innovate and 100 per cent housed in public cloud infrastructure for security, resilience and horizontal scalability."

Mansell reiterated that TelcoSwitch will not be



To make the most of this opportunity we need to think about software, not just telecoms

abandoning its UC heritage, noting that hybrid working continues to drive market growth with a CAGR of 5.8 per cent. "There will be a sunset one day but that will be led by partners," confirmed Mansell. "I won't draw a line in the sand and partners will be able to decide when is right for them to migrate."

Nurturing partners

TelcoSwitch's partner base numbered circa 450 at the end of 2022, a steep rise from sub-50 in 2019. This growth trend will be less aggressive going forward, according to CMO Simon Blackwell, who noted: "We are looking to boost the quality of our current base."

This approach has prompted a refresh of the vendor's

partner programme which includes a tiering system for the first time. From Q2 onwards TelcoSwitch partners will be categorised as Channel Partners (50-plus seats), Platinum Partners (500-plus seats) or Carbon Partners (1,500-plus seats). These three cohorts have access to digital partner media with the top two also receiving physical kits. Carbon sponsors will also gain access to marketing development funds.

"We thought hard about how to do this differently as MDF is usually a boring process and only supplements the usual marketing budget," said Blackwell. "We want initiatives that sit outside of our partners' standardised marketing budget and are encouraging them to come to us with any ideas they truly believe in. We may believe in them too and split the risk down the middle."

TelcoSwitch has also brokered deals with three software vendors to bolster its programme. The first is Lead Forensics which reverse IP tracks visits to a website. TelcoSwitch has negotiated 10 per cent off for Platinum Partners and 15 per cent off for Carbon Partners. This same deal applies to HR platform Breathe HR. TelcoSwitch has also partnered with Tapni, a sustainable business card model. "We want to add value for our partners even if the software does not relate to our platform," added Blackwell. "We aim to continue bringing in new software partners."

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From VoIP start-up to key

Entrepreneurship has long been the bedrock of the channel community but few start-ups flourish like the enterprise of **Xelion UK Managing Director Dave Reynolds.**

eynolds shows how the power of positive action, underpinned by an entrepreneurial spirit and the self-belief to take a risk, can bring a new and successful dynamic to the comms channel. The business he launched in 2017 – namely the UK arm of Dutch cloud provider Xelion – is now forecasting to land circa 100,000 seats by 2025 and Reynolds expects 30 per cent of these to come from base migrations.

Xelion was established as a software development company in the Netherlands by Micha Cohen in 1988. It initially focused on the fossil fuels sector but in 2008 launched an on-premises VoIP PBX service into the Dutch market. Reynolds first encountered Xelion in 2013 while working in a pre-sales role at Birminghambased Intercity which also operated in the Netherlands.

He met Cohen and was 'sold' on the concept of apps and on-screen communications services, having seen first hand Xelion's fully functioning softphones and a basic web app that worked on BlackBerry mobiles. "We launched directly into the UK SME market and the sales

team won pretty much every Xelion deal we presented and proposed," he said.

The next phase of Reynolds' relationship with Xelion came when he joined PMGC and introduced a fully managed cloud version of the service. "After a few years it was time to move on and I made a business plan that led to Micha and myself becoming business partners with a goal to launch Xelion as a full channel proposition to the UK market," stated Reynolds.

He attributes his ability to run a business 'off-the-cuff' to experiences gained while an employee at Griffin Internet, his second place of work in the comms sector which followed a stint in a BT call centre. "Griffin was the turning point in my career," added Reynolds. "We learnt everything from starting a business, finance, product development and the basics of M&A. But the UK market is extremely competitive and to arrive as a complete unknown was a huge challenge to overcome."

According to Reynolds, Xelion's biggest achievement is its ability to drive net growth year-on-year while a strong development arm



The UK market is extremely competitive and to arrive as a complete unknown was a huge challenge to overcome

adapts the service in near real-time to an ever-changing market. The latest company figures testify to this successful strategy. "2022 was our biggest year with

an average of 33 per cent growth across the group and 39 per cent growth in the UK, with a forecast of 200,000 seats by the close of 2023," he stated. Ten years ago Xelion was a cloud PBX, a straightforward proposition for customers that wanted to replace an on-premises PBX with something similar but in the

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y player

cloud. Today it operates an omnichannel communications platform with no border limitations delivering services via partners across Europe.

"We supply a fully managed service as a single user licence model with no boltons," explained Reynolds. "This includes 365, Teams and Azzure AD integration, telephony functionality, contact centre features and web chat services. Partners can bring their own hardware to the platform and terminate calls on pretty much any SIP provider's network.

"This model puts the partner in control and makes the proposition simple for the end customer who values reliability, simplicity and good integration. Elements like integration with 365, Teams and Azure are game changers for businesses with their own IT department. Alongside this, opening contact centre functionality to smaller businesses is a great way to bring more value and get long-term customers."

Winning formula

It's a proven recipe for success: Analysis of partner deals supported by the Xelion team during 2021 show a 91 per cent win rate. And nearly all customers received 100 per cent uptime throughout 2021 and 2022. With such a strong footing secured, Reynolds sees the ad-hoc contact centre market as a major growth area, observing that even the smallest of businesses are looking for new ways to engage with customers.

"The coming 12 months will see the dev' team working on more contact centre functionality including a new web chat service alongside

Just a minute with Dave Reynolds...

Role model: Anyone who takes a risk on themselves.

What talent do you wish you had? The ability to learn languages easily.

Your main strength and what could you work on? I am great at kick-starting projects, I'm not so good at finishing them and generally hand them over to someone with more attention to detail.

If you weren't in ICT what would you be doing? Probably working in the gaming sector.

Tell us something about yourself we don't know: I am a keen gamer and once worked in the Lan Gaming industry when it was a thing.

Industry bugbear: Porting landline numbers needs to be like mobile numbers. The current system is poor in every way.

Biggest achievement?Launching Xelion in the UK.

Best advice you have been given: Take more risks, fail fast and move on.

In hindsight: We could have launched in the UK two years earlier than we did.

The biggest risk you have taken? Leaving a stable job to launch Xelion UK.

Top tip for resellers: Master the services you sell and focus your energy on what you are great at.

a new control panel and workforce management solutions, which will be included in the standard user licence," stated Reynolds.

"We also see the need for a future service that is purely operated via mobile apps for the lower end of the SME and SoHo markets. We have completed the first major partner deal for this and will open it to the wider UK channel later this year."

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McIntyre talks digital

AV distributor Midwich acquired Nimans in a £27.5 million deal last February to bolster its presence in the comms and UC market. One year on, we caught up with Nimans Marketing Director Steve McIntyre to shine a light on the distributor's accelerating strategy as a digital solutions provider.

ike Nimans, all businesses have no doubt undertaken a strategic review in response to uncertain times, reassessing their technology solution stack against new and pressing priorities. "Businesses are currently undergoing reinvention to secure their long-term future," stated McIntyre. "Many are shifting to digitalfirst models, embracing new technologies and focusing on CX. The opportunities for comms resellers to take advantage of this trend are many. They can help organisations transform their comms infrastructure while leveraging new technologies and digital solutions to improve the customer experience."

Getting to full grips with the goals and objectives of an organisation is critical, noted McIntyre, who said successful technology transformations depend on balancing short-term needs such as operational efficiency with long-term strategies like digital transformation.
"It also requires being
able to provide both the
technology and the expertise
to help organisations
make the transition as
seamless and cost-effective
as possible," he added.

To bring about technology change and create new growth opportunities requires a fresh approach, and three emerging areas that McIntyre is currently considering include automation, AI and data analytics. "Automation is a rapidly growing area of interest for many businesses and has the potential to create new opportunities for UC channels," observed McIntyre. "Automation can be used to streamline customer service, improve CX and increase efficiency."

He also noted that AI is becoming more popular and has the potential to revolutionise the way businesses operate. "AI-powered chatbots, customer service automation, voice recognition and



other applications can help reduce costs and increase efficiency," added McIntyre. "A trend that particularly interests me is the increasing availability of AI in areas like the opensource ChatGPT and how that can be used in different areas of business."

Analytics

At the same time, data analytics has become an important tool for organisations to gain valuable insights and uncover hidden opportunities. "With the right data and analytics tools businesses can gain a competitive edge by predicting customer behaviour and making more informed decisions," said McIntyre.

But economic volatility is the overarching theme and both businesses and consumers continue feel the pinch. There are, however, some positive notes amid the turmoil. "We have global economic uncertainty, the rise of Covid in China again and potential supply chain disruption

for the UK tech industry," stated McIntyre. "We will overcome these by focusing on the right products in the right markets, such as the rise in hybrid working which provides tangible bottom line savings for businesses, while driving demand for collaboration hardware."

Despite these challenging times Nimans has set itself the task of becoming a leading provider of digital solutions and services. To achieve this, the company will continue to invest in its portfolio, people and infrastructure. "Choosing the right growth partners and building sustainability into our decision making is also a priority," noted McIntyre. "We are focusing heavily on sustainability and will be communicating more about this in the coming months with hard facts and numbers around our activity, and outlining what we aspire to be.

"We need our industry to adapt its thinking if we

are to meet the social, economic and climate challenges that lay ahead of us. If we all focus our attention on this critical priority we can have a far bigger impact as a collective, ensuring people see our industry for the forward thinking and sustainability conscious one that it is."

Evolution

Manchester-based Nimans was founded in 1981 and trades with over 2,500 telephony, IT and retail customers and employs more than 200 staff. And as noted above, the company's next phase of development is an evolution that meets the changing needs of customers with a focus on digital solutions and services. This includes providing a full range of products for the digital workplace such as UC, cloud, collaboration and security solutions, along with training and technical support.

"The preconditions for a significant growth push this year are in place," stated McIntyre. "We expect double digit growth in 2023, heavily led by the adoption of Microsoft Teams room systems and associated technologies. Our biggest long-term opportunity is the continuation of hybrid working coupled with collaboration platforms."

Not surprisingly, McIntyre's leadership priorities are to remain acutely aware of the marketplace and competitors, while staying close to vendors and customers. "But the main priority has to be looking after our staff," he added. "If we ensure they are engaged, supported and motivated then the numbers will look after themselves."







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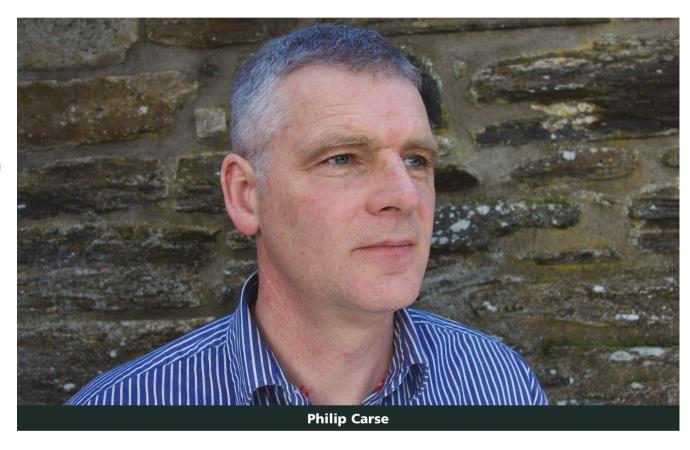
Channel displays ongoin

The telecoms service space continues to exhibit resilient trading supported by price rises, ongoing IT services focused M&A while BT and cost inflation pile the pressure on altnets and support services companies, writes Philip Carse, Analyst at Megabuyte.com.

K telecoms channel resilience is best highlighted by service aggregators Gamma and Digital Wholesale Solutions. Gamma flagged calendar 2022 EBITDA in the upper half of analyst expectations, implying at least £105m, up circa 10% on 2021. The UK direct and indirect businesses shrugged off inflation and supply chain challenges with continued growth in cloud voice and newer services such as contact centre and Microsoft Teams, with maintained ARPUs. Gamma flagged further growth in 2023 (analysts forecast circa 7% revenue and EBITDA growth).

Inflexion-backed Digital Wholesale Solutions (DWS) released its inaugural accounts for the year to March 2022 showing revenues, EBITDA, and capex of £320m, £63.3m, and £17.1m respectively, with revenues up 14% organically on a pro forma basis and with 90% recurring. Fiscal 2023 is displaying similar momentum despite macro uncertainty, with six month revenues up 14% to £176m at similar margins, and management believe double digit growth is achievable for the foreseeable future.

Other large telecoms resellers (broader comms and IT service providers) maintaining solid trading, based on recent



UK telecoms trading remains resilient despite macroeconomic and geopolitical concerns and the cost of living crisis

conversations, include SCG (Southern), Focus, Natilik, Onecom, Babble, Arrow, FluidOne and 4Com. Some service providers, however, are suffering from supply chain and other factors. For example, AIMlisted business comms. cloud and IT services provider Maintel issued a profit warning for 2022, expecting to report EBITDA of £4m+ (2021: £9.6m, prior guidance of circa £7m) on revenues of £91m (-13%),

impacted by higher product costs and project delays in the fourth quarter. We consider this the exception rather than the rule.

Channel consolidation

M&A also continues unabated in the channel with bolt-on acquisitions recently for several buy-and-build platforms, including Croft, SCG, Arrow, Babble, 4Com and Onecom. There have also been interesting strategic deals. First, size, with Adept

Technology recommending a bid (estimated 7.7x EBITDA) from Wavenet representing a circa 50% revenue uplift for the buyer. Second is the continued build-out of IT capabilities by telecom resellers, with FluidOne, Croft and BDR all recently acquiring IT resellers and MSPs. Third is new indirect routes to market for the larger buy and build platforms, with Focus Group buying wholesale mobile-focused Zest4, following peers such as

Onecom (launching Onecom Partners following the 2021 Nine acquisition) and SCG.

Finally, a toughening environment for FTTP altnets that we have previously flagged is now driving consolidation (albeit within its portfolio, Fern Trading combining four FTTP network builders, Giganet, Jurassic, Swish and AllFibre). Aside from a tougher funding environment due to higher interest rates, BT goes from





g resiliency

strength to strength with its own fibre upgrade. It added 810k premises in the December 2022 guarter to reach a 9.6m total of its target 25m rollout (versus 32m UK premises), and 326k subscribers through BT Retail and ISP partners to a 2.7m total (28% penetration), whilst flagging 50% penetration in >24 months old FTTP areas. In addition, VM02 owners Telefonica and Liberty Global and institutional investor InfraVia are planning a 5-7m

Channel resilience is best highlighted by service aggregators Gamma and **Digital Wholesale Solutions**

premises FTTP network on top of VMO2's existing 16m premises operation.

There is also evidence of pressure on roll outs due to cost inflation, highlighted by telecoms network support service provider/ builder Light Source going into administration and Telent scaling down its FTTP build division to half its previous size. We suspect that Light Source, despite a long history in UK FTTP, got caught out both by the logistical and balance sheet challenge of a massive ramp-up in FTTP business and by rising costs in the face of customer reluctance to pay more. Management had already flagged margin pressures in December 2021 due to a combination of skills and supply shortages and long-term build contracts.

As an example of customer pressure, BT noted that it kept its FTTP upgrade costs within a previously declared £250-350 per premise range in the December 2022 quarter despite broader inflationary pressures.

On the whole, UK telecoms trading remains resilient despite broader macroeconomic and geopolitical concerns and a cost of living crisis, with limited volume impacts and price rises helping

> mitigate cost and salary inflation. In particular, it appears easier for telecoms companies to pass through price rises to end customers (whether originating from the network/wholesale operators or passed on by resellers) than, say, IT managed service providers.

The larger players also appear to have cost cuts in the back pocket to help meet profit targets. BT released an in-line trading update for the nine months to December 2022, with EBITDA up 3.0% to £5,880m on revenues down 0.5% at £15,593m due mainly to the disposal of BT Sport (flat pro forma), with capex excluding spectrum up 19% at £3,880m. BT reiterated full year guidance that was tweaked last quarter for higher capex spend (EBITDA of >£7.9bn (>+4%), capex of £5bn and normalised FCF of the low end of £1.3-1.5bn), though with cash flow weighted to the final quarter.

Vodafone issued a revenue update for the third quarter to December 2022, with declining growth across

the board due to lower roaming and B2B, but again with the UK being the star. Total revenues fell 0.4% (+2.7% organic) to 11,638m euros, with focus Service revenues down 1.3% (+1.8% organic) to 9,520m euros, with organic growth dipping below the +2-3% of the prior five quarters. Germany was the prime factor (-1.8% organic), while UK price and customer-driven growth eased to 5.3%, to 1,327m euros service revenues, versus 6.5-6.9% in the last two quarters.

There was a significant contrast in the UK between mobile (+8.1% organic to 977m euros, with customers up 4% over the last year to 17.8m and monthly ARPU up 4.4% to 14.6 euros) and fixed line (-1.6% to 350m euros). The company, however, reiterated fullyear group guidance that was slightly downgraded last quarter; 15-15.2bn euros EBITDA and 5.1bn euros FCF, both flat to slightly down on fiscal 2022, to be achieved by accelerated cost savings and giving local markets full commercial autonomy.

VMO2 has yet to report the December 2022 quarter but its September 2022 quarter was in line, with EBITDA up 8.6% to £991m (boosted by merger synergies as well as a £30m non-cash legal resolution) on revenues down 0.6% at £2,588m, whilst capex rose 10% to £551m. VMO2 reiterated guidance for the year of mid-singledigit growth in EBITDA (pre-merger synergy costs), supported by improved top line growth and capex of over £2.1bn on accelerated network investments.

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Energy gives Global 4 a strong revenue stream

est Sussex based Global 4 Communications is one of the UK's leading suppliers of telecommunications solutions, but in 2019 added Energy to its portfolio by partnering with Fidelity Energy, resulting in a stream of new revenues

The alliance was forged after a meeting with Fidelity Energy Sales Director Sean Dixon as Carl Barnett, Group Managing Director at Global4, explained.

"Sean focused on the simplicity of the Fidelity Energy portal, which means a customer quote can be



produced right away by just getting a copy of their bill. It was so simple and sleek. And it was something I could get the sales team to do without being too onerous on them. Since onboarding energy, it has just worked seamlessly.

"One of my biggest concerns when we first launched energy was that we didn't have any knowledge of the fast-changing market, especially over the last couple of years. But members of the Fidelity Energy team have always been there to support us, and they have been instrumental in getting some big deals over the line. They also help us to think outside of the box for some of the trickier customers."

Recently, Fidelity Energy Sales Director Sean Dixon has met some of Global 4's customers and provided solutions for them that are tailored to their specific business needs.

"Because of the strength and knowledge Sean and the team offer we have hooked customers I never thought we land, including Local Authorities which is a great fillip for us," said Carl.

Global 4 Sales Director, James Routledge handles the relationship with Fidelity Energy on a day-today basis and outlined how the quality of the partnership is helping the energy business develop and

"The relationship with Fidelity Energy is really strong and we have a number of contacts within the business who support us

depending on the priority level of an enquiry. We have our Internal Account Manager, Kingsley Pannell, who is attentive and responsive. He provides strategic pricing structures and offers ways that we can go out and win business we are quoting for. Business Development Manager Joe Sudlow is also very reliable and knowledgeable and between them we have a strong core team at Fidelity we are in touch with daily.

"Energy is such a great revenue stream for the business and a solution we have used to strengthen our customer



relationships," continued Routledge

"With Fidelity Energy's help we have won some big customers recently and we've also recontracted some existing customers, saving £5 million for one and £3 million a year for another. In the current climate these are huge savings that we are making for these customers who are now much more loval to us because of our combined effort.

"During the energy crisis the profile of opportunities has changed, but we are still closing more business than we ever have before. Ultimately, we are making good margins out of energy whilst benefiting our customers and helping them navigate their options in a volatile energy market.'

Routledge stressed that Fidelity Energy are always available to provide insight on any opportunities Global 4 can monetise.

"By far and away this year, the energy revenue that has come into the business has far outweighed our expectations. We are now in a position where we can employ three additional members of staff who deal with energy all day, every

"It is a common cross-sell discussion with our existing customers, as it's a simple matter of looking at the energy bill from when they signed up as a proof of the impact moving to our service has had," he concluded.

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Bunching up with Google

Fuelled by a fresh investment boost CTS Managing Director Chris Bunch is set to build on the MSP's status as the largest dedicated Google partner in Europe.

TS was established in 2008 by a group of 'smart folks' who were approached by Google to build a product that migrates customer data from legacy platforms into Google's cloud computing platform. This activity initially focused on what is now Google Workspace but CTS shifted into GCP (Google Cloud) in 2017, a move that proved to be a greater accelerant of growth. CTS became a Google Cloud MSP in 2020 (the top tier for GCP) and aims to remain an EMEA leader in Google Cloud services following investment from Marlin Equity Partners in January this year.

To advance its international growth strategy, in 2018 CTS acquired Qlouder in the Netherlands to secure a foothold in mainland Europe. It also has offices in Manchester, London and Edinburgh. "CTS is well positioned to capitalise on the momentum behind Google Cloud, one of the fastest growing public cloud platforms," stated Bunch. "With additional backing from Marlin I'm expecting our growth to accelerate faster - including new markets. While cloud growth will moderate slightly in 2023 due to economic contractions around the globe, it will continue

to grow at what is quite frankly a ridiculous pace."

CTS has witnessed over 60 per cent growth in Google Cloud revenues during the last 12 months and overall gross revenue is forecasted to reach circa £70 million for the current financial year. Headcount in the services husiness numbers more than 170 with 142 technical roles holding a total of over 220 Google accreditations and technical certifications all supporting 675-plus customers across a range of size and industry, the majority of which are recurring.

Client success in large part has been attributed to a strategic pivot that created a dedicated services practise while the launch of a software product, called CloudM, also provided a notable boost to CTS's strategy. "We help enterprise organisations with Google Cloud, across both Workspace (collaboration) and GCP (infrastructure and data), providing project and managed services," stated Bunch. "CTS continues to invest in growth and we're hiring smart new people every month alongside improving our go-to-market clarity."

The trend that impacts CTS most remains Google's



own growth and how that evolves across different cloud segments. "It's fascinating to read reports describing that growth each quarter, alongside seeing it happen first hand with our customers," added Bunch. "I continue to track Google's investments in Al and Machine Learning which have been a lynchpin of both Google's, and our, go-to-market. Personally, I'm interested in pretty much anything around automation from the recent buzz around GPT to how the RPA market will develop.'

New model

Historically, noted Bunch, Google has been strong around data and ML on GCP and increasingly it's gaining traction on migrations and modernisation. "Despite these progressions I still see people knocking out licences which feels like a shaky business model, along with cumbersome procurement processes that add no value," he added. "All the major cloud vendors are moving to a marketplace model that simplifies procurement."

Resellers who are stuck in he past would be doing themselves a big favour by lending an ear to Bunch's insights, which are largely born of experience and a pedigree in IT that stretches back in time. Having grown up tinkering with a 48K Spectrum in the 1980s Bunch was perhaps destined to acquire a degree in computing before securing his first IT job in the early 2000s, a developer role for a consulting business. In 2011 Bunch moved to a small cloud computing consulting start-up and was part of the leadership team. The business grew to over 900 people, took investment, won accolades, broke records and had fun along the way.

"Working for small fast growing businesses in leadership roles requires a certain level of commitment and dedication to making it happen," said Bunch. "That can take a mental toll if you're not careful and I'm proud of making it through some really tough times over the years, while managing to have some fun."

Just a minute with Chris Bunch...

What talent do you wish you had? To speak another language. Only speaking one language credibly is somewhat poor!

Your main strength and what could you work on? I'm very driven when it comes to work and our success, but that makes me impatient.

If you weren't in ICT what would you be doing?
Something involving travel.

Tell us something about yourself we don't know: I once appeared on the One Show.

What do you fear most? Failure

Biggest risk you have taken: Wing-walking, but it was great fun.

Best piece of advice you have been given: Never
compromise on the quality of
people you are hiring, even
when desperate. Set the
bar high and keep it there.

How would you like to be remembered? Worked hard, delivered results, but in the right way with a smile and sense of humour.

How do you relax when not working? Mainly thinking about my next holiday. But I'm a big fan of walking and live close to big hills that lend themselves to a walk, followed by a room temperature pint by a fire.

Name one thing you couldn't do without in your job:
Google Workspace.

What possession could you not live without? My passport.

Top tip for resellers: Sharpen your focus and work out what your business is and what it isn't. Stop doing the latter, and only focus on the former. In many businesses, there's too much wasted time and energy with people running around chasing things that don't matter.









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4Com Formalises Move into Acquisitions with its 3rd in 8 months, completing a Customer base Purchase from Bluebell Cloud Solutions

Com, the telecommunications provider to UK SMEs, have announced that they are actively pursuing further acquisitions of telecommunication companies or customer bases. In 2022 the company completed its first two acquisitions, starting in May with Midshire Business Systems (Communications) Ltd, commonly known as Midshire Telecom, and following this up with the purchase of Eastern Telephones Ltd, commonly known as Eastern Voice and Data. They are continuing to pursue acquisitions in 2023 and beyond, having now secured the latest purchase of Bluebell Cloud Solutions' customer base.

Ben Newbury, Director at Bluebell, commented "4Com were very clear from the outset how the process worked, and pulled no lastminute tricks on price, as so commonly seen in the industry. At Bluebell we wanted funding to expand the business further, so we needed an injection of capital, that's where 4Com came in and purchased a large part of our customer base. The process was finished within 6 weeks of our initial contact."

4Com's Chief Executive Officer, Gary Scutt said, "We've already got several other acquisitions in the pipeline, with companies in a wide variety of situations. What our experiences have shown is that there are multiple ways to value a





business; many acquirers are looking for EBITDA for growth with cost synergies, others to simply top up their recurring revenues. From what we have seen so far, that undervalues some businesses or totally removes any value at all. Many businesses have built great customer bases

Thinking of selling?

If you would like to have a confidential, informal conversation with the 4Com Acquisitions team, please visit https://www.4com.co.uk/acquisitions/. No matter the situation, all businesses have value; 4Com welcomes the opportunity for further acquisitions.

that suit our profiles to cross-sell HiHi but don't necessarily show huge profits to match, and with that in mind we want to talk to as many potential businesses as possible."

Chief Operating Officer, Dean Cartledge added: "Each of our acquisitions has been a steep learning curve for the business and management team, while bringing huge successes in cross-selling HiHi to their customers. They have also allowed us to quickly expand our team and our customer base, creating a step[1]change in the history of our company. We're now in a position to make further acquisitions, buoyed by our experiences so far."

Gary continued, "There are a lot of different ways to do acquisitions, and we're committing ourselves to being open and honest with potential sellers. We work quickly without incurring costs for either side to analyse if there is a fit and value in progressing for both parties."

Midshire Telecom's Operations Director, Simon Lister, praised the clarity 4Com provided during their acquisition, "We really appreciated the approach 4Com took with their acquisition. From the outset they were clear on what they were looking to do and were transparent with us throughout both in terms of process and price. In short, their approach ensured the process was seamless."



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Optimising your value

Creating value through process efficiency and optimised management tools is a top priority for Excalibur Communications CEO Peter Boucher. And after reading the strategic insights he offers in this article you will surely be asking: How well do I know my processes?

oucher has doubled down on the task of achieving substantive results through a root and branch reassessment of what can be optimised from within the organisation. "I want to keep the focus on over delivering to customers by continuing to look for improvements in how we do things as a business," he stated. "To make sure we control the controllables and stay focused on delivering the fundamentals brilliantly."

One aspect of Boucher's approach is to improve efficiency and processes by introducing new technology. "We are investing in a CRM system that will optimise day-to-day operations and improve efficiency across the business," he added. "We are making a significant investment in operational automation and efficiency to raise overall productivity levels. The new CRM end-toend system goes live in the first half of 2023. We expect this to free up the team's time and boost engagement

as well as build on the service we already offer."

Performing the same task with less resource and time consumption while optimising quality of service and growth is one of today's big leadership priorities, believes Boucher. "Our overall objective is to accelerate the growth of Excalibur by investing in scaling up our existing business," he added. "We have two key priorities that support our ambition - engagement and efficiency: We want to drive more customer and employee engagement which drives positive results and acts as an anchor to sustainable growth."

Excalibur's turnover was up by five per cent in the year end to 2021/22, mainly due to increases in mobile and UC revenue. And Boucher expects to see continued growth this year through new customer wins, the return of more mobile revenues from increased international travel and enhanced product cross



We want to drive more customer and employee engagement which accelerates positive results and acts as an anchor to sustainable growth

selling. He noted that in July to December 2022 growth ran at nine per cent. "Cross selling new tech to customers provides huge opportunities commercially, but we need to make sure we remain genuinely expert in selling and supporting the solutions we offer," he stated.

Adaptability

Excalibur will also look to make selected acquisitions to expand its capability in managed networks and services, which also brings process and systems integration to the fore. Drilling down into process improvement and identifying inefficiencies also underscores the need to adapt in a changing market, noted Boucher. "In our business there is a constant evolution of complexity and range of products to sell and support," he added.

"Customer demands have increased correspondingly and we are under more pressure than ever to sell and service the expanded gamut of technology. We are investing to improve ourselves and elevate the

whole customer experience for our clients. We are doing this with the guidance of Excalibur partners who give us regular feedback on our processes and systems, what works or needs improvement. More often than not, they also provide the solutions."

Business process optimisation is also about supporting people in their work, which combined with a right-fit culture should raise the people engagement bar. "Ensuring that employees understand their role in the wider company plan is key, ' added Boucher. "This helps build engagement and makes every member of the team feel valued, recognised and supported. We want to grow our existing staff through coaching and mentoring, leadership and technical training. Again, anything to do with process efficiency. Headcount currently stands at 65. We will expand personnel numbers when required."

Boucher believes that management tools should be optimised to improve efficiency and maintain corporate culture, particularly in the context of hybrid working and managing the motivation and morale of staff in uncertain times. Furthermore, retaining and finding good talent is an ongoing challenge in a competitive market. But all too often these priorities slip down the leadership agenda.

"SMEs are busy organisations and can be guilty of under investing in automation and efficiency," he said. "But the strategic priorities we are focused on alongside the right processes, skills and communications will put most businesses in a good position to succeed."





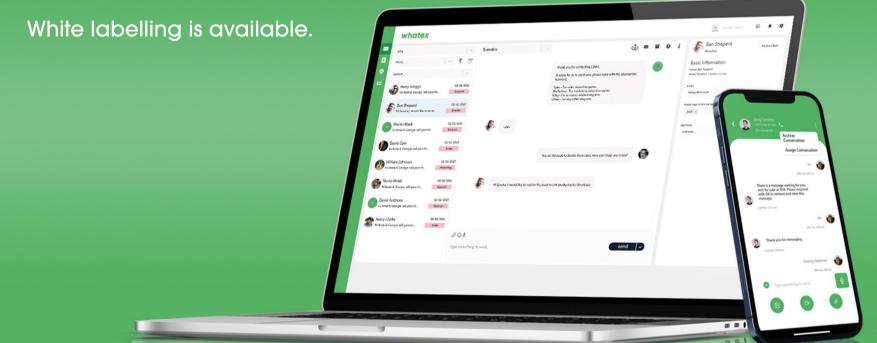
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Channel Champions Awards are open for entries!

Channel Champions will return to Regent's Park, London on July 6th 2023 to celebrate the brilliant teams that have performed miracles over the course of another challenging year.

ow's the time to recognise those achievements and hard work by entering your teams into the popular and prestigious Channel Champions Awards process.

The Channel Champions Awards delivers awards across all functions of channel businesses including:

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There are also special awards for teams that have run quality apprentice schemes, run amazing business events and raised funds for good causes.

Channel Champions offers a unique promotional opportunity to associate your organisation with high achievers. And we have made entering simple and easy to do. Just register on the awards website www.channel-champions.com , which will enable you to view all the categories and download the entry forms.

The entry deadline is May 5th, 2023, so there's plenty of time to enter. If you are shortlisted, you will then join other finalists who will gather at a celebratory summer garden party with the awards ceremony staged in an open marquee



followed by networking in the glorious surroundings of London's most elegant Royal Park.

Terry O'Brien, CEO of Channel Champions headline sponsor DWS, commented: "We are so pleased the Comms Dealer team is determined to give people in our industry the event they deserve after working so hard during the pandemic and helping millions of key workers to keep Britain working.

"As headline sponsor of both this event and the Comms National Awards later in the year, we are delighted to play our part in paying tribute to the amazing professionals in our fantastic industry. Staging Channel Champions in the open air with a festival atmosphere make this an event to remember and once again I can't wait," he added.

Channel Champions Event co-ordinator Nigel Sergent said entries will be based on work and activities carried out between March 1st, 2022, and March 1st, 2023.

"The Channel Champions Awards 2023 will recognise the full range of teams who contribute to building winning channel organisations. Great things are achieved when a group of colleagues unite and pull together to achieve a common goal. At Comms Dealer we are fortunate to see this every day in the sector we are proud to be a part of. You are all amazing.

"I am sure all ICT companies will want to take the opportunity to properly acknowledge their teams by entering and with the entry deadline not until May 5th, there's plenty of time to get submissions completed," added Sergent.

Terry O'Brien urges all channel businesses to get involved in the process to recognise teams which do not always get the credit they deserve.

"Winning, or even being shortlisted for these Awards, will brings a huge uplift in morale as everyone feels valued and they can see how their hard work is paying off. Channel Champions will yet again be fantastic opportunity to recognise the contribution teams have made not only to their business, but to the wider Channel as well."

To enter go to www.channel-champions.com















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technical teams make in the development and delivery of innovative and profitable services and propositions within their organisations; and these are values we share. We look forward to some terrific entries – so all you CTOs and Technical Directors come on, tell us how great your teams are!"

Gavin Jones, Head of Channel, BT Wholesale



EVOLVE IP

"Evolve IP UK is thrilled to be back at Channel Champions Awards. This is a great opportunity for us to acknowledge what we have

achieved as a team in 2022. Everyone will agree that this is a great way to celebrate excellence within the industry for both individuals and leading organisations. Evolve IP UK is very happy to be back sponsoring this event in 2023."

Paul Harrison, Managing Director EMEA





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"People make businesses work, and so we are delighted to be sponsoring Channel Champions, an event that

recognises the hard work and commitment of people in the channel. We look forward to the opportunity to say thank you and celebrate the achievements of everyone. We wish everyone the best of luck."

Paul Taylor, Sales & Marketing Director, Voiceflex



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"If you're as entrepreneurial as we are, you'll always have a fresh business idea in your head! At Channel Champions, you have the exciting opportunity to exchange ideas with like-minded

people. What better way than to, meet up with current friends, make friends and sometimes do business in the process. Covid forced us to move this event outside, and what a great decision it was. We look forward to a sunny day, out in the fresh air, filled with energy and excitement."

Alan Shraga, Managing Director, The Fidelity Group

Multiple barriers to full f

Full fibre take up will continue below market expectations unless a shake up of existing business models and approaches is urgently pursued. Without change, low fibre adoption rates will remain the most immediate consequence of an altnet community largely out of kilter with the comms channel, giving rise to greater market inertia, according to industry thinkers at last month's Comms Dealer Insight Session (held in association with B2B operator ITS Technology Group).

he Full Fibre Insight Session laid the foundations for an analysis of trends reshaping the fibre connectivity landscape and gave us clarity of direction on the importance of redefining traditional perceptions of connectivity. The discussion suggested that full fibre success in large part hinges on overcoming the clear disconnect between perceptions of connectivity as a commodity and full fibre's role as a strategic tool, and identified a number of roadblocks hindering full fibre uptake including a disproportionate focus on residential customers, the likelihood of transitional products extending the life of pre-full fibre connectivity, potential price barriers, the lack of an authoritydriven motivating trigger for end user businesses to adopt full fibre, and a general dissonance between altnets and the channel.

Against this backdrop, partnering to solve challenges has become more important than ever not least in the drive to increase full fibre adoption and transform businesses. But barriers remain, and ironically some obstacles are of certain altnets' own making. "I

wish some of the altnets would think about us and our customers when they design their propositions," stated Sara Sheikh, Head Of Product Management, Gamma. "No altnet I have spoken to has given me a proposition with a wholesaler like Gamma in mind. SLAs are different and there is no thought given to our customers. There needs to be full consideration in designing portfolios. Some altnets need to think about who they are supplying the service to."

While in some quarters there is little movement on creating channel-friendly propositions, consolidation is accelerating and has the potential to transform the competitive altnet landscape. Dave Ferry, Head of Enterprise Sales, ITS Technology Group, predicts fundamental changes ahead in what many see is an immature sector. "We need to pull it all together," he said. "There are circa 150 altnets but only around 30 have done anything meaningful in terms of premises passed – and they are mostly residential. There are platforms trying to pull it together but will they have value post-consolidation? Partners will be happy to work with three or four of the remaining operators.



Fibre providers have the easy job of putting fibre in the ground - the hard part is being obsessed with the food chain. We need likeminded partners to drive the market

There is a role for aggregators but it's a short-term play as the market consolidates."

Tough choices

For all businesses, including channel partners, there are tough choices to make on prioritising investments, which for Luke Hunt, Head of Network Services, Focus, includes how to approach the plethora of fibre providers. "There's a lack of awareness

among partners on options and availability," he said. "We need aggregators to consolidate the altnets so we have a couple of trusted partners who can support us properly. We can't have relationships with all the fibre providers."

Luke's observation is reflective of Ferry's prediction that there is a short-term requirement for a tactical

solution. Moreover, this evolving dynamic points to the role of close and strategic level collaboration between resellers and forward thinking fibre providers. Mark Thomas, Chief Revenue Officer, Adept Technology Group, commented: "Choice in the fibre market is broad but we work with two or three partners who help me make intelligent decisions. My customers aren't buying



fibre adoption identified



connectivity, they are buying a service. The experience is important to them and collaboration underpins consistency. Without it you fail. The less people I deal with the more important my business is to them."

Clarity of vision

Unravelling the comms sector connectivity tangle demands a clear view of both the bigger picture and the underlying detail in terms of full fibre being a strategic tool that features strongly in a collaborative relationship. But at the same time traditional industry language and perceptions of connectivity continue to

suppress full fibre's potential, creating barriers to adoption and blurring more than ever the distinction between full fibre as 'the plumbing' and a 'commodity' product versus an essential enabler that drives quantum leaps in resiliency and service, as well as capacity. "For businesses it's less about how much bandwidth you have available, it's more about reliability and resilience," stated John Whitty, CEO, Air IT. "That's what our customers are after."

Full fibre enables organisations to go beyond connectivity and capacity to experience transformational levels of strategic long-term resiliency and productivity, observed Andy Harris, Chief Commercial Officer, IT Professional Services (ITPS). "Our focus is on productivity for customers rather than nailing our colours to the mast of a carrier," he said. "We also focus on cloud and security and choose good fit based on reliability. Fibre comes up in customer conversations as part of future proofing the solution."

According to Thomas, the relationship between Adept and ITS provides a blueprint for success as their shared sense of strategic direction continues to accelerate fibre adoption. "When you work with less people you have more value to them," he said. "For example, ITS asks where we are going and how they can back our story. We invest together whereas larger providers aren't interested in me. I'm not big enough. With ITS we have a relationship that is beneficial to everybody."

In this context, the customer conversation starts by

identifying how full fibre can deliver the most significant strategic benefits. And Daren Baythorpe, CEO, ITS Technology Group, underlined the criticality of high degrees of service improvement being the focal point. "I want service providers to realise the importance of being obsessed with customer service," he stated. "We spend a lot of time with potential partners assessing whether there is a long-term relationship there. Fibre providers have the easy job of putting fibre in the ground – the hard part is being obsessed with the food chain. We need like-minded partners – that's what will drive the market."

As mentioned, full fibre builds strategic resiliency into end customers' infrastructure. This allows partners to engage more closely with clients who in turn are better informed about how to maximise the value of their investment. But driving this success model across the UK is a challenge. "The UK is 50 per cent fibre but convincing people to buy something they don't think they need is difficult," commented Baythorpe. "They see fibre as a future consideration and some businesses don't need 10 Gig at the moment. The challenge facing the altnet community is that some may be struggling with an overspend on rolling out fibre yet people aren't using it. Why not when it's the next big thing? Because in many customers' eyes there's plenty of time."

Connectivity transformation is vital to growth, but not all businesses have the same wherewithal or inclination to change, especially where they don't see a requirement.

Not surprisingly, the need for end user education around full fibre and the 2025 switch off came through strongly in the discussion. "Ninety six per cent of businesses are yet to create a plan for the switch off," said Neil Rampe, Managing Director (Comms Division) Intercity Technology. "We should be asking why rather than talk about the technology. We should find out the motivation for customers not behaving the way the industry would like. Furthermore, we have a cost of living crisis, suppliers are putting prices up and customers are trying to keep their businesses afloat. Someone has to walk in and solve the problem for them."

Confusion reigns

SMEs are concerned about future growth at a time when most are busy trying to overcome day-to-day business challenges, rather than push through a transformation in how they communicate. "From a client point of view they get different messages, so do nothing," added Thomas. "We try to educate customers but they often think you are selling to them as an angle. No-one else is saying that this is a UK-wide initiative or providing a consistent story to validate the conversation."

Building trust into customer conversations around full fibre is a top priority, and according to Matt Reeve, CEO, Modern Networks, high level engagement at Government and regulator level should be at the heart of the UK's strategic digital agenda. "It's hard to understand what is happening so I would direct Ofcom to make fibre easy to consume and implement a PR exercise to explain

what's going to happen during the next three years," he stated. "That would make it much easier for us to help our customers."

On this important point Whitty added: "UK plc relies on good connectivity. It's got to be reliable and cost-effective, so why isn't the Government pushing Ofcom? They should be instructing fibre companies getting investment to, for example, have a licence to do a, b and c."

To accelerate full fibre adoption also requires a commitment to longterm partnerships, with collaborative efforts focused on elevating service as a critical success factor in the competitive digital landscape. "The aftercare and support is important," stated lain Shearman, Chief Commercial Officer, Node4. "When the green light goes out you need to fix it quickly, and we all know there are differentials in service. That's what we look for in a relationship. Does the underpinning vendor help us meet our commitments? The support relationship is absolutely critical."

Deepening channel partnerships with service and resiliency at their core empowers both customers and partners, and according to Baythorpe this approach will help channel partners to turn industry change to their advantage. "It's all about the story and the service that you give," he said. "If collectively across the UK we are all amazing at service, that drives the need for us to build more fibre. There's not enough partners obsessed with service. Amazing service drives demand."



Celebrate and network in style





Championing diversity an

organisations to formerly celebrate the achievements of their female employees and put a spotlight on removing the remaining obstacles to equality and inclusion in the workplace. This year's campaign theme, #EmbraceEquity, also provided another opportunity for Comms Dealer to showcase the all-embracing approaches channel businesses are taking to integrate and promote diversity and inclusion as part of everyday organisational culture.





"Since the founding of our Women's Network five years ago we have marked International Women's Day as an occasion to celebrate, reflect, educate, and connect. Women+@Colt focuses on generating connections through mentoring, development and educational events. A key focus is creating inclusive policies and support mechanisms such as creating a culture where the menopause experience is understood and supported. Women over 50 are the fastest growing demographic in the workplace, yet more than one in ten have left their job due to unmanageable menopause symptoms. Achieving diversity without inclusion is an empty promise. We've launched a programme to get Colt employees to build it into day-to-day habits and promote allyship."



"International Women's Day is an important day in our content calendar, enabling us to raise awareness of the achievements of women internally and externally. In an industry with huge gender inequalities it is important we are part of the conversation. We also ensure the day's values are celebrated all year round. For example, we introduced a new Menopause Policy to support those experiencing symptoms. We're also putting our money where our mouth is: 51 per cent of Hable employees are women compared to the industry average of 26 per cent. We measure the success of our diversity and inclusion through a bi-annual form which ensures our workforce is representative of society. A diverse workforce is a creative, productive and successful one and we are committed to ensuring we continue to champion this day in, day out."



"International Women's Day is a way for us to celebrate our female colleagues, raise awareness of barriers and challenge bias. We began celebrating IWD in 2020 when we launched our Women in Tech Networking Group which discusses the challenges women face in the industry and promotes solutions to maintain a diverse and inclusive working environment. Imposter syndrome is a key issue raised by the group and we regularly hold events to improve confidence. By taking it in turns to present key topics we are helping our colleagues develop presentation and public speaking skills in a safe environment. Following presentations on women's health, we have introduced policies for menopause and parental leave, and we've delivered workshops on breast and cervical cancer. We also champion colleagues with mentoring schemes and have many talented women rising into management and leadership positions.'



"We have several D&I networks that account for 24 per cent of our workforce. Each has a vision and objective to ensure we take proactive action to make a difference and they are monitored annually. Our Women in Tech group aims to achieve gender equity, increase the number of women in tech and leadership roles and promote gender equity in the wider sector. Over the past 12 months promotions for women have increased by 13 per cent and we have seen a 20 per cent increase in the hiring of female managers. Some of our initiatives include the Step into Tech programme, a female mentoring scheme, female specific development (including confidence training, flexible/hybrid working), a menopause policy, buddies for female returners, and working with schools and colleges to change perceptions, influence curriculum and provide mentorship to young women."



Do you offer these products to your customers?

d inclusion in the channel





"CityFibre celebrates International Women's Day though activities that raise awareness of the event and promote the ongoing work of our own internal Gender Network. Last year we were named Times Top 50 Employer for Women for the second year running recognising our efforts to drive gender equality and empower women in the workplace. We do this by monitoring our equality metrics and setting ourselves a long-term target to increase the percentage of female employees year-onyear. We have introduced important policies and charters including Menopause at Work and family friendly working schemes. We are also developing a new early careers and apprenticeships scheme to encourage female candidates into more technical mid-management roles - an area where we see a diversity deficit. We will support this strategy with coaching and mentoring opportunities, and learning and development support."



"One of the priorities for our Women at Exertis Employee Resource Group (ERG) is to provide support and create opportunities to build networks. We will be hosting several Lunch and Learn events focused on this year's International Women's Day theme of #EmbraceEquity and will be spotlighting some of our senior female leaders' personal stories, which we did last year with great impact. Our Women's ERG is one of three current ERGs and is the one with the most momentum. We have set targets and incentivised our senior team to move our diversity metrics. We are collaborating with large customers like Softcat and big suppliers like Microsoft to roll out and learn from each other, and we ensure that Women's ERG topics have a regular board agenda slot among many other exciting developments in our celebrations of women."



"With a female CEO and a growing number of women in leadership positions, inspiring and promoting women into technology is a major priority at TalkTalk. Our Women in Tech employee network champions inclusivity in the workplace and provides a platform for role models across all levels to share career stories and encourage internal mobility. Through community engagement we seek to inspire the next generation of young girls. We created the annual TalkTalk North West Women in Technology awards to shine a light on female tech talent in the region. In 2022 almost 40 per cent of new employees were female. We launched a 'women in leadership' apprenticeship programme, 70 per cent of whom have since been promoted. Our gender pay gap has consistently reduced and almost half of our Executive Committee are women. While progress is in the right direction we acknowledge there is always more to do."



"We have been celebrating International Women's Day for many years and 2023 is no exception. The team decides how they want to mark the day and this year we hosted a breakfast and book club morning honouring the women at Redsquid, putting a focus on women in tech and sharing some lesser known stories. Our workforce usually comprises between 35 per cent and 45 per cent women due to us investing in an inclusive workplace that can attract that diversity. To keep diversifying we let the team come up with the ideas and changes they want to see and have created different committees that facilitate this. Diversity and inclusion is about more than just gender and we are currently reviewing all our people policies to ensure they reflect that mindset, so we can keep being innovative and have an inclusive culture and community."



"We continually focus on increasing diversity and creating an environment where everyone can be themselves. One of the ways we do this is through promoting our various EDI groups. This year we will be highlighting the incredible women in the business and promoting our Women in ANS group which brings women together to share, network and learn from female colleagues they might not regularly cross paths with. We are developing a Future Leaders programme which looks at nurturing our female leaders, providing coaching and mentoring to bring out their full potential. Alongside this we're working with the Tech Academy to address the wider diversity gap in the industry. We are working to make a fully inclusive workplace where our people can be their amazing true selves every day."

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Birch on fostering high po

Node4's Managing Director for Digital Hannah Birch discusses ways to nurture females seeking leadership roles in the comms sector, and shares insights into how organisations can best unlock womens' full potential in the boardroom.

irch, who was formerly Accenture Managing Director, joined Node4 as Managing Director Digital in January this year. She started her career at BP and also held leadership positions at Fujitsu Services UK and Computacenter. Here, she discusses a number of approaches to progressing gender equality in leadership roles, and reflects on the very real impacts of women in the boardroom....

What are the benefits of a strong female presence in boardrooms?

Innovation: Having a mix of people in the boardroom not only ensures a true diversity of collective thinking, it also stimulates new and creative approaches to real-world challenges. I believe that having a female presence in the boardroom is critical for the delivery of long term, and sustainable, company value.

What have been your experiences during your career in terms of being female?

While I'm sometimes aware of being the only female in

the room, my primary focus has always been on doing my job to the best of my abilities. I come to work, I contribute, and I've excelled because I worked hard. This in turn led to me being recognised for my achievements, and not my gender.

How are you taking a lead on increasing female representation at the top?

I'm passionate about mentoring women who have the inclination and capability to rise through the ranks. Over the years I've been involved with many groups and organisations dedicated to supporting women in ICT and continue to actively mentor women I've connected with through these networks.

Ultimately, however, it all begins with seeding a female talent funnel in the first place - heading into schools to educate children on the breadth of opportunities they can expect to encounter in the tech world and dispelling notions that it is populated by males who work in darkened rooms crammed with equipment.



Encouraging girls to focus on STEM subjects isn't the only game in town. Many girls studying the arts aren't aware their skill sets and creativity are ideally suited to today's world of agile tech or project management

Talking to students as they prepare to make decisions about the subjects they will go on to study at A Level is also important. Encouraging girls to focus on STEM subjects isn't the only game in town. Many girls studying the arts aren't aware their skill sets and creativity are ideally suited to today's world of agile tech or project management. I'm always eager to take up

invitations from schools and colleges looking for female tech ambassadors to visit and share what a 'day at the office' really looks like.

What initiatives can help to retain high potential women?

Today's companies have few problems attracting women into entry level roles. Down the line, however, many drop out at the very

point their careers are set to take off to take on parenting responsibilities. When they get back to the workplace, they need to play catch up fast. So any organisation looking to limit talent attrition and harness the potential of these future leaders needs to implement programmes that help women returners to bridge this gap and progress their careers.



otential women

Recent government policy is helping to level the playing field on this issue. Schemes like Shared Parental Leave help to facilitate new ways of working and make it the norm for men to play a much more active role in their training and development for trainees looking to pursue a wide range of workplace roles. Everything from traditional engineering roles to customer service, digital marketing, accounting and business administration.

Trusted advisors
have a critical role
to play in helping
women overcome
the debilitating
impact of imposter
syndrome, which so
often undermines
confidence in their
ability to take on
new roles

children's lives. All of which contributes to breaking the organisational barriers that can inhibit gender inequality at line management and more senior levels. Ultimately, creating a more equitable and supportive working environment is the key to enabling a pipeline of women who are willing – and also able – to take up the leadership opportunities that come their way.

What other initiatives are you progressing?

When it comes to creating a more balanced workforce, I'm a fervent fan of apprenticeship schemes that deliver greater access to workplace opportunities for all – regardless of gender or background. Node4 operates an apprenticeship programme that doesn't just welcome the more technically gifted, it also provides practical

With regard to helping women across the industry progress up the management ladder, work from home policies initiated in response to the pandemic have helped spur many companies to rethink their workforce planning and development strategies. Here at Node4, for example, we run a re-skilling and support programme designed to help our

employees successfully transition internally and take up a new role.

What more action needs to be taken to boost the number of women on boards?

We've already touched upon the importance of making sure there is an effective executive mentorship programme in place to support women to achieve their full potential. As well as providing opportunities for analysis, reflection and action that enables people to achieve success, a mentor is able to pass on knowledge and experience that opens the door to new opportunities. In my experience, these trusted advisors also have a critical role to play in helping women overcome the debilitating impact of imposter syndrome, which so often undermines

their confidence in their ability to take on new roles.

What barriers have you identified to having more women on board?

Statistically speaking, because more women previously chose to step out the workforce to take up the bulk of child care responsibilities, men have traditionally outweighed women when it comes to holding senior leadership roles. However, I believe that this is beginning to change for two reasons. Firstly, the growing prevalence of female role models and secondly, more organisations are now proactively promoting policies that enable women returners to pick-up where they left off and progress their careers.

In my role as a mentor, I often share my experiences when it comes to managing the balance between work responsibilities and family life. But just as important is acquiring the skills, knowledge, expertise and emotional intelligence that is needed to be considered for a place on the board. So, organisations that have an eye on the future will need to ensure they have programmes in place to bolster these capabilities.

What are the key flexibility considerations that need to be taken into account and why?

More and more organisations are recognising that the challenge of juggling worklife responsibilities impacts employees of all genders, at every stage of their career. Whether that's raising a family or, increasingly, caring for elderly adult relatives. In the UK, the current caregiving crisis means that hiring Continued on page 38

THE RECRUITMENT COLUMN



Why is hiring for sales so difficult?



f there is one skill neoci get asked to hire for the most in 2023, it's sales! Everyone and anyone, from resellers to vendors, alt nets to software houses....everyone wants sales people. And yet, they are probably the most difficult hire in telecoms right now.

So why is it so difficult?

Firstly, hiring for sales has always been tricky. Many new business sales people feel more comfortable in account management, there are far less hunters than farmers.

Secondly, they are a risky hire... it can take a long time before a sales person becomes profitable. If they don't perform, it can be very costly for the employer. Telecoms companies are understandably careful with who they hire to sell their solutions, often creating convoluted interview processes to try to avoid hiring the wrong people... this, however, will put the best sales people off!

But there are other factors at play...

Sales people in telecoms often earn recurring revenues as part or all of their commission package. The best sales people (the ones we all want) will be making a very healthy amount of commission. Why would they decide to walk away from that and start again? Unless they are desperately unhappy with their employer, it will take a seriously compelling offer to prise them away from their nest egg. Who can blame them? Even if you offer a 'ramp up' period, it is unlikely that a business can sustain that for long.

Another factor making it difficult

is the expectation that they have a 'black book' of contacts they can bring with them. Any sales person worth their salt would feel highly uncomfortable about building strong relationships of trust and pitching that their product is the best, only to then jump to a competitor and say the same thing all over again. They would lose all credibility putting their integrity and reputation at stake.

How do we solve the 'sales hiring' conundrum?

Well, I don't think anyone has all the answers on this, however, we at neoci have a few ideas of what has worked for some of our clients.

Firstly, the compensation needs to be right. It seems pretty obvious to most, but it is surprising how many companies kid themselves into thinking their salary and commission packages are competitive, when they're not. Get this bit right and you've got a much better chance. Most sales hunters are driven by money – offering double OTE that isn't realistic won't wash.

Consider training people if you have time. Hiring on personality and attitude or will over skill, puts you in good stead when building a successful team.

Finally, do you actually need someone with industry experience? True sales 'hunters' will perform regardless of what they are selling. Products and technologies can be learned... sales ability, not so much...

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STW's young talent



SUPPORT to Win (STW) is scaling up its projects and BAU capabilities with the addition of four new operational positions to underpin growth and boost support for implementations of UCaaS and CCaaS projects on behalf of STW partners. The first phase of its 2023 recruitment campaign focuses on a 'grow your own' approach that leverages the company's training know-how.

CEO Julie Mills explained: "We are adding four comparatively junior roles

across our team in preparation for net new business in 2023. It's a tried and trusted formula of recruiting individuals who are new to the telecoms industry and nurturing them through our STW Academy training programme." Mills also noted that the company's next hiring round this year will focus on three experienced and proven professionals to take on strategic roles.

Also on the move...

FOLLOWING a strong personal performance and having displayed a full grasp of key leadership skills across strategy and sales Xelion UK's Partner Director Craig Howell has been promoted to the Sales Director position. He joined Xelion three years ago in a move that builds on prior roles within telecoms companies and media outlets in the comms sector. Xelion UK Managing Director



Dave Reynolds said: "Craig has been key to helping grow our UK partner base and is a true asset to the Xelion family." Howell added: "We will continue to build on the great work we have achieved over the years."

FOLLOWING a leadership restructure Tim Griffin has stepped up as Exertis UK CEO. He was previously DCC Technology Managing Director. The move means that Griffin takes direct



responsibility for Exertis UK's Retail and B2B operations along with oversight of other businesses in the UK and Ireland of parent DCC Technology. Griffin stated: "The size of the opportunity in the UK is a major prize and the work we're doing now will bear fruit for many years to come." The reshuffle also saw

UK Managing Director Paul Bryan move into a new international role, leading DCC Technology's operations in the Benelux, Nordics, France and Middle East.

UCAAS provider TSI has pulled in Aaron Foster as Technical Director ahead of launching the Cross Connect telephony platform to the UK channel market. Foster was previously CTO at TelcoSwitch where he spent almost five years working on its platform, and he plans to leverage his experience to establish Cross Connect as a 'disruptive platform within the channel'.

MICHAEL Gowen has joined tech provider Celerity as Chief Revenue Officer. His prior roles include stints at Flow, Daisy and Dimension Data. "I'm joining Celerity at a pivotal time in its expansion," he stated. Craig Aston, Chief Operating Officer, added: "Mike's experience, leadership and energy will enable our sales and marketing teams to reach the next level in supporting our growth journey."



Continued from page 37

and retaining top talent increasingly depends on initiating flexible workforce policies that will keep employees' careers on track and provide access to the resources and professional services that deliver practical support for staff.

Flexible working arrangements make it easier for people to achieve a work/ life balance and dovetail their work and personal worlds more cohesively. This will not only reduce the loss of personnel who feel they have no option but to give up on their career

will support your voice based on their knowledge and opinions. When it comes to decision making at board level, my personal experience is that gender goes out of the window.

How can ambitious women influence their own ability to reach a board level position?

Over the years I've benefited from positive male and female role models who encouraged me to just go for it. Rather than focusing on potential barriers to progression, they instead acted as cheerleaders who proactively counselled me

While we've made significant strides forward as an industry, there's no denying that women are still underrepresented at a leadership level. There's work to be done

ambitions – or worse still, take early retirement or leave the workplace entirely. It also extends the potential pool of candidates the board can look to when selecting the next senior leaders to guide the organisation forward.

Research suggests that for a group to have an impact on decision making it needs to form 30 per cent of the whole. Do you think business leaders in general consider this critical mass ratio when seeking to increase the number of women on their boards? Frankly, I think that diversity of thought and viewpoint are what's important here – not gender. If you're on a board, then you've been selected on merit to be there to run the company and make decisions that will impact everyone - employees, customers, shareholders, communities. If you've got an insightful point to make, you make it and the other board members, male or female,

along the way. So I'd say ambitious women should find good mentors, observe and learn from others, and work on developing genuine and empowering gravitas.

In your experience, has the comms sector in general made progress in recent years on increasing diversity and inclusion at leadership level? While we've made significant strides forward as an industry, there's no denying that women are still underrepresented at a leadership level. So clearly, there's still work to be done. That said, I think that women need to take it upon themselves to consciously skill up for the boardroom, act decisively and with self-confidence - and never be fearful of speaking truth to power.

Armed with the right knowhow and competencies, no woman should ever underrate her credibility when it comes to undertaking an executive leadership role.



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