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Critical need for knowledge share

BRIDGING the market knowledge gap between upstream suppliers and partners must be a top priority if the channel is to get anywhere close to realising its full growth potential, warned Giacom COO Nathan Marke.

SPECIAL REPORT

Comms Dealer research and subsequent analysis of the data during Comms Vision 2023 (8th-10th November, Gleneagles) underscored the criticality of knowledge sharing across the channel and why a more tightly interconnected partner ecosystem is vital to success across all markets.

"We need to do a lot more around taking information we are privileged to have because

of our scale and package it up for the channel," stated Marke (pictured). "Busy entrepreneurs don't always have the space to spend time with analysts and understand technology trends."

Marke reiterated that suppliers have a crucial and urgent role to fulfill in enabling partners. "We've got to find the growth now and chase it," he said. "And make it as easy as possible for partners while giving them confidence. They have the best sales teams out there."

More supportive partnerships are especially key because seizing market opportunities is a big challenge for many resource strapped channel firms.

"We know channel partners are being asked to go broader and deeper," added Marke. "Yet most of these businesses are quite small, sub-£10 million, and can't afford big contract teams. So the responsibility is on us if we are going to make this work."

Comms Vision report p27-38

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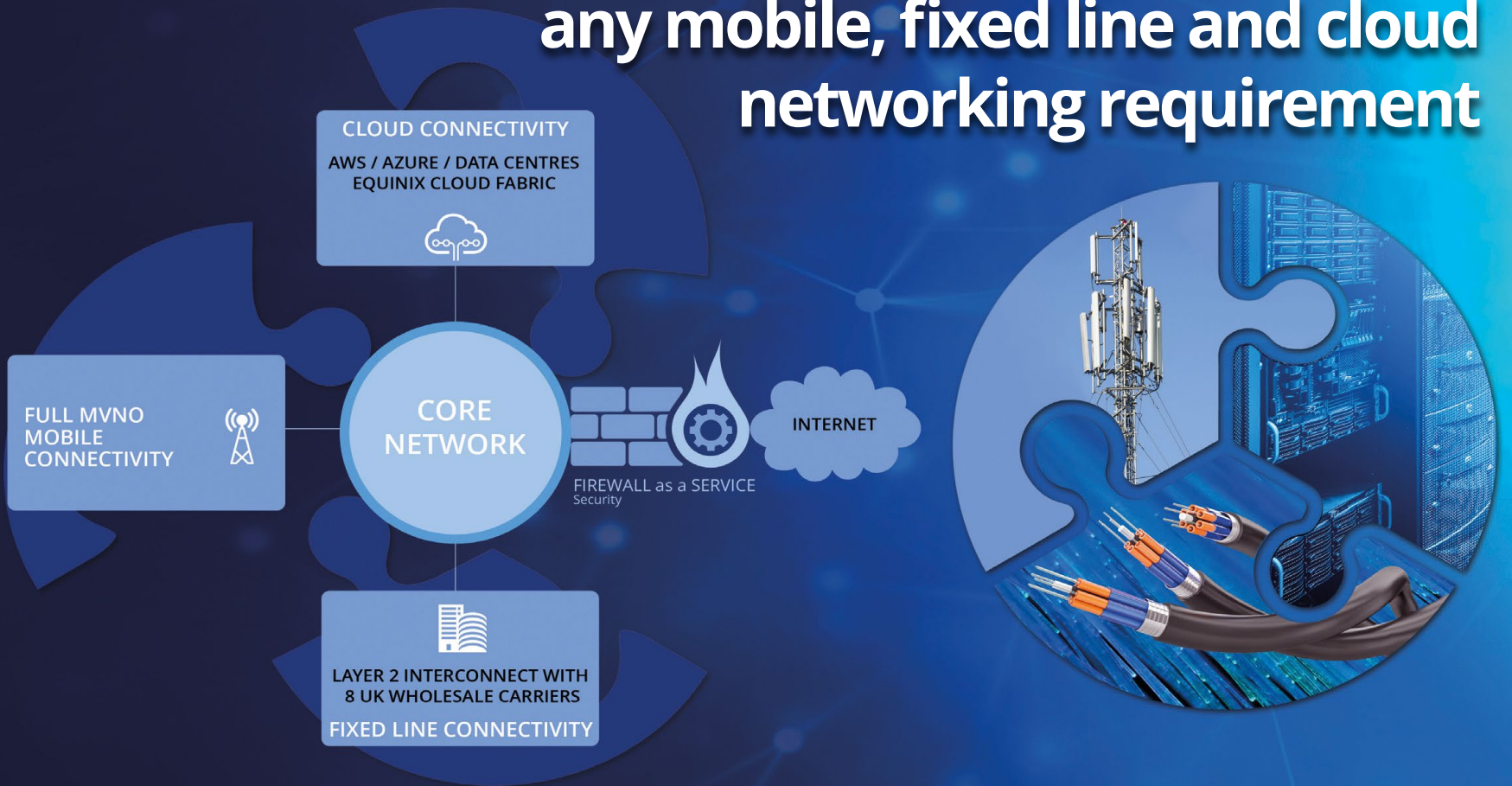
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EDITOR'S COMMENT



Stuart Gilroy

CONVERSATIONS around the convergence of comms and IT should really have run out of steam by now. It's here, it's happening and has been for ages – but is nonetheless still an issue and a hot topic. Before joining Comms Dealer well over 20 years ago I worked on magazines aimed at IT contractors, IT personnel and

the IT recruitment market, and was writing articles on LAN telephony at the same time as editorials around combating the Millennium Bug in the lead up to Y2K. The IT world was steaming ahead with LAN telephony before it became a thing in the comms channel, and I imported my experience into Comms Dealer magazine soon after joining.

Casting our minds way back further, do you remember the Siemens HiCom system being launched, with its stylish phones having a plug at the back end for a computer? Convergence has been on desks and under noses for so many years. Yet still the IT and comms channels remain, in the main, separate entities, but the time is ripe for both sides to extend their portfolios as more and more customers seek a one-stop-shop managed services solution.

There also seems to be some divergence underway within the channel. On the one hand we have companies that prioritise their purpose, put ESG and D&I front and centre, think organisational culture is important and are basically modern. On the flip side, there are channel businesses that think none of that is for them, so they follow the same pathway they've trod since the year dot, disparaging the idea of being far more purposeful and appealing to customers and talent.

These musings on convergence and divergence, when considered in the context of who will be the winners and losers in the time to come, should provide food for thought as we truly are at the pivot of a transition phase that will define the shape of tomorrow's ICT channel.

Stuart Gilroy, Editor

Giacom builds on Sky collaboration

FOLLOWING a distribution agreement between Giacom and Sky Business Wholesale the industry giants wasted no time in setting out their plans to create what they claim will be 'game changing' propositions for the channel.

Initially, Giacom partners gain access to Layer 2 Ethernet services leveraging Sky's network, with Layer 3 services, FTTP and Wi-Fi solutions in the pipeline.

Giacom and Sky are collaborating to further develop a digitally driven model for partners supported by the self-service and management capabilities of Giacom's Cloud Market portal.

Giacom CEO Terry O'Brien said: "Sky Business Wholesale has worked closely with our team to develop a portfolio of disruptive products that give partners a chance to differentiate as we fast approach 2025."

O'Brien also noted that all Sky Business Wholesale products will be supported by services such as mobile back-up, Wi-Fi solutions and security features all configured to work out of the box.

"The two organisations bring complementary skills and we'll continue to look for ways to



Terry O'Brien



Damian Saunders

engineer that together over the coming two to three years," added O'Brien.

Damian Saunders, MD, Sky Business Mid-Market & Wholesale, stated: "We're developing a channel-first product portfolio and Giacom's Cloud Market portal offers seamless integration with our provisioning systems.

"We've got lofty ambitions but our feet are firmly on the ground. That means ensuring we've got a good, reliable, simple to use and simple to resell connectivity suite, which is our baseline. Future plans will focus on developing new products to unlock the generational opportunity presenting itself in the coming years."

According to Saunders, Sky Business Wholesale is well placed to lead on innovation by localising products that are tried and tested in the US via parent

company Comcast, which has its own B2B division turning over \$10bn annually.

O'Brien added: "There are opportunities for much broader moves that add length and breadth to this partnership. For example, who says there isn't capacity for media services in the channel in the future?"

Saunders pointed out that Sky's kit bag includes services such as IPTV and localised TV advertising, which could provide future opportunities for the Giacom channel.

"The partnership is based on innovation and development, but there's also a holistic piece around ESG and what we are doing from a D&I and charity perspective," added Saunders.

Notably, in September Sky Business Wholesale signed up to The Big Goal initiative, headline sponsored by Giacom (see page 10).

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NEWS ROUNDUP

MICROSOFT specialist C2 Software has been acquired by Kick ICT Group. The deal is Kick's ninth in eight years and provides a boost to its Dynamics division. The transaction pushes run rate turnover to over £30m, EBITDA to £4m-plus and recurring revenues to £20.5m. Dundee-based C2 Software has been in business for over 25 years and its acquisition increases Kick's headcount to 170, with more hires planned from the upcoming intake of the Kick Academy, an initiative aimed at recruiting school leavers and graduates.

4COM'S 12th transaction in 18 months sees the Bournemouth-based communications provider snap up 128 customers from Hampshire located Meraki Communications. Meraki was established in 2020 and continues to be a trading partner with 4Com following the deal. To date, 4Com's acquisition strategy has added almost 6,000 customers. Haydn Neville, 4Com's Acquisitions Manager, said: "Selling a customer base, or part of it, can be a quick and cost-effective way of generating funds for a business, and is an increasingly preferable alternative to finance for many companies."

TD SYNEX has confirmed that all four of its UK locations are running on electricity from a renewable source. Kevin Wragg, Director, Environment and Quality Compliance, said: "It's vitally important that our industry continues to make progress in reducing its carbon impact. Every small step takes us closer to net zero."

ABERDEEN-based Converged Communication Solutions has acquired Caleycom, a wireless Internet service provider delivering high speed Internet to rural communities across Scotland. The deal sees Caleycom merge with a separate company under the Converged Group (Converged Rural Broadband) and builds on Converged's acquisition of Aberdeen Technical Services (rebranded as Scot-Tech Fire and Security).

CARDIFF-located IT and telecoms support firm Ikona IT Solutions has become Flotek Group's ninth acquisition in 18 months. Flotek CEO Jay Ball and Ikona owner Spiro Ginis have known each other for 16 years. "Ikona has experience in serving businesses with a varied range of IT and communication needs," said Ball. "The acquisition means Flotek can add these services to our roster."

Chess builds security arm

CHESS Cyber Security and acquired firms Armadillo Sec and Cyberlab Consulting have merged into a single entity called CyberLab, led by former Chess CTO Gavin Wood.

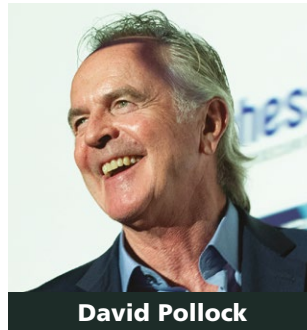
The new cyber security company is positioned as a one-stop-shop for business security requirements and is the culmination of a journey that began in April 2017 when Chess acquired Foursys.

Chess added penetration testing expertise in 2021 with the purchase of Armadillo Sec, and in April this year swooped on Cyberlab Consulting which provides compliance and managed security services, along with a cyber security as a service (CSaaS) platform.

CyberLab's leadership team also includes Tom Davies, CFO, and Cyberlab founder Ryan Bradbury remains as CTO.

Chess Chairman David Pollock stated: "We are merging our cyber expertise under the CyberLab brand to grow our cyber security business."

Wood added: "We are now a one-stop cyber security advisor, from testing, assessment and discovery to consultancy, delivery and hardening. The team is equipped to help businesses of



David Pollock

all sizes, including large public sector organisations."

While CyberLab and Chess have the same shareholders the new company is able to independently pursue its own finance growth partners.

NEWS ROUNDUP

NORTH west-based Wi-Fi and location analytics platform Purple has secured a £10.5m investment from BGF. The deal enables Purple to accelerate its global growth campaign and develop its product offering, including a new asset tracking platform. "The rise of indoor location services has rocketed, providing us with a platform to grow our core product offerings," stated CEO Gavin Wheeldon, who founded the company in 2012. Purple now has more than 1,000 customers worldwide. BGF investor Pinesh Mehta commented: "Purple has tapped into a market that is ripe for growth, both domestically and internationally."

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Fournet ties up 01T deal

FOURNET'S capabilities in providing the underlay end-to-end connectivity for its critical infrastructure and large enterprise customers has been boosted by the acquisition of global network firm 01T.

Palatine-backed FourNet's critical infrastructure customers include the Prime Minister's Office and ambulance services.

Brighton-based 01T is best known for designing, building and managing high speed global networks and delivering connectivity and WAN services. Its customers include sports media and broadcast, online gaming and gambling, financial services and market analytics firms.

FourNet co-founder and CEO Richard Pennington said: "This latest acquisition builds



Richard Pennington

on our network infrastructure offering and allows FourNet to provide an enhanced end-to-end service for critical infrastructure and large enterprise customers with resilient global reach network requirements.

"Essentially, 01T offers the underlay connectivity to FourNet's overlay of communications, CX and cybersecurity managed services. It also allows FourNet to view and manage the end-to-end network and gain more control of network implementation and support, whereas currently we are reliant on third party network aggregators."

01T was founded in 2009 and evolved into a managed service business. In 2020 it switched its focus to international network connectivity which is now its main source of revenue.

01T founder and MD Alex Lower added: "There's synergy between our two companies and joining forces is a natural fit. 01T has been on a similar journey to FourNet – that's why we feel this is the right time to become one company."

The deal is FourNet's fourth acquisition in three years. The company now has more than 200 employees with offices in Manchester, London and Derby.

Mills drives for neurodiversity



Julie Mills champions neurodiversity with the ITP

SPEAKING at The Institute of Telecommunications Professionals' (ITP) Digital Futures seminar held at BT's London HQ last month, neurodiversity champion (and Support to Win CEO) Julie Mills urged delegates to tackle the skills gap by harnessing the 'superpowers' within neurodivergent people.

"Evolving recruitment, training and management practices to support neurodiversity in the communications sector was a key theme at the event," commented Mills, who co-presented with Louis Taylor, who is a Consulting Business Psychologist working with Lexxic, an organisation dedicated to empowering neurodiversity in the workplace.

Mills also shed light on how businesses stand to gain when they become more neurodiversity aware and inclusive. "Especially in the tech and telecoms sector," she stated.

"Many neurodivergent people have hidden superpowers just waiting to be discovered and harnessed in the workplace.

"Attendees were extremely positive – and I lost count of how many delegates spoke to Louis and I about their experiences and what to do next in their companies."

See page 26 to find out more about unleashing the full power of neurodiversity.

Got a news story? email: sgilroy@bpl-business.com

NEWS ROUNDUP

NFON's trading performance during the first three quarters of 2023 has provided a 'solid foundation for sustainable, profitable growth', claims the European cloud comms vendor in a business update. Revenue was up 2.1% from 60.4m euros to 61.7m euros, while recurring revenue rose 5.1% to 57.8m euros in the period, taking the share of recurring revenue to 93.6%. NFON also revealed that former SAP SVP Andreas Wesselmann will join the business as CTO in January. He brings 20 years experience working in international environments.

MITEL'S innovation agenda and technology strategy is to be led by Luiz Domingos, the vendor's newly appointed CTO and Head of Large Enterprise R&D. He joined Mitel via its acquisition of Unify earlier this year. "Adding Luiz's knowledge and experience allows us to capitalise on integrating emerging technologies into our portfolio," commented Tarun Loomba, President and CEO. "His leadership will be especially valuable as we bring together Mitel and Unify's R&D operations over the coming months and deliver a combined go-to-market strategy and product portfolio."



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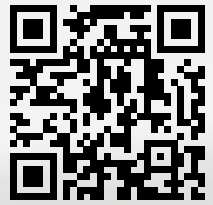
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TalkTalk in Zoom link-up

A link-up with Zoom marks a big step in TalkTalk Wholesale Services' shift away from its traditional role as a connectivity-focused supplier towards becoming a channel-only platform-based ICT service provider. "Traditionally we have had a connectivity-heavy offering," stated TalkTalk Wholesale Services Managing Director Tom O'Hagan. "Our aim is to move towards being a wholesale platform business providing CCaaS and UCaaS with Zoom and enter the security arena, with all this underpinned by connectivity."



Tom O'Hagan

The deal expands Zoom's portfolio to the UK channel and according to Dion Smith, the company's Head of Channels in EMEA, the high profile partnership with TalkTalk Wholesale Services will help to shake off perceptions that Zoom is a meeting-only product. "We have diversified over the last 10 years to have an

all-encompassing UC platform," he stated. "We are tapping into an ecosystem of partners that have the ability to sell these products individually or as a platform, driving full end-to-end collaboration."

TalkTalk Wholesale Services will offer Zoom Phone (a cloud phone solution



Dion Smith

for businesses with circa six million global users) and Zoom Contact Centre (an omnichannel solution optimised for video). The portfolio has an AI capability as standard and expands to include value-added services such as whiteboards, webinars, events and analytics. O'Hagan commented: "Zoom has

demonstrated its commitment to shaping the future of communications and collaboration, releasing over 500 new features in the last quarter alone, including Zoom AI Companion."

On Zoom's evolving channel strategy, Smith noted: "We sent a clear message to the market around 18 months ago that we wanted to become a channel-first organisation, and forming a strategic partnership with TalkTalk Wholesale Services is a catalyst towards this target."

All Zoom solutions will be consumable via 1Portal, TalkTalk Wholesale Services' customer interface, as well as its suite of APIs, enabling channel partners to work at scale in their preferred systems, with quotes updated in real-time as solution designs change. Also, the platform can be managed centrally through the Zoom Administrator portal and dashboard. ■

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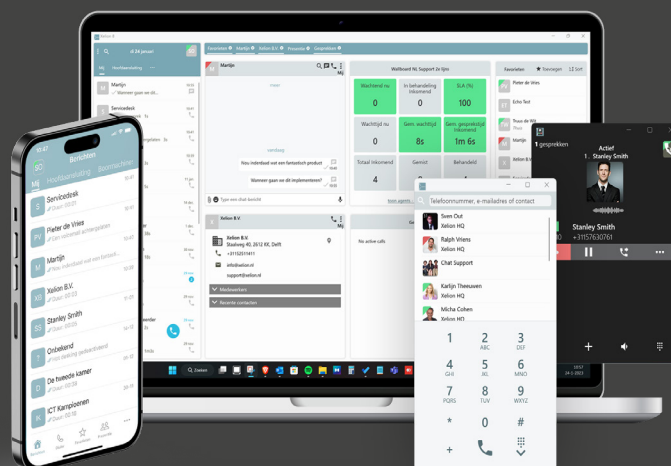
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The Big Goal lifts off!

The Big Goal is officially up and running with two Street Soccer Foundation academies already set up and changing the lives of disadvantaged young people in Hull and Salford. As the main sponsor of The Big Goal, Giacom was the first to support the inaugural academies run in association with the Tigers Trust (Hull City) and Foundation 92 (Salford City). Giacom's team welcomed graduates to the two academies at site visits last month and were delighted at the reactions of the young people who will now be learning new skills to help them find direction and purpose in their lives, through the power of football.

"Visiting our sponsored academy at Hull City through the Tigers Trust was a wonderful experience," said Hayley Duckmanton, CPO at Giacom. "It was great to see the academy in progress and to see the positive



The Foundation 92 Street Soccer Foundation Academy

impact it has made. The Big Goal is going to make such a difference to so many peoples' lives and Giacom is proud to be involved."

Andrew Wilford, MD, Mobile, Giacom, who visited the Foundation 92 Academy, added: "Seeing how The Big Goal makes a difference in the lives of the individuals reinforces the reasons for being involved. The work being done by The Street Soccer Foundation is transformational."



The Tigers Trust Street Soccer Foundation Academy

The Big Goal launched at St George's Park in October giving teams from the UK ICT industry the chance to play each other in a national five-a-side tournament, with the finals taking place at St George's Park next summer. Each team's entry fee means they become the sponsor of Street Soccer Academy locally, which will help struggling young people in their area gain confidence and learn work skills in an inspiring football environment.

Street Soccer Foundation CEO Keith Mabbutt commented: "We already have 25 companies signed up, which is truly amazing as it means over 300 disadvantaged young people will get help to change their lives. This is just the beginning, and our overall aim is to help 1,600 young people across the UK.

"That target has been set because there are 1,600 holes in a regulation football goal and we aim to prevent that many young people from slipping through the net into a life of homelessness and despair."

There's still time to become a Founding Member of The Big Goal initiative by signing up here: www.thebiggoal.co.uk

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Trading results still hold

Megabyte Chief Analyst Philip Carse looks at the key trading results from the past quarter, analyses how the sector has performed and spotlights the trends he expects to see during the coming year.

What is emblematic of the broader comms sector, channel stalwart Gamma highlighted resilient trading with first half to June 2023 revenues and EBITDA of £256m and £56.5m, both up 9%. Growth was similar across Business (the former Indirect, £165m), Enterprise (former Direct, £53.0m) and Europe (£38.4m), in the UK supported by price rises. Gamma now anticipates FY23 EBITDA in the top half of market expectations of £110-£117m (>+8%). Unsurprisingly, Gamma's resilient outlook is supported by recent conversations with large B2B-focused channel players such as SCG, Babble, Focus etc and other aggregators like Giacom.

Inevitably, some players have struggled in recent times, aside from poor management reflecting factors such as pandemic impacts (especially if exposure to verticals such as retail and hospitality and/or reliant on mobile roaming) and equipment supply issues. Newer headwinds include, for some smaller resellers, the PSTN switch-off/migration from analogue to digital services, with the potential loss of customers/on-prem maintenance revenues, exposure of paid for but unused lines etc. The latter is, of course, an opportunity for better prepared resellers.

How long can this resilience last in the face of ongoing macro-economic uncertainties

and challenges? Whilst some headwinds are easing (notably general inflation/energy prices and volatility, skills recruitment and retention, and hardware supply), economic growth has trickled to a standstill (<1% forecast for 2023 and 2024 versus +4.3% in 2022), whilst the rapid rise in interest base rates over the last two years from 0.1% to 5.25% is impacting consumer and business spending and may push some business customers over the edge. The latter is also impacting valuations, private equity investment and general M&A volumes.

Resilience

Results from public companies and discussions with private firms continue to highlight the relative resilience of the UK telecoms sector that has served it well through the pandemic and subsequent macro-economic uncertainty, with mission critical, contracted recurring revenues recently bolstered by RPI+ price rises helping mitigate service providers' own inflationary pressures.

This is helping the major networks at least stabilise if not grow revenues and profitability. There are of course headwinds, including consumer softness highlighted by VMO2, but we would judge telecoms to be more resilient than, say, some IT services and particularly more discretionary spend areas such as IT consulting.



Philip Carse

Results from public companies and discussions with private firms continue to highlight the relative resilience of the UK telecoms sector

Turning to the latest quarterly results from the big telcos, again they highlight that the sector remains generally resilient, buoyed by mission critical/consumer must-have services (though with evidence of consumer 'optimisation'), contracted

revenues and inflation beating price rises. The latter in turn provides an umbrella for resellers to mitigate their own inflation pressures.

But can revenues remain resilient in the face of continued macro uncertainty

and weakness? Looking at recent major telco results, BT reported in-line results for the first half to September 2023, with EBITDA of £4.1bn (+6%, +4% pro forma) on revenues of £10.4bn (+3% pro forma), whilst capex was down 11% to £2.3bn, courtesy of improving FTTP costs in the lower half of BT's £250-£350 per premise range. Revenue growth was largely driven by price rises and increased fibre-enabled product sales.

Fibre footprint

The total FTTP footprint now stands at 12m with 3.9m connections, though BT flagged softness in overall broadband connections, down 255k in the first half versus an annual 400k target. BT re-affirmed FY24 guidance of revenue and EBITDA growth, capex of circa £5.0bn but an improving FCF outlook, towards the top end of previously flagged £1.0-1.3bn. Beyond FY24 BT continues to expect consistent growth in revenue and EBITDA, whilst post FTTP capex falls should generate an additional £1.5bn FCF by the end of the decade, more than double current levels.

For its third quarter to September 2023, Virgin Media O2 (VMO2) reported EBITDA of £1,047m (+5.6% boosted by synergies) on revenues of £2,772m (+7.1%, +1.3% excluding nexfibre construction), whilst capex fell 1.5%. Fibre rollout progress saw 251k premises passed (predominantly the

ing up

nexfibre JV with an additional 175k premises acquired with Upp). VMO2 downgraded revenue guidance from 'growth' to now 'stable' due to consumer optimisation in fixed line, whilst continuing to deliver mid-single-digit EBITDA growth.

Vodafone reported an in-line first half to September 2023 with Group EBITDA of 6.4bn euros (-12%) on revenues of 21.9bn euros (-4.3%), but with EBITDA up 0.3% in organic terms whilst service revenues

to 1,059m euros (driven by SME and corporate mobile), EBITDA fell 5.3% to 640m euros, with 3.3pp due to higher energy costs.

Overall, we estimate that the combined revenues of BT's UK retail activities (ie, excluding Openreach and Global Services), VMO2, Vodafone UK and Three UK are down around 5% compared with the pre-pandemic 2019 (to £31.2bn) – albeit with EBITDA down a faster 9% to £9.5bn and capex up a FTTP-driven 7%

to £5bn – an arguably not bad outcome given the challenges of the last three to four years and probably little different to pre-2019 market trends.

Generally, it feels as if the sector can't be immune from

general pressures that are playing out in other parts of the tech market with more discretionary spend, for example IT consulting, where companies previously growing in high teens are now flat or declining (Endava, for example). Thus, although the broader outlook seems fairly stable for UK tech companies at the moment it is prudent to plan for continued if not slightly tightening trading conditions for the telecoms sector through 2024. That said, its relative mission criticality and contracted recurring revenue visibility will continue to stand it in good stead. ■

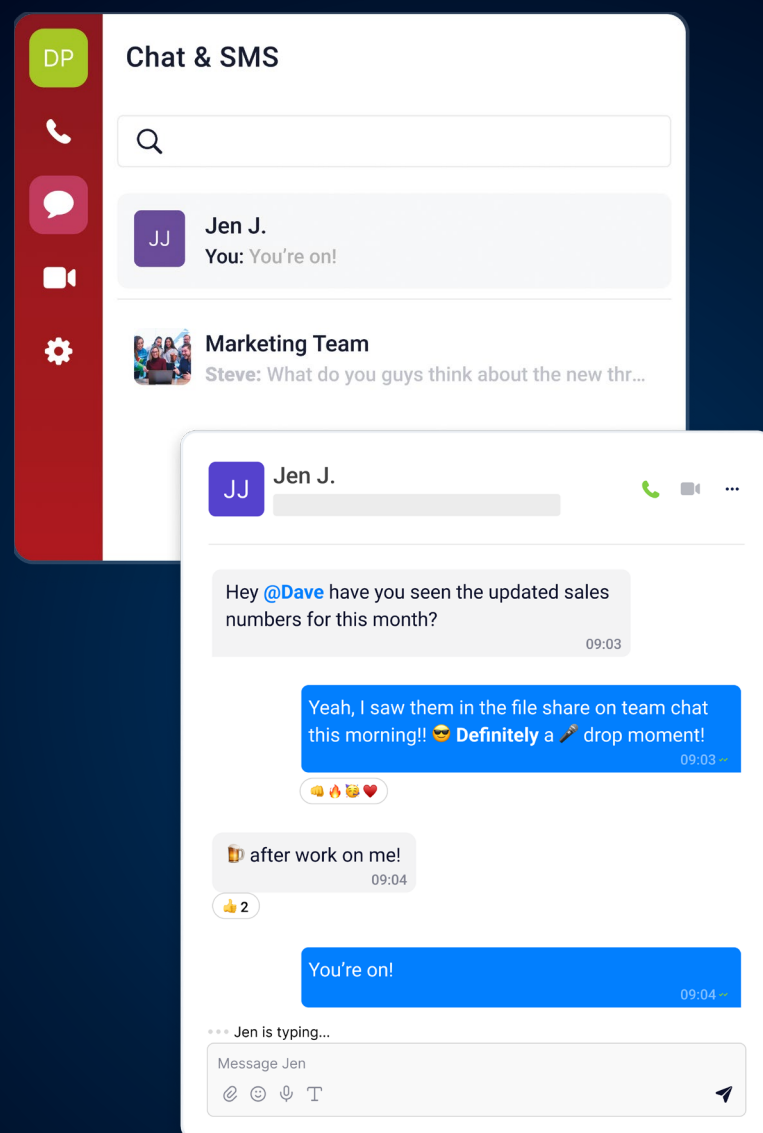
This article focuses on the Telecoms Services peer group, comprising 1,038 UK-registered firms. **More company news on page 14.** philip.carse@megabuyte.com

We judge telecoms to be more resilient than some IT services, particularly more discretionary spend areas such as IT consulting

grew 4.2% organically to 18.6bn euros. Highlights included a return to growth in Germany. Vodafone reiterated full year guidance of 'broadly flat' EBITDA (13.3bn euros) and adjusted FCF of 'around 3.3bn euros'.

For Vodafone UK (15% of Group), H1 service revenues rose 5.6% organically to 2,822m euros, within which mobile service revenues rose 6.2% to 2,096m euros (monthly ARPU up 3% to £15.3 and customers up 4% to 18.2m) whilst Fixed line revenues rose 3.8% to 726m euros (driven by consumer broadband, +69k to 1.3m customers via BT and CityFibre). Note however that the 69k additions in the half was down on +112k in H2 23. Vodafone UK B2B revenues rose 3.8%

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Zoom nudges up FCF guidance as Zoom Phone reaches seven million seats

US-listed videoconferencing and UC player Zoom, which recently signed up TalkTalk as a UK distribution partner, has reported an expectations-beating third quarter to October 2023 with adjusted operating profits up 17% at \$447m (equating to \$474m EBITDA, 10% ahead of expectations) on revenues up 3.2% at \$1,137m, whilst FCF (OCF-capex) jumped 66% to \$453m. Growth drivers included a 5% rise in enterprise customers (to 220k), with a 105% net expansion rate. Enterprise is now 58% of revenues, up 2pp. Zoom Phone seats reached 7m, with 9% quarter on quarter growth in customers with >10k seats. Zoom contact centre reached 700 customers, up from 500 last quarter. Geographically, the Americas grew 5% to \$814m revenues, whereas EMEA and APAC both fell 2% to \$178m and \$144m respectively. Cash and marketable securities reached \$6.5bn, partly offset by Remaining Performance Obligations (RPO, unbilled plus deferred revenues) reaching \$3.6bn, up 10%. Zoom nudged up the full year outlook for revenues (mid-point of \$4.59bn, +3%) and FCF (\$1.34bn, +13%).

Twilio and RingCentral offer profits cheer

CPaaS business Twilio reported well received results for the third quarter to September 2023 with adjusted operating profit of \$136m (FY22: \$35m) on revenues up 5% (8% organic) at \$1.03bn (though flat sequentially), beating expectations by 65% and 4% respectively. This led the company to increase full year adjusted profit guidance to \$475-485m (from \$350-400m); essentially improving profits on flat revenues. Coincidentally,

UCaaS firm RingCentral also released expectations-beating Q3 results, with adjusted operating profits of \$107m (+55%) on revenues of \$558m (+10%). However, both companies' shift from growth to profits has yet to benefit their share prices, still down 87% and 94% versus mid 2021 highs.

COLT gets the keys to Lumen's \$1.8bn EMEA biz

Almost exactly a year since being announced and in line with the original planned schedule, telco COLT has closed its transformative acquisition of the EMEA business of US-listed telco Lumen for \$1.8bn/11x 2021 EBITDA, with the implied circa \$160-165m (165-170m euros) EBITDA representing a sizeable uplift on COLT's 479m euros EBITDA for the same period. It's fair to say that both companies need the deal: COLT's calendar 2022 accounts revealed yet more lacklustre trading, 1,612m euros revenues (flat), EBITDA of 435m euros (-9.1% due to cost inflation), deal-related exceptional costs of 26.0m euros, and capex of 482m euros (+43% due to network and data centre investments); whilst Lumen has renegotiated terms on \$7bn of its \$20.2bn debt, which represents the bulk of its \$21bn EV/4.6x 2023 EBITDA valuation.

ITS Technology takes new debt avenues with £100m for B2B fibre play

Wholesale B2B fibre network services provider ITS Technology has secured £100m in new debt funding from Avenue Capital Group (which also funds Netomnia), supplementing £145m raised from Aviva in 2020 and 2022. The funding will support ITS's goal of passing 50% of UK business premises, including M&A, with the latter scope highlighted by the company's acquisition of Nextgenaccess. ■

Comms Visioners consume insights at breakfast forum

Pressure on certain invested-in channel companies to deliver stronger performances is mounting, according to Knight Corporate Finance Director Adam Zoldan. "Private Equity companies are highly motivated to deploy funds and the sector is still seen as relatively safe," he stated. "However, we do need to see some big returns on investment from investors who have been involved for three to five years."

Speaking at the Comms Vision ICT Investment Forum Breakfast Briefing (November 11th, Gleneagles) Zoldan also noted that private equity firms made 47 investments across the industry over the last 12 months, similar to the number of deals in 2022 with a trend towards investors favouring MSPs over comms resellers. "Buy and build continues to drive deals," he added. "In 2024 some of these larger buy and builders may begin to consolidate."

In total, there were 284 transactions in the last 12 months, according to Zoldan, representing a 30 per cent decline compared to the prior year. "At Comms Vision 2022 I shared that a deal was being done for every day of the week. This year, it is every business day of the week," observed Zoldan.

He also pointed to BCM's acquisition of Pure IP as a sign that more American investors may begin to



Adam Zoldan

We need to see some big returns on investment from investors who have been involved for three to five years

take a greater interest in UK MSPs in 2024. While Zoldan forecasts the number of deals in 2024 to remain flat he highlighted that the conditions for growth remain propitious for companies with the right strategy. "The year ahead could be a little bumpy but there are plenty of things you can think about when growing your business," he stated.

Zoldan offered four key pieces of advice to growth-minded delegates, with realistic growth targets being key among them. "If

an investor believes your plans are possible, they will back you," he stated.

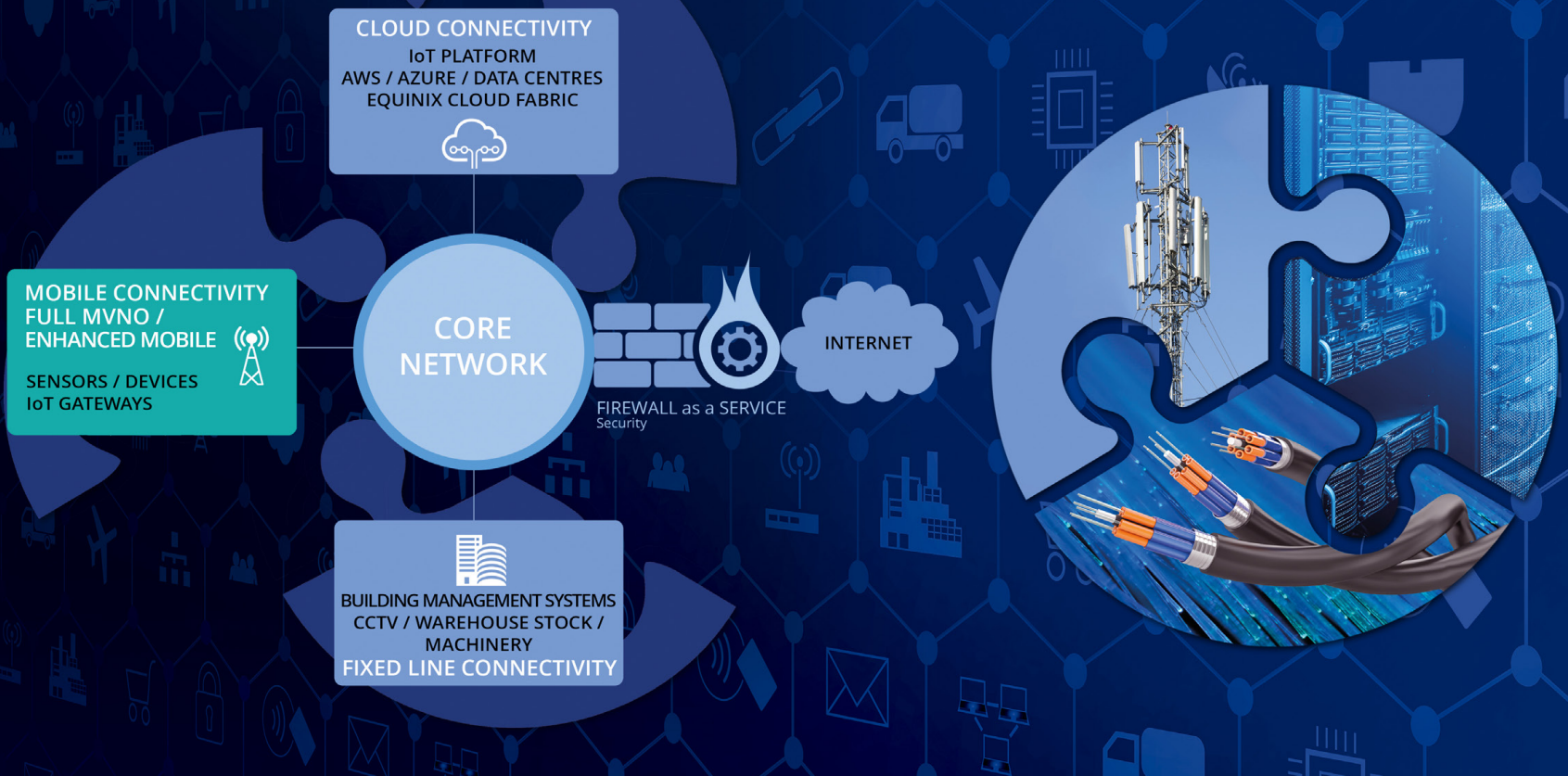
Zoldan also urged delegates to prioritise customer retention and drive cross-sell opportunities. "Investors like to see companies that will grow their revenue even if they don't add customers," he added. Business leaders should also optimise their go-to-market spend and focus on building a strong business line, advised Zoldan. ■

See pages 27-38 for full coverage of Comms Vision 2023



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AI in the contact centre

Developing an organisation-wide AI capability is rising up the corporate agenda and according to Cirrus CEO Jason Roos contact centre applications are blazing the trail with use cases not only driving productivity but also directly generating new business.

Artificial Intelligence is transforming the contact centre, automating tasks and workflows that traditionally require human intervention. And according to Roos, these developments provide various threads of opportunity that can be woven together and delivered through a single all-embracing AI platform. This is a far cry from the performance of most contact centres today which fail to meet SLA and CX objectives, claimed Roos, who pointed to the downward pressure on payroll costs creating a shortage of people to deal with contact volumes.

"The ability to combat this challenge by making agents more productive is key," he stated. "We can shift contact from synchronous, one-to-one in a phone call, to asynchronous, or one-to-many via webchat or WhatsApp. We can also use engineering improvements to facilitate agent workflows."

As well as boosting productivity, Roos noted that

wait times will become a bane of the past thanks to AI. "You'll have somebody who can answer any question across the entire business instantly," stated Roos. "Our mission is to eliminate poor customer experiences and we're reaching a point where we can achieve that goal. We'll also see cost reductions. Contact centres have a high staff turnover so you're constantly training. Being able to shorten training lead times will help to reduce those costs."

Roos noted that in practical terms, ChatGPT, or any large language model, will be able to learn training manuals within a couple of hours. "AI will massively shorten training lead times which will improve first contact resolution and improve customer experiences," he added. "AI will have all the information – this is a game changer."

AI also enables the creation of hybrid working models, where the AI assists both the agent and the consumer by automating tasks and contact workflows, leading to much



Jason Roos

needed productivity and CX gains. This may prompt some people to think that AI will replace human agents, but that's not the case, pointed out Roos. "We are not seeing a reduction in agent headcount because there was too much work to start with," he stated. "What we are seeing is significant improvements in SLA and CX."

"While the emergence of advanced AI like GPT-based models has been anticipated to reduce the need for human contact centre agents by handling repetitive and simple customer interactions, the integration of AI into online customer service may, paradoxically, result in an increase in qualified contact volumes and an increase rather than a decrease in agent employment."

According to Roos, the contact centre industry is going to move into a space where businesses are able to increase their revenue significantly. He says AI will give them the ability to sell more, citing greater website engagement as an example. This is good news because the hardest and most challenging task for most businesses is generating new business.

"Our goal is to provide a solution that will engage everybody who hits a website, qualify those that are monetisable and where there's a business case feed them through to the contact centre," he added. "Those that aren't monetisable can also be answered when the website isn't able to give them what they want."

Against this backdrop of market potential Cirrus has introduced its latest upgrade, which draws together key contact centre tools and technologies onto a single platform, including CRM, workforce optimisation, and omnichannel features such as outbound dialler, drag-and-drop IVR and workflow builder, plus agent scripting – with a single log-in. "Bringing these elements onto one platform also makes it easier to deploy generative AI like Cirrus' new AI assistant called Cirrus Copilot," added Roos.

He says the new platform will enable businesses of all sizes to create more personalised experiences with AI driving the conversation. He cited a practical example. "The real-time agent assistance feature creates a live transcription of the call which is processed in real-time by AI which absorbs the specifics of the customer's query along with the agent's response," explained Roos. "AI can then apply that knowledge immediately to provide the agent with moderation or next best actions."

Also, connecting AI to the omnichannel platform enables the product to consume every email, WhatsApp message, SMS, webchat and voice call that's been transcribed and that the business has ever created. "But then you have to moderate and organise the content so that ChatGPT is giving the answer you really want," stated Roos. "Once the training is completed it has access to the full omnichannel contact centre capability excluding voice. We'll continue to expand AI capabilities with more integrations and enhance the overall user experience." ■

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A smiling woman with long brown hair is holding a large blue sign with white text. The sign reads "even greater opportunities for resellers!". In the background, there are blurred images of other people in an office setting.

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MSPs to drive collaboration

Pressure is mounting on traditional MSPs to reinvent their business models but laying the foundations for a sustainable and value building future is no easy task. Therefore a primary aim of last month's MSP Fit for the Future strategic insight session (held in association with ANS Group) was to help answer two critical questions: How much life is left in the traditional MSP model? And how will tapping into the capabilities of non-traditional strategic partners help generate and capture long-term differentiated value?

Today's MSPs operate in a fast-moving world characterised by technological disruption, greater complexity, the move to the cloud, the exponential rise of applications, shifting customer expectations – all while cyber security is shooting up the corporate agenda. These are just some of the considerations facing MSP business leaders as they work out how to flex and evolve. "The days of high volume leased line and FTTP selling are long gone," stated Ryan Martin, Indirect Sales Manager, ANS Group. "Yet few seem to understand how to move into the cloud and security space effectively. The partnership model will change and collaboration will be a key enabler."

The traditional channel business model will likely tick along for a while yet, but the heyday is over and value creation is fundamentally changing, bringing opportunities for growth among proactive MSPs and threats to those that remain static. Yet there remains a big and fundamental challenge when seeking to make the most of these opportunities – enablement

and talent. "The UC world is fantastic at supporting partners, their sales teams, account managers, while providing training and regular incentives," said Phil Scanlon, Technical Services Director, Elite Group. "In the IT space you are likely to have to self-serve, so you end up employing your own people to do what I consider to be the job of vendor support."

Changing times

For MSPs who lack the resources to self-serve their requirements, identifying the right strategic partnerships will be especially key to gaining the required inputs for their future growth prospects. "The model is changing," commented Martin. "We come from a world where everything was delivered as a white label service, but that won't exist in this new world. We are in a major transition period and the most important element for MSPs is enablement. How you bring the partner on that journey and enable them to create value for their own customers is the most important factor."

Business model change is also reflected in the evolving sales process,



Industry thinkers unravel the MSP business model conundrum

There are many great channel organisations that want to move into the cloud and cyber security space, and perhaps areas such as CRM Dynamics, but there's a huge skills gap. So how do they make that jump?

with the pre-sales function emerging as a particularly time-consuming and costly necessity that comes with some risk. "We have made

a significant investment in pre-sales resource and highly accredited technical people," commented Stephen Dracup, Chief Operating Officer,

Chess. "Customers are struggling to know how to transform their businesses and need good advice and great delivery. The trusted



Driving the MSP collaboration agenda

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tion ecosystem model

We're expanding our pre-sales professional services team, which is a lot bigger now than our sales team – mainly around cloud and security. There is still growth in traditional connectivity, UC and contact centre, but that is transactional. The wholesale model is purely about how we can enable MSPs with a security play and package those services."

A cornerstone of any sustainable value building business model is understanding what your differentiating factors are, and therefore your competitive advantage. "We're heading into a world where everyone will be offering a ubiquitous service and differentiation will become key," observed Martin. "There are many great channel organisations that want to move into the cloud and cyber security space, and perhaps areas such as CRM Dynamics, but there's a huge skills gap. So how do they make that jump? There is an opportunity to drive this conversation across the channel."

It's not news that business models in the channel are fast evolving, in part based on an understanding of how end customers in general prefer to consume what they buy. This evolution in the consumption of digital products and services will continue to change how value is created, so there is a big question around how far the traditional go-to-market model can survive such megatrends, creating a challenge for MSPs.

"We're being compared against expectations in the consumer world," stated

Daniel Brown, Operations Director, Curveball Solutions. "Simplifying things and applying that to the customer is a massive challenge and headache. We need to evolve in terms of the services we deliver. But we also face a talent shortage."

Key decision

It goes without saying that extending the life of a dwindling business model is not a good strategy, and that effective business model change requires a combination of strategic vision and decisive bravery. Therefore to avoid the risk of remaining grounded in its

It was a seven year transition. We learnt incrementally, and solving each challenge opened up the next market opportunity

own traditional model, and to re-engineer operations to harness the power of 'the new', ANS Group has pursued a 'burn the boat' business transformation. "ANS of old was a traditional managed service provider focused on IT infrastructure," explained Joe Wolski, Chief Revenue Officer, ANS Group. "There was high margin on the kit itself and low touch once it was deployed on a three to five year contract. Then cloud started to become a thing. That shifted the margins and the business model.

"We went through an aggressive transformation with a burn the boat strategy. We didn't want to look back and knew we couldn't enable the sales team to embrace 'the new' while the old was still there and easy to revert back to. We

gave no other option. The same scenario rings true for many MSPs today. We adapted the whole business around proactive services and value. It was a seven year transition. We learnt incrementally, and solving each challenge opened up the next market opportunity."

For many channel organisations, whether to reassess their strategy and business model could be one the most important questions they have ever considered. And Scanlon noted that Elite Group made the decision to go cloud-first every time in 2016, which

we've seen, for IT partners it's an easier transition and they don't need much support, but a telco moving into IT needs far more support – it's a difficult transition for them," noted Mandy Fazelynia, Managing Director, Zest4. "There is a lot of fear when taking on new products, such as moving from traditional telco into IoT. They've had customers for many years and are nervous about selling something they don't know well. So there is an opening to put a service wrap around the product and take partners on a journey of evolution."

Another factor in maximising future opportunities is to have a tight grip on what's coming next. "You can always guarantee that there's going to be more IT tomorrow than yesterday,"

stated Dave Funnell, Senior Manager, Cloud Provider Business, VMware. "Around 400 million applications were produced over the past 14 years and there will be 400 million more over the coming five years. The velocity is increasing massively – everything is about the application."

On the flip side, Andrew Wilford, Managing Director – Mobile, Giacom, is on a mission to embed traditional comms into the cloud partner base as part of an all encompassing solution. "Our fastest growing partners are selling across the whole product portfolio," he stated. "IT partners that add commodity lines expand their margins and multi-product solution set. We have a mix of ex-comms partners that have pivoted

Continued on page 20



ndrum

provider element has never been more true."

New sales approach

Antony Black, Channel Sales Director, Wavenet, is also developing a new approach to securing sustained growth by harnessing the power of consultancy. "Sales today are different," he commented. "You speak to the prospect, do the gap analysis and then there may be a 12 month programme to deliver.



Driving the MSP collaboration agenda



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Continued from page 19 into cloud and cloud-based voice. They are playing in the MSP space and market themselves as such. They are creating boiler plate repeatable services encompassing Teams and 365, for example, along with the connectivity and mobile. The most successful partners provide all services on a monthly cost per seat basis."



A goal of all MSPs is to take customer value to the next level, and Alan Stephenson-Brown, CEO, Evolve, shed light on how his company has grasped a deep understanding of how value is created beyond the initial scope of customer engagement, with trust residing at the core of extended relationships with clients. "The managed service wrap we put around SD WAN

Growth lies in all of us collaborating with each other to fill the gaps

has prompted customers to extend the value we provide into other areas, like providing visibility of dispersed devices, the status of which is unknown," he stated. "We have extended our service wrap to monitor a client's own internal service and given them a view of the status across thousands of devices. We use the platform to push our management capability out, enabling us to provide trouble shooting support beyond the networks."

For MSPs, the key to making the most of current and emerging opportunities is enablement and delivery. "It's easy to buy something, but the differentiation is in implementing it properly," added Dracup. "Doing it securely may also require a big infrastructural shift from where customers are today. And consider the impact of

AI on businesses: It's all very exciting, but the truth of the matter is that if you let AI loose on a badly constructed data infrastructure you're going to have problems. The differentiation factors are capability, accreditations and a track record of doing things properly."

We can see from this discussion that MSPs are under pressure to perform a deeper and wider role in their markets. And achieving long-term success hinges on maximising two interconnected factors: The link between sustained value creation

and competitive advantage; and secondly, how the skills/resources gap can be bridged through high level strategic partnerships. "The telecoms channel is unique and some cloud and security vendors don't understand it, nor the power of the comms channel," added Martin. "Future growth lies in all of us collaborating with each other to fill the gaps Microsoft has in its portfolio. It's all about the enablement.

"For example, we work with MSPs that are proficient in Azure and Teams and they may have Dynamics opportunities, but Dynamics is difficult to deliver. So rather than close the door to those opportunities, if you find the right partner you can deliver a broader portfolio to the customer. MSPs will accelerate their success if they get their collaboration strategy right."

More key points to consider...

Many resellers won't touch cloud as they don't understand it. But there are alternatives to the hyperscalers – and cloud can mean many different things to different people.

Ryan Martin, Indirect Sales Manager, ANS Group

Getting the basics right from an infrastructure perspective is a key growth area. There are multi-million pound businesses that don't have the basic infrastructure.

Daniel Brown, Operations Director, Curveball Solutions

As an ISP, it's about technically enhancing the product, and connecting securely and directly to the cloud provider without going over the Internet.

Peter Wightman, Managing Director, IP River

Finding the right sales and account managers is hard and you'll have to commit to training them yourself.

Phil Scanlon, Technical Services Director, Elite Group

We're seeing 25 to 30 per cent growth in cloud versus comms which is expected to be static at around two to three per cent over the next five years.

Andrew Wilford, Managing Director – Mobile, Giacom

Penetration testing is a great entry point for MSPs, potentially displacing the existing MSP.

Antony Black, Channel Sales Director, Wavenet

Seize All-IP opportunity urges Marke

The future success of comms resellers hinges in large part on whether (and how quickly) they seize the All-IP and Microsoft Teams opportunities, with the fastest responding partners certain to gain most. That was the priority message Giacom presented to delegates attending its All-IP Summit (31st October, the IET, Westminster), where COO Nathan Marke also urged partners to reframe the narrative around the 2025 PSTN switch off.

"We are all partly responsible for making this transition look like a chore," he stated. "To date we have put a product lens on the switch off but SMBs have little interest in swapping products. We are not leading with the benefits to their businesses. The switch off is a customer switch off – so switch them on with All-IP."

Marke also noted that SMBs are especially interested in how investment in technology can ensure business continuity, enable hybrid working and improve their businesses. "They

are also looking for a strategic partner to help them achieve their goals and value propositions need to demonstrate this vision," he added.

Enabling growth

Giacom used the conference as a launch pad for its All-IP Managed Service designed to support resellers and MSPs to transform their existing services and grow their businesses through the All-IP opportunity. Giacom also spotlighted a rich seam of opportunity in maximising products around Microsoft Teams. Claire Makin, Giacom's Head of Voice Portfolio, called for a show of hands to see how many delegates used Teams, and the response was unanimous. But only three sold Teams.

"This response signifies that users are out there but perhaps being supported by Microsoft directly or a soon to be competing MSP," said Makin. "The products MSPs provide are underpinned by good quality connectivity – the next step is to branch further into communications. If not, competing MSPs will eat their lunch."



Nathan Marke



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Avoira chief on his winning

Avoira's winning formula is based on broad synergies delivered through multiple strategic mergers supported by bold leadership actions, according to Managing Director Andrew Roberts.

Avoira was formed in July 2019 through the merger of long-established VAR Pennine Telecom, audio-visual specialist Videonations and two-way radio firm Co-Channel. Communications devices provider Rocom subsequently merged with Avoira in January 2020 while IT managed services specialist Yellowbus joined the group the following October. "The marriage of these specialisms gives us the ability to deliver fluent, integrated and multi-disciplinary solutions," said Roberts.

Pennine, the core business from which Avoira was born, has roots dating back to 1976. "I joined the company – which was founded by Ian MacPherson and Richard Evans – as an apprentice in 1978 working on the workshop benches," stated Roberts. "After successive promotions I then led an MBO as Sales Director in 2003 and have been at the helm ever since."

Big turning points for the business came with the liberalisation of telecoms in 1984 which lit the blue touch

paper. "In what became something of a template for our future growth we sensed an opportunity and seized it, diversifying from our two-way radio roots into business telephony," added Roberts. "Then, the MBO became a catalyst for growth with an ambitious and agile management team pursuing expansion through diversification of specialisms."

At the time of the MBO Pennine employed 85 people and generated a turnover of £9 million. Today, the company employs nearly 160 staff across sites in Bury, Bristol, Cumbria, London and Warrington, with turnover now reaching £28 million.

"Our customer base is diverse, embracing SMEs, major corporates, local authorities, primary, secondary, further and higher education institutions and government departments," said Roberts. "Projects can range from Wi-Fi networking for a primary school through to implementing and managing radio and mobile communications at Hinckley Point C, Europe's largest construction site." Avoira's solution set includes



Andrew Roberts

Smarter, more powerful speech analytics solutions will become must-have tools because of their ability to significantly enhance the customer experience, increase productivity and boost compliance with internal and regulatory requirements

AV and video conferencing, customer experience and speech analytics, contact centre technologies, managed services, networking two-way radio and unified communications. The broad spectrum of its portfolio is based on key vendor partnerships including Hewlett Packard, Hytera, Jabra, Microsoft, Motorola, NEC, Phillips, Poly, Xdroid, Yealink, Zebra and 8x8. As a long-standing partner of Motorola, Roberts is mindful of the opportunities presented by the company's Solutions Safety & Security

Ecosystem initiative which unifies voice, data, video and analytics on a single platform. "This creates an ecosystem that amplifies the strength of different technologies – CCTV, body cameras and radios – through seamless, fully functional integration," added Roberts.

Strategy for growth

He is currently working through what he calls the One Avoira strategy which promotes all of the firm's technologies to all of its customers. "This is designed to bring sustained growth

over the next couple of years," added Roberts.

He also noted that circa 85-90 per cent of Avoira's UC income is now generated by monthly recurring revenues rather than capital purchases. Furthermore, Roberts believes Artificial Intelligence is a transformative technology with Avoira's contact centre clients already using its Xdroid solution to full advantage. "Smarter, more powerful speech analytics solutions will become must-have tools because of their ability to

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ng formula

significantly enhance the customer experience, increase productivity and boost compliance with internal and regulatory requirements," added Roberts.

Other leadership priorities include investments in skills and staff, which Roberts has felt strongly about for many years. "Not just within Avoira but across our industry and way beyond," he said. "It's why I've devoted so much energy to supporting Bolton College and University as a Governor and STEM adviser. I'm a big fan of apprenticeships, but also keen to see staff across the business develop their skills. We're empowering up-and-coming talent to further their careers through leadership training and enabling our sales teams to refine their talents with sales leadership coaching."

Roberts' bias towards taking a leadership position on key issues and new technologies is reflected in Avoira's Comms National Awards win this year, scooping the Best SME Contact Centre Solution gong. "It doesn't get any better than securing affirmation by industry peers of the quality of your expertise," enthused Roberts. "It is just reward for our CX team who, working in partnership with the client, Principal Insurance, created a powerful tool which is delivering substantial qualitative and financial benefits. Commercially, the award win is invaluable too. We are talking with other financial services firms and contact centres about how Xdroid can transform their operations, and having a prestigious award under our belts reaffirms the strength of our proposition." ■

Just a minute with Andrew Roberts...

Role model: My parents. We didn't have much but lacked nothing.

Tell us something about yourself we don't know: On a school trip to Paris a friend and I gave blood at a mobile transfusion unit in return for free beer and food.

Your main strength and what could you work on? My greatest strength is sincerity. But I need to work on how to say 'no'.

Three ideal dinner guests: As a Governor of the University of Bolton I regularly get to dine with some amazing people, royalty, ambassadors and high commissioners, educators, politicians, business leaders, actors, sports personalities and many famous people from all over the world. It's too difficult to choose just three.

Biggest career achievement: Leading the MBO in 2003 and subsequently achieving 20 years of sustained growth.

If you weren't in ICT what would you be doing? Driving a bus.

Best advice you have been given: Work to the best of your ability – nobody can ask anything more of you.

Biggest risk you have taken? Borrowing money to carry out the MBO. We knew we could run the business but had to prove that to our backers.

One example of something you have overcome? Gaining good qualifications through work and life experience, having left school with two Es and a U, and now having two doctorates and three fellowships.

What talent do you wish you had? Omnipresence: I often need to be in two places at the same time.

Top tip for resellers: Look after your staff because they are your greatest asset.

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Inspiring women to succeed

Meet Kim Lonas, Global Diversity & Inclusion Programme Lead, DCC Technology – a highly influential change agent dedicated to closing the gender gap in the ICT sector.

What steps is DCCT taking to increase female representation in leadership positions?

Our parent company DCC has four board members who are women. This is a powerful symbol of what women can aspire to achieve within the industry. It exemplifies the 'see it to be it' principle where young women and professionals can find role models who have broken through barriers. Our leadership development programmes prepare women for the next stage in their careers. This includes mentorship, Employee Resource Groups specifically for women, and we are launching a pilot programme for Women Returners. This initiative encourages women formerly in senior level roles and looking to re-enter the workforce. By providing a pathway for experienced women to return to senior positions we're benefiting from their expertise and addressing the gender representation gap at the top.

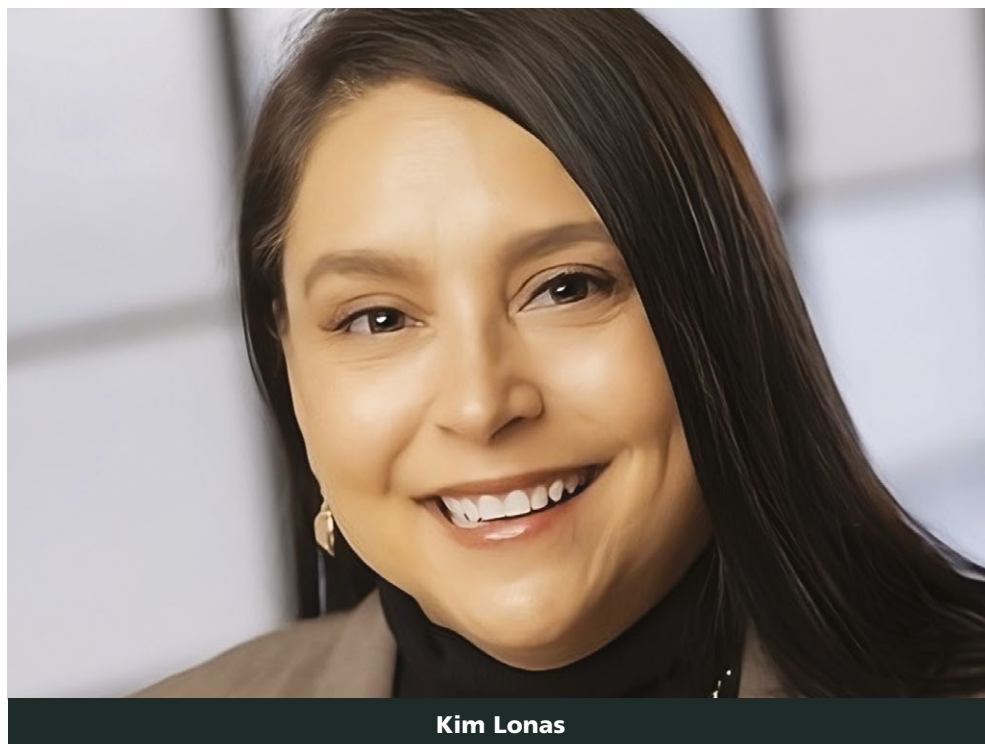
What other initiatives do you participate in to help increase the presence of women on boards in the wider industry?

I'm actively involved in various women's

organisations and networks dedicated to promoting gender diversity within our sector. These groups provide valuable resources for women's advancement, including networking opportunities and advocacy efforts. I also engage in public speaking where I advocate for change in all dimensions of diversity; and write articles that offer thought leadership on various diversity topics. Through these efforts, I aim to drive awareness and action for greater diversity and inclusivity in leadership roles within our industry.

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

Boosting the number of women on boards in the technology sector requires a multi-faceted approach to address the various barriers and challenges. For publicly traded companies in the UK there has been a growing recognition of the importance of gender diversity in corporate governance, not only in the technology sector but across various industries. In response, FTSE introduced an aim that all companies trading on FTSE have 40 per cent gender diversity on their boards. This requirement



Kim Lonas

My commitment to promoting diversity and inclusion motivates me to be a driving force for change within the industry and beyond

sends a clear message that achieving greater gender diversity at the highest levels of leadership is not just a nice to have, but a must have for modern businesses.

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

To influence their ability to reach a board level position ambitious women can consider various strategic steps. First and foremost I recommend exploring opportunities to join non-profit or community boards. These experiences provide valuable exposure to board level dynamics and allow you to contribute to causes that align with your values. Additionally, it's crucial to build a diverse network both within and outside your industry. Participate in

industry events, conferences and seminars and engage with peers and senior leaders. A well cultivated network can offer insights into potential opportunities and enhance your visibility in leadership circles.

Moreover, don't hesitate to emphasise your achievements and contributions. Effectively communicate how your accomplishments have positively impacted your organisation's success. Articulating your value and showcasing your track record of success is essential in positioning yourself as a viable candidate for any next level role.

In your experience, do leadership pipelines include enough women?

Leadership pipelines often need to include more

women and other types of diverse candidates. The predominant reason for this underrepresentation is in industry demographics, particularly in sectors traditionally male dominated. Achieving greater gender diversity in leadership pipelines demands a combination of internal development efforts and an open minded approach to sourcing talent.

First, we must focus on developing the women already in the industry. Offering training, mentorship and leadership development programs can help women build the skills and confidence required for leadership positions. Ensuring women have equal access to growth opportunities within their current organisations is vital.

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Second, we should broaden our perspective by looking outside the industry for potential candidates. Women from diverse backgrounds may bring unique skills and perspectives that can enrich leadership teams. Recognising the value of transferable skills and actively considering candidates from various fields to expand the talent pool is essential.

Has the ICT sector made progress on increasing diversity at leadership level?

Like numerous other industries, the ICT sector has acknowledged the significance of enhancing diversity in senior leadership roles. It's important to emphasise that progress can differ substantially based on the specific organisation and geographical region. According to the latest McKinsey report, a notable increase in women's representation in the C-suite has reached the highest levels since 2015. Over this period, the presence of women in C-suite positions has risen from 17 to 28 per cent.

However, it's important to acknowledge that advancement in the middle tiers of the career pipeline has been less rapid. There continues to be a consistent underrepresentation of Black and ethnically diverse leaders in these roles.

Given your global perspective, do you see differences in the levels of D&I between countries?

Diversity and inclusion levels can vary significantly between countries and regions. These differences are influenced by various factors, including historical, cultural, legal and social contexts.

The historical treatment of marginalised groups, such as racial and ethnic minorities, LGBTQ+ individuals and women, differs from country to country and can lead to distinct challenges and priorities in different regions. The legal frameworks and regulations in place also influence D&I. For instance, the US and the UK have different reporting laws and regulations. These laws shape how organisations approach D&I and can again vary widely worldwide.

The demographic composition of a region and economic inequalities can also significantly influence D&I efforts. Some countries may be more open and accepting of diversity, while others may have deeply embedded biases. These cultural norms affect how D&I initiatives are received and the challenges they face. Regions with more diverse populations, industries, international businesses and global perspectives may prioritise D&I more strongly.

How can we stop one kind of 'difference' or diverse group being prioritised over another?

While companies increasingly highlight the importance of diversity and inclusion, a genuinely inclusive workplace goes beyond surface level commitments. Inclusion is more than just a one-size-fits-all concept, it's a dynamic, multifaceted endeavour. For example, when a company genuinely values diversity and inclusion, it must recognise and support neurodiversity as a part of that commitment. This involves implementing strategies to accommodate and embrace employees with neurodiversity and various cognitive differences,

fostering understanding and cultivating a supportive work culture where all employees, regardless of their neurodiversity, can thrive.

Ultimately, authentic inclusivity extends to encompass every facet of diversity, including gender, ethnicity, individuals with both physical and mental disabilities, the LGBTQ+ community and various other dimensions like age, socioeconomic background and cultural diversity. This list is by no means exhaustive, but it underscores the wider point.

How have your broader experiences shaped your overall outlook?

As a parent of two daughters, my experiences and current role have profoundly influenced me. They have strengthened my commitment to leaving a lasting legacy of a better, more inclusive world where everyone feels valued and appreciated for their unique contributions. My commitment to promoting diversity and inclusion has significantly shaped my career and aspirations, motivating me to be a driving force for change within the industry and beyond.

In the earlier stages of my professional journey we launched a programme to inspire college-aged women to consider our industry as a viable career option. Providing mentorship and guidance to the next generation is crucial for catalysing positive change. Encouraging young women to explore the opportunities within the ICT field empowers them and contributes to a more diverse and vibrant industry. ■

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Know your superpowers

The best team performances hinge on human differences being effectively managed, and managers who truly understand neurodiversity will find the superpower in every employee, writes Support to Win CEO Julie Mills.

Writing about the special qualities offered by neuro diverse people and sharing my experiences and passion for neurodiversity (ND) has led to many conversations on the subject. Many people want to better understand their neurodivergent colleagues, while some feel that they may even be ND themselves. A common question is, 'does ND include dyslexia?'. The answer is yes, and much more besides. But these labels may be misleading and create misunderstandings in the workplace that can be detrimental to both individuals and organisations unless addressed with flexibility and understanding.

For example, dyslexia is classified as a 'learning difficulty', but dyslexic people have no learning difficulties. They simply process written words differently which creates challenges when reading and spelling. This has nothing to do with intelligence.

While most people are aware of dyslexia, not many are familiar with the following three conditions. Dyspraxia affects coordination and perception, causing potential clumsiness with certain tasks. Dyscalculia affects the understanding



Julie Mills

of numbers and numeracy, making counting a challenge, let alone more complex arithmetic. Thirdly, Dysgraphia affects the ability to write, especially when transcribing text. Why is it important to know about these conditions? Because too many managers have blinkered vision and see them as immovable roadblocks preventing certain jobs from getting done, rather than small obstacles that can be easily navigated, thereby allowing affected employees to flourish – which is also good for teamwork and the business.

Wasted talent

One of the most talented team leaders I know is pure gold for any organisation. She's hard-working, super-smart and knows exactly how to motivate her colleagues. Customers love her and she always gets top results from

her team. She has dyscalculia – but that doesn't detract one jot from the amazing contribution she makes. However, she recently moved into retail, working as a team leader and at the end of each day had to cash up the tills. Naturally, she couldn't do this and her manager refused to make allowances, so she left the business.

Perfectly good people who are fantastic at the core aspect of their job can be crushed by an inflexible demand placed upon them. Pushing square pegs into round holes is a waste of time and human potential, but matching skills to roles and maximising individual strengths is a key part of successful and productive people management. Good people managers know where to compromise so that each member of their team can excel. This

ND AND ME: Joel Goring, UCaaS Specialist, Support to Win

I joined Support to Win four years ago. It's a busy environment and I like to get stuck in with my work. During a particularly hectic period late last year two colleagues could see I was in crisis and took me aside. They insisted that I take some time off work to focus on my mental health, and, specifically, to see a mental health professional. That was a real turning point as it led directly to getting my autism diagnosis and the treatment that goes with it.

I never thought I was autistic, just a bit weird perhaps! I've known I had ADHD for a number of years and the team at Support to Win have always accepted my quirks, but putting a name to it (ie, the autism diagnosis) allowed me to learn more about what it means in practice, especially at work, which in turn has alleviated some mental health issues.

I'd always associated autism with some of the general stereotypes – the genius savants or people who can't communicate with the world around them. But there's a massive spectrum, I now know I'm on it and

learning more has helped me understand and come to terms with that. This has enabled me to get the best out of myself.

My return to work earlier this year coincided with a big company push around neurodiversity. I have a unique perspective on this and I'm helping colleagues understand more about ND while finding out more about it myself. The team haven't changed their attitude towards me at all, and there's genuinely no stigma.

The company has also brought in measures to ease some of my autistic behaviours that can be counterproductive. For example, I have a tendency to do all the work I can, working on everything all the time and eventually getting very run down and stressed out. Now, there are guardrails that keep me solely focused on my projects. I'm not mucking-in on the support desk like I used to, and I'm not allowed to be in the office before normal hours. This whole approach to neurodiversity is unique and I feel fortunate to be part of Support to Win. ■

is especially true in the context of neurodiversity.

We all have job roles that need filling, and we naturally look for the right person with the right skills, a task that does not always go well. So consider neurodivergent people as a talent pool that

does not need pandering, just understanding and flexibility. If you bend a little, you will become better at treating all of your staff as individuals, balancing their strengths and weaknesses to best effect, while fully empowering your teams and individuals to succeed. ■

COMMS VISION CONVENTION 2023

THE NETWORK SUMMIT FOR ICT CHANNEL LEADERS

CONFERENCE REPORT



Creating a competitive edge in times of change

This year's gold standard Comms Vision conference took a multi-faceted research-led approach to unearthing why many organisations may only be scratching the surface of their competitive potential, providing critical insights into what is required to forge a long-term edge over rivals based on four key categories – Leadership, Culture, Technology and Markets, and Industry Collaboration – all of which contribute towards building an ultra-competitive business as well as a force for good.

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Are the right issues shaping

To help chart a strategic course forward, Comms Vision 2023's opening insight session – based on Comms Dealer research – delved into the many business dynamics impacting leaders in the ICT sector today, and clarified why striking the right balance between the interconnected priorities identified by the study is key to achieving sustained growth.

Analysis of the research data identified strategic mismatches that bring into focus whether the right issues are shaping decision making. And Rob Hamlin, Chief Strategy Officer, CityFibre, believes that it's time to resolutely double down on today's changing leadership priorities. "A key reason for change is that people within organisations and customers are evolving generationally in terms of their make up," he commented. "By 2030, 70 per cent of the workforce will be millennial or Gen Z. For them, diversity, purpose and the environment are front of mind. This is an opportunity to take businesses to the next stage, make better decisions, present our organisations in a different way and make our employees and customers feel part of that journey."

Comms Dealer's research also put a bright spotlight on why leadership strategies may need to evolve with a particular focus on ESG and D&I. "Management styles need to change," commented Kathryn Platt, Head of Indirect, Vodafone Business. "I'm on the Vodafone ELT team but it took me ten years to get there. That

was less about Vodafone as a business and more about how I evolved my own career. The problem is a lack of confidence among females about taking on those bigger roles. It's up to us as a community to inspire and make sure companies are embracing their talent and capability. From a D&I perspective, constant conversation is the best way to make it happen. It's easy to lose trust if you're not having the right conversations."

Key interventions

The panel discussion also put a spotlight on the key interventions that leaders can make to put their organisation on a stronger footing. "There is absolutely more that we need to do," commented John Chester, Director of Wholesale, Fixed, Virgin Media O2 Business. "Around 50 per cent of our executive team is female and they are role models for the wider business, encouraging the next generation of leaders. We also have communities of support across many areas, five pillars that people can plug into. This creates a supportive environment in the workplace and gives people additional points of reference beyond traditional line management."

According to Lisa Hewitt, People Director, TalkTalk Wholesale Services, the starting point is to engage all stakeholders – colleagues, customers and investors – and to understand what matters most to them. "Then you can build and embed initiatives into strategy," she stated. "It's also key to invest in data that demonstrates how you're performing against KPIs and shows RoI. Organisations perhaps need to be better at implementing initiatives such as these. It's all about agility, and where you can capitalise on that is by empowering middle management. These people are leading the day-to-day operations while talking to suppliers and customers. Having them as your biggest champions is the best way to get things done. We tackle that through regular communication."

The imperative to change is unquestionable, but the practicalities are not easy, observed Daryl Pile, MD UK Indirect, Gamma. "Business leaders set the culture, they set everything," he said. "But that becomes a challenge when you get to three degrees of separation. A company with 30 to 40 people will live and breathe the culture and the values you set. You employ



You need to ask how ESG, D&I and accountability are going to address the goals that you set out as an organisation. Having a more diverse workforce gives us the necessary talent to address those challenges

ng your decision making?



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people personally and mould them. For bigger businesses, that becomes a problem. Then you need a totem that tells everybody how they are expected to behave and execute strategy. Having a positive ESG policy helps in the execution."

Damian Saunders, Managing Director of Mid-Market, Wholesale and TV Hospitality Divisions, Sky Business, shared insights into how Sky went about its own leadership transformation. "In the UK, Sky has 38,000 people and we've been through an evolution," he commented. "Now, everyone can articulate why ESG and D&I is important and how it links to business performance. From the CEO to the front line we are measured in two ways: What are we doing? And how do we do it? The 'how' is about values, how we expect people to operate. Unless you can demonstrate the values and deliver the 'what' you're never going to be successful at Sky. We've gone through that shift."

Talent acquisition

Prioritising talent acquisition is also key and interconnected with a number of other important leadership challenges, observed James Baker, Managing Director, Cloud, Giacom. "Talent and growth are intertwined - and you need to

ask how ESG, D&I and accountability are going to address the goals that you set out as an organisation, and the challenges," he stated. "ESG and D&I won't fix all of these challenges but if you recruit the right people the customers' issues, challenges and concerns can be addressed.

By 2030, 70 per cent of the workforce will be millennial or Gen Z. For them, diversity, purpose and the environment are front of mind

Having a more diverse workforce gives us the necessary talent to meet those challenges.

"ESG and D&I are big scary topics to consume, and perhaps some of the sentiment in the channel is that they have businesses to run, revenue to generate, and shareholders. That's where shining a light on the challenges and opportunities, and providing information on the successes of organisations that have

seen improvements through ESG and D&I, helps to show how it fits into strategy."

Platt added: "We as networks and vendors have a responsibility to help the channel community. One of the things I will take away from this session is sharing what we do from an ESG perspective with partners to help them make a difference when talking to customers. We see ESG frequently in tenders and need to arm partners with the information they need to respond effectively."

Given the importance of the major leadership transformations at hand, Adam Zoldan, Director, Knight

Corporate Finance, placed the conversation in the context of shareholder value. "To date we haven't been able to raise the value of a business through ESG or D&I," he said. "It is on the agenda, and I've seen in due diligence questions where a minimum level is required. This is still on the compliance rather than the value side. But we can take from this discussion that these factors are moving up the agenda and I expect to see more of this impacting deals moving forward."

Why it's time to think more

The word 'culture' may well be a 'soft' signifier, but the hard facts about its critical role in today's businesses cannot be ignored, according to thought leaders at this year's gold standard Comm Vision conference.

Culture is best developed with consistency and authenticity, and the axiom that culture eats strategy for breakfast holds fast, believes Alex Tempest, Managing Director, BT Wholesale, who outlined the importance of authenticating cultural declarations with effective actions around inclusivity especially. "Prioritisation is key and that starts with inclusivity," she said. "If we're all the same, where are you getting that difference? Culture attracts strong talent and we need to inspire people through our purpose."

The Comms Dealer research showed how competitive advantage may be significantly weakened by cultural shortfalls, and Steve Hackley, Managing Director, Sky Business, highlighted ways to address and resolve some of the key culture related challenges. "You have to see it to be able to do it," he commented. "Culture defies definition. In Sky, we use employee satisfaction surveys as the marker for culture. They give you a lot of ways to calibrate, and the mass of data helps answer the question of how to move the

cultural dial in a positive way. It's maths-based and that cuts through the subjectivity, giving you ways to target interventions that help drive a better sense of purpose, more collaboration and better executive engagement. That's how you translate culture into competitive advantage."

Small steps

Raza Baloch, Head of Business Partners, Virgin Media O2 Business, pointed to another set of actions that help organisations develop important cultural traits and behaviours that could strengthen their competitive stance. "When you look at culture, how do you start to change?," he stated. "One way to do this is to make it more bite-size. You may have work culture, social culture, support culture and equity culture. Consider whether you are hierarchical, overly bureaucratic and supporting employees in the right way. Focusing on small wins by breaking culture down into subsets has a butterfly effect."

For those business leaders grappling with culture management within a changing and fast moving

market, Andy Smethurst, Channel Sales Director, Gamma, offered perspectives that may help prevent culture becoming stagnant. "You've got to understand whether you've done a good job of communicating what your values are to people – that becomes more complex considering how people work in the organisation," he commented. "And having communicated your core values are you then celebrating the successes of those people that live them? There may be remote workers who feel less in touch with the organisation. Do you celebrate the value they bring? And have you created a feedback loop?"

Clearly, having a full grasp of culture and its impact on organisations is essential. But leadership coach Cally Beaton noted that in her experience many business executives 'think they have all the answers'. "We need to clear the path for brilliance and to let influences and differences come to the fore," she said. "The best wisdom comes from the most unlikely conversations and the most unlikely places. Let the learning come to you and be humble enough to let it in."



Purpose is what activates strategy. It's where you bring emotion and human elements to the businesses. We will fail to deliver on our objectives if we don't activate the strategy with a culture that is more emotionally purpose driven

ore deeply about culture



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Hackley noted that hierarchy can be helpful in driving strategy, but culture can be driven out at any level by the people who care and know it best. "I resist the notion that culture has to be an artefact of hierarchy," he added. "Purpose is what activates strategy. It's where you bring emotion and human elements to the businesses. We will fail to deliver on our objectives if we don't activate the strategy with a culture that is more emotionally purpose driven."

Walking the walk

Embracing the opportunity to build on an organisation's reputation as being purposeful and inclusive means truly turning words into action, emphasised Tempest. "You have to walk the walk," she stated. "If we don't make time for this we're not going to achieve in any way shape or form. Culture is a soft word and some struggle with its meaning and how to deploy it. But if you don't walk the walk and learn what those challenges are, whether it's ethnicity or disability for example, then you're not going to understand how to help and support those who are brave enough to put themselves forward. If you're a top level leader in an organisation you have to rapidly understand these challenges."

Tempest shared insights into BT's 'walking on eggshells' initiative where people have a platform to say 'this is what I suffer with in everyday life, and this is how you can help me'. "Inclusive programmes like this enable you to learn," she added. "They go some way in creating an engaged

and often the people who can action things are not in senior positions," added Beaton. "They are colleagues at different stages in their career, and allowing their opinions to become part of how we engender change is important. Underestimate younger generations at your peril."

The best wisdom comes from the most unlikely conversations and the most unlikely places. Let the learning come to you and be humble enough to let it in

workforce that delivers successful outcomes. You create an organisation where people aren't afraid to speak up, they feel listened to and heard, and then put 100 per cent into helping themselves and the business to be successful."

One of the clearest action points identified in the discussion relates to whether cultural goals are actually reflected in the real-world experiences of staff. "It's about turning words into action,

At the centre of this argument is the issue of potential cultural misalignment between leadership and employees, and in this context Hackley observed that a primary cultural motivation can be linked to the adage that problems should be shared. "One of the quick wins is to engage the organisation in the culture

war and make it a distributed solve, instead of deciding your cultural icons and strategy and then cramming it down into the organisation," he commented. "Assign responsibility to people to come up with the answers and watch the magic that happens. Push culture out and let it come back to you. It's not just about empowerment, it's invitation too, freeing people to own the culture, to speak up and be part of it. There is an

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important nuance that distinguishes empower and invite.”

It is true that cultural priorities are different for each organisation, but the factor that unites them all is that there is no excuse for not making time to ‘look after your employees’, noted Baloch. “You can’t say you don’t have time to look after your employees, and yet have time to focus on delivering on a number – the two are intrinsically linked,” he emphasised. “This is a mindset shift. Issues around budget and time impacting culture development could be excuses. Time and budget holding back culture development is a nonsense.”

It is generally accepted that by far the most important cultural enabler is top level leadership, but there is a question as to whether leaders are targeting their cultural development strategies on the right critical areas. “When employees see the leadership teams make decisions – which is what leaders do – they want to be part of the process,” noted Smethurst. “That’s important. But people may not give enough time to realise that culture and strategy are not mutually exclusive. Culture brings together the strategy and you have to make time to understand that.”

The advantages of emphasising cultural traits in this way can only be fully maximised if the conversation is ongoing and remains a day-to-day priority, noted Baloch. “Culture is ever evolving, so you have to be able to adapt,” he commented. “We are in what is technically and ageing industry and we struggle to hire new generational employees, therefore we have to continually evolve. We work with technology which is constantly changing, and

We need to develop cultures that enable difference and failure. Perfectionism is the enemy of success, so you may as well square up to failure

we embrace it, but from a cultural and employee standpoint we’re not so good at embracing them.”

Tempest noted that change does not happen overnight and that when events like Covid come along you have to react. “One of the challenges many companies are going through is the post-Covid home, hybrid and office working culture,” she added. “We have a proportion of people who don’t come into the office at all. It’s challenging, but we find a way of creating a collaboration culture. It requires leaders to think differently and deeply.”

According to Beaton, opportunities to build on an organisation’s reputation as being purposeful will likely be missed unless ‘everyone has a voice and makes the edit’. “When I do panel shows, which are still very much male dominated, it’s not about saying the right or the funniest thing, it’s getting your voice into the room so that there’s no choice but to keep you in the edit,” she explained. “We still allow the loudest voices in the room to dominate.”

At the centre of this debate is inclusion, and Beaton noted that neurodiversity inclusion, for example, is about developing a culture that embraces not being perfect, along with business leaders understanding that they don’t have all the answers. “We need to develop cultures that enable difference and failure,” she added. “Perfectionism is the enemy of success, so you may as well square up to failure.” ■

More key points to consider...

Raza Baloch, Head of Business Partners, Virgin Media O2 Business

You can’t execute on a strategy without having the right culture in place. They are intrinsically linked.

Steve Hackley, Managing Director, Sky Business

You just have to engage. Businesses are full contact high engagement environments and you’ve got to get messy.

Andy Smethurst, Channel Sales Director, Gamma

You’ve got to create a business case for culture and in some instances make a budget for it. You cannot leave culture to chance.

Raza Baloch, Head of Business Partners, Virgin Media O2 Business

It all starts with your purpose. You can’t drag people along. You have to inspire and motivate them to believe in and adhere to a set of values. This drives the culture of a business.

Cally Beaton, Leadership Coach

Perfectionism is the enemy of success, so you may as well square up to failure.

Channel reality check

Comms Dealer research has crystallised a critical question facing the channel: To what extent do vendors and partners need to work closer together to unlock current and future market potential? In addressing these pressing issues, Comms Vision thought leaders doubled down on how the channel could be far more effective at converting market opportunities into sustainable, differentiation-led growth.

We know from our research that many channel companies may fall behind and be less able to react to what's coming next unless knowledge sharing challenges are addressed, wider opportunities are embraced and the channel ecosystem becomes more tightly interconnected. And during the Comms Vision Technology and Markets Insight session, thought leaders discussed the technology and partnership levers that may need to be pulled to create long-term growth by closing the technology and go-to-market gap.

That 60 per cent of the business leaders surveyed do not feel they are maximising growth opportunities in their own back yard represents an opportunity for upstream suppliers to rethink partner engagement models and align their product strategies, roadmaps and support mechanisms more closely with partners.

The need for upstream suppliers to provide leadership and direction, and become a better match for partners in terms of driving channel growth, is crystal clear. "Busy entrepreneurs don't always have the space to step back the way we do, spend time with markets and analysts and understand technology trends," stated Nathan Marke, Chief Operating Officer, Giacom. "We have an important role to play in condensing all of this information and communicating that through to channel businesses. We've got to find the growth now and chase it. It's our job to feed that information through."

There is a general consensus among thought leaders that the mismatch between vendor messaging and what many partners are actually experiencing is impacting growth, largely caused by low levels of education delivered via vendor-partner engagement. "The job of the channel is to make sure we are empowering resellers with the information they need to talk to their



Validating market opportunities is a challenge for resource strapped channel companies. Unless this gap is bridged the status quo will persist

customers," commented Matt Worboys Business Development Director, Gamma. "Resellers want to know what's in it for them and how to take products to market. These products are largely the same – the value is in empowering resellers and making it simple for them."

These issues provide food for thought, not just for ICT resellers and MSPs, but also for technology vendors because, on another level, taking new products to market is a complicated process. "There is a big difference between a product being launched and truly embedded," commented Neil Wilson, Chief Product & Marketing Officer, TalkTalk Wholesale Services. "You can get new products over the line and technically out, but with a channel community there's a lag between a product being launched and sales teams being confident with it. This takes time and patience. Sales people generally don't like leaving their comfort zone and we have to empower partners to overcome that challenge."

Turning to current tech opportunities, Gavin Murphy, Propositions Principal, BT Wholesale, observed that the majority of the market has

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The need for upstream suppliers to provide more leadership, direction and market information, and become a better match for channel partners in terms of driving their growth, is crystal clear

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adopted cloud services. "But how many are truly generating the value that cloud can provide?" he commented. "For example, most resellers are not selling analytics, therefore customers are not getting the information they need to make informed decisions and maximise their cloud services. As an industry we can get carried away with technology and the future, yet we have great technology here and now that businesses can actually use."

That said, our survey found that many reseller/MSP business leaders are open to new ideas about technology and product innovation, with 63 per cent planning to move into a technology market not yet addressed by their business. Significantly, and symptomatic of broader issues, 5G did not feature at all in their planning. Emma Keedwell, Head of Innovation, Vodafone Business, noted: "As an operator, we need to share more stories around our trials and where we are delivering 5G, but also be honest about some of the challenges. With the channel being so close to end users we also need to hear from them to understand more about their customers."

Keedwell reported that 5G is on top of all businesses' minds and will unlock a transformation with throughput application being better and faster, while some areas of business 'will be unlocked in ways that we don't know'. "The application for 5G is relatively early so we need the channel to help us prioritise by industry and vertical the top three uses cases. That's the opportunity."

Murphy cited end user research undertaken by BT in which 70 per cent of businesses said 5G is 'absolutely critical'. But despite this apparent demand, the message is yet to land as a real opportunity for the channel. For future 5G potential to be realised it seems that the free flow of important information must be a two way system between resellers and vendors, which is likely to be a challenge in practice. "I don't understand the value proposition for 5G into SMB," stated Marke. "That's fundamentally one of the problems. We see case studies coming through about network slicing for large enterprise applications, but for most of our SMB customers it doesn't mean anything. That's the issue."

Start with the customer

Paul Heritage-Redpath, Head of Products, CityFibre, added: "If you look at the UK business market, the vast majority is SME. The good news is that we are all pretty good at doing the core connectivity, but 5G isn't featuring highly because manufacturers are struggling to articulate a use case for most of the UK's SMEs. That's not to say it won't come. The power of story telling is where the channel is brilliant. That's where we can all focus again. From a product perspective you start with the customer and the problem they are trying to solve and offer a solution. You should never fall into the trap of thinking you have a cool widget then ask what you can do with it."

Resolving this conundrum could unlock significant opportunities for many channel companies. This also holds true for upstream suppliers who grasp

the nettle and put their shoulders into better enabling channel partners. "We know the world is changing, we know channel partners are being asked to go broader and deeper and to provide one-stop-shops and do a lot more," said Marke. "Yet most of these businesses are quite small, sub-£10 million and can't afford big contract teams. So the responsibility is on us if we are going to make this work. We need to make this as easy as possible for partners and give them confidence. They have the best sales teams out there."

Wilson added: "We have a huge amount of expertise that's never been turned into something that the channel can use. For example, security is a tough market to get into but we have strength and depth in delivering that to the



channel as a managed service that's white labelled. We are working on an overlay play."

These knowledge gaps prompt the question of whether markets, customers and partners are being underserved. And if they are, what's the implication for channel players? Furthermore, the shelf-life of a channel firm unable to provide the full product and service suite, today and tomorrow, may be getting shorter. There is clearly an opportunity for upstream providers to truly provide leadership and get more strategic with their channel strategies. "We as a vendor have to enable confidence and competence and give all our teams, and our customers' teams, everything they need to be successful," commented Murphy. "There is progress, but also a long way to go for suppliers to underpin partner and customer success."

That innovation drives growth is not in question, but there is an issue around how the channel leverages innovation and brings growth potential to fruition. "It's far easier for us to innovate than the OTT players," stated Keedwell. "The world is changing, people are subject to competition law and it's difficult to understand how best to innovate. If we really work together we can understand which technologies our customers want and how they are going to use them. We must spend more time with the channel to understand what they can add to core products. It's about cementing the partnership."

Closer, more interactive partnerships are key because validating market opportunities is a challenge for many resource strapped channel companies, and unless this gap is bridged the status quo will persist. In this context, Marke hammered home the point and reiterated the criticality of knowledge sharing. "We have lots of data about where the growth categories are and we need to share that better," he said. "For example, if you look at SMB wallet share, about 40 per cent or less is in telecoms and 60 per cent is in IT managed services. The fast growth categories are cloud, infrastructure, platforms and SaaS, particularly in SMB around

There is clearly an opportunity for upstream providers to truly provide leadership and get more strategic with their channel strategies

infrastructure software where there is high double digit growth. All of these environments need to be secured so there is growth in security. The good news for the channel is that all of this needs to be built and run for SMBs. If you get it right there is a massive opportunity to grow – and you will be the one customers want to talk to about AI in the next round."

Adding value

In terms of where growth will come from, Worboys pointed out that Microsoft intends to take 'massive share' in the SMB space. "So think about how you can add value around that, whether licensing, voice enabling or the peripherals," he said. "Mobile and IoT will be a significant growth area for Gamma over the next three to five years. And in the SMB area we're increasingly seeing consumers demand enterprise class functionality when communicating with SMEs, therefore they need to operate and respond with products that enable them to deliver on expectations. Customer experience in the SME sector is key. But the enablement piece is where the true value lies, that's the biggest growth area within Gamma. It's our responsibility to make sure we are providing partners with the right tools."

Heritage-Redpath highlighted the 'huge opportunity' for partners to get the basics right with connectivity across the UK. "You get the solid foundation in and then layer up

services," he added. "If you spin the story you will win big time in this market."

For Murphy, a big narrative is the full fibre story which is entering a new chapter. "The exchange closure kicks off in anger soon," he commented. "Stop-sell happened in September and the next two stages are on plan to deliver... we have stop-serve at the end of 2025 and complete closure in 2030. Analysts are saying that organisations with above average copper-based services could potentially impact their risk profile for private equity investments. It's therefore important to focus on having an above average FTTP base and migrate customers to drive value."

Ultimately, being competitive and driving growth means having the agility to respond effectively to the evolving market, and for resellers and MSPs this in large part hinges on their technology propositions and capabilities. But a lack of skills, a need for support, and a lack of market knowledge and product leadership is hindering growth. On this point, Wilson emphasised: "Partner enablement is not a one-off exercise. When you're taking people into new areas, giving dedicated focused support over time to grow confidence is key." ■

More key points to consider...

Paul Heritage-Redpath, Head of Products, CityFibre

We have a once in a lifetime event where every customer has to do something and we need to gear up to support all of those businesses.

Emma Keedwell, Head of Innovation, Vodafone Business

You can't get away from verticals. People buy and use technology differently and there are vertical nuances in how simple technology is used. All government funded bids are coming out in verticalisation. If you can, celebrate it. If not, try it.

Neil Wilson, Chief Product & Marketing Officer, TalkTalk Wholesale Services

It can be tremendously powerful when you own a vertical, speak the language and be at the core of it. But getting there requires a lot of investment.

Matt Worboys Business Development Director, Gamma

Our job is to support the channel to get into verticals, help them get on the frameworks, help with marketing literature so partners are talking the right language with pricing that works.

Gavin Murphy, Propositions Principal, BT Wholesale

As an industry we don't make it easy. We love acronyms and no-one is challenging the TLA attitude. That means we don't follow through with value-based outcomes that impact the end customer.



Unprecedented levels of

Unleashing the full power of strategic alliances and maximising the value of collaboration for a competitive advantage is an accelerating trend in the channel, and to get a window on this important development Comms Dealer research shed light on the factors driving the expansion of partnerships, providing food for thought among channel leaders during the conference.

The expansion of industry collaboration is essential to the future success of the channel, according to 90 per cent of the reseller/MSP business leaders we spoke to in our Channel Collaboration research. Furthermore, 92 per cent expect to see more collaboration between like-minded organisations in the channel over the coming two years, and they agree that collaboration in all its forms makes their world of opportunity bigger and more disruptive. It's a viewpoint echoed by Tom Robinson, Head of Commercial Indirect, Vodafone Business. "The conversations I'm having with channel partners are more entrepreneurial," he said. "They are disruptive and creative. They're conversations that probably wouldn't have taken place 18-24 months ago. The greater willingness and openness to sharing risk and reward allows us to have very different conversations that traditionally would not have taken place."



Many channel's business leaders are addressing the challenge of finding growth in a complex and transforming ICT market by expanding their focus. Given this sentiment, it's not surprising that over 80 per cent of business leaders think the channel needs to elevate supply chain collaboration as an absolute priority – and two thirds say upstream suppliers could do better at collaborating with channel partners. "Greater collaboration is going to be an underpinning requirement," emphasised Dale Parkinson, Managing Director, Connectivity, Giacom. "There is a good reason for that: We are at a point of generational technology change and end user customers are stacking their businesses in the cloud. That opens up a fantastic opportunity to sell an ever widening range of products and solutions. Collaboration has to be at the heart of this."

The move towards more collaboration puts a spotlight on how the channel is reacting in agile ways to a transforming comms market that is growing in complexity against a backdrop

How we collaborate as a community is fundamental to driving momentum across the channel

of evolving demand factors, observed Gavin Jones, Channel Partners Director, BT Wholesale. "Technology is changing fast," he stated. "We saw massive change during the pandemic and all-IP is making things more software based. The world we operate in is faster, more dynamic and there's many more solutions – therefore you need a range of partners. The old days of exclusivity are long gone because you can't address all of the opportunities. Collaborative partnerships that enable you to adapt at the speed of the market are critical."

Direct conversations

According to Sam Weller, Head of Wholesale, Sky Business, this means working harder at having more direct conversations. "The barrier can be that we are all busy – there's lots of people to see and support – and there may be a limited

number of subject matter experts," he said. "But creating a community, as Comms Vision has done, allows us to exchange ideas, exchange thoughts and challenge each other, which is healthy. The decisions we make about who we partner with and take our learnings from are absolutely critical as we scale our business in the channel."

But maximising the rewards of collaboration is not a guaranteed result of joining forces, meaning that strategic alliances must always be kept on track and the success factors maximised. For 86 per cent of business leaders the trend towards greater collaboration has brought trust forward as a key factor. According to the majority of this cohort, trust is not one dimensional, with most saying that trust between their business and partners has become more multifaceted. "Risk

f industry collaboration

traditionally can be a bit taboo," said Robinson. "It's the conversation that people try to avoid. But with greater transparency and a degree of openness around facing into risk up-front, that helps build trust. Alongside risk comes reward. As long as we are open and collaborative in how we address that, and align and gain consensus on how we apportion risk and reward, then that's beneficial for the partnership."

Building trust

According to our research, among those with a strategic focus on building greater trust in their business, over half (52 per cent) say trust is manifested through greater visibility and transparency, while closer communication is the main foundation of trust for 32 per cent. In this context, it is worth noting that nearly all expect to shift their focus onto

The need for greater collaboration becomes ever more pressing among channel companies wanting to elevate their organisational purpose

future innovations, but only 18.5 per cent currently leverage alliances to boost innovation, probably due in large part to perceived risk.

"The reality is that you can't have innovation without some risk," stated Paul Smith, Chief Sales Officer (Partners), TalkTalk Wholesale Services. "We need to be bold in how we work with collaboration. There's a massive ICT space out there that's very new to many partners and feels quite risky. Partners have great relationships with their customers, and collaboration allows you to work with other partners and take different approaches. So be OK with risk and explore it."

Robinson added: "Collaboration drives innovation, so greater collaboration is fundamental to the needs and wants of the industry we are servicing. There is a more openness and willingness to collaborate and we are on the start of something quite interesting. In terms of partners and conversations with customers, there's almost an expectation for collaboration which we've not seen to this degree before. Innovation in isolation is dangerous and hard to do. And how we collaborate as a community is fundamental to driving momentum across the channel."

It is good news that over 80 per cent of reseller/ MSP business leaders in our survey think the channel needs to elevate supply chain collaboration as an absolute priority, and it's fair to say that they have a head start. "From a comms perspective, partners have been collaborating at a local level for many years," commented Parkinson. "But the technology change we are going through will substantially change that, especially when you consider what SMBs want from the partners that we serve. This may change how organisations need to work together at a channel level and across the vendor community.

"We are moving away from volume-based programmes to the vendor community effectively orchestrating an ecosystem of partners with a multiple set of disciplines because, ultimately, that is what customers will be asking for. Broadening out capability and portfolio through collaboration is a fantastic opportunity for the channel."

Furthermore, by overlaying the expansion of alliances with the demands of ESG goals the requirement for collaboration becomes ever more pressing among channel firms wanting to elevate their organisational

purpose. "There is an opportunity to explore meeting ESG targets with partners," said Robinson. "Organisations will be at different stages on their ESG journeys. It's front and centre for us, and there is an opportunity for partners to take advantage of our knowledge and understanding. There is synergy in information sharing."

Focus on ESG

According to Parkinson, in terms of vendor-to-vendor and vendor-into-channel partners, much more needs to be done on ESG. "It's not just about net zero or key parts of an ESG policy, there are adjacent topics – like digital inclusion, rural broadband and supporting the most vulnerable people in society – that we can have a bigger impact on by working together more effectively," he stated. "Everyone stands to gain."

That value and growth will be enhanced by maintaining ESG compliance is beyond question, and an observation made by Andy Wilson, Sales Director, Wholesale Channel, CityFibre, serves as a harbinger of what's to come. "In our supply chain we are actively choosing partners who have a low emission carbon plan," he commented. "Equally, we recently won a big rural scheme in

Cambridgeshire and one of the primary points in contract negotiations was around showing our ESG commitments. In general, collaboration reflects the continual evolution of what is effectively an ecosystem. Gone are the days of supplier-customer and supplier-partner relationships. To be successful in this market you've got to add value through working together."

Comms Vision 2024 in pictures – page 38

More key points to consider...

Gavin Jones, Channel Partners Director, BT Wholesale

Everybody should be sharing skills, knowledge, experience and innovation. In this changing world no-one can be an expert in everything.

Tom Robinson, Head of Commercial Indirect, Vodafone Business

The partner community informs, educates, provides insight and has a level of entrepreneurial spirit that helps guide and shape our thinking as operators.

Andy Wilson, Sales Director, Wholesale Channel, CityFibre

From an altnet perspective, and as a challenger in that market, working with other alternative network providers is critical.

Paul Smith Chief Sales Officer (Partners), TalkTalk Wholesale Services

Regulations can make everyone more risk averse, but if you go down that route you stop innovating. There needs to be a strong voice around pushing forward. Shared goals drive change but we can do more, and everyone should be open to what collaboration can bring. It's a win-win.

Sam Weller, Head of Wholesale, Sky Business

Sky Zero commits us to being carbon neutral by 2030, and the thought, effort and innovation that goes into delivering against those commitments gives us insight. It's incumbent on resellers in the channel to demand that insight of their suppliers, even though their mindset might just be around hard numbers and growth.

Gavin Jones, Channel Partners Director, BT Wholesale

Microsoft Teams is ubiquitous across a lot of organisations but there is a complexity to rolling Teams out that partners need to address. This is where collaboration comes in. Helping partners to educate, be aware and be able to sell such services is our role.

Conference in pictures





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Gauging the current impact

This month, comms industry thought leaders share insights into current demand for Artificial Intelligence solutions, how they are adopting AI within their own organisations and the extent to which this exciting technology will likely reshape the channel landscape.

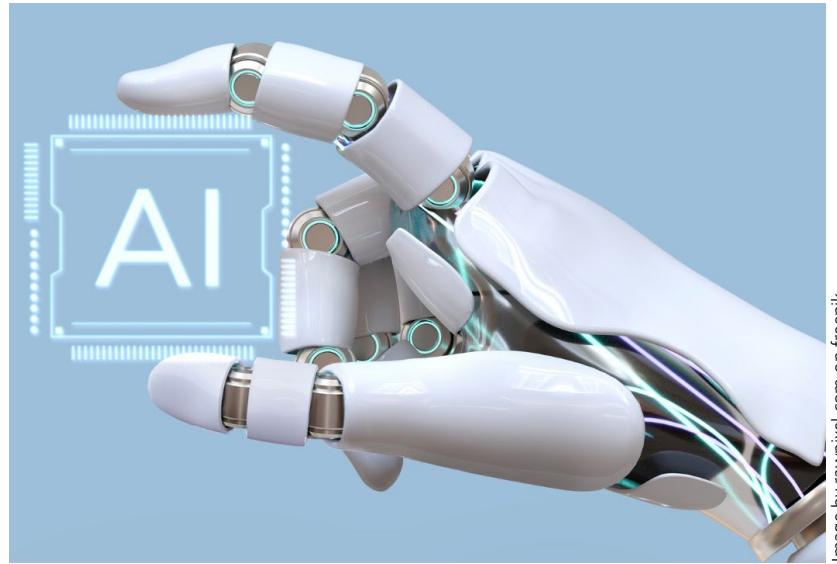
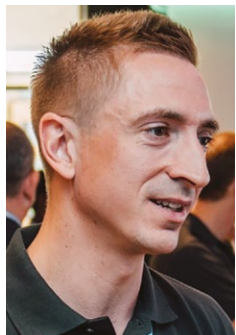


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GEOFF BARLOW
TECHNOLOGY
PRACTICE LEAD –
STRATEGY
NODE4

AI will impact the MSP industry by remediating issues faster, automatically running predictive fault analysis, detecting security issues and spotting anomalies that humans may miss. Some MSPs may eventually offer low price-points for support services as they will be relying on AI to drive their cost model down, or will reduce costs by utilising AI for previously human roles. Future technologies will need to incorporate AI or risk getting left behind. We use AI internally for code generation, meeting note summaries and sales enablement. For our customers we see our role as an advocate for the proper usage of AI from a tech implementation and a skills perspective. To perform effective predictive analysis from AI-generated content, data analysts, scientists and engineers are required. This is an area where skilled professionals can add massive value. However, there is a growing skills gap that will continue to be a challenge for many businesses.



NICK TIDDY
HEAD OF SALES
AT ZEN'S PARTNER
DIVISION

From conversations we're having with our channel partners, AI is not widely adopted and is still an emerging technology. Everyone is watching it closely and many are experimenting with it for content generation, but it's not yet elevated to strategic priority level from a product perspective. Our partners' focus is on the many other opportunities they can leverage while the potential of AI unfolds. We've deployed an AI team to explore the possibilities, initially looking at introducing process efficiency gains internally. We are exploring its use across the business from marketing and sales through to our development teams with a view to sharing our learnings with our partners. This way we can advise our channel partners on their own journeys through AI when the time is right.



HILARY OLIVER
CHIEF MARKETING
AND EXPERIENCE
OFFICER
TOLLRING

AI-powered analytics is the future. Service providers and resellers should start to familiarise themselves with the value and benefits of AI as soon as possible while also up-skilling to understand its impact on security and compliance. We've been using machine learning in our toll fraud protection products for many years, but following recent advances in the technology we expect AI to play a part in our entire product portfolio. For example, in January 2024 we will launch an AI-powered call recording application that delivers insights by identifying keywords and topics, eliminating the manual review of every call. This will impact customer experience and democratise and commoditise the technology.



JAMES ROUTLEDGE
SALES DIRECTOR
GLOBAL 4

We must be mindful not to confuse AI and Intelligent Automation. AI systems learn from consistent data and adjusts its behaviour based on this. A speech analytical tool that delivers the same output based upon similar inputs is not AI, it is an intelligent tool that automates a process. Aside from an occasional Chat GPT shortcut our industry is only beginning to understand where AI could make a difference. I see the biggest opportunity around analytics. By learning and evolving faster than the human mind could comprehend, adjusting individual tolerance parameters and presenting data in a forever improving way, AI facilitates more agile decision making and supports personnel to enhance the customer experience. We aren't there yet, however in years to come we will be.



**Transform operational
efficiency & streamline
processes**

Impact of Artificial Intelligence



MARTIN TAYLOR
CO-FOUNDER AND
DEPUTY CEO
CONTENT GURU

Customer experience and contact centres are ground zero for AI as the first true business use case where it can be put to work for immediate benefit. It is up to vendors and those within the sales channel to take the lead and demonstrate the value of AI and present clients with tangible steps on how it can be delivered. Much of the excitement generated by the initial buzz of AI was focused on solutions which would interact with the public directly. In fact, a middle ground is needed. There are enormous business benefits to enabling super-efficient workers - 35 per cent productivity gains are achievable by applying Generative AI to current cloud contact centre technologies to automate in-call transcription and post-call summarisation – a safer version of AI, where agents remain in control, but are much more efficient.



SCOTT MORDUE
HEAD OF
MARKETING
AVOIRA

We continue to assess AI products and will deploy them if we can see a benefit. It is not something customers are asking about, and we tend to have to tell our customers about the AI products in our portfolio. We frequently discuss with clients how AI might enhance their solutions. There are huge opportunities in healthcare, transport, financial services, retail and more. Harnessing data and gaining insight empowers companies to innovate and provide compelling solutions. AI enables us to learn and act from that insight. But AI poses a slight threat around misuse and poor regulation. There needs to be freedom to innovate while ensuring there's trust. Technical sales will also need to boost skills around building AI models and how the AI works.



MARK HOLLMAN
VP, PARTNER
DEVELOPMENT AND
SUCCESS
COLT

We interviewed 755 IT leaders for our Digital Infrastructure report and found 91 per cent intend to adopt AI in some form, up from 33 per cent in December 2022. Of those that are already using AI, usage was most popular when used as part of enterprises' digital infrastructure management (45 per cent) in fraud detection (45 per cent) and across HR (45 per cent). For the past few years we've used AI to help us get closer to customers. We use an AI-powered recommendation engine, built on Microsoft's Azure platform, to analyse high volumes of data. This helps us to identify patterns and make accurate predictions, and it means we can engage with our customers at the right point in their buying process.



STEVE BARCLAY
MANAGING DIRECTOR
EVE NETWORKS

AI features heavily in eve's roadmap. For example, we're launching an AI powered recording studio that generates lifelike voice recordings. We're also exploring how we can use AI in eve's support process to reduce the need for human intervention and decrease pressure in the supply chain. This can lower our resellers' costs and improve customer experience. AI is also changing the B2B buying process. There's an opportunity for smart resellers to stand out and win more sales by understanding how their customers use AI to research and buy. Smart service providers will add value by showing their resellers just how to do that. AI is a trending technology, therefore we're not experiencing the full potential just yet.



JEFF GREEN
CEO
ELISHA TELECOM

AI is a hot topic and we receive many questions on it from direct customers and resellers. A common one is whether AI-powered insight platforms must be delivered by the same vendor as the customer's comms platform. They don't. With the right transcription and sentiment analysis engines content from anywhere can be interrogated. Plus, the learning curve is minimal as applications are intuitive. So, don't worry if it's new ground for your team, any decent vendor will offer robust training to ensure pitches are delivered confidently. But partners aren't always asking about customer deliverables. Just like in end customer businesses, AI has massive potential to reduce support and technical teams' workloads. We use AI internally via tech support chatbots. Now, engineers rarely tackle simple tasks, and partners want to mirror this in their organisations too.



MATT MIMO
CEO
7ARDIS

For the channel, the greatest risk AI poses is not adopting it, and the easiest entry point into AI is chatbots. AI does require new skills, so work with a confident provider that already controls its own ML and DL. We receive a lot of questions around our AI-powered Mobile Coverage Map and video surveillance solutions. For example, scanning workers' PPE on entry and rejecting those who aren't up-to-code. One of AI's greatest advantages is how scalable it is across similar situations and industries, like applying the same technology to recognise PPE in healthcare settings or training it on facial expressions to record behaviour and sentiment, which we're exploring.



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Brace of new starters



Kevin Foley

James Howard

CELLHIRE'S channel development team has been bolstered by the appointments of Kevin Foley as Channel Development Manager – Mobile, and James Howard as Channel Development Manager – IoT. Foley brings 20-plus years of telecoms experience, the past ten years working in the channel with partners including Vodafone, Daisy and Giacom. Howard has worked in the channel since 1996 in a career that includes spells at HPE, Apple and Adobe. Cellhire Managing Director Matt Bennett stated: "Their experience and industry knowledge will

strengthen our channel development efforts. With their expertise, Cellhire is well positioned to enhance its offerings to partners." Over the last five years Cellhire has emerged as a key player in the partner channel and IoT market, and is an MVNO on the Orange France network, an ISP for Vodafone, EE and O2, and its white labelled SIM management and Atlas billing systems are widely used by channel partners.

Also on the move...



Chris Darling

EVOLVE'S project management is to be led by incoming Delivery Director Chris Darling. He joins from chemicals company Nouryon where he was responsible for transitioning a fixed wired and wireless network to a new global

Network Operations Centre. Prior to that he was the European Network Manager for AkzoNobel. Darling stated: "Exceptional service isn't just a transaction, it's an experience, a commitment to going above and beyond."

CISCO'S SMB partner play will be spearheaded by incoming Senior Vice President, Partnerships and Small & Medium Business, Rodney Clark. His career experience includes a near 25 year spell



Rodney Clark

at Microsoft where he held a number of senior sales leadership positions including Corporate VP, Global Channel Sales and Channel Chief. Prior to Microsoft he spent nine years at IBM in sales, marketing and management capacities. Most

recently he was Chief Commercial Officer at Johnson Controls. Jeff Sharritts, EVP and Chief Customer and Partner Officer, Cisco, said: "Rodney is the right leader at the right time as we push our partnerships into a new era."

Distie names net zero chief



Kevin Brzezinski

WESTCON-Comstor's SVP of Global Operations Kevin Brzezinski has also been appointed to the newly created position of Chief Sustainability Officer. In his dual role Brzezinski takes overall responsibility for

the company's efforts to minimise its carbon footprint and environmental impact – including working across the supply chain with technology vendors and partners to create a more sustainable IT channel. Westcon-Comstor aims to achieve net zero greenhouse gas (GHG) emissions by 2050, a target validated by the Science Based Targets initiative (SBTi). The SBTi also validated Westcon-Comstor's objective to achieve a 50% reduction in Scope 1 and 2 emissions (and a 25% reduction in Scope 3 emissions) by 2030, while ensuring that 80% of its suppliers have science-based emission reduction targets by 2025.

STEVE Glaister has joined NTA as Channel Partner Manager, bringing over 25 years of industry experience to the position. His previous roles include notable stints at Norweb Telecom (now part of Vodafone), Dotcomm Consultancy (now Wavenet) and most recently Invosys.

Lloyd heads channel play



Daniel Lloyd

THE promotion of Daniel Lloyd as Channel Director at Cirrus signals a ramping up of the contact centre provider's channel engagement strategy. He was previously Channel Partner

Manager, a role that followed a stint as Solutions Delivery Manager having joined Cirrus six years ago. In total, Lloyd has over 20 years experience in the contact centre industry and previously worked for Economy Energy and RWE Npower. Lloyd has a particular focus on CCaaS and will leverage his background in BI, performance analysis, workforce optimisation, resource planning and service delivery. "Daniel's deep understanding of the contact centre industry, combined with an innovative approach to solution development, makes him the ideal leader to guide our channel strategy forward," said Cirrus CEO Jason Roos. Lloyd added: "This role presents an opportunity to enhance our customer service offerings and drive meaningful growth."

Hexa shapes up with Davies hire



Jason Davies

BUSINESS finance provider Hexa Finance has named Jason Davies as General Manager. He brings over 35 years experience in the financial services sector including 15 years in asset finance working for UK-based funders and brokers. Previous roles also include stints at Henry Howard Finance, 1PM (now Time Finance) and Corporate Asset Solutions. Adrian Monger, Associate Director, said: "In his career, Jason has held many senior operations and customer service roles at lenders and independent finance companies across the UK, and his experience will have an immediate impact on the service levels we provide, while adding value to the development of our young and ambitious team."

Keep these dates free!

We've got 2024 all sewn up with a fantastic programme of unique ICT Channel and Fibre events proven to bring communities together to celebrate success, build relationships and forge new industry connections...



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Forest of Arden
Midlands



CHANNEL
CHAMPIONS

4th July 2024
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awards**

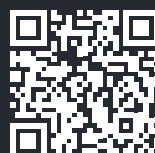
26th September 2024
Park Plaza
Westminster



commsvision
THE GLENEAGLES HOTEL

6th – 8th November 2024
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