

## **Leaving the Comfort Zone: How CSPs and TEVs Can Capitalize on Enterprise Mobility Applications**

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Enterprise Mobility Applications (EMAs) will transform competition across all businesses. That's the conclusion of a Wipro survey of 161 North American companies whose executives are at the forefront of EMA deployment. How confident are these executives that sweeping change is on the way? In the area of sales productivity alone, a whopping 88 percent said they believe EMAs will improve the win rate, and 82 percent said EMAs will increase the average deal size.

EMA development has lagged the growth of consumer apps, but that's changing. Informational EMAs—remote access to supply chain management reports is one example—are becoming commonplace; and many companies have moved up the development ladder to embrace Collaborative EMAs, such as mobile sales presentations that combine the portability of Cloud computing with the interactive and graphical capabilities of tablets.

At the head of the development curve, however, are a handful of companies that are looking beyond EMAs that can help them improve processes to consider EMAs that will help reinvent how they do business. When they arrive, these "Transformational EMAs" will provide a competitive edge in workforce management, internal operations, transaction processing, supply chains, and logistics—in short, almost everything.

That makes an 'early adopter' enterprise mobility plan essential for companies in every vertical. But businesses can't make that kind of transition alone. They will need help in planning and executing a strategy to leverage Collaborative EMAs for near-term improvements while planning for longer-term, game-changing Transformational EMAs.

Communications Service Providers (CSPs) and Telecom Equipment Vendors (TEVs) are well positioned to capitalize on this high growth opportunity—if they move out of their comfort zone by migrating upstream from the communications layer. That will require a calculated strategy to leverage and market the communications industry's strengths relative to three core EMA product requirements:

- **Network controls for data security.** Some 70 percent of the EMA early adopters in our survey said security is an above average concern—and addressing security in product development and execution is in the operating DNA of the communications industry, where services-oriented networks are a service provider advantage.
- **Network ownership to guarantee quality-of-service (QoS).** Latency and downtime are generally accepted in the consumer market but are unacceptable for

mission-critical enterprise solutions—and QoS is an area in which CSPs and TEVs that have redundant infrastructure can differentiate themselves against IT competitors by guaranteeing uptime, availability, and a consistently high level of performance.

- **Vertical industry breadth.** The communication industry's presence across every industry vertical makes it well-positioned to deliver proprietary, industry-specific mobility solutions—something nearly 90 percent of the companies in our survey said is "strategically important" for their business.

## Capturing Enterprise Mobility Market Share

If it's clear that the communications industry has strengths that are in the right place at the right time, leveraging the EMA opportunity will require a change in mindset and marketing strategy. In the communications consumer market, the boundaries of competition are clear: operators compete with other operators, while device vendors battle it out with one another. The EMA market will require tailored capabilities and services, and a more sophisticated and nuanced go-to-market strategy.

EMA competition will be more complex. Software vendors will attempt to layer mobility functionality on top of an already-installed base of solutions, while systems integrators will pitch more holistic approaches to tie disparate IT systems together through a common interface designed for mobile consumption. Competition in this space will be fierce, and there will be a broader range of participants circling a smaller number of deals.

With all this in mind, how should CSPs and TEVs proceed? We recommend the following next steps:

For CSPs, the best-positioned firms will already have trusted client relationships in the provision of network services, managed services, and communications infrastructure outsourcing. Since the key technologies that enable enterprise mobility—Cloud, 3G/4G, smartphones, and tablets—are uniquely communications-centric, CSPs should stress that their expertise in these technologies bolsters their ability to design, build, and deliver EMAs.

On the sales front, we see two primary go-to-market strategies. The horizontal approach, such as building a world class, real-time field force management solution, will avoid a battle in the vertical solutions arena where competition from IT players may be stronger. The alternative approach is to partner with an IT services leader whose domain competency will bring credibility to the provision of industry-specific solutions. In either case, value-oriented offerings will improve market credibility and positioning.

For their part, TEVs should focus on building the Infrastructure and Service Delivery Platform (SDP) to support EMAs by ensuring QoS, reliability, and customer experience management for the mobile work force. The network is no longer just a channel for delivering services; it's now a critical mechanism for service differentiation. When we apply this concept to enterprise mobility, TEVs should

consider the following:

- Enablement of ubiquitous network access and rapid porting of applications
- Seamless hand-off capability across multiple devices, such as the handover of sessions from mobile devices to fixed line devices
- Integrated Service Management infrastructure for rapid deployment of new services, integrated services across multiple devices, and integrated billing and monitoring of service quality based on class of services
- Customized networks for vertical markets; for example, meeting the unique industry requirements of banking, education, media and entertainment, and healthcare
- Connected device solutions for multiple devices in homes and enterprises
- Analytical engines to gather intelligence and support customer marketing and targeting

There are tremendous opportunities for TEVs to monetize infrastructure investments as enterprises adopt more applications. IT and telecom infrastructure are blurring as EMAs become available on multiple access devices—anytime and anywhere—and as data is made available on a secure Cloud infrastructure.

## **Building on Assets and Strengths**

EMAs will dramatically transform businesses of all types, much as e-commerce overturned the traditional competitive landscape in retailing. To avoid being left behind, businesses will need a successful enterprise mobility strategy—and they'll need a partner to help them create and deploy it. That's good news for the communications industry, whose inherent strengths in security, QoS, and vertical expertise are pre-requisites of a compelling EMA solution.

But success for CSPs and TEVs is not guaranteed. Competition will be intense, and in some cases communications players will be running uphill to beat IT services competitors. To win this game, CSPs and TEVs must hone a calculated market strategy that leverages their unique communication-centric assets and strengths while they have the advantage. That means stepping out of their comfort zone and migrating upstream from the communications layer to business applications that solve their clients' complex problems.

## **About the Authors**

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