行政院所屬各機關因公出國人員出國報告書
（出國類別：考察）

赴英國、法國考察中小企業客戶市場營運與行銷策略
報告書

服務機關：中華電信公司
出國人 職稱姓名：企業客戶處科長 李鐘義
出國地點：英國、法國
出國期間：91 年 12 月 3 日至 91 年 12 月 12 日
報告日期：92 年 3 月

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考察中小企業客戶市場營運與行銷策略

主辦機關:

中華電信股份有限公司

聯絡人／電話:

姜學民／2344-5405

出國人員:

李鐘義　中華電信股份有限公司　企業客戶處　科長

出國類別: 考察

出國地區: 法國　英國

出國期間: 民國 91 年 12 月 03 日 -民國 91 年 12 月 12 日

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分類號/目: H6／電信　H6／電信

關鍵詞: 客戶市場營運與行銷

內容摘要: 新固網民營公司於九　一年初陸續營運後，國內電信市場競爭更趨白熱化，國內爲數高達一百萬中小企業成爲固網民營公司搶占市場的主要目標。此次奉派赴英國法國考察中小企業客戶市場營運與行銷策略，一方面瞭解英、法兩國電信公司如何經營中小企業客戶市場，同時汲取渠等在中小企業客戶市場之行銷經驗，俾強化本公司競爭力。由於中小企業對通信與資訊之費用預算相當節省，且在沒有資訊技術人員（IT）下，企業e化程度較慢，故英法兩國電信皆積極開發中小企業市場。本報告先描述英、法兩國電信公司在中小企業客戶市場之經營策略與營運情況，及依客戶規模做市場區隔，透過CRM篩選目標客戶；針對中小企業客戶需求，結合合作廠商發展容易使用（Easy install、Easy use、Easy maintain）之整合性套裝產品。最後提出考察感想與建議。

本文電子檔已上傳至出國報告資訊網

摘　　要

新固網民營公司於九十一年初陸續營運後，國內電信市場競爭更趨白熱化，國內爲數高達一百萬中小企業成爲固網民營公司搶占市場的主要目標。此次奉派赴英國法國考察中小企業客戶市場營運與行銷策略，一方面瞭解英、法兩國電信公司如何經營中小企業客戶市場，同時汲取渠等在中小企業客戶市場之行銷經驗，俾強化本公司競爭力。

由於中小企業對通信與資訊之費用預算相當節省，且在沒有資訊技術人員（IT）下，企業 e 化程度較慢，故英法兩國電信皆積極開發中小企業市場。本報告先描述英、法兩國電信公司在中小企業客戶市場之經營策略與營運情況，及依客戶規模做市場區隔，透過 CRM 篩選目標客戶；針對中小企業客戶需求，結合合作廠商發展容易使用（Easy install、Easy use、Easy maintain）之整合性套裝產品。最後提出考察感想與建議。

目　　錄

壹、前言

為因應電信市場激烈競爭，本公司於九十一年一月將原服務大企業客戶之專戶處改組成立企業客戶處，擴大服務範圍及於中小企業。新成立之企業客戶行銷服務體系，負責大中小企業市場行銷與售後服務；並賦予使命：1、開拓新業務與提昇服務品質，以鞏固與擴大企業客戶群，增裕營收。2、依行業別規劃、設計、包裝產品並以合理訂價，加強行銷。3、藉企業 e 化、m 化、p 化、k 化推廣產品與服務。

新固網民營公司於九十一年初陸續營運後，國內電信市場競爭更趨白熱化，尤其企業客戶市場成為兵家必爭之地。由於過去本公司已對大企業客戶提供專戶服務，因此國內為數高達一百萬中小企業客戶市場成為固網民營公司搶占市場的主要目標。此次奉派赴英國法國考察中小企業客戶市場營運與行銷策略，深覺英、法國電信公司均極重視中小企業客戶市場，此乃因中小企業 e 化程度較慢，各電信運營業者、網際網路服務提供者（ISP）、電信設備廠商，甚至資訊電腦廠商皆積極搶佔此市場。

本出國報告從英法兩國在中小企業市場之營運方式，客戶市場區隔，以及行銷策略作為借鏡，尤其對其提供滿足中小企業所需之整合性套裝產品，可供本公司推展中小企業 e 化之參考。面對愈來愈劇烈之競爭市場，除應加強固守大企業客戶外，更應整合公司資源，建構完整的中小企業客戶行銷服務體系，深耕企業客戶市場，俾增強本公司競爭力。

貳、行程概述

12/3　　台北 --- 英國倫敦　　啓程

12/4～12/6　倫敦　訪問英國電信公司聽取 SME 市場營運方式及行銷策略、BT Wholesale 之寬頻策略與營運管理簡報與討論。
研討 CRM 系統之運用與如何提升客戶滿意度。

12/7（六）　倫敦---法國巴黎　　行程

12/8（日）　巴黎　整理資料

12/9～12/10　巴黎　研討 France Telecom.SME 市場營運方式及行銷策略、參觀 Total-solution center 及討論中小企業 e 化整合性套裝產品。

12/11～12/12 巴黎 --- 台北　　返程

參、考察英國法國中小企業市場營運與行銷策略內容之報告

一、英國電信營運概述

（一） 組織簡介

英國電信公司所屬四個主要的獨立營運公司包括 BT Retail、BT Wholesale、BT Ignite、 BT Openworld：

- **BT Retail**

係英國最大的電信服務提供者，針對消費市場與企業客戶市場提供廣泛的電信產品與服務包括語音、數據、網際網路及多媒體服務，並對企業客戶提供企業網路服務套裝產品與整體解決方案。它也是英國電信事業群主要的通路公司。

- **BT Wholesale**

主要業務爲提供完整的網路服務給英國國內電信公司、網路與服務業者、以及 BT 事業群其他營運公司。2002 年員工人數爲二萬八千餘人。

- **BT Ignite**

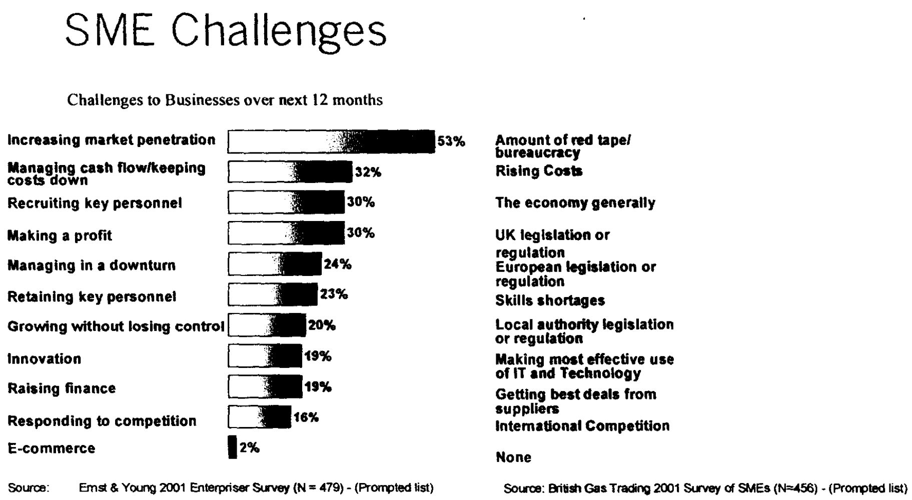
負責跨國企業網路服務包括提供 MPLS-based IP-VPN 及加值服務，2002 的營收達十八億二千萬歐元，比上一年成長百分之五十，員工人數爲一萬四千六百餘人。

- **BT Openworld**

爲一家 Internet Service Provider（ ISP），提供一般客戶與中小企業客戶上網及加值服務，寬頻與內容服務爲其主要推展業務，爲提高 2002 年營收，購入英國知名的遊戲網站 Games Domain 以及深受歐洲人士歡迎的音樂網站 dotmusic。員工人數爲四千人。

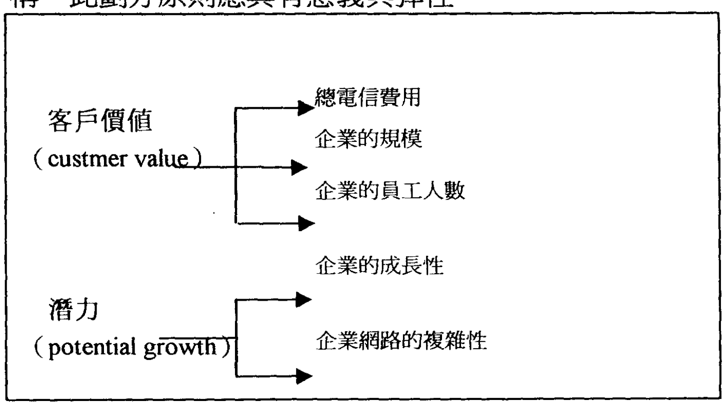
（二）中小企業（SME）市場面臨的挑戰

1. 在 SME 市場營運方面，未來一年面臨的挑戰包括增加市場滲透率、持續降低成本、補充關鍵人力、如何增加利潤等；對於未來幾年面臨的困境包括僵化的制度、成本的增加、經濟環境、英國政府政策等。

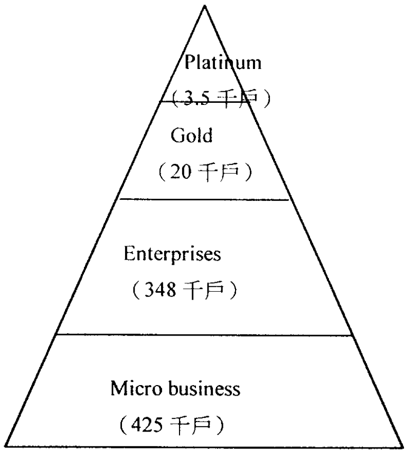


（三）市場區隔（Segmentation）

1.將企業客戶區分為白金級、金級、中型企業與小型企業客戶，其劃分之評量因素如下，據英國電信企業客戶市場部門策略與行銷經理（Strategic Marketing Manager）Ed Best 稱：此劃分原則應具有意義與彈性。



2.企業客戶結構如下：



3.大中小企業客戶區分標準與行銷服務方式：

項目	白金級	金級	中型企業	小型企業
區分標準	高貢獻度 高成長	員工人數： 50-500 有很多據點	員工人數： 5-100 有成長潛力及電子商務需求	員工人數： 1-10 低使用量
戶數（千戶）	3.5	20	348	425
貢獻度英鎊/年	160,000	27,000	2,000	660
主要策略	成長	固守	成長	忠誠度
行銷服務方式	派專案經理及專案工程師服務	派專案經理及專案工程師服務	採促銷與保衛戰	客服中心（Inbound）

（四）行銷策略

1.BT Business 的使命與任務：

- 使命：爲 BT 賺取利潤，以及成爲英國企業客戶市場電信業的領導者。
- 任務：透過各種通路提供整體服務（end to end）以滿足企業客戶之需求。

2.SME 的策略：爲中小企業客戶提供資訊與通信（IT）整

合服務，以及增進 IT 給客戶帶來的價值。

3.重點策略（Strategic Priorities）：

- 鞏固與提升核心業務
- 面對愈來愈劇烈的市場競爭與日益減少的利潤，應對鞏固與提升核心業務提出因應措施。
- 對於成長的業務區塊，及被新技術所取代業務，研擬因應措施。
- 重視客戶關係

  －擴充通路，及運用客戶關係管理系統，關懷與拉近目標客戶。
- 提升客戶滿意度

  －滿足客戶的需求與期望。

（五）積極推動寬頻業務的 BT Wholesale

1.寬頻業務發展情況

- 英國電信於 2000 年夏推出 ADSL，2001 年由 BT Wholesale 負責。
- 2001 年九月有 1010 個交換局提供服務。
- 2002 年一月推出客戶自己安裝（self-install）產品。二月推出具有國際性的競爭價格。
- 2002 年五月 BT 開放其他競爭業者租用接取網路（access）與機房（content）。
- 2002 年九月大力辦理促銷活動廣告。

2.在寬頻業務市場上，英國電信是網路批售者亦是零售商。

3.BT Wholesale 建設寬頻網路平台，提供英國 ISP 使用，其客

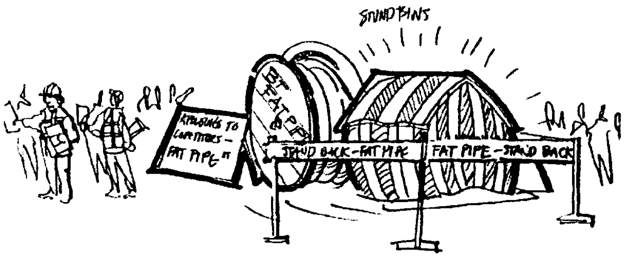
戶超過二百個。

4.BT Wholesale 的促銷廣告－包括電視、廣播以及平面媒體。

New TV marketing campaign - 22nd September 2002

Bringing "Burst Pipe" ad to life

BT tent brought to life



PIPE INSTALLATION

二、法國電信營運概況

（一）組織簡介

法國電信擁有九千二百萬用戶包括固網四千萬戶、無線四千三百二十萬戶、網際網路六百三十萬戶以及有線電視二百二十萬戶，員工人數（在法國）有十四萬五千餘人。2001 年營收達 430 億歐元，虧損 83 億歐元，2002 年營收 466 億歐元，虧損達 207 億歐元，創下法國企業史上虧損金額新高。法國政府目前擁有法國電信 56%的股份，儘管政府爲法國電信提供了全面的支持，但是政府的控股也是導致公司的債務危機的重要原因。作爲國營企業，法國電信也難免遇到政府多頭管理、責權不明、債務糾葛等問題。此外，法國電信還擁有龐大的員工，14 萬員工中有 10.8 萬是國家公務員，而國家公務員的工作受到法律的保護，因此公司很難精簡人員；爲此，法國電信主張讓員工提前退休，或者是分流到其他政府部門。

法國電信的主要營運部門爲：

1. Fixed-Line service & Distribution France

此部門負責產品、服務及終端設備的行銷，以及客戶端線路、專業客戶與公用電話業務，在法國的客戶超過二千四百萬，此部門負責管理大眾市場（包括住宅與專業客戶 residential and professional clients）的服務與行銷。

2. Corporate solution

此部門負責對大企業客戶、跨國企業客戶與其他電信公司提供整體服務解決方案以及數據網路服務，而跨國企業則由 Equant 來服務，並聯合其他在法國的分公司對企業客戶提供服務例如：Transpac（data transmission）、Expertel Consulting、France Telecom e-business、TDF（audiovisual services）等。

3. Networks and Operators

此部門分爲骨幹網路與接取網路兩部門，它是主導法國電信事業群有關國內國際網路之建置，主要分公司有 FCR、France Telecom Marine、Long Distance。

4. Orange

負責行動電話業務之經營，員工 7,000 人中有三分之一在國外工作，此公司營運擴及全球二十個國家，市佔率位居法國、英國行動電話市場的龍頭。2001 年底的客戶數爲 3 千 9 百萬戶，年成長率約 28.8%。強調最佳網路、最佳涵蓋率、最佳服務的 Orange 商標，遍及歐洲各大城市。簡訊 SMS 業務之使用率在歐洲非常高，平均每月約 1 億 2 千 6 百萬通，其營收佔總營收的 10%以上。

5. Wanadoo

負責網際網路服務之經營，此部門提供大眾上網接取電路（commuted network，cable，ADSL，satellite），以及對企業客戶提供企業對企業電子商務（B2B），入口網站，網站建置與內容服務等。

6. Research & Development and IT

此二部門負責對法國電信事業群提供研發與資訊系統的支援，冀望在競爭環境下對法國電信有所貢獻。

（二）企業客戶服務

法國電信對大客戶、中小企業客戶的服務自成一個體系，從申請受理、規劃、裝機至維修等工作全部辦理；大客戶與跨國企業客戶服務由 Corporate solution 部門提供 Total solution，據企業行銷部門（Business Marketing Division）企業發展處處長 Michel Khmomenko 稱，大客戶數約一萬戶，依客戶規模營收貢獻分為金銀銅三級，除派設專案經理服務外，並組成 ICT Solution、技術專家等團隊提供整體服務，中小企業約 20 萬戶，其行銷服務則運用 Call Center/Outbound 及促銷活動包括廣告 DM。

（三）中小企業客户市場之行銷做法

1.Wanadoo's

它主要負責網際網路、寬頻應用服務以及電話號碼簿業務。其營收約四分之三來自 600 個企業客戶，大部分的中小企業喜歡使用 Wanadoo 提供的服務，尤其小企業與 SOHO 族可利用 Page Jaunes（類似本公司的電子碼簿 highPage）來製作網站，對大企業客戶則提供量身定做的服務，此外 Wanadoo 也是法國主要的網域名稱申請提供者。

號碼簿業務是 Wanadoo 公司一項賺錢的主力業務，品牌名為 Page Jaunes，包括平面與電子號簿，號稱歐洲最大的號簿提供者。

2.法國電信對中小企業提供套裝產品

法國電信於 2000 年針對中小企業客戶推出三種主要的套裝產品

- Oleane Open-提供上網與網際網路相關服務，包括電子信箱、申請網域名稱以及設置網站等。
- Oleane Multi-提供企業內部網路〔intranet〕包括企業總公司與分支機構之資訊傳遞以及大量資料傳送服務。
- Oleane Control-提供企業內、外部網路〔intranet & extranet〕。

1. 此外法國電信亦針對醫療機構提供具有安全機制之醫療網，包括病歷資料以及藥品查詢。
2. 為提供中小企業網際網路相關服務，法國電信與 Compaq 合作，由 Compaq 提供用戶終端設備，電路則由法國電信集團下的 Wanadoo 提供以及 Netissimo 提供 ADSL。
3. 法國電信早於 1998 年即積極投入電子商務市場，除尋找合作夥伴 Andersen Consulting 、Logic Achat 外，並針對中小企業應用電子商務之需要，加強付款與加密機制（payment and encryption）；另為服務跨國企業客戶電子商務需求，與 Global One 合作，推出國際性電子商務。

（四）Wholesales

為推展歐洲骨幹網路，法國電信以 Open Transit 商標，提供下列 Wholesales 業務：

- Open Transit internet－提供各種接取速率與頻寬給 ISP。
- Open Transit mobile-to-mobile － 提供語音傳送給 GSM 業者
- Open Transit City-to-City－ 提供歐洲主要城市間寬頻網路給其他業者或跨國公司。

三、支援中小企業 e 化的整合性套裝產品

在全球新知識經濟時代中，如何協助企業調整結構與經營模式，正是本公司贏得中小企業市場以及建立堅實競爭優勢的基礎。本公司企業 e 化的產品包括 IP 網路服務企業虛擬專屬網路(IP-VPN)、雙向 512、新世代光纖網路(FTTB)，結合合作廠商發展客製化之 e 化後端平台，如客戶關係管理(CRM：Customer Relationship Management)、企業資源計劃(ERP：Enterprise Resource Planning、公開金鑰基礎建設(PKI：Public Key Infrastructure)、供應鏈管理(SCM：Supply Chain Management)，並藉由以上業務推展企業 e 化服務，建立企業網路服務套裝產品。

由於中小企業在預算上相當節省，在沒有資訊技術人員（IT）下，如何吸引企業推展 e 化工作，提高內部作業效率與節省成本，即成為企業 e 化的目標；另一方面多數企業非常重視介面設計的便利性(user-friendly)，在簡單易用(easy install、easy use、easy maintain)的要求下，對於通信與資訊整合服務需求愈殷切。此次考察法國電信期間，電信設備供應商 Acatel 推出一套針對中小企業 e 化的產品 OmniPCX Office ，茲簡介如下：

1. 電子商務應用

OmniPCX Office 係設計將所有的需求整合單一平台，在內建的系統架構內包括網際網路接取、電子郵件伺服器、區域網路架構與服務、電腦與電話整合、個人助理與語音信箱服務的電話功能、及網內（on-site）移動等。

它的硬體架構採模組化以及萬用埠槽位設計，適合 6-236 個分機規模的中小企業客戶，另提供一套軟體關鍵管理系統，讓中小企業客戶可增加終端機數量或新增功能。

它的軟體採用 Linux 作業系統，強調整合大多數網際網路通訊協定，並適用其他軟體廠商所開發之通訊應

用軟體。

2. 區域網路解決方案

該系統提供安裝6片高速乙太網路10/100區域網路交換器介面模組，強調可提高中小企業Intranet 的效能，包括資料檔案轉換、資料擷取，以及多媒體應用接取等。此外OmniPCX Office解決方案可內建更多區域網路服務，簡化區域網路設定與管理，例如內建DHCP（動態主機設定協定）伺服器，可自動且動態地在區域網路內預留IP位址，讓客戶可輕易在區域網路內新裝IP設備如PC或IP電話。

3. 網際網路解決方案

它支援中小企業上網的各項需求，包括分享式快速上網接取服務、安全機制如防火牆、最佳化與可控制的網際網路服務等。並具有企業專用的電子郵件伺服器，以及語音信箱、傳真與電子郵件整合功能。此外，亦可透過網際網路提供企業虛擬私有網路（VPN），讓企業總公司與分公司、營業據點間進行資料傳送與查詢。

4. 語音解決方案

它除了具有一般按鍵電話機功能外，並提供VoIP服務，藉由電話伺服器進行管理IP電話或IP電話軟體，同時亦提供一台整合媒體閘道器（Integrated Media Gateway）支援H.323標準通信設備。此項服務可大幅節省企業長途電話費。

中小企業若欲導入IP電話，其內建式DHCP伺服器，讓企業在移動或加一台PC時僅需把話機插入任何一個乙太網路連接埠即可通話。支援完整的IP電話之設備包括：

➢ IP Reflexes：完整的IP電話產品，提供簡易使用的語音服

務。

- Fast IP Enabler：一套安裝軟體，讓數位式終端話機轉換成 IP Reflexes 電話。
- IP PIMphony：一套電話軟體，可讓一台多媒體個人電腦執行 IP 模式的 IP 電話功能。
- H.323 產品：一套 H.323 的電話機及 NetMeeting 軟體。

肆、感想與建議

一、英法兩國電信公司均重視中小企業客戶市場。

此次考察期間深覺英法兩國電信公司均極重視中小企業客戶市場，探討後乃因通信與資訊技術進步快速，大企業客戶營收很難再增長，而中小企業客戶則為待開發的市場，因此各電信競爭業者爭先搶攻此市場。另經濟部委託資策會 E-CRC-FIND 進行「我國企業連網及資訊應用程度調查」中，國內已連網的客戶中，大型企業的網站建置率達 74.2%，中型企業為 37.1%，小型企業則僅 26.2%，可明顯看出中小企業建置網站的比率，遠低於大型企業，是一個深富潛力、值得開發的市場。因此，本公司如何整合內部資源，積極開拓中小企業客戶市場，乃刻不容緩。

二、對中小企業客戶需求，推展整合性套裝產品。

由於中小企業未聘僱資訊技術人員（IT），企業 e 化程度較慢，故各電信競爭業者無不針對中小企業客戶需求－即提高企業內部作業效率，節省成本，且容易使用、易於維護與管理上，研發符合且滿足中小企業需求的套裝產品。例如法國電信針對中小企業客戶市場的行銷方式，即以其擁有的通信網路包括專線，ADSL、FTTB 等，並結合 Acatel 研發之通信與數據整合性套裝產品 OmniPCX Office，再搭配 HP 電腦廠商提供之應用軟體。此種行銷方式值得吾人參考。

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三、為提高企業加值服務營收，宜結合合作廠發展客製化產品。

本公司數據加值服務營收與英法兩國電信相較，明顯偏低，因此，宜仿效英法兩國電信結合客戶終端設備廠商、電腦廠商網際網路內容提供者（Internet Content Provider）以及內容服務提供者合作，推展客製化產品，除增強企業客戶市場競爭力外，並可大大提高企業加值服務營收。

伍、附錄－參考資料

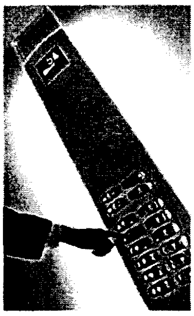
The SME Market

4th December 2002

BT.com/business

Connections that get results. BT

BT Business: the elevator pitch



- 1.2m customers
- 25% of BT Retail revenues
- 80% of revenues from products which existed 80 years ago
- No.1 ISP
- No.1 Broadband

To earn, for BT, the position of market and thought leader in communications for Business customers in the UK

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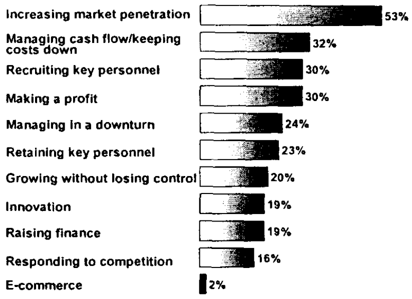
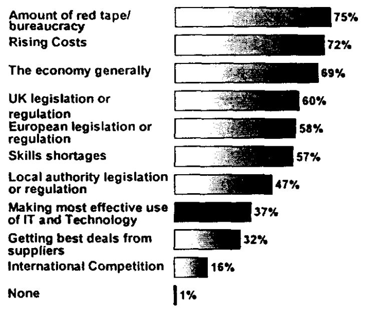
SME Challenges

Challenges to Businesses over next 12 months



Source: Ernst & Young 2001 Enterpriser Survey (N = 479) - (Prompted list)

Difficulties facing Companies over next few years



Source: British Gas Trading 2001 Survey of SMEs (N=456) - (Prompted list)

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Segmentation

BT.com/business Connections that get results. BT

BT Segmentation Philosophy/Principles

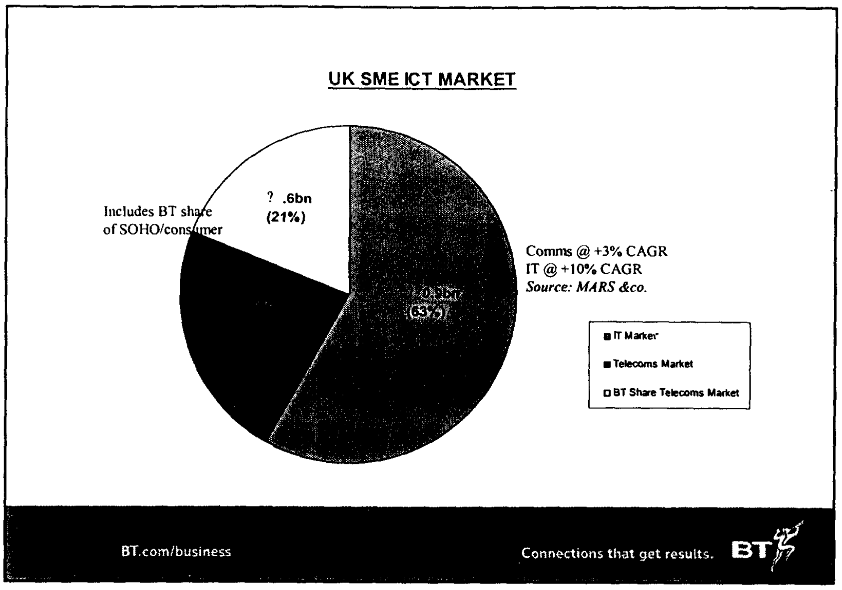
- Value-based/customer-centric approach across whole base
- Graded treatment appropriate to needs, potential & risk and cost/return of service
- Combines key internal and external criteria
- Dynamic allocation of customers ('promote/demote')
- Clear/Logical business rules
- Benefits to date:
  - £900k saved on Catalogue @ increased resp (Micro)
  - Organisational focus/redesign
  - Segment plans (resource, spend, propositions, treatment)

BT.com/business Connections that get results.

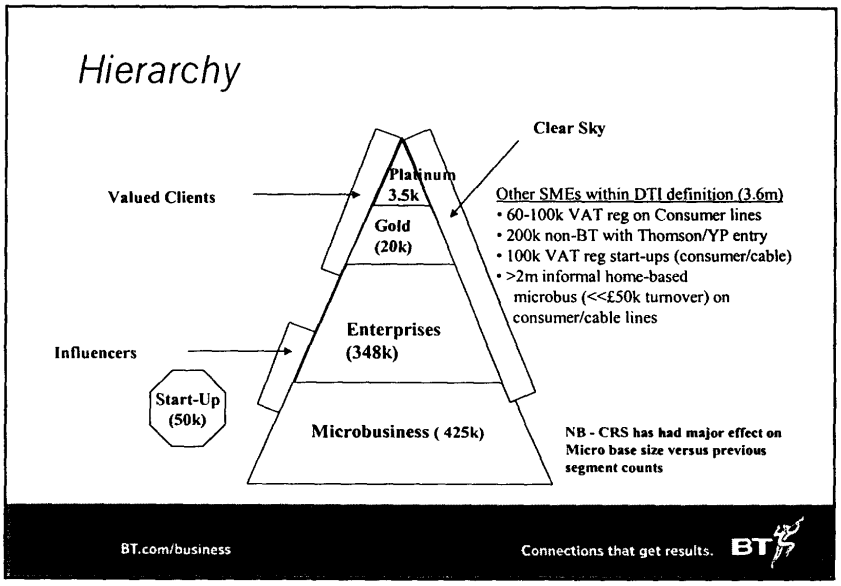
Information Used

- CUSTOMER VALUE
  - Total current spend with BT
  - Size of company (Dun & Bradstreet)
  - Number sites/employees
- POTENTIAL GROWTH
  - Line of business
  - Technological sophistication (Pathfinder)

BT.com/business Connections that get results.



UK SME ICT MARKET
? .6bn
(21%)
Includes BT share of SOHO/consumer
(63%)
Comms @ +3% CAGR
IT @ +10% CAGR
Source: MARS &co.
IT Marker
Telecoms Market
BT Share Telecoms Market
BT.com/business
Connections that get results.



Hierarchy
Clear Sky
Valued Clients
Platinum
3.5k
Gold
(20k)
Other SMEs within DTI definition (3.6m)
• 60-100k VAT reg on Consumer lines
• 200k non-BT with Thomson/YP entry
• 100k VAT reg start-ups (consumer/cable)
• >2m informal home-based microbus (<<£50k turnover) on consumer/cable lines
Enterprises
(348k)
Influencers
Start-Up
(50k)
Microbusiness (425k)
NB - CRS has had major effect on Micro base size versus previous segment counts
BT.com/business
Connections that get results.

...and they are very different

Segment	Microbusiness	Entreprises	Gold	Platinum
No. of accounts	717.2k	409.2k	20.6k	3.7k
Revenues (as % of total SME Business)	20%	33%	24%	23%
% of accounts with 100% BT comms spend	81%	71%	40%	41%
Customer sat (out of 10)	7.33	7.08	5.94	5.66
% revenues from non-PSTN	~2%	~8%	~15%	~33%
Average annual spend with BT	£0.7k	£2k	£27k	£160k

Segment Breakdown

Clear Sky

Who?	- dot.com companies, fast rising
	- internal/externally sourced data
How many?	- 10k *(847 internally matched)*
BT spend pa?	- £10-15k
Primary Objective?	- growth in spend with BT
Sales Treatment	- dedicated F2F Sales Team
Marketing Treatment	- establishing credibility (inc PR/Sponsorship/Brand)
	- increasing speed to market
Competitors	- from IBM downwards

BT.com/business Connections that get results. BT

Segment Breakdown

High Value - Platinum

Who?	- high spend and high potential
How many?	- 3,761
BT spend pa?	- £160k
Primary Objective?	- growth
Sales Treatment based	- ICT Solutions/Valued Clients desk SC + Field Specialists/CUG
Marketing Treatment	- Relationship Marketing/Propositions Online/Extranets/Managed Solutions
Competitors	- Energis, Colt, Uunet/Worldcom, C&W

BT.com/business

Connections that get results. BT

Segment Breakdown

High Value - Gold

Who?	- mid-market;traditional focus;50-500 employees; usually heavily multi-sited
How many?	- 20k
BT spend pa?	- £27k
Primary Objective?	- defence
Sales Treatment based	- ICT Solutions/Valued Clients desk SC + Field Specialists
Marketing Treatment	- Events/functional/IT Mgt advertising/DREAM/Mail/Propositions
Competitors	- Energis/C&W/Vodafone/Demon/Sage

BT.com/business

Connections that get results. BT

Segment Breakdown

Enterprises

Who? - small but with growth potential;need help with e-business; 5-100 employees

How many? - 348k

BT spend pa? - £2k

Primary Objective? - growth

Sales Treatment - campaign-driven/Islands of Excellence/Defence

Marketing Treatment - Campaign - o/b calling;advertising/Direct Mail/Online/Field Mkting/Events

Competitors - ntl/AOL/Orange

BT.com/business Connections that get results. BT

Segment Breakdown

Microbusinesses

Who? - small (1-10 employees); low spend;low tech; local catchment;inert

How many? - 425k

BT spend pa? - £0.66k

Primary Objective? - keep loyal

Sales Treatment - Inbound

Marketing Treatment - Minimal - outsourced/ mobility/ISP campaign + Bill Inserts

Competitors - AOL/FreeServe/Resellers

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Segment Breakdown

Niche - Start-Up

Who? - <1 year old;

How many? - 50k (target 100k next year)

BT spend pa? - £0.6k (but higher growth potential than Micro)

Primary Objective? - to get in early and evaluate potential growth

Sales Treatment - Inbound & campaign-driven

Marketing Treatment - Magazine;online;o/b calling;affinity

Competitors - low with Telcos, but high with Banks etc

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Segment Breakdown

Niche - Influencers

Who? - Trade Bodies;Chambers;Professional Bodies; with influence over top 25 SICs

How many? - <1000 *(12 badged to date)*

BT spend pa? - £114k *(skewed due to small numbers)*

Primary Objective? - create cost-effective route to market for both sales and opinion-forming

Sales Treatment - graded

Marketing Treatment - graded (eg from 3rd party deals - Press Releases)

Competitors - varied

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Clusters - Objectives

- Explore mass SME segments for meaningful clusters/sub-segments
- Data-driven approach based on richer data/info set than in main segmentation
  - esp calling behaviour
  - more use of Pathfinder data
  - verified/characterised using external MR (Teledynamics)
- Uses:
  - Identify pockets/clusters of potential
  - define marketing treatments to increase ROMI (pilots in Q3 Broadband)
  - Refine segmentation rebuild Oct/Nov 02 & beyond
  - Possible promotion/demotion between segments
- Next steps
  - pilot calling/response tests
  - overlay Work X financial trend data
  - verify use by application (eg RAD)

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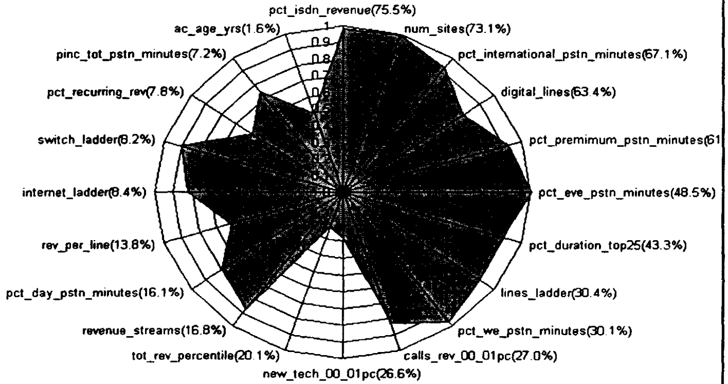
Clustering Criteria

e3_005:14_1



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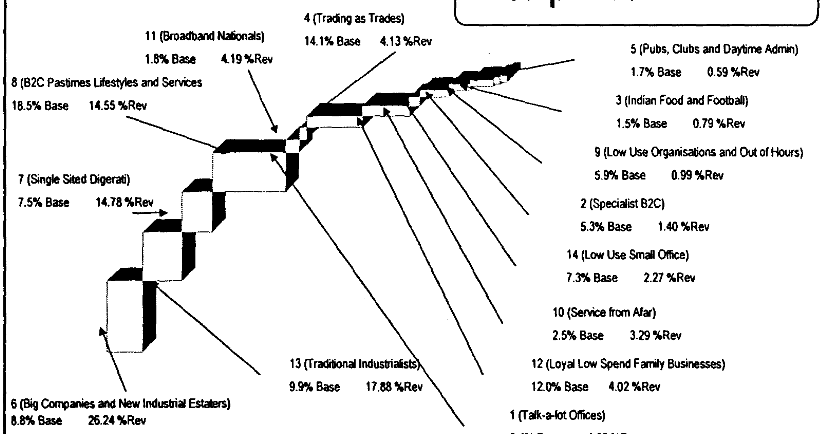
Enterprises



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Connections that get results. BT

Talk-a-lot Offices

12,182 Customers 3.4% Base 4.9% Rev

Description – Smaller cluster whose primary focus is voice traffic. Typically single sited but with about 5.5 exchange lines.
Industry areas are mostly 'White Collar' professionals and they have about 18 employees

Treatment – Tailor their plans for high voice volume

Survey Highlights
•LARGE (68% >=10 empl; 78% turnover £500k-£5m)
• Optmism - HIGH
• CSAT - LOW (40% @8-10)
• Dual sourcing MED (36%)
• Switch HIGH (60%)
• Mobile HIGH (73%)

Who are they?
Likely professions: 5.9% Legal activities (440% lift), 17.8% Medical/Dental activities Insurance Brokers, 3.6% House Sales Agency
Recruitment Consultants

What BT Products & Services?
Generate 6.6% of calls on the network, 195% uplift
95% of customers have traditional calls/lines/apparatus revenue streams of 95% total revenues.
Avg Bill £3,830

How – Calling Behaviour
Recurring revenues are lowest at 38.5% of revenue
Make lots of calls – widest calling circle, call many localities. Greatest pattern of increasing PSTN revenue.

BT.com/business

Connections that get results. BT

Single Sited Digerati

27,295 Customers 7.5% Base 14.8% Rev

Description - Single sited companies exploiting digital technologies. Typically employing about 19.0 employees and being in High Tech industries. Uplift in Postcode Areas in M4 Corridor

Treatment - Need to support their growth whilst ensuring their retention

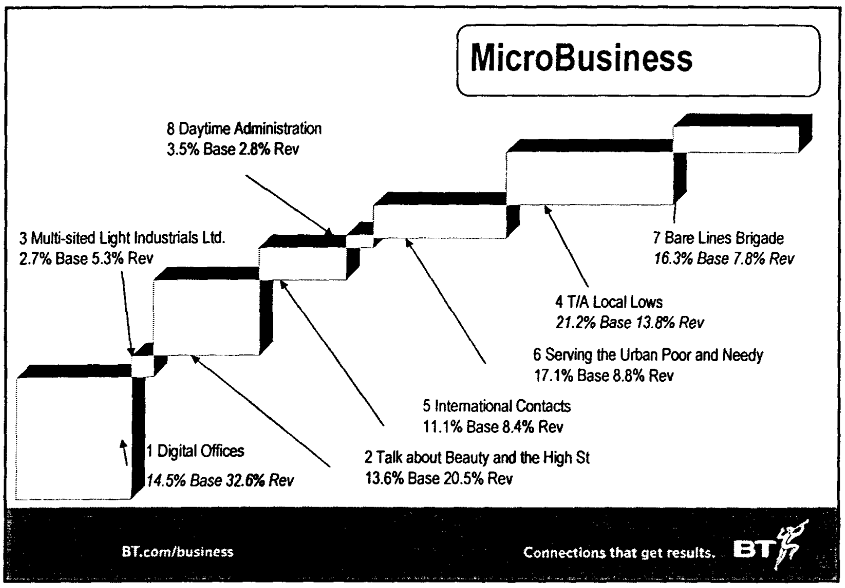
Survey Highlights
- SMALL/MED (87% 2-49 empl; 64% turnover £500k-£10m)
- Optmism - MEDIUM
- CSAT - MED (67% @8-10)
- Dual sourcing MED (40%)
- Switch HIGH (53%)
- Mobile HIGH (67%)

Who are they?
Likely professions: Computers and Software, Imaging and Copy Bureau, Consultancy, Advertisting, Printing/Plate-Making

What BT Products & Services?
Higher numbers of exch lines (avg. 8.2)
High Digital - avg 3.5 lines
Avg Bill £4,870, and highest discounts at 11.2% indicating optimal plans

How – Calling Behaviour
ISDN generates 47.6% of call revenue
International calls generate 15.0% revenue

BT.com/business Connections that get results. BT



T/A Local Lows ("corner shop")

117,756 Customers 21.2% Base 13.8% Rev

Description – Large cluster of customers with lower revenues and a higher likelihood to be 'Trading As'.
Typically seem to be local shops serving the consumers.

Perhaps Low Telephony needs so low touch.

Survey Highlights
- •V SMALL (47% self-empl; 100% turnover <£500k)
- • Optmism - LOW
- • CSAT - MED (54% @8-10)
- • Dual sourcing V LOW (<5%)
- • Switch V LOW (<5%)
- • Mobile MED (60%)

Who are they?
Likely professions:
Butchers
Tyre and Brake Shops

What BT Products & Services?
Bill £589
Single sited analogues

How – Calling Behaviour
No International calling
[redacted]

BT.com/business

Connections that get results. BT

Bare Lines Brigade ("one line inert")

90,546 Customers 16.3% Base 7.8% Rev

Description - Lowest revenues per line. They employ about six employees and use just one analogue line

Treatment - Possible Acquisition Targets

Survey Highlights
- •SMALL (86% <5 empl; 61% turnover <£50k)
- • Optmism - LOW
- • CSAT - LOW (40% @8-10)
- • Dual sourcing MED (39%)
- • Switch V LOW (7%)
- • Mobile LOW (33%)

Who are they?
Likely professions:
1.9% Retail sale of meat (208% uplift).
Craft and Care Services
Design and Services Offices

What BT Products & Services?
Bill £412 – lower revenues per line
Lowest on the internet use (ladders)

How – Calling Behaviour
Local Focus (highest proportion 54.5% of minutes)
Lowest number of calls (133/month)
[redacted]

BT.com/business

Connections that get results. BT

Digital Offices ("explorers")

80,828 Customers 14.5% Base 32.6% Rev

Description –Large and technically sophisticated business.
Just under a third are multi-sited. Have a large staff with about 11 employees.
Good uptake of New Technology products

Treatment – very Enterprises profile

Survey Highlights
- MED (53% 2-9 empl; 55% turnover £500k-£5m)
- Optmism - MED
- CSAT - V LOW (33% @8-10)
- Dual sourcing HIGH (42%)
- Switch LOW (27%)
- Mobile MED (60%)

Who are they?
Likely professions:
Most likely to be 'Companies' (54%)
Solicitors, Property Management, Consumer Groups

What BT Products & Services?
Bill £2258 – highest revenue per line
22% have digital lines, generate 51% of ISDN rev.
Higher on the lines ladder – half having Bus Highway/FtrLine/ISDN/ADSL etc.

How – Calling Behaviour
Higher revenue per line (80% have more than £250/line)
Call more localities
[illegible]

Strategy

BT.com/business Connections that get results. BT

Where do we want to be?
Vision & Mission

BT Retail & BT Business Vision
"Connecting your world Completely"

BT Business Mission
To earn, for BT, the position of market and thought leader in communications for Business customers in the UK

Our Role
Meeting our customers' needs through multiple channels and for the end to end customer experience (throughout BT) in the Communications marketplace

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Connections that get results. BT

Strategic Issues – Pressure on Revenues & Margin

- Core market growth - combined, the business calls & lines market will shrink by 1.9%
- CPS - we anticipate potential customer losses of 130k customers
- Cannibalisation of our own products will have a margin impact of £31m eg:
  - DSL for ISDN, Non Geographic Calls, Voice

- New Wave Market Very competitive
  - Worldwide ICT slowdown (growth below 2%)
  - UK Software & IT vendors made net loss of £2.5Bn in 2001
- SMEs taking a "Make do and Mend" approach
  - Want support for existing IT
  - Want to drive greater value from existing IT

BT.com/business

Connections that get results. BT

Strategic Issues – Customer Experience

- Existing Relationships Product Based
- Customer Experience variable across Channels
- Flat Market & increased competition highlight need to extend market reach
    - Especially coverage at top end
- Growth market areas require closer understanding of customers business

- Must Ensure Consistent Customer Experience
- Across All Managed Channels (Internal & External)
    - Contact Centres, On Line, F2F, Vars, ISVs, BTLB........
- For Sales, Service & Advice
- Supported by Customer Centric Systems
- Enabled By New Behaviours

Strategic Priorities

Defend and Grow Core

To address the effects of increased competition and margin erosion in our core business

Focus on Customer Relationships

develop channels, business systems and behaviours that enable us to develop close relationships with target customers

Grow New Wave

To address growth areas of the market and minimise the effects of technology substitution

Improve Customer Satisfaction

To ensure we give our customers the experience they expect

03/04 Key Programmes

Defend (and Grow) Core	Grow New Wave	Improve Customer Sat
VOICE MARKET SHARE	BROADBAND PENETRATION/ APPS	DRIVERS OF SATISFACTION/ DISSATISFACTION
	NEW WAVE	
	MOBILITY	
	VENTURING	

Focus on Customer Relationships

- CHANNEL STRATEGY/NETCENTRICITY
- STRATEGIC SYSTEMS
- ENABLING OUR PEOPLE

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ICT Focus Areas

Direct Sales: Volume or High-Value	Indirect: The BT Solution (e.g. VAR)	Indirect: Enabler - "BT Inside" (e.g. specialist software co.)

Optimum Channels (logical alternatives in brackets)	Customer Segments	
	Enterprise	Corporate
Broadband	Direct Sales (Indirect)	
Desktop Management	Indirect - Solution (Indirect - Enabler)	
IP Infrastructure		Direct Sales (Indirect)
Mobility & WLANs	Direct Sales	
Applications, Mgmt & Hosting	Indirect - Solution (Indirect - Enabler)	Indirect - Enabler
Network-based Services	Direct (Indirect)	

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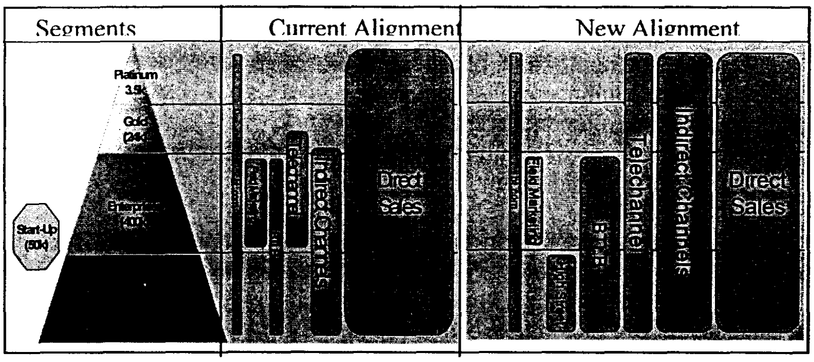
Connections that get results. BT

Channel Alignment



BT.com/business

Connections that get results. BT

Customer Satisfaction

BT.com/business

Connections that get results. BT

Business Satisfaction Overview

- 1900 Customer Interviews each month across Platinum/Gold/Enterprises/Micro Business segments
- Cover 'overall satisfaction with BT' and 'Competitor satisfaction'
- Also; key drivers of satisfaction and verbatim feedback 'what BT needs to do to improve satisfaction', 'why very satisfied with BT', 'why more satisfied with competition'
- Satisfaction improvement programme implemented in April 01
- Objective to be significantly better than the competition in each
- segment by March 03.
- To reduce dissatisfaction within each of the segments to 10%, from circa 17% overall Business. Platinum from circa 30% dissatisfaction.
- Input from Business MD and Directors including Customer Satisfaction Director who are involved directly in improvement programmes.

Business Satisfaction Programmes - built around 'verbatim feedback' and 'drivers of satisfaction model'

1. Customer Value Perception & Billing
2. BT Service - Provision/Faults/Complaints
3. Sales Relationship
4. ICT & Business Propositions
5. Brand & Communications - Contact Strategy

- **Targets Set for Each of the Key Drivers and initiative's implemented to improve performance**
- **Monthly reporting of initiatives and satisfaction performance**

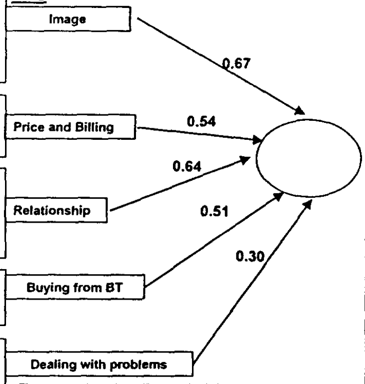
BT.com/business Connections that get results. BT

Key Drivers of Business Customer Satisfaction Model

Question	Coefficients
Cares about customer needs	0.119
Is a company you can trust	0.112
Helps customers get the most out of comms	0.099
Is the company would prefer to buy from	0.099
Can meet my changing comms needs in future	0.095
Meets needs of small and medium businesses	0.079
Keeps you informed about relevant comms apps	0.065
Value for money	0.219
Overall satisfaction with pricing	0.169
Overall satisfaction with Billing	0.149
Easy to do business with	0.189
Capabilities of BT people	0.174
Offers right comms solutions for your business	0.157
Business partner rather than just supplier	0.119
Provision of Service	0.507
Satisfaction with BT sales team	0.005
Fault Repair	0.167
Complaint Handling	[illegible]

Improvement Coefficients impact on satisfaction if drivers move up by 1 point

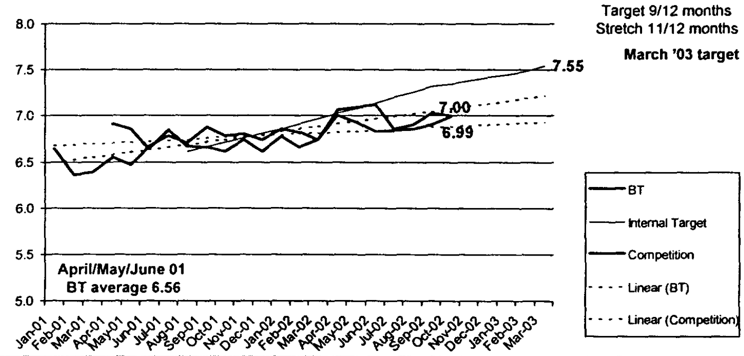
SME



BT.com/business   Connections that get results.   BT

Business Overall Sat vs Competition

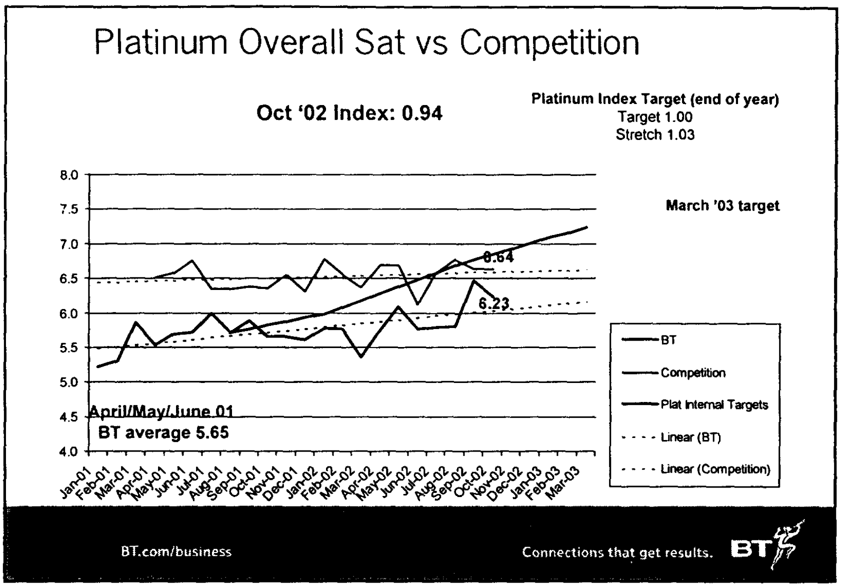
Oct '02 Index: 1.00



Business
Index target April - Sept 1.0
target Oct - March 1.03
Threshold 7/12 months
Target 9/12 months
Stretch 11/12 months

March '03 target

BT.com/business   Connections that get results.   BT


Platinum Overall Sat vs Competition
Oct '02 Index: 0.94
Platinum Index Target (end of year)
Target 1.00
Stretch 1.03
March '03 target
8.0
7.5
7.0
6.5
6.0
5.5
5.0
4.5
4.0
6.64
6.23
April/May/June 01
BT average 5.65
Jan-01 Feb-01 Mar-01 Apr-01 May-01 Jun-01 Jul-01 Aug-01 Sep-01 Oct-01 Nov-01 Dec-01 Jan-02 Feb-02 Mar-02 Apr-02 May-02 Jun-02 Jul-02 Aug-02 Sep-02 Oct-02 Nov-02 Dec-02 Jan-03 Feb-03 Mar-03
BT
Competition
Plat Internal Targets
Linear (BT)
Linear (Competition)
BT.com/business
Connections that get results.
BT

Broadband powered by BT

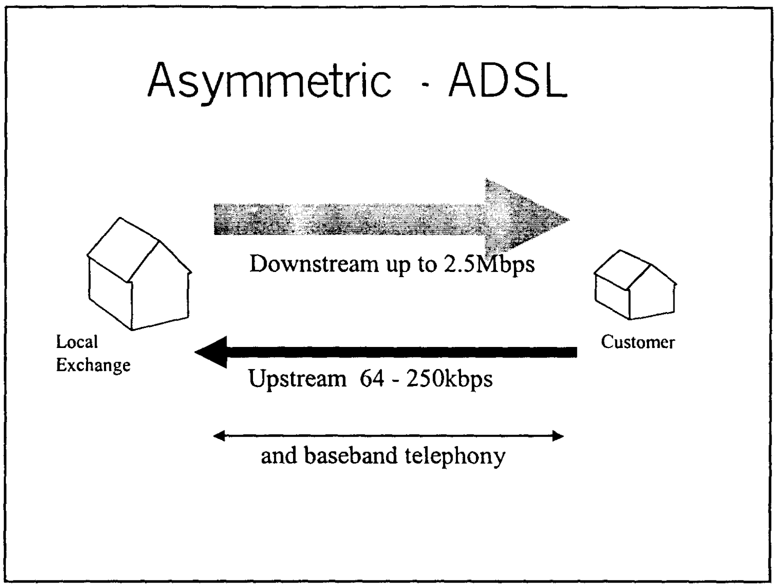
Andy Jugg
Broadband Strategy & Business Management
BT Wholesale

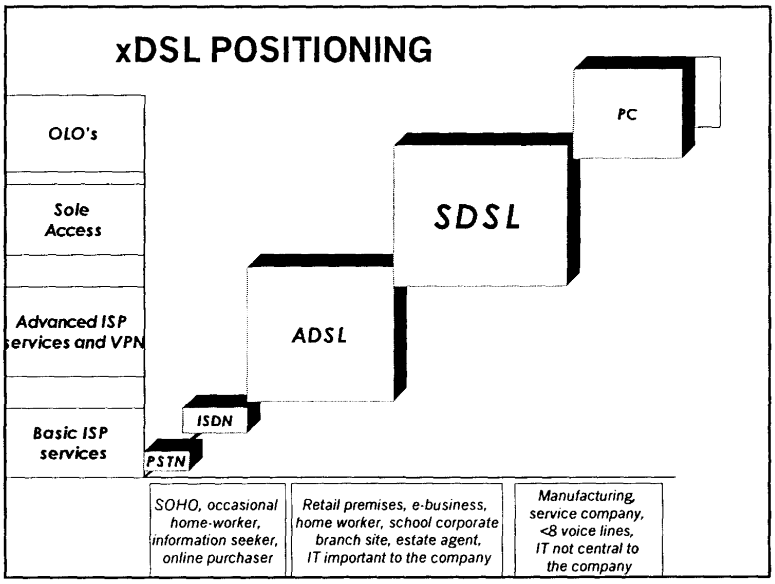
BT Wholesale

Broadband Volume Targets

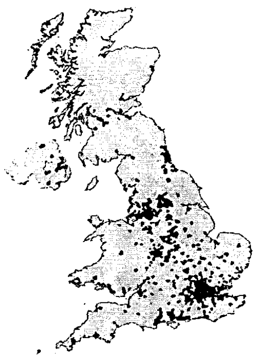
- Summer 2003
  1 million
  - 2004
    2 million
    - 2006
      c5 million

A new partnership with service providers


Asymmetric - ADSL
Downstream up to 2.5Mbps
Local
Exchange
Customer
Upstream 64 - 250kbps
and baseband telephony

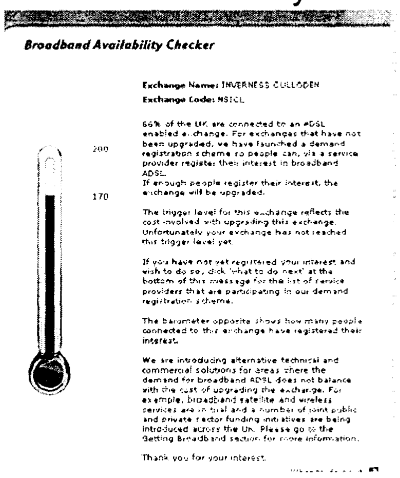

xDSL POSITIONING
OLO's
Sole
Access
Advanced ISP
ervices and VPN
Basic ISP
services
PSTN
ISDN
ADSL
SDSL
PC
SOHO, occasional
home-worker,
information seeker,
online purchaser
Retail premises, e-business,
home worker, school corporate
branch site, estate agent,
IT important to the company
Manufacturing,
service company,
<8 voice lines,
IT not central to
the company

Broadband Rollout



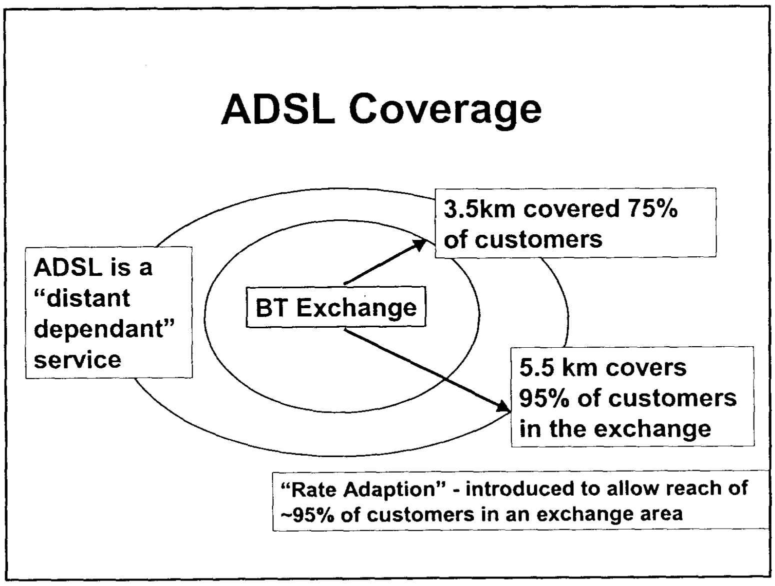
- 60% of households, 70% of internet users covered by 1,015 DSL enabled exchanges at end of April 2002
- 66% of households and 75% of internet users with 1119 DSL enabled exchanges at end August 2002
- Further rollout to be based on demand via pre-registration scheme
- Partnership opportunities
- 1 way satellite trial underway
- Fixed wireless trial later this year

Broadband Registration scheme
- commercially viable Broadband

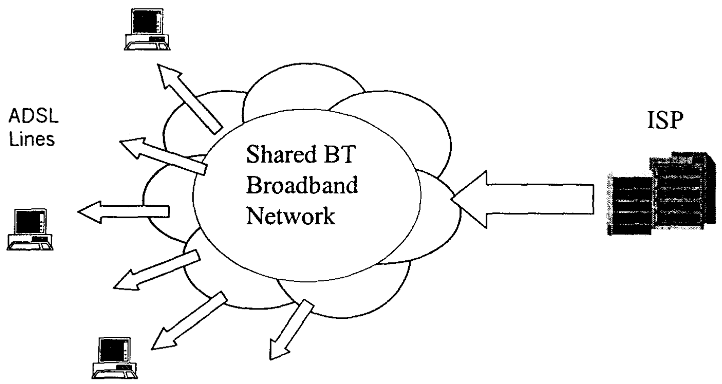


- Introduced 1st July 2002
- Trigger volumes determined for each exchange based on cost


BT - Broadband Services - Netscape
BT wholesale
What is Broadband?
Getting Broadband
This Site
News
Broadband in Action
Broadband Suppliers
Welcome to Broadband
What is Broadband?
Can I get it?
Go
About Broadband Availability
Check Registration Levels
Go


ADSL Coverage
ADSL is a "distant dependant" service
BT Exchange
3.5km covered 75% of customers
5.5 km covers 95% of customers in the exchange
"Rate Adaption" - introduced to allow reach of ~95% of customers in an exchange area

One to Many Products



BT's wholesale DSL portfolio

BT IPStream

Corporates provide teleworkers with fast access to LAN

ISPs provide subscribers with fast access to content/the Interne

BT DataStream

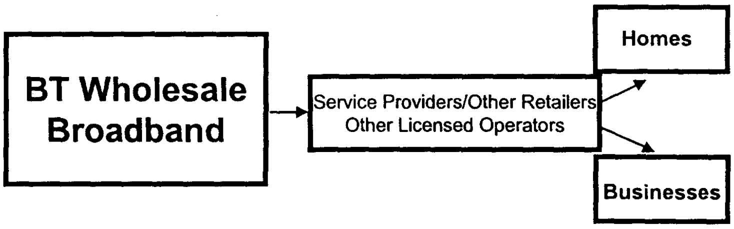
Other network operators provide DSL solutions to other service providers, or maybe direct to subscribers

BT VideoStream

Service providers offer TV based services e.g. video on demand

BT Wholesale Broadband

Infrastructure Provider | **Service Providers** | **End Users**



BT is both a wholesaler and a retailer

BT Wholesale Broadband Options

Local Loop Unbundling

The "BUILD" option

buy space in a BT exchange to establish own network & use to deliver broadband services

Wholesale DSL

The "BUY" option

buy wholesale end to end solutions that run over BT's broadband network & use to deliver broadband services

BT Wholesale is committed to helping Broadband Britain

BT Wholesale Broadband Options

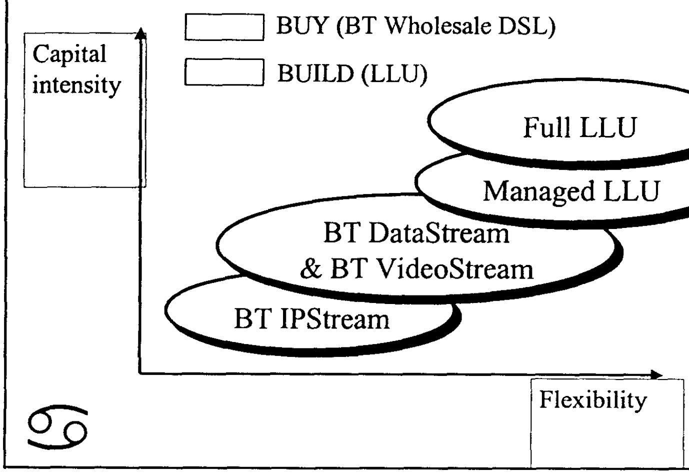
Local Loop Unbundling
The BUILD option

- Available to OLOs
- Available from any of BT's 5.5K UK exchanges
- OLO defines how broadband is delivered to end users

Wholesale DSL
The BUY option

- OLOs & service providers
- Available from 1119 exchanges that BT Wholesale has upgraded
- BT Wholesale has defined how broadband is delivered to end users

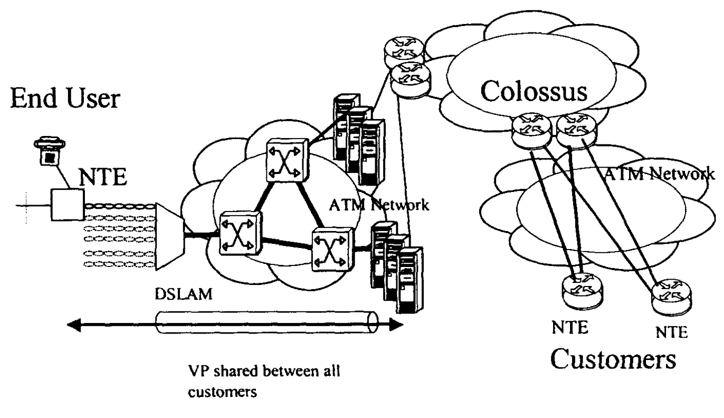
To Build or to Buy?



>200 Wholesale DSL Customers

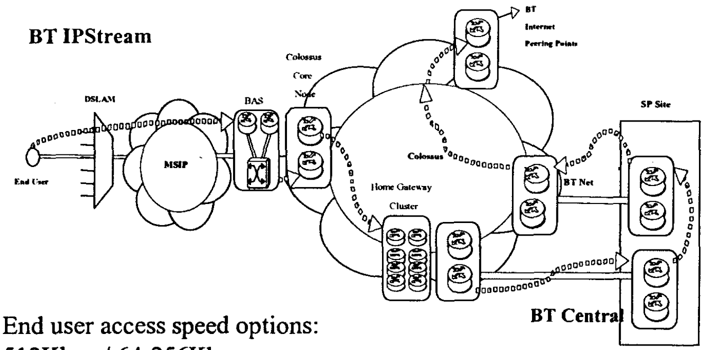
The UK has one of the most open markets in the world

Service Components......



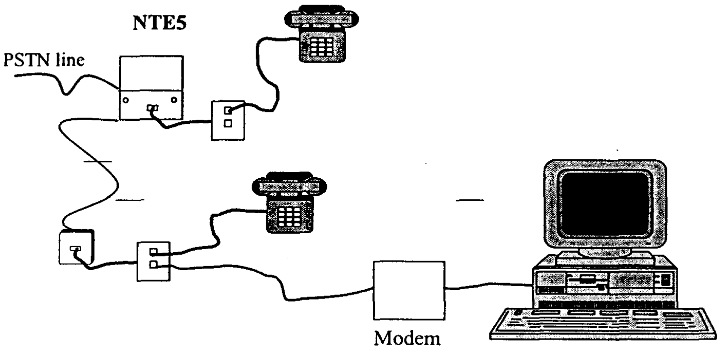
IPStream Home & BT Central

BT IPStream



End user access speed options:
512Kbps / 64-256Kbps
1Mb / 256Kbps
2Mb / 256Kbps

IPStream Home/Office

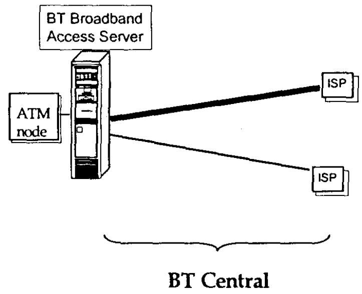


Existing PSTN wiring
Plug in micro filters required
Customer/end user provides modem

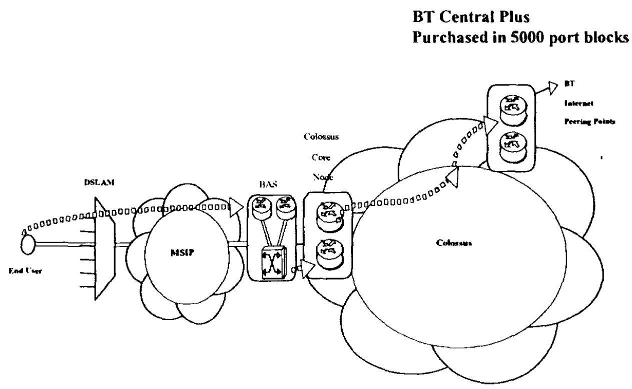
BT IPStream - BT Central

Data rate options:

- ~~512Kbps~~
- ~~1Mbps~~
- 2Mbps
- ~~4Mbps~~
- 10Mbps
- 34Mbps
- ~~100Mbps~~
- 155Mbps
- 155Mbps L2TP

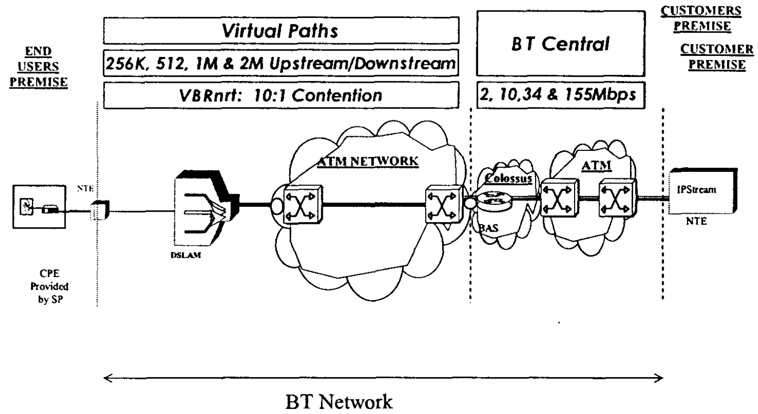


IPStream Home and Central Plus



IPStream Symmetric

Summary of BT IPStream Symmetric



Features

- Shared Virtual Path
  - Virtual circuits contend for available data space in VP
  - Virtual circuits are configured as Variable Bit Rate
- BT take the risk
  - what demand is placed on the core network
  - infrastructure rolled out to entire coverage

IPStream pricing - ex VAT

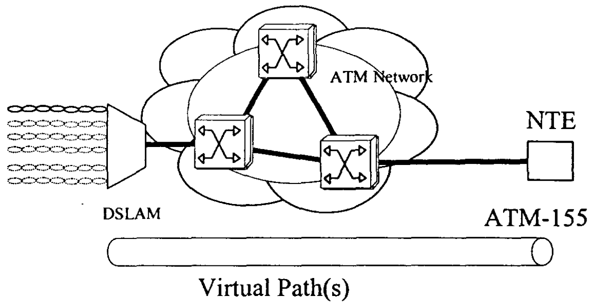
Product	Connection	Rental
IPStream 500	£210	£14.75 p m
IPStream Home	£50	£14.75 p m
IPStream S500	£260	£45 p m
IPStream S1000	£260	£65 p m
IPStream S2000	£260	£85 p m
IPStream Office 500	£50	£40 p m
IPStream Office 1000	£50	£60 p m
IPStream Office 2000	£50	£80 p m
BT Central 2Mb	£3000	£9000 p a
BT Central 10Mb	£14000	£17000 p a
BT Central 34Mb	£14000	£21000 p a
BT Central 155Mb	£40000	£40000 p a
BT Central 155Mb L2TP	£40000	£40000 p a

resilience options available for 10Mb & 34Mb, resilience included for 155Mb

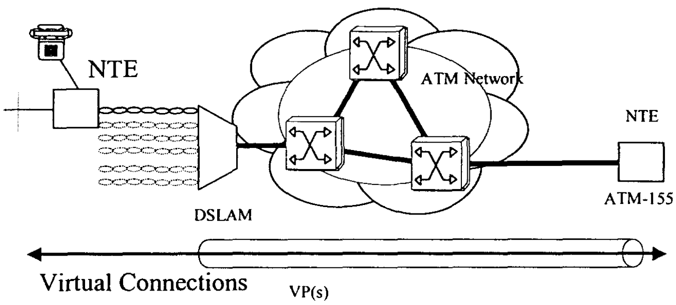
The DataStream portfolio

BT DataStream enables a Service Provider and Corporate Businesses to access multiple End Users via an ATM-based data network, and to develop their own Layer 3 transport services over the native ATM.

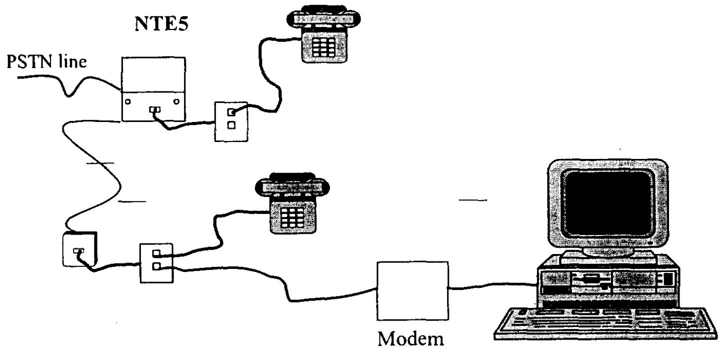
Service Components……



Service Components……



DataStream Home/Office

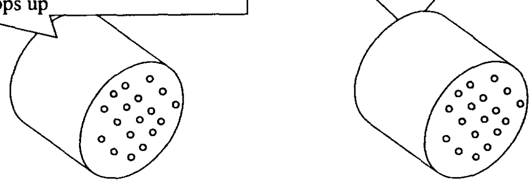


Existing PSTN wiring
Plug in micro filters required
Customer/end user provides modem

DataStream Virtual Paths

DataStream Home
Options of 0.25Mb, 0.5Mb, 1Mb to 10Mb Symmetric
supporting end user product:
500Kbps down
64-256Kbps up

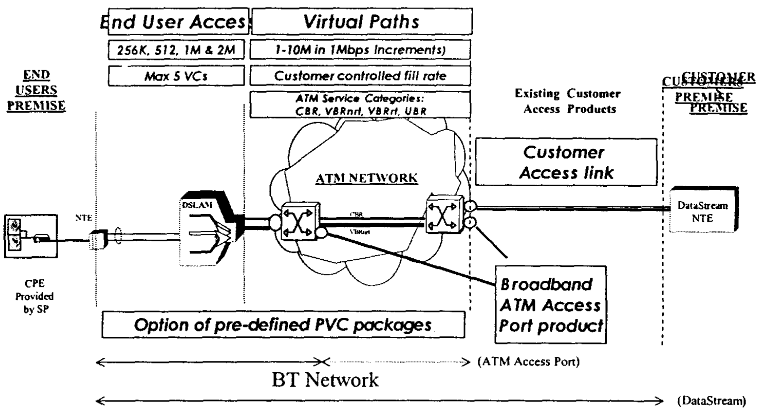
DataStream Office
Options of 0.25Mb, 0.5Mb, 1Mb to 10Mb Symmetric
Supporting end user products:
500Kb/1Mb/2Mb down
256Kbps up



In span, Local, Regional and National Variants

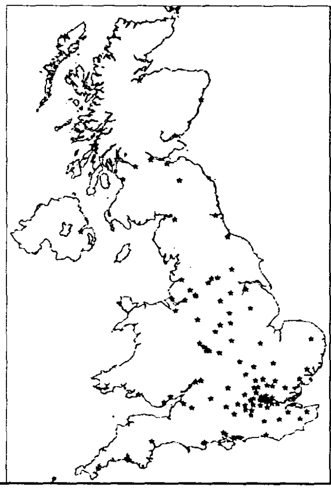
Any number of end user ports can be reserved against each VP
- subject to availability and an annual reservation fee

DataStream Symmetric

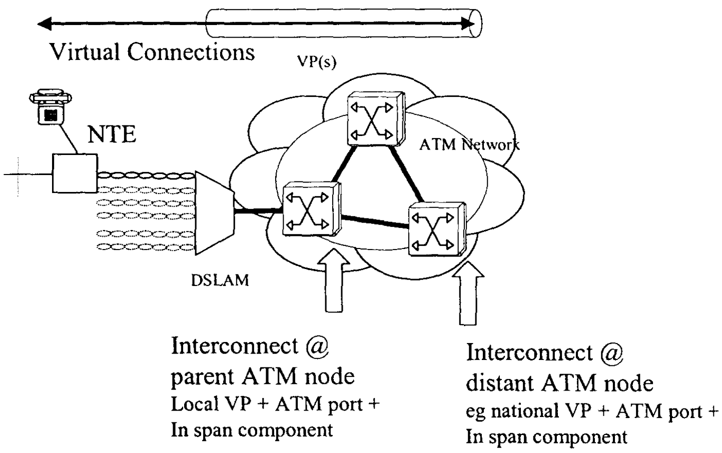


Aggregate Points of Presence

- Based on BT ATM nodes
- 120 PoPs Nationwide
- Fixed price up to 40km
- Can be extended on a per Km charge basis
- Supports a mixture of Local, Regional and National VPs



ATM In Span interconnect



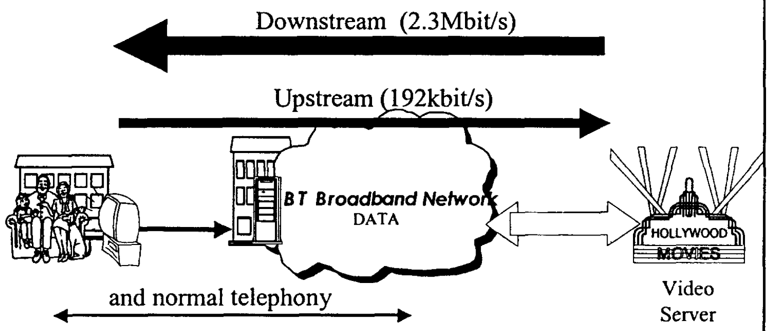
DataStream pricing - ex VAT

Product	**Connection**	**Rental**
DataStream end user data path	£50	£9.25pm
DataStream Home Local VP 4Mb		£2200 pa
DataStream Home Regional VP 4Mb		£3200 pa
DataStream Home National VP 4Mb		£4000 pa
DataStream Office Local VP 4Mb		£2200 pa
DataStream Office Regional VP 4Mb		£3200 pa
DataStream Office National VP 4Mb		£4000 pa
DataStream 155Mb CAL	£50000	£30000 pa
End user port reservation fee per port		£10 pa
ATM Port (In span)	£2000	£8000 pa
In span hand over component varies	~£3000	~£3000pa

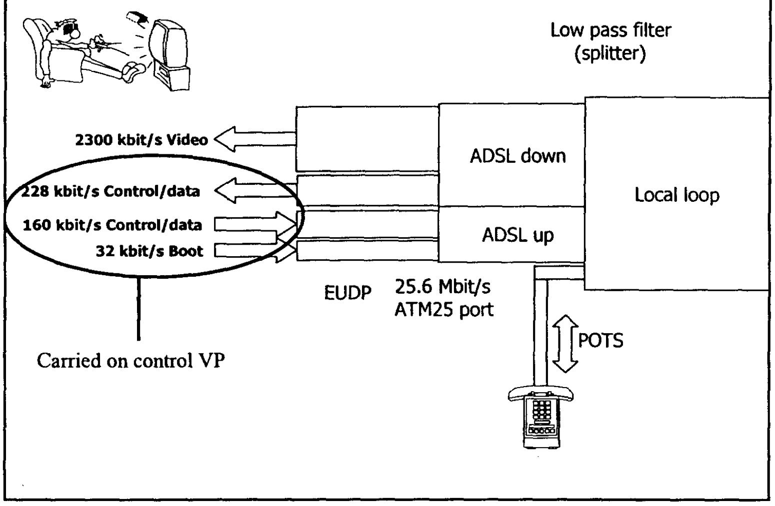
The VideoStream portfolio

The BT VideoStream service is aimed at Service Providers who want to offer video based multi-media content services to a community of End Users in a specific geography

Overview - BT VideoStream



VideoStream Channels



VideoStream attributes

- 144 end users per VP package (1 per DSLAM)
- 120Mb VP for video - CBR traffic
- 8.2Mb Control/data VP - VBR traffic
- Contended @ 3:1 i.e. only 50 end users can watch video at any one time - controlled by Service provider

Feedback

"You click from one link to another and it's instant"

"I couldn't go back to how things were"

"I use it for all sorts of things now like checking the football results. I wouldn't have done that before"

"I don't have to worry about how long I am online"

"I'm hooked"

Accelerating Broadband

- Summer 2000 - launch of ADSL
- June 2001 - BT Wholesale takes control
- August 2001 - launch of rate adaptive product
- September 2001 - 1,010 exchanges enabled
- January 2002 - launch of self-install product
- February 2002 - world competitive pricing
- May 2002 - launch of BT Central Plus product allowing unbundling of access and content.
- End May 2002 - 1,115 exchanges enabled
- July 2002 - Registration scheme for further deployment
- September 2002 - Major advertising campaign

BT Wholesale

Making Broadband Affordable

Wholesale consumer rental

~~£25.00~~

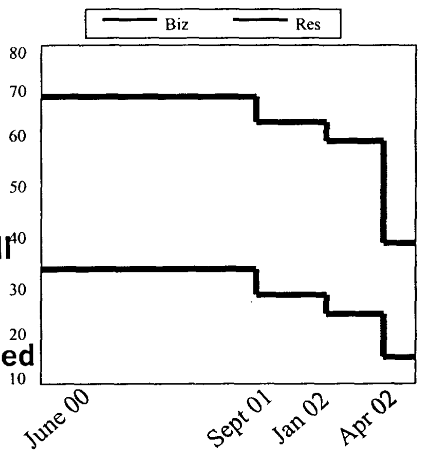
now

£14.75

Supporting Broadband Britain

Pricing Initiatives

- £5 price cut (Sept 01)
- Special offer (Oct-Dec 01)
- Cheaper self install (Jan 02)
- All products reduced (Apr 02)



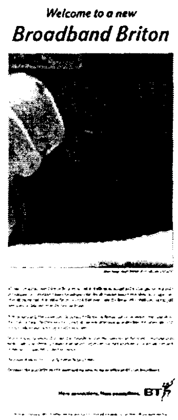
Marketing Activities

- National advertising campaign (Sept/Oct)
- National advertising 26th Feb - March
- Press & Radio advertising (Mar/Apr)
- Marketing toolkit - brochures now available
- 43 Marketing Grants:
- Marketing Grant Competition

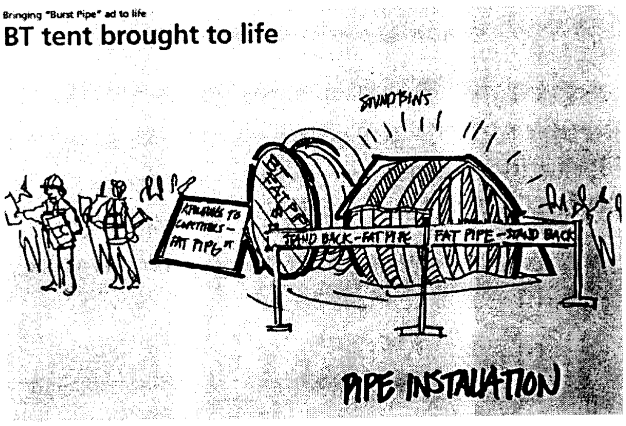
"This is about a different look to broadband.
As you will see, we expect in four year's time to have 25% of our connections as broadband connections...

... It's not just about price. It is price, customer experience and marketing"

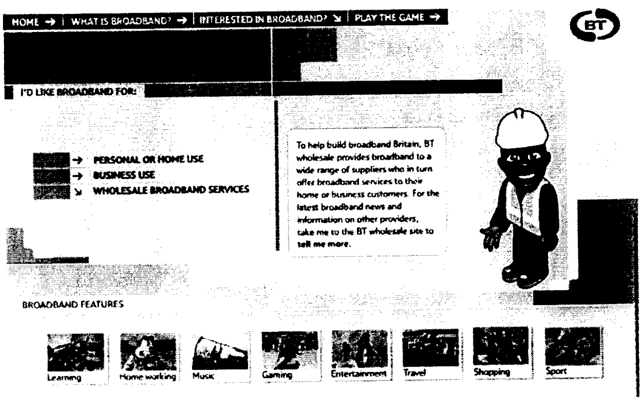
Ben Verwaayen 26th Feb 2002

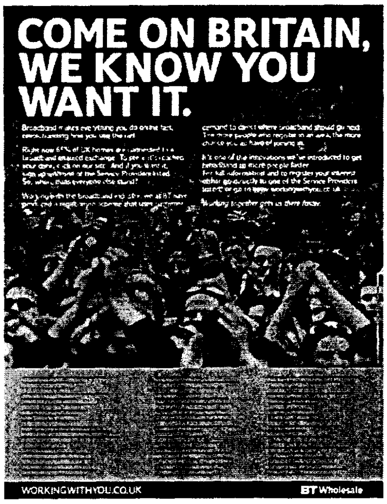


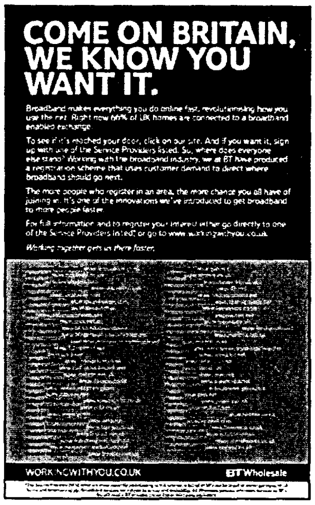
New TV marketing campaign - 22nd September 2002



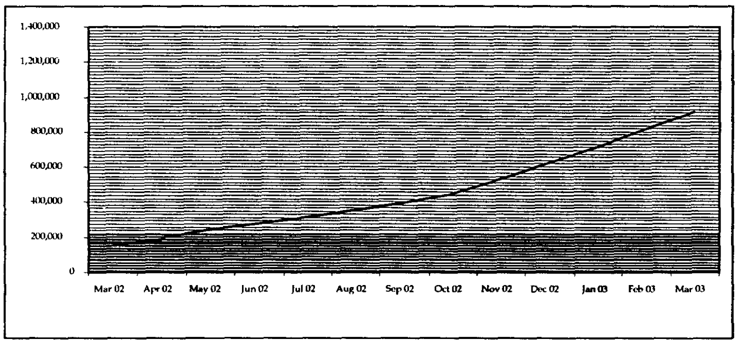
used on BT.COM



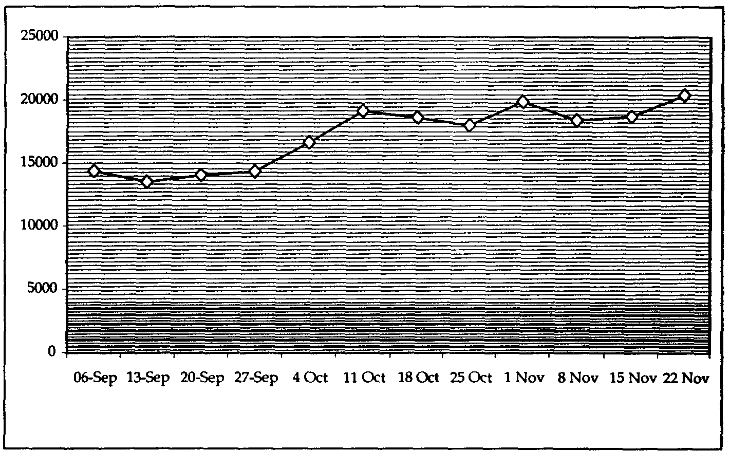




Broadband Latest Forecasts (WSS)

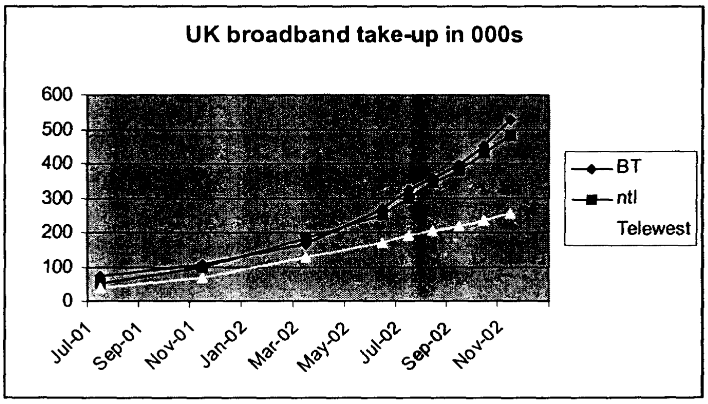


Weekly Broadband orders



Broadband market share Cable v BT DSL

- BT currently 41%



Focus for 2002

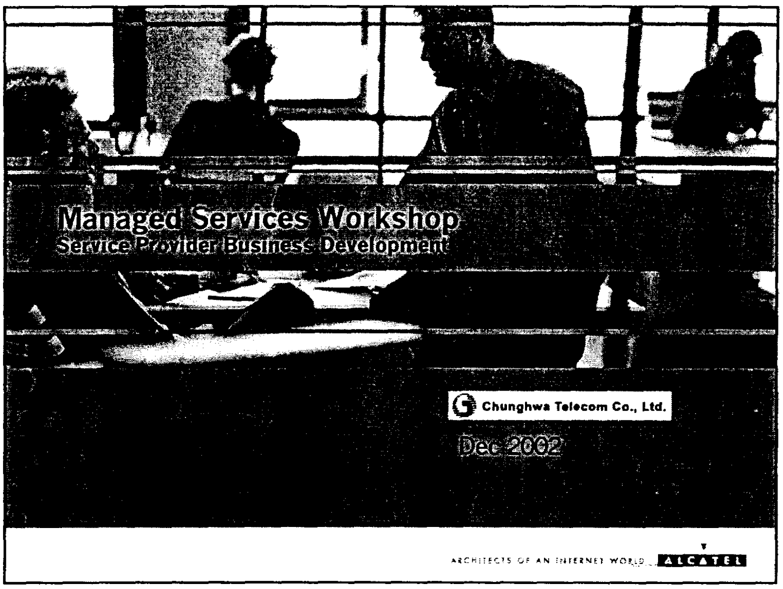
What we have

- Good portfolio
- Price that meet market needs

Focus for 2002

- Continue to enhance products
- Improve service further
- Focus on the customer experience
- Wait for the orders

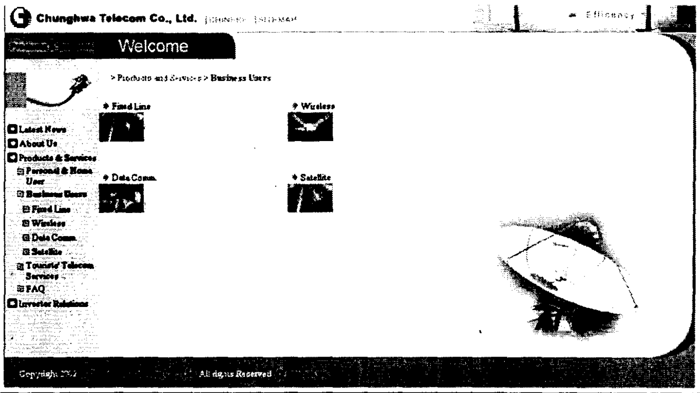
I million lines by mid 2003



Objective of Workshop

> Begin to work together to:
- Share with you our experience and lessons we have learned
- Produce together an action plan that we can follow to move forward with Managed Services

What we know about – is only public info.



Slide No 3
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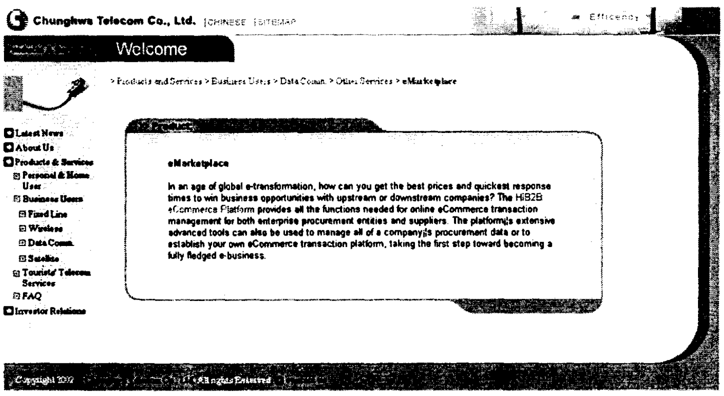
Without Alcatel written authorization

ALCATEL



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ALCATEL

SMEs – who are they

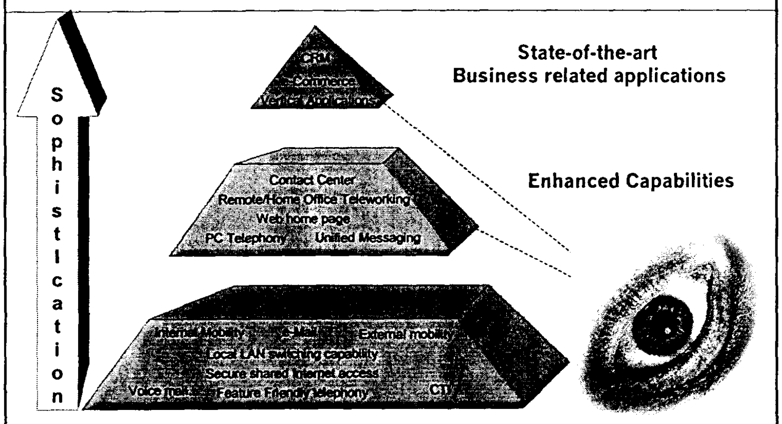
> Manufacturing

- Aerospace, Defense and Advanced Engineering
- Autos
- Mining
- Consumer Industries
- Energy and Utilities
- Health Care
- Transport

> Service

- Consumer Industries
- Financial Services (Accountancy, Property, Insurance)
- Information Technology
- Media, Entertainment and Sport
- Retail and Services

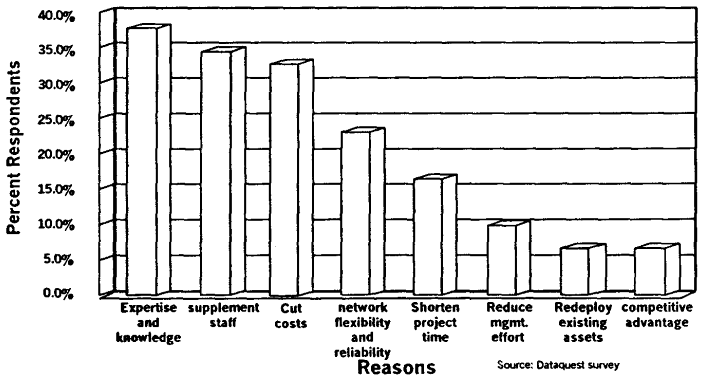
SME Vision



SME market

- Rule of thumb
  - SME sophisticated communications belief
  - Correlate with Taxi transport availability
- SMEs need to solve their fundamental needs
  - But are seeking a solution that can easily migrate to the more sophisticated applications.
- Increasing interest in managed services

SME Reality - Managed services



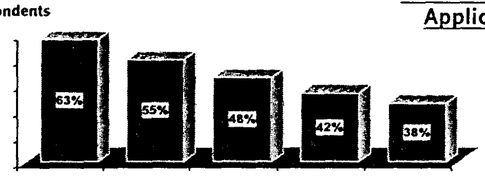
Source: Dataquest survey

SME Managed Services needed now

> Hosted Communication applications the SME market seeking, in the first place

% of Respondents

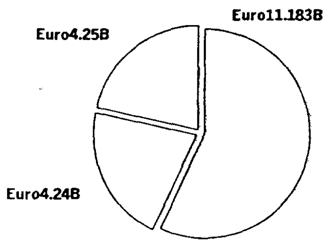
Communications Applications

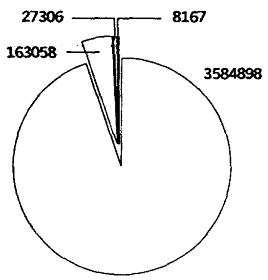


Source: Mercer Management Consulting - Customer Interviews

SMEs Make Up the Vast Majority of a National Economy

United Kingdom Business Segmentation





☐ 0-9 Employees ☐ 10-49 Employees ☐ 50-249 Employees ☐ 250+ Employees

Source: Benchmark IT 2001

SME Selection Criteria

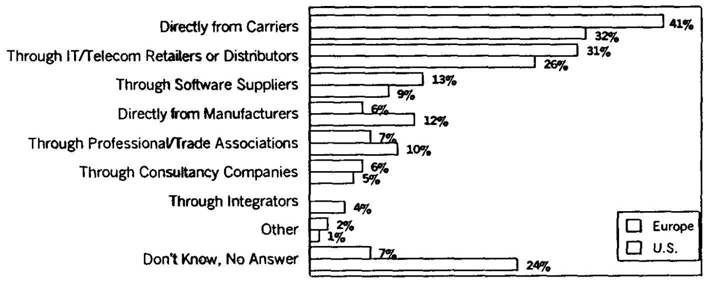
> Cost reduction
  - 15 to 20 percent required
    - Achievable with single CPE device

> Simplicity of solution
  - No technical jargon, just benefits

> Added value
  - Does this solution have the ability to improve the productivity of my business?

> Reassurance
  - Is there going to be disruption by changing supplier?
  - Is my new potential supplier reputable?

Who do SMEs buy from



> Recommendation from local systems integrator
  - Distribution model for Managed Services offer

Objective of Workshop

- > Share with you our experience and lessons we have learned
- > Produce together an action plan that we can follow to move forward with Managed Services

Foreword

- > The success of managed services implementation is linked to a <u>dedicated Project Director</u> in each of the involved companies
- > Depending on the estimated time to market , up to five working teams will be required
  - Business-plan, technical, operation, services, legal
- > Synchronized regularly by Project director meeting.
- > The Phases of a successful project
  - Phase 1 - Opportunity analysis
  - Phase 2 - Pilot investigation
  - Phase 3 - Launching

Actions Phase 1
Opportunity analysis

> Step 1 : Analysis of CHT SWOT
- Strategic : does the Easy Office program fit in the strategic direction CHT is taking towards SME customers ?
- Marketing wise: What does the program bring in terms of CHT image building and positioning in the market?
- What are the side effects to be taken into account ?
  - DSL boost, customer retention....

Actions Phase 1
Opportunity analysis

> Step 2: Customer needs investigation
- The value chain ?
- The evolution of existing solutions to an Easy Office type of solution (PBX, LAN/WAN, IT infrastructure...)
- The evolution in customer needs ? (BB Internet , Teleworker, Hosted applications, leasing...)
- The expense model of customers ? What are they ready to spend ?

Actions Phase 1
Opportunity analysis

> Step 3 : Customer configuration analysis

- What are the different types & their architectural implications :
  - Mono-site
  - Multi-site with equality larges sites (IP VPN, WAN)
  - Multi-site with smaller remote site and/or teleworkers (V+D?)
  - CHT connections portfolio ?

Actions Phase 1
Opportunity analysis

> Step 4: Analysis of business volumes and go-to-market

- Partitioning of value chain between the actors (HP, Alcatel, CHT, channels..)
- High level business plan looking at the volumes to be expected
- Go-to-market analysis:
  - Indirect and or direct channels ?
  - Channel analysis
  - Determination of roles
- Market access cost

- It is an Initial exercise , taking into account the support given by Alcatel and HP .

Actions Phase 1
Opportunity analysis

> Step 5 : Go / No go on opportunity analysis

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Actions Phase 2
Pilot investigation

> Step 1 : In depth design of the solution and its evolution
- Choice between components offered by Alcatel / HP and CHT
- Take into account go-to-market model

> Step 2: Design of provisioning and support system

> Step 3 : Pilot implementation process study
- Scope of the trial + objectives
- Identification of pilot customers
- Launch process study

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Actions Phase 2
Pilot investigation

> Step 4: Go / No go on technical and operational feasibility
  - Including signing on MOU for the trial

Actions Phase 3
Launching

> Step 1 : market pre-emption
  - Creation of bundle (if needed) that can evolve to a full MS solution
  - Alcatel + CHT
  - CHT + HP

> Step 2 : communication to channels
  - Training
  - Incentives
  - Presentation, road show, seminar....
  - Installation guide

Actions Phase 3
Launching

> Step 3: Communication to market
- Press release
- Announcement
- Advertising
- Tele-marketing campaign

> Step 4:
- Sales follow – up !!!

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