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Olympics 2012: opportunities and risks

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Introduction

The UK is splitting into camps when it comes to the London 2012 Olympics. There are the *enthusiastic aficionados* – some of whom managed to secure one of the “golden tickets” that gives them access to fascinating events such as the men’s coxless fours or the women’s handball – the *resentful refuseniks* who don’t want any part of it, and the *indifferent masses* who might tune in to a “Daly Dive” final but would rather be pottering round their garden in the all-too-brief British summer.

What’s particularly exciting for me though, is the opportunity the Olympics provides to showcase the very best of telecoms in the UK to all three customer types we’ve outlined. In this paper we’re going to take a brief look at some of these opportunities, and exam the pitfalls the industry needs to avoid. Telesperience perceives the customer experience to be comprised of four main elements (which we call “pillars”) – these are the network experience, the product experience, the commercial experience and the service experience. We’re going to look at the opportunities and pitfalls in each of these four key areas and consider what CSPs can do in each to protect and stimulate their brands.

The 2012 Olympics may very well end up being the first “m-Olympiad”, as customers explore the full capabilities of their smartphones, as well as the UK’s mobile and broadband networks. For the sake of UK CSPs we hope that these Olympics are remembered as having created an enjoyable experience for customers and a profitable event for service providers, and not because they turned what should have been a fast, exciting sprint into a long drawn-out marathon of a service experience. For this to happen though, all departments within the CSP have a vital role to play in delivering an optimal and profitable Olympic experience.

Teresa Cottam

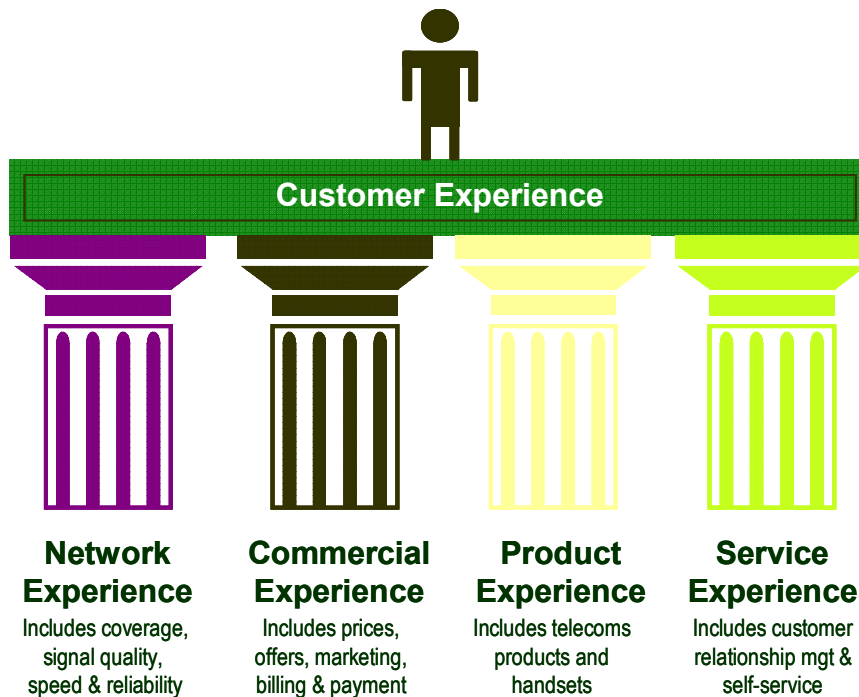
Research Director, Telesperience

1 The Olympic customer experience

When the Olympics kicks off in the summer of 2012 there will be lots of customers – both domestic and roamers – expecting a lot of things from their telecoms services. Customers will have expectations both of continuity (that services will continue to work as expected) and contextuality (that services will complement their experience of the event).

In order to analyse the opportunities for CSPs around the Olympics, let's look at the four elements that make up the telecoms customer experience and consider how we can use each to deliver a truly world-class Olympic telecoms experience.

Figure 1 The four pillars of the customer experience



Source: Telesperience 2011

In order to create a good customer experience, the very first step is to understand how the customer perceives that experience. This is created not just from customer service (ie CRM-based), but from all the different touchpoints customers have with the CSP. For the Olympic telecoms experience to be a good one, each of these pillars needs to be optimised by the CSP, and the four need to be co-ordinated to work well together.

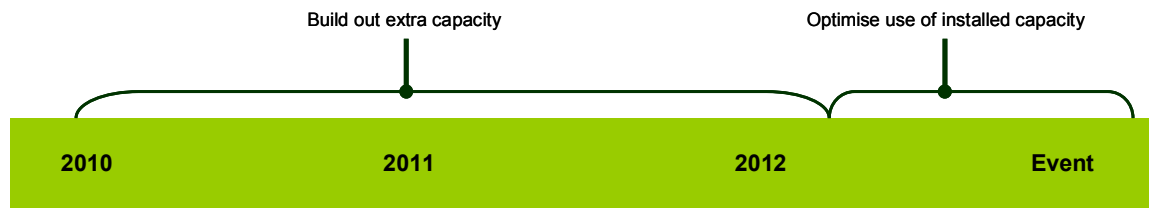
2 Optimising the Olympic network experience

The network experience is the experience that customers derive from the telecoms networks they use – singly or in combination and irrespective of the underlying technology. This is an area that has certainly received a lot of attention in the run up to the Olympics, with extra capacity being built out in central London around where the Olympic venues are. For example, the government recently announced that to alleviate strain on the mobile networks it would provide free Wi-Fi hotspots

around London. A number of companies are bidding to deliver these free hotspots including BT, Sky, O2 and Virgin. This is certainly good news, as WiFi – whether via public hotspots or private connections (eg in hotels) - can be used not just for internet access to look up venues and information, but also to offload traffic from mobile networks.

What’s important to understand, however, is that the opportunity to build out extra capacity in time for the Olympics will soon be over. Building new capacity is a mid- to long-term solution. Once the point is reached where it is too late to add extra equipment, CSPs will need to shift their attention to optimising use of what they already have (see *Figure 2*).

Figure 2 **The opportunity to build extra “Olympic” capacity will soon be over**



Source: Telesperience 2011

Likewise, it doesn’t matter how much capacity is provided, the network experience will be suboptimal if the capacity is in the wrong place, or at the wrong time, or if bottlenecks develop in the network. There’s an old saying that “a chain is only as strong as its weakest link” and this is certainly true of the network experience. Spikes in usage, for example, can be both predictable and less predictable. We might predict that there will be a high level of mobile activity in the main Olympic stadium during the opening ceremony. However, the effect of thousands of Londoners, sightseers and visitors travelling around London and the South East with video-enabled smartphones, tablets, laptops and so on can be harder to predict.

Proactively managing traffic in order to maintain quality of service end-to-end is why it’s critical to have insight into what’s happening across the CSP’s networks in order to resolve any problems as quickly as possible. This realtime insight also means that at the very least the CSP can explain to its customers that there’s a problem and apologise, offer recompense or suggest alternatives. A poor network performance with no explanation is simply not acceptable in 2012, and this is where cheap and ubiquitous services such as SMS can be used to great effect to communicate with customers. CSPs can also use pricing-based offers to shape traffic proactively – something we’ll return to later.

Network performance though needs to be monitored both in realtime and from the customer’s perspective (the microview), rather than just from the engineering perspective (the macroview). While network managers absolutely have to ensure the functioning of their networks, this perspective needs to be married with how the network is performing in localised areas and for individual customers. From the customer’s point of view there is nothing more irritating when they ring their CSP to complain about poor network signal on their mobile, or slow downloads on their broadband, to be told that the network is functioning correctly. This is almost like being told that their problem doesn’t exist; whereas in reality it’s an inability on the part of the CSP to differentiate between the network functioning well at the macrolevel and problems at the microlevel.

Furthermore, customer problems can be caused by far more than lack of capacity: CSPs also need to ensure good signal strength, that calls are not being dropped, and that products (including handsets) are functioning correctly. Furthermore, some new services – such as video – are very demanding, as they are highly QoS sensitive with a low tolerance of latency. Studies suggest that many customers are frustrated by their current mobile video experience, and this is a cause of both complaints and churn¹. Conversely, customers who have a fast, smooth, high-quality video experience perceive network quality to be higher, and are less likely to churn to competitors. However, there is a certain idiosyncrasy to how the network experience is perceived, and different customers or the same customer in different circumstances may perceive a particular network experience to be acceptable or unacceptable.

With video accounting for a higher and higher percentage of overall traffic – and with UCG and video expected to account for more than 80% of Olympic telecoms traffic - the challenge is not just to handle traffic but to manage different service types according to their requirements. A small delay in the delivery of a text message may not be perceived by customers as a problem; but a slow, packetized or jerky video experience may make the service unusable.

The expected level of quality cannot be achieved simply by building out more capacity, but rather requires that CSPs can manage available installed capacity efficiently, shape traffic through various means (including tariffing), and smartly handle different services and customers according to their requirements (using policy-driven prioritisation and optimisation). Offloading mobile traffic to WiFi also has a part to play in this mix, as does specific solutions to help handle high-density environments such as the main Olympic venues or train stations.

Another factor that's often overlooked is that most of the UK's networks were built for voice but are being used for data. This presents a challenge generally, but also means that for specific service types CSPs will need to examine whether specialised network equipment is up to the job. And again, this isn't just about the capacity management or quality of service, but also about whether equipment can cope from a commercial point of view. It wouldn't be good business, after all, to carry traffic you couldn't then charge for. Likewise certain service types could be used highly strategically to shape traffic. SMS and MMS provide the ability to send now and deliver later, as SMSCs and MMSC can schedule and store texts, which can help alleviate the effects of congestion. However, this requires that the SMSCs and MMSCs are able to handle the level of traffic and are functioning correctly.

With regards to the offloading of mobile traffic to WiFi, this can be advantageous from a traffic management point of view, but since there is a high degree of separation between mobile operators and fixed line operators in the UK, operators have to consider whether by offloading traffic they are

¹ For example, a September 2010 survey by GfK NOP, which was conducted on behalf of Mobixell, found that 96% of UK customers that used mobile video were frustrated by their experience. The survey revealed that up to 67% of adults who watch video on their mobile device are discouraged by non-continuous video playback and the length of time it takes a video to begin playing. Interestingly, the survey also revealed that the younger the users questioned, the more demanding they were about continuous video playing and their overall user experience.

either losing a revenue-generating opportunity² or incurring costs as a result of offloading. Potentially, for example, they could be encouraging offloading to fixed when the mobile network has excess capacity, and thereby creating a additional cost unnecessarily.

Similarly, large volumes of prepaid traffic will place a heavy load on IN platforms. As we know, some IN platforms are already elderly or under heavy load and may not be able to cope with a large increase in traffic. It's important therefore to understand how a service is delivered end-to-end in order to identify hidden bottlenecks on both the traffic management and charging side.

There isn't a single solution to these challenges. While extra capacity is certainly helpful, a range of other measures need to be deployed (as we have discussed), many of which sit in other domains. This shows how important it is for the CSP to think of traffic management holistically, rather than just as a network domain issue.

3 Optimising the commercial experience

The Olympics presents a fantastic commercial opportunity for UK CSPs. However, in order to maximise this opportunity they need to think strategically about how they can use marketing, sales and tariffing. This is what we call "the commercial experience".

The most obvious challenge is the number of roamers who will appear on UK networks in the summer of 2012. Roamers are often fearful of the charges that will be applied to their accounts when they return home – a phenomenon known in the industry as "billshock". As the UK is a member of the EU, CSPs have to comply with EU roaming regulations³ for roamers from other EU countries. This requires them not just to have measures in place to comply with these regulations – such as policy control solutions to automatically apply controls – but that these measures are robust and scalable.

In addition there will be a large increase in roamers from outside the EU. While it is not mandatory to provide such measures for these roamers, it would certainly be good business practice to do so since fear of charges causes many roamers to turn off their devices. If this happens it will certainly help with traffic management but it also represents a lost revenue opportunity for CSPs. After all, unused and uncharged for capacity is a wasted commercial opportunity.

The sheer number of roamers that are likely also presents increased opportunities for fraud – particularly with the nascent use of m-payment facilities. CSPs therefore need to ensure that their fraud management and bad debt processes are both tight, timely and scalable. Otherwise the CSP or its partners might find their Olympic legacy is a large number of unpaid bills.

² If the traffic is offloaded before the SGSN then the CSP can also bypass its ability to charge for the traffic, because of the SGSN's role in billing. If it wishes to charge for offloading it will need to address this issue.

³ Regulations have been in force since 2010 that mandate maximum intra-EU roaming tariffs and measures to avoid billshock. These include the necessity to offer controls and warnings to roamers. Operators have to impose a default cut-off for data roaming of EUR50 per month unless the consumer has selected a different limit. CSPs are also obliged to send customers a warning when they reach 80% of their limit. See http://ec.europa.eu/information_society/activities/roaming/regulation/index_en.htm

Charging is set to be highly strategic both commercially and as a means of shaping traffic patterns by pushing some traffic into off-peak periods (through customer choice). This could be achieved by proactively designing and marketing special tariffs designed to appeal to Olympic roamers from different countries. There are two ways of doing this. The first is to work with roaming partners to jointly promote tariffs. The second is to proactively target roamers when they first connect to the network or subsequently if their usage or locality indicates they may benefit from a relevant offer.

Since roamers are coming from all world regions, the ideal time for them to call home may significantly differ from UK traffic peaks. This factor can be utilised to encourage them to call home or send video or texts outside UK peak hours via special Olympic tariffs. Likewise certain individual services can be promoted above others in order to shape traffic further. For example, text messages can be a cost-effective way of staying in touch with family and friends when roaming and yet they have a small data footprint. These can be stored in SMSCs when congestion occurs, helping spread the load on the network. Olympic text packages are therefore an ideal way of encouraging use of mobile services, managing bill shock (since customers readily understand the charges for them) and shaping traffic.

For roamers and home customers who want to use the most bandwidth-intensive services such as video, the CSP can design promotional charges that help to flatten traffic peaks and spread the load on networks into off peak periods.

Working proactively with roaming partners can ensure that UK CSPs have more certainty about traffic before the event. Getting roamers to sign up to Olympic packages promoted by their home network, provides the opportunity for UK CSPs to understand how many roamers are likely to be visiting, and to proactively manage this traffic to some extent via tariffing. This will take at least some of the guesswork out of likely traffic patterns, but it requires CSPs to put far more effort into service plan innovation in order that packages are attractive to customers and also encourage them to use telecoms services, while getting customers to use services in a manner that maximises profitability and helps with traffic management.

Using tariffing to maximise and shape demand

An 'Olympic 2012' package could provide free access to information, alerts about events and news, discounts within the Olympic Park, a text bundle and easy access to WiFi hotspots. An hour of voicecalls to the home country could be included for international roamers – scheduled to be appropriate for their home country's time zone as well as to boost traffic in offpeak periods. The package might also provide an Olympics screensaver customisable by the customer to reflect the sports they're interested in and the country they're supporting, as well as an Olympic torch game that enables the roamer to tag the venues they've visited or sights they've seen and collect badges along the way. It could also provide appropriate discounts or offers to visitor attractions being promoted by partners.

A 'Happy Hour' in the early evening would provide an opportunity for roamers to call home, text or send MMS at a discounted rate - even where visitors have not signed up to any particular package. And the 'Olympic 2012 Night Owl' package would provide services aimed at visitors wishing to explore London's nightlife, and include even cheaper calling for those who wish to do so in the "wee small hours".

4 Optimising the Olympic product experience

The product experience describes the experience provided by telecoms products and handsets. The Olympics presents a fantastic opportunity to showcase some of the most innovative new services CSPs have been developing. To be successful though, CSPs need to tie new product offerings to the likely needs of customers. They may wish to be entertained, informed or connected, and CSPs should understand these needs and ensure there are products to fulfil them. CSPs also need to work in partnership with content providers to ensure their products will work as expected on the network without causing traffic management problems. There is a win-win here for both the content provider and the CSP in working together to ensure third-party products perform well.

Showcasing new technology

The Westfield Stratford City shopping centre has just opened and is in a prime position for the Olympics – so prime in fact that spectators will have to walk through the mega-mall to get to the Olympic Park. People are generally 'wowed' by good technology and Westfield is brimming with it - even the paving stones generate sufficient energy, when they are trodden upon, to power the complete street lighting in the area!

The adjoining Olympic Park will be similarly bubbling with high-tech making a showcase of everything that's new – and the telecoms industry will be a central player. NFC-enabled smartphones could allow fast-track entry to events and smart-payment for drinks and snacks, as their owners swankily wave their devices in the general vicinity of an NFC reader. In contrast, non-NFC'ers will have to join long queues for ticket authentication and search their pockets for the appropriate coinage!

However, this also demonstrates the requirement to promote NFC-enabled devices and to educate customers on their use prior to the Games, or customers will find they are not able to try the services at the Games.

Customers might be willing to try new products on a trial basis or on a one-off basis while they are in holiday mood, but the question is can the CSP support this? Do they have solutions in place that will support speedy fulfilment, entitlement management and one-off charging? CSPs need to ensure that customers can readily buy products that appeal to them but also that customers can reliably receive these products with minimum delay.

There may also be a market for selling mobile peripherals around the event – such as phone stickers, charms, cases and so on – as well as more traditional products such as ringtones. CSPs should identify the types of cheap products and gifts that roamers and UK customers might be interested in and ensure they have a good selection to offer at the right price.

The Olympics is actually a great opportunity to use profile, contextual and historic data to personalise services and offers – thereby truly engaging with customers. By understanding where, how and when customers are using their phones, the CSP can match customer behaviour and context with appropriate products or offers. Location can also be used to qualify customers for certain offers or ads. Geofences will be everywhere in the Olympic park and its vicinity – allowing adverts to be focused on groups of people for whom the products and offers are most relevant. This is a chance for both CSPs and advertisers to really get creative and engage with customers. However, business customers will require assurances that their products and adverts will perform as designed, as they will be concerned that poor network performance will affect their brand values.

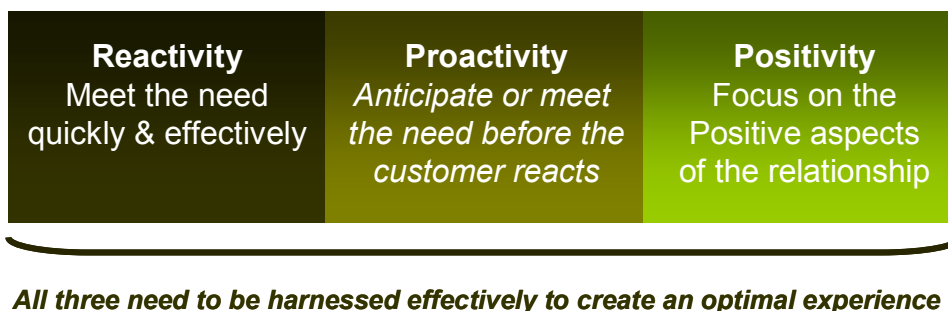
Using the opportunity to engage all customers

The “Olympic Refusenik” package could provide access to services that help customers not interested in the Olympics to avoid the event. This could include access to content or events that they are interested in, advice on how to avoid the Olympic “traffic”, suggestions on activities that don’t involve sports (with discounts from partners promoting these), or even games that enable them to show their frustration. The Olympics provides a unique opportunity for CSPs to get closer to those customers who aren’t interested in the event, as well as those that are. Done well it’s possible for CSPs to create a beneficial commercial opportunity for CSPs and an experience that’s appealing to refuseniks during the summer. Since all the attention will be on London and the South East, many attractions outside this area will want to ensure they maintain a share of consumer spending. This provides unique opportunities to promote events and attractions to those not attending the Olympics.

5 The Olympic service experience

CSPs have many choices to make in terms of how they support customers during the Olympics. This will require the CSP to offer a number of channels (such as IVR, CSR, bricks and mortar, web, mobile and social) with a consistent experience across all of them. Many aspects of customer care will need to be automated to provide a higher level of care and a more responsive service, but automation should have a supporting role and not create a negative or impersonal experience⁴. As shown in *Figure 3*, CSP also have to provide a blend of three qualities - reactivity, proactivity and positivity.

Figure 3 **The ingredients of good customer service**



Source: Telesperience 2011

Reactivity involves CSPs optimising their responses to enquiries and complaints, for example. When the customer reports a problem, can the CSP resolve that quickly and effectively? If a customer enquires about a tariff or service can the CSR respond to their need?

Reactivity is underpinned by automation and by data. To resolve a problem originating from the network the CSR needs access to the correct information to understand what has happened; without access to the right data the CSP is not able to perform root cause analysis and resolve the problem and learn from it.

⁴ For more information see *Avoiding Automation Annihilation*, <http://www.microsperience.com/?p=5496>

However, reactivity is not enough. The CSP also needs to be able to detect problems before the customer is aware of them and before they impact on the customer experience. They need to be able to proactively communicate with customers (eg using a customer notification system) and advise them not just what the problem is, but when it will be resolved, what alternative services exist and what recompense (if any) they are prepared to offer.

Proactivity is likewise underpinned by automation, but here realtime data gathered from a number of sources provides insight to detect problems, resolve them and suggest solutions very quickly. No longer does the CSP have to wait to be told there's a problem – this approach puts them back in control.

Positivity is an enhanced form of proactivity. It's not just about anticipating problems and dealing with them before they turn into a complaint, but instead it's about having a more positive engagement with the customer. This means really understanding the customer's needs through two-way communication and then finding ways to delight the customer, leading to loyalty opportunities and increased sales⁵.

Customer care also needs to be tailored to the unique nature of the event, which will see roamers from many different countries coming to the UK. The ability to provide advice, hints and tips, and offers in native languages would be extremely useful. However, this must extend beyond the first touch with the network (ie an initial welcome text) to a deeper, and experience-enhancing service. Such a service must be permission-based and pitched to be welcoming and friendly rather than obtrusive.

Beyond customer support though, the service experience supports the marketing of products and offers to customers. Thus the commercial, product and service areas need to work closely together in order to maximise the opportunity. For example, if the ordering process isn't easy, then no matter how good the product or how appealing the price, the customer will not order it – wasting the opportunity.

Summary

Olympics 2012 provides an excellent example of how all departments within a CSP must work together to deliver a good customer experience while also exploiting a great commercial opportunity. Each of the four domains we've looked at here is interdependent; although perhaps the most basic is that the network provides the service as required and described. During the Olympics, UK CSPs will need to *defend* their brand through a high level of operational performance and efficiency, but they also have a unique opportunity to *promote* their brand through the use of innovation and personalisation. *Figure 4* summarises some of the challenges and opportunities, demonstrating which domain they fit within.

⁵ For more information see: Is the Telecoms Industry Too Focused on The Negative? (<http://www.microsperience.com/?p=5538>)

Figure 4 **Summary of strategies UK CSPs are considering or using in the run up to the Games**

Strategy	Comment	Domain
Build extra capacity	Sufficient capacity is very important. However, building out extra capacity is not a short term solution, and also needs to be aligned to revenues and longer term demand	Network
Design end-to-end QoS	It's important to understand the entire end-to-end experience from the customer's point of view. Identifying and addressing bottlenecks is also key	Network
Employ traffic shaping, deliver differentiated QoS	Techniques such as throttling can help alleviate congestion. However, such techniques may not be popular with customers when they are imposed. Enabling customers to choose the level of service they require and are prepared to pay for is a smarter alternative	Network, Commercial
Enable offloading	Helps with congestion on the radio network by shifting traffic via WiFi to the fixed network. However, offloading should also be approached smartly or it can lead to unfortunate consequences such as traffic being shifted to the fixed network (which may incur costs) when there is sufficient capacity on the mobile network	Network, Commercial
Introduce tailored service plans	Tailored service plans can be used both to shape traffic and better meet the needs of customers	Commercial, Product, Service
Comply with regulations on roaming and minimise billshock	UK CSPs are obliged to apply controls and caps to roaming traffic in order to comply with EU regulations and help customers avoid billshock. CSPs are well advised to help customers avoid billshock even where regulations do not apply, because billshock can lead to customer dissatisfaction, brand damage and bad debt	Commercial
Work proactively with partners	Olympic 2012 challenges CSPs to work far more proactively with partners and business customers to maximise the opportunity. To avoid a bit pipe future, CSPs need to develop valuable services that help other businesses perform better. However, partners will require assurances that networks and products will perform adequately if they are to risk their brand values	Commercial
Support customers	The challenge is to provide information, support and the ability to buy new services across a wide range of customer service channels in order to meet the needs of customers. There should be a consistent experience across all channels of interaction	Service, Commercial
Rollout new products	The Games are a great opportunity for CSPs to innovate and to show off exciting new technologies. However, CSPs also need to ensure that they provide sufficient support and education for customers. Some new products (such as NFC) will require CSPs to encourage uptake of new smartphone features and provide support for these prior to the Games	Product, Service
Apply controls and business rules	The CSP needs to ensure that it is able to apply business rules consistently across all customers and services— whether that be age controls or credit rules. Providing user-configurable controls is another area of innovation that might be greatly appreciated by customers	Commercial
Profile and personalise	One-size does not fit all. Being able to market services to different types of customer, according to customer preferences and profile, and due to location etc will help optimise the business value and the customer experience	Network, Commercial, Product, Service

Source: Telesperience 2011

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About the author

Teresa Cottam is the Research Director and Founder of Telesperience. She has more than 18 years' industry experience and was previously an Associate Principal Analyst with UK-based telecoms consultancy Analysys Mason, covering the billing, CRM and service delivery sectors. Before that she was Research & Publications Director at Chorleywood Consulting, a specialist BSS/OSS consultancy which was acquired by Informa Telecoms & Media. Prior to this she was Managing Editor at industry analysts Ovum. Teresa has authored numerous influential reports and trends papers during her career, is a regular speaker at telecoms industry events, and is a judge at various industry awards including the GSMA awards 2011 and 2012 (presented at MWC). Teresa is passionate about helping CSPs optimise the value of their software, and strongly believes that software will play an increasingly important role in helping CSPs differentiate their offering, operate profitably, and attract & retain customers.

About Telesperience

Telesperience is a UK-based telecoms analyst firm focused on how software and data helps communications service providers improve their operational efficiency, commercial agility and the customer experience they deliver. We consider where the problems lie with legacy technology, and how companies can transition to provide a more positive telesperience for their customers and a more profitable business for themselves.

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