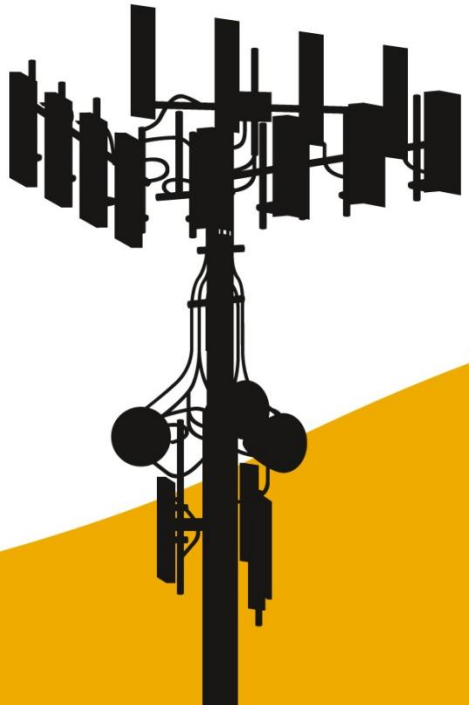
Market Insight and Service Innovation



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Innovating Faster in the “Big Data” Era

Accelerating Innovation

Innovating with Timely Insight

Gaining a Competitive Edge

SAP Innovations

Telcos are facing tremendous challenges in the new digital economy as their traditional services are being commoditized. With the emergence of smartphones, the digital economy is equipping telcos to accumulate data on customers’ preferences, services consumed, and locations visited like never before.

Today’s environment is more competitive than ever. Telcos face nimble new entrants willing to offer aggressive pricing and all-you-can-eat plans. Powerful over-the-top players fundamentally want to disrupt telcos in the digital space. In this all-digital competitive world, telcos have rapidly evolved from selling voice minutes to data bytes. But they are still in search of optimal strategies to maximize their revenue. They need to accelerate and deepen adoption of smartphones even as phone penetration nears 100% in many geographies.

This digital era is the source of massive customer data growth, creating challenges both in handling and in making sense of it. Structured (service usage, transactions) and unstructured (social site posts, tweets) data is accumulating at a rate never experienced before. It will become increasingly important for telcos to be able to unlock the value of this data to deliver more targeted services and accelerate their ability to innovate.

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Innovate Using Timely Insight

Accelerating Innovation

Innovating with Timely Insight

Gaining a Competitive Edge

SAP Innovations

Meaningful and timely insight is central to the success of telcos. They must accelerate the insight-to-action process, turning knowledge into innovation faster. Accurate customer insight lets telcos deliver differentiated and customized products and services and always keep their portfolio up to customer segment preferences.

To survive and thrive, telcos need a deep understanding of customers' individual preferences and behaviors. With that, they can serve customers more effectively and innovate with customized offerings. Deep analysis of customer data is a crucial tool. Telcos must use analytics to mine the ever-expanding mountain of data they can access about customers. To identify new opportunities for strategic product and service innovation, they need comprehensive, integrated product intelligence, product performance analytics, project pipelines, operational metrics, competitive information, market trends, and customer analyses.

A comprehensive software portfolio and project management process is also essential if telcos are to respond swiftly and efficiently to the latest customer insights they have. With the right tools and processes, they can efficiently execute complex infrastructure programs that use information gathered from market insights, project portfolios, human resources, and financials.

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Gaining and Keeping a Competitive Edge

Accelerating Innovation

Innovating with Timely Insight

Gaining a Competitive Edge

SAP Innovations

The most agile telcos will win by understanding customers' consumption patterns and preferences and leveraging this data as effectively as possible to acquire or up-sell customers. This strategy enables the telco not just to gain a competitive advantage in the market but to retain it as well.

Telcos need the capability to drill down into each customer's historical usage data on a highly granular level, generating insight and predicting consumption patterns in a timely manner. They must identify the most accurate segmentation of customers with regard to any set of attributes. Their billing systems must be fully flexible to accommodate complex pricing structures such as bundled plans with both fixed and mobile offerings, family plans, and corporate plans. Telcos can significantly shorten their time to market by employing the right billing system.

The proper network infrastructure and software portfolio, including strong project management tools, make a huge difference in bringing new services to market. Overall, the product and service innovation empowered by the portfolio, the project management system, and the billing system are driven by timely business insights coming from analytical systems, and they need to be integrated seamlessly.

17%

More field sales reps achieve quota when sales pipeline is optimized to ensure that cross-sales and add-on sales opportunities are proactively pursued

Source: SAP Performance Benchmarking

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SAP Innovations

Accelerating Innovation

Innovating with Timely Insight

Gaining a Competitive Edge

SAP Innovations

Technologies like real-time analytics and mobile solutions enable telcos to design, analyze, update, and execute their product and service portfolio strategies at Internet speed, using highly scalable and flexible deployment options.

The SAP HANA platform can be used to extract and analyze granular data from multiple back-end systems, including billing, customer relationship management (CRM), and enterprise resource planning (ERP), in real time. Instead of waiting for hours or days, marketing managers can use this technology to have the latest insight in hand at all times.

Mobile solutions equip executives and managers to review real-time customer intelligence reports anytime and anywhere on their mobile devices. These solutions improve efficiency greatly by making more time available for focusing on analysis.

Business analytics tools enable business users at telcos to create intuitive and visualized reports with any dimensions and values they wish, which greatly increases agility and flexibility.

Cloud-based applications such as the SAP Business One OnDemand solution provide the quickest way to create market insights with the lowest implementation cost.

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Winning Through Targeted Offerings

Market Insight and Service Innovation

Develop Customer Insights

Manage Service Innovation

Define Innovative Products

Telcos have much to gain by developing a deep understanding of their customers and designing campaigns that leverage this knowledge to acquire, up-sell, or retain those customers.

Develop Customer Insights, Segmentation, and Targeting

Telcos need to understand their customers first. Then they can design the right offers for the right customers.

Manage Service Innovation Holistically

Even with the most accurate insight, telcos need to manage innovation holistically with the appropriate resources and investments.

Define Innovative Products and Services

Telcos need the flexibility to rapidly design complex, targeted offerings and release them to the market within the opportunity window.

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Targeting Through Accurate Insights

Market Insight and Service Innovation

Develop Customer Insights

Manage Service Innovation

Define Innovative Products

Telcos can gain detailed customer insight by monitoring service usage, consumption patterns, and other sources. They can then group customers into segments according to a combination of observed attributes and create precise target campaigns to capture their business.

7%

Higher customer satisfaction when detailed profiles and interaction histories for customers are available at the point of interaction

Source: SAP Performance Benchmarking

Customer Insights

Leading telcos gain insights into their customer bases in real time on both a macro level and a granular level.

At the macro level (geography, sales channel, service type, and so on), they rapidly measure performance and sense the pulse of the market as a whole.

At the granular or individual level, they gain an understanding of personal preferences.

Customer Segmentation

Based on the data they have collected, telcos then identify a population of subscribers that may be prone to a specific offering because of the preferences they have demonstrated.

The key is to understand each customer as an individual, not as a member of an aggregated group.

Customer Targeting

Telcos then determine which groups or clusters to target for specific offers or plans.

They create precise target lists for execution of campaigns across desired channels.

And they enable the creation of highly relevant interactions with the target groups.

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Manage Service Innovation Holistically

Market Insight and Service Innovation

Develop Customer Insights

Manage Service Innovation

Define Innovative Products

With accurate visibility of their customers, telcos can make smart decisions about programs to invest in. They need an integrated solution to manage the process of service innovation including portfolio management, project management, and resource management.

Telcos' very first need in running targeted campaigns is to have a basis for very informed decision making. They must be able to proactively identify growth and innovation opportunities. They need the information and decision support to leverage their core capabilities and align everything they do with corporate strategy.

Next, telcos need the capability to fully leverage the right talent, resources, and capabilities – not just within the organization but in the extended business network of suppliers and even directly with customers.

Moreover, telcos must have the ability to coordinate execution and achieve fast time to market, making optimal use of their resources.

Finally, telcos must be able to track performance of their programs with visibility and accountability – and to support a continuous and sustained innovation process – to continuously align portfolio performance with corporate and strategic objectives.

11%

Shorter time to market when forecast for resource requirements is generated and communicated during portfolio approval process

Source: SAP Performance Benchmarking

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Define Great Products and Services

Market Insight and Service Innovation

Develop Customer Insights

Manage Service Innovation

Define Innovative Products

Create the content and pricing structure of new products and services based on insight from current service/product performances and customer insight. Develop an infrastructure that provides agility and flexibility in the way new services are created, revisited, and launched.

Telco customers are no longer "just telephone users." They text, run apps, watch videos, and so forth – different types of usage that telcos can track to determine what kinds of offers will appeal to them. Coupled with accurate customer segmentation and insight, that knowledge enables the right new offers to be launched in focused campaigns.

Telcos need the flexibility to launch new products and services in minutes – not days or weeks. They can't afford to waste time and money coding and testing applications. With an intuitive billing engine, telcos can easily and swiftly configure complex and innovative bundled plans. Rapid time to market enables telcos to respond quickly to shifts in the market or in customer usage patterns.

12%

More new products meet their revenue targets when product requirements are identified and validated from internal and external sources

Source: SAP Performance Benchmarking

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Market Insight and Service Innovation Value Map

Customer Insight and Segmentation	Customer Insight	Customer Segmentation	Customer Targeting	
Continuous Service Innovation	Portfolio Management	Project Management	Resource Management	Enterprise Project Connection
Service and Offer Definition	Convergent Charging			

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Customer Insight and Segmentation

SAP Solutions

Customer Insight

Service Innovation

Service and Offer Definition

Target the right customers with accurate insight and segmentation.

Gain an understanding of the trends around customer consumption behavior through insight analysis. Group customers into clusters or segments based on common attributes. Formulate programs to appeal to specific clusters and target them in your campaigns.

Customer Insight	Unlock new value in real time from billing and associated financial events that potentially number in the billions of dollars. Perform multidimensional customer analysis, usage analysis, and financial analysis at the speed of thought.
Customer Segmentation	Enable marketers to model customer segments flexibly and intuitively using an unlimited number of attributes, profiles, and consumption patterns. Visualize and explore high volumes of customer data.
Customer Targeting	Support marketers in defining the right target group to address by providing a platform that can access data of all kinds. Generate, modify, and execute on target lists using the SAP Customer Relationship Management application or by making lists available for execution outside of SAP CRM.

24%

Higher new product revenue when new product ideas are captured from all stakeholders through multiple channels

Source: SAP Performance Benchmarking

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Continuous Service Innovation

Manage innovation through smart investments and portfolio management.

The SAP Portfolio and Project Management application helps maximize the business value of portfolios and projects by providing a structure for managing them. Tightly integrated with other core SAP solutions, this software provides full transparency at a corporate level.

Portfolio Management	Execute portfolio performance review processes across multiple business functions, aligning key portfolio performance metrics with overall corporate objectives and strategies.
Project Management	Coordinate projects across multiple business functions to hit market windows for maximum revenue capture, while optimizing utilization of resources.
Resource Management	Enable the allocation of resources appropriate to specific tasks. The process begins during project planning where resources are soft-booked and later confirmed (hard-booked) when the project is in the execution phase.
Enterprise Project Connection	Share information among project management applications within the enterprise quickly and cost-effectively.

94%

Higher operating margin when the new products pipeline and existing products portfolio are driven by corporate strategy

Source: SAP Performance Benchmarking

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Service and Offer Definition

SAP Solutions

Customer Insight

Service Innovation

Service and Offer Definition

Create a variety of innovative pricing, rating, and charging plans.

With the SAP Convergent Charging application, you can create a variety of pricing, rating, and charging plans. This software supports high-volume service monetization scenarios including telephone usage, cloud computing service usage, transportation usage, business service usage, and content downloads.

Convergent Charging

SAP Convergent Charging integrates with other SAP applications as well as non-SAP and legacy software. It has been proven to be a robust and highly scalable solution, handling tens of millions of subscribers and tens of thousands of transactions per second.

The application enhances business agility through an industry-leading graphical approach for representing pricing and charging logic. Coding is not required when making changes or designing new pricing models. An intuitive graphical user interface takes its place, saving time and empowering business users.

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SAP Innovations

SAP Innovations

Applications

SAP HANA

Mobile

Analytics

Cloud

Latest technologies like real-time analytics and mobile solutions enable telcos to design, analyze, update, and execute their product and service portfolio strategies at Internet speed, with highly scalable and flexible deployment options.

SAP HANA

Handle large volumes of highly granular data and perform analysis in memory with zero latency to drive better decisions.

Mobile

Unwire employees and equip them with full access to your business processes to make agile and informed decisions and move closer to the consumer.

Analytics

Use relevant insights to target customers who matter most to your business. Focus on the essential success factors of your company.

Cloud

Deploy business processes quickly and reliably to transform and optimize the customer experience.

75%

Of telcos recognize enterprise mobility and analytics as highly important for their operations, while 45% recognize cloud

Source: SAP Performance Benchmarking

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SAP Business Suite Powered by SAP HANA

SAP Innovations

Applications

SAP HANA

Mobile

Analytics

Cloud

SAP Business Suite software powered by SAP HANA enables telcos to capture market opportunities as they occur and become the market makers.

Market Insights and Service Innovation

One of the biggest challenges for marketers in the telco industry is to determine how to deal with the Big Data explosion, driven by new levels of connectivity for consumers via mobile devices and social networks. Timing is everything in marketing. The ability to capture market opportunities as they occur – or even better, being the market maker – is a challenge and an opportunity. You don't want to take long to respond to customer demand. It may change tomorrow.

SAP Business Suite software powered by SAP HANA provides one central place for multiple data sources. It provides near-real-time monitoring and reporting of marketing performance, delivers a true 360-degree view of customers and their surrounding ecosystems, and provides the flexibility to slice and dice data that is not aggregated. In real time, you can seek answers to any business question, run what-if scenarios, leverage analytical functionality on unstructured data such as social media, and perform data mining. You can deliver offerings at the right time, leveraging rule-based and event-triggered marketing automation to orchestrate inbound and outbound activities in waves.

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SAP HANA

SAP Innovations

Applications

SAP HANA

Mobile

Analytics

Cloud

Today's unprecedented availability of customer data offers a significant opportunity for doing business like never before. The best-run telcos of tomorrow will be able to benefit from Big Data to drive a landslide competitive advantage.

Customer Insights and Segmentation

Audience Discovery and Targeting
Companies can draft, refine, and optimize target groups for campaigns in a collaborative way by providing a whiteboard as a user interface for marketing, sales, product management, and other parties involved. Teams can explore data sources, simulate outcomes, optimize offers, and identify customers that are most likely to respond.

SAP 360 Customer Solution Used for Telecommunications
Run your entire CRM system on SAP HANA to meet volumes required by tier 1 telco customers, enabling innovations and insights like never before.

Customer Usage Analytics
Enable agile and innovative marketing strategies by providing fast time to action through instant access to large volume of customer data. Allow more efficient financial and collections activities by providing enhanced visibility of billing-related financial flows.

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Mobile

SAP Innovations

Applications

SAP HANA

Mobile

Analytics

Cloud

Connect your sales, service, and operations teams to your back-end system to have effective customer conversations with convenient real-time visibility into market dynamics.

Mobile Business Intelligence	**Mobile Business Intelligence** Provide managers and executives with detailed views of their businesses on any mobile device. Fast access to relevant product performance at a glance enables executives to make proper decisions anytime, anywhere.
On-Device Charging	**On-Device Charging** Push innovative rating plans to SIM cards in handsets. Allow pricing, rating, charging, and balance management to be handled locally with no need to access a back-end billing engine during the billing process.

8%

Higher revenue per employee when organizations enable almost all users with mobile CRM

Source: SAP Performance Benchmarking

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Analytics

SAP Innovations

Applications

SAP HANA

Mobile

Analytics

Cloud

Provide up-to-the-minute visibility into key performance indicators across every facet of business operations. Enable real-time monitoring, root cause analysis, risk mitigation, predictive modeling, and optimization.

Campaign Effectiveness	**Campaign Effectiveness** Measure campaign effectiveness on an ongoing basis so that you can react fast and launch new campaigns to better target your customers.
Contract Accounts Receivable and Payable	**Contract Accounts Receivable and Payable** Analyze receivables and payments to recognize the payment history of customers. Introduce measures for improvement and check the effectiveness of changes.

27%

Higher operating margin when organizations enable a higher percent of employees to receive analytical information from business intelligence tools

Source: SAP Performance Benchmarking

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Cloud

SAP Innovations

Applications

SAP HANA

Mobile

Analytics

Cloud

Fast and flexible deployment of both critical and complementary solutions is the essential aspect of on-demand technology. Best-run telcos deploy cloud solutions to enable flexible global sales and obtain customer insights, even from social channels.

85%

Of companies believe the cloud will have a major impact on their organization through efficiencies, innovation, or competitive differentiation

Source: SAP Performance Benchmarking

Business Intelligence on Demand	**Business Intelligence on Demand** Deploy cloud-based business intelligence to provide the fast access to the information managers and executives need for performance monitoring and decision making. The processes involved are straightforward and have intuitive user interfaces.
Sentiment Analysis	**Sentiment Analysis** Monitor, aggregate, and assess consumer preference information in postings and interactions on social media and Internet sites to extract demand signals and drive supply plans.

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Best-Run Customers

Best-Run Customers

Rogers

T-Systems

UNE EPM Telecommunications

Vodafone

Why SAP?

Ten of the top 10 telecom operators worldwide run SAP software.

The top three European telecom operators use SAP software.

SAP Mobile Platform reliably delivers 1.8 billion text messages worldwide every day.

Cloud solutions from SAP provide the freedom for 17 million people to work from anywhere.

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Customer Co-Innovation

Best-Run Customers

Rogers

T-Systems

UNE EPM Telecommunications

Vodafone

Why SAP?

SAP co-innovates with leading telco operators using the Telco Advisory Council to drive priorities. Its member companies lead co-innovation and continuous incremental enhancements right across the value chain.

The Telco Executive Advisory Council (TEAC) is a strategic board comprising senior-level executives from our most important customers.

Its goal is to create an executive dialogue among the board members and with SAP in order to share best practices and drive joint innovation.

Deutsche Telekom

Co-Innovation Partners

Deutsche Telekom: Cloud technology and concepts for Web-based service marketplaces

T-Mobile: Customer analytics management on SAP HANA

TELUS: Price simulation on SAP HANA

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Best-Run Customers

Rogers

T-Systems

UNE EPM Telecommunications

Vodafone

Why SAP?

Canada's Rogers Communications Inc. provides wireless voice and data communications services, cable services, and media assets. After migrating to SAP BusinessObjects business intelligence solutions and SAP Sybase IQ server, the company increased self-service access and insight into network performance and reduced query and report time to support operational decision making.

Key Benefits

- Improved insight into data to inform operational and service-related decisions
- Achieved a unified vision of OSS data for better report accuracy and security
- Realized greater agility in managing and analyzing data
- Reduced licensing fees and IT support requirements

3,000%
Reduction in query time

0%
Increase in IT staff after 20x growth of data

100%
End-user reporting autonomy

"SAP BusinessObjects BI solutions provide an environment that empowers our business units to do their own reporting and analysis, and we're able to control access to uphold our security policies."

Greg Kohli, Manager, Network Quality and Performance, Rogers Communications Inc.

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Best-Run Customers

Rogers

T-Systems

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Vodafone

Why SAP?

T-Systems

With the implementation of the SAP Customer Relationship Management application, T-Systems wanted to establish a cross-segment, cross-national process that spanned the entire sales process, from receiving a request to performing aftersales activities.

15%
Annual total cost of ownership

360°
View of customers

Business Value

- 15% less overhead per year
- Internationally optimized opportunity management
- 360-degree view of customers
- Lower administration expenses
- Full concentration to deal with prospect of success
- Faster time to market
- Higher data quality and consistency
- Integration form leading to aftersales processes
- Streamlined workflow processes

"Every change to our own processes costs time and money. With parameterization, our business requirements and processes are covered in the best way possible, because the SAP software can be customized to a great extent."

Peter Detsch, Project Management for CRM and Offer Support Solutions, T-Systems International GmbH

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Best-Run Customers

Rogers

T-Systems

UNE EPM Telecommunications

Vodafone

Why SAP?

EPM Telecomunicaciones

The SAP Profitability and Cost Management application provides this telecommunications company with an intuitive tool for releasing timely operating, analytical, and managerial reports at less cost – giving it improved cost management and profitability analysis.

Key Benefits

- Administrative and financial analytic platform for managerial reporting, maximizing the value of SAP ERP application licenses
- An intuitive tool for releasing timely operating, analytical, and managerial reports without incurring development costs
- Removal of new ABAP programming language–based reports
- More agility in information analyses with multiple views

"The project was conceived as a great opportunity to improve the company's information about product profitability and assess process cost. This is the first phase of a large project, which will be followed by the deployment of SAP Business Planning and Consolidation."

Andrés Vélez Vieira, Corporate Finance Director, UNE EPM Telecomunicaciones S.A.

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Best-Run Customers

Rogers

T-Systems

UNE EPM Telecommunications

Vodafone

Why SAP?

Vodafone is currently in the process of transforming its entire business through its global rollout of SAP ERP, and the new mobile apps will integrate directly with this system. Vodafone has selected SAP Employee Lookup, SAP Leave Request, SAP Travel Receipt Capture, SAP Timesheet, and SAP HR Approvals mobile apps. These will allow users to access any employee's details and organizational information residing in the back-end human capital management solution, allow employees to create and review leave requests and travel expense entries, enable time entry to be captured immediately as work is performed, and approve HR-related requests.

10,000

Employees will be using these applications

Key Business Benefits

- Smartphones and tablet devices mean that employees can be anywhere in the world and continue to be productive, as long as they are armed with the right tools.
- The HR applications mean that the workforce can handle HR tasks on-the-go, thus improving both their productivity and that of the wider team because the approvals process will now be much quicker.

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Why SAP?

Best-Run Customers

Rogers

T-Systems

UNE EPM Telecommunications

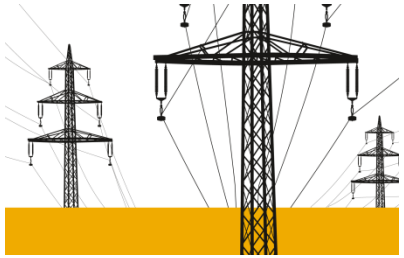
Vodafone

Why SAP?

SAP solutions provide the framework telcos need to break from the downward-spiraling revenue sources of the past and capitalize on modern trends and technologies to build powerful new sources of business.

Solutions from SAP cover all the needs of telcos that want to provide new services based on the abundant sources of customer data now available. At lightning speed, Big Data solutions from SAP process mountains of data that only recently were impossibly daunting – a vital need because the customer data available is measured in mountains. Analytics solutions from SAP are just as important, because finding the right slivers of insight buried in those data mountains makes all the difference in getting your customer to buy.

SAP also offers the right charging and billing applications to make adoption of your new services easy on your customers. And the tight integration that is found throughout all this SAP software makes adoption of new services businesses just as easy on you.



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