



EXECUTIVE OVERVIEW

MARKET
MAP

Telco Customer Experience Management Analytics Market Map 2016

JULY 2016

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We have tracked the maturation of the telco CEM market since 2008 as the vendor landscaped shifted from siloed, operational OSS/BSS legacy systems toward the adoption of network-driven insights to improve customer experience. CEM is key for operators as they focus on combining network-level data in an attempt to deliver a consistent, dynamic and transparent experience across all four dimensions of brand, products and services, channel, and delivery and operations.



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Sheryl Kingstone is the Research Director of Business Applications, which covers the rapid evolution of business applications and how they serve in a digitally transformed world. Technologies and applications have a profound effect on employees, customers and partners as businesses transition from digitization to true transformation. A 16-year veteran Industry analyst, her research focuses on improving the customer experience across all interaction channels for customer acquisition and loyalty. As part of the 451 Research team, she helps businesses make decisions regarding the use of technology, business processes and data to boost revenue and optimize business performance. Trends such as mobile, omni-channel and personalization represent a revolutionary shift in the brand-customer relationship.

Key Findings

Operators need to transform from network-centric to user-centric management practices. It's important to correlate the end user's overall perception of the product or service with the actual network experience to generate a deeper understanding of subscriber needs. End-to-end insight across a combined rich data set enables the operator to respond to changing subscriber usage patterns and preferences.

Operators will need to deploy new solutions to run their networks and services more efficiently, creating new opportunities in turn, such as policy management and improvement of operational support services to apply management at the individual subscriber level to customize the user experience. Big data analytics that incorporate network data will lead the transformation and differentiation as a key component of CEM projects.

While the industry has begun to combine internal and customer-facing KPIs, it must also relate these results to key network events – tying the emotional and function-specific experience of the individual user with network data is a fundamental piece of CEM.

By gathering, enriching and using a complete individual subscriber profile correlated with network information for both real-time service delivery and operational business insight, operators can achieve their end goal of improving customer experience and engaging in proactive communication regarding network quality improvements.

Executive Summary

INTRODUCTION

Customer experience management (CEM) is a top driver of telco digital service transformation projects. Investments in telecoms infrastructure and online channels to support customers' increasingly digital lifestyles are about improving network quality of experience (QoE) and garnering insight to improve marketing and customer care. CEM is key for operators as they focus on combining network-level data in an attempt to deliver a consistent, dynamic and transparent experience across all four dimensions of brand, products and services, channel, and delivery and operations. The goal is to achieve competitive differentiation by viewing the world through the eyes of one's customers and modifying interactions of the experience accordingly.

We have tracked the maturation of the CEM market since 2008 as the vendor landscaped shifted from siloed, legacy operational support systems/business support systems (OSSs/BSSs) toward the adoption of network-driven insights to improve customer experience. Over half a decade later, the CEM market continues to be a battleground between telco IT and network equipment providers. Projects are finally moving beyond the pilot phase to become increasingly broader implementations. This report breaks the CEM market into the main market segments of most significance: Service Assurance/OSS, BSS, Policy Charging, Core Network Provider, Probe and/or DPI, Video Optimization Traffic Management, RAN Analytics, Big Data CEM Analytics and Multi-Dimensional Analytics. The report includes key challenges and opportunities for vendors in these segments and charts new and old, participating in this transitioning market that is a combination of both network and software assets. It further illustrates the current vendor landscape, including key company profiles and positioning.

METHODOLOGY

451 Research Market Maps™ are designed to provide a view of the vendor landscape by major segment. The map highlights companies competing in multiple segments by connecting them through a circuit line. Identification and placement of companies into these segments is based on analysis, both published and unpublished, performed by 451 Research. This analysis includes interviews, reports and advisory work with several thousand enterprises, vendors, service providers and investors annually. 451 Research Market Maps™ are not intended to represent a comprehensive list of every vendor operating in this market. Inclusion on 451 Research Market Maps™ does not imply that a given vendor will be specifically featured in one or more 451 Research reports.

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