Market Guide for Telecom Expense Management Services, 2017

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Optimizing costs and managing efficiencies within dispersed telecom estates continues to challenge enterprises. IT infrastructure and operations leaders should evaluate TEM vendor offerings for a cost-effective and efficient solution when planning, sourcing and managing communications services.

Key Findings

- Gartner has seen a 45.1% rise in end-user enterprise inquiries associated with telecom expense management (TEM) in 2016. Many organizations are looking to source a TEM vendor to help with cost optimization and efficiency of their telecom estates — fixed and mobile. Enterprises typically benefit from a third party to navigate the telecommunications market when their telecom estates are complex or don't have resources to effectively manage them internally.

- Many TEM vendors are extending their scope from fixed and mobile services deeper into managed mobility and other IT expenses, such as usage and inventory management for unified communications and collaboration, cloud application licensing and emergence, machine-to-machine (M2M)/Internet of Things (IoT). For the most complex multinational corporation (MNC) or enterprise needs, there are few TEM providers with true global reach.

Recommendations

To optimize communications service management, infrastructure and operations (I&O) leaders should:

- Assess TEM vendors on their ability to perform ongoing cost and inventory optimization by their ability to drive ongoing efficiencies at scale and enhanced analytics for business intelligence and scenario planning for strategic growth initiatives.

- Ask vendors to supply recent references of the same size, geographic spread and services mix for both traditional, and if required, additional services such as usage and inventory of cloud application licensing (unified communications as a service [UCaaS], infrastructure as a service [IaaS], platform as a service [PaaS], among others), or mobile IoT endpoints and managed mobility services (MMS) or mobile device management (MDM) capabilities and level of partnering (for the latter).

- Choose vendors that fit your geographic scale; the right size according to expected annualized spend or device count. Some vendors might need to partner outside of their core region. Select the most appropriate engagement model as prices vary widely, especially if your reach is global or complex, whether a fully managed TEM engagement or SaaS with basic management.

VoicePlus

Based in Sydney, Australia, VoicePlus is active in the MMS space, providing fleet management and MDM, in addition to TEM. The company provides services to more than 600 medium and large Australian enterprises and MNCs in Asia/Pacific, offering fixed and mobile, endpoint computing solutions, with annual telecom spend ranging from AU$0.5 million to AU$12 million, and mobile devices from 400 to 10,000. VoicePlus manages more than 61,000 devices and AU$36.6 million in annual enterprise telecom spend. It has 38 employees, from technical staff to dedicated account teams.

VoicePlus' Atrium Managed Mobility solution is a hybrid TEM, IT asset management, software asset management, IT financial management and telecommunications asset management solution. Integrating into both HR and payroll systems and providing asset cataloging, procurement, management, reporting (including chargeback) and maintenance/repair, the solution tracks any asset that wholly belongs to a single entity (usually a person) and provides a single total cost for that entity.

The company uses an e-managed service desk for operations, and an e-supply solution that generates automated customized ordering and delivering systems. VoicePlus offers procurement, reporting through to dispute resolution, and offers usage and service optimization, billing error resolution and action plans against unauthorized usage and excess usage of mobile expenses via its Atrium Smart Portal, serving the complete mobile telecom life cycle. It is integrated with ServiceNow, is AirWatch-certified, and is an accredited Telstra enterprise and business partner.

Vendors

This is an extract from the full Market Guide which listed 13 vendors. Gartner advises the vendors listed in the Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Readers should consider all applicable candidate vendors that interest them. The vendors here are those most frequently asked about in Gartner end user inquiry, typically serving the large, regional and MNC enterprise base.

The global TEM market is highly fragmented with some 200-plus vendors active, along with lots of consolidation and partnering for additional scope of services and geographic scale. Enterprises need to find the right fit for their reach, resource requirements and level of engagement in each country or region. Check the capabilities of the TEM provider in international regions — can they address the level of service expected or only part of this? Assess the level of internal governance you have on your communications estate by region and country again, and then pair with the level of management from the TEM provider — whether a self-managed SaaS TEM service or fully managed TEM BPO-style engagement. Enterprises must have a good evaluation of their telecom estates and understanding of their future plans. Vendors provide capabilities to assist in managing sourcing, ordering and provisioning, invoice, inventory, usage, dispute management as well as business reporting and intelligence/analytical capabilities for ongoing efficiencies for both fixed and mobile telecom environments. They are expanding into other IT areas such as cloud licensing, UC and managed mobility services.