



# Market Landscape

*Industry Research  
from AOTMP*

# Wireless Mobility Management

May 2009



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## Defining Wireless Mobility Management

Wireless mobility management can involve many different activities and objectives. For the purpose of this landscape and to provide some level of capability categorization, AOTMP has defined Wireless Mobility Management into six areas (eProcurement, Asset/Inventory Management, Expense Management, Help Desk Management, Mobile Device Management and Reporting & Analysis).



**eProcurement:** This activity specifically relates to providing an on-line portal to order and secure services, devices and/or accessories from carriers.

**Asset/Inventory Management:** This area involves offering the capability to track the wireless assets (e.g., devices, accessories, service plans, contracts, and software licenses) of an organization so at any given time, a company has visibility into the wireless environment.

**Expense Management:** This area involves providing the ability to manage wireless expenses. This includes activities such as invoice processing and contract lifecycle management. This also involves offering rate plan optimization and being able to communicate with the carriers on any contract or invoice disputes.

**Help Desk Management:** This aspect constitutes having dedicated staff who can be contacted in order to troubleshoot technical issues and manage trouble-tickets on behalf of the customer.



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**Mobile Device Management:** This involves providing the ability to manage devices and provide security services such as wiping stolen or lost devices clean (i.e., remote “kills”), remote application updates and device server administration.

**Reporting & Analysis Tools:** This area specifically encompasses providing an on-line tool which provides visibility into expenses, consumption, assets and inventory as well as usage trending. Basic information that is available includes wireless expenses for the month as well as specific call details for each user.

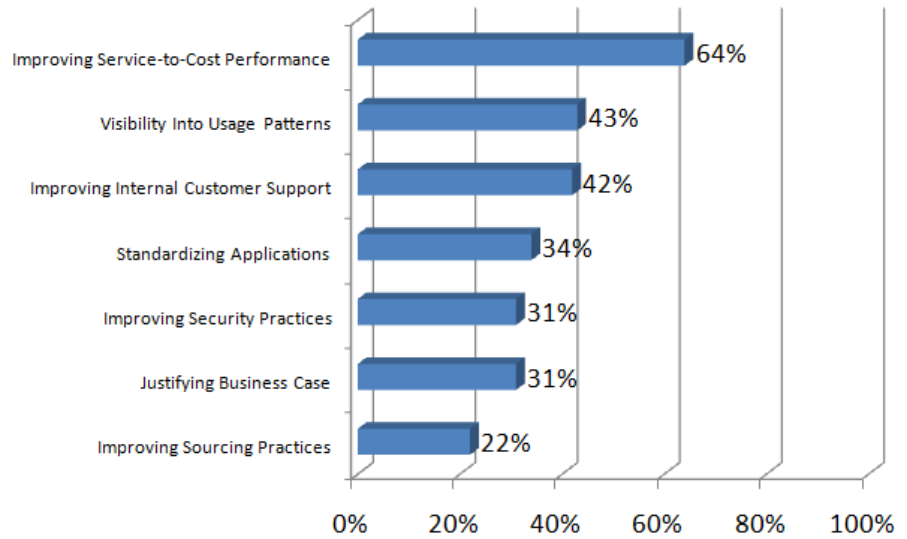


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**The Wireless Mobility Landscape**

Expense reduction continues to be a top priority for most enterprises. Based on AOTMP's latest wireless mobility research report, [A New Agenda for Wireless Mobility Management \(April 2009\)](#), improving service-to-cost ratio is the primary objective for Wireless Mobility Management (WMM) programs. Controlling expenses through increased usage visibility as well as improving internal customer support are also priorities. With the current state of the economic climate, visibility into expenses becomes even more critical.

**Figure 1: Primary Objectives for Wireless Mobility Management Program**



Source: AOTMP, January 2009

Management of wireless programs within the enterprise is becoming more diverse and complex. The number of applications, devices and users which an enterprise manages is rapidly growing. In fact, based on recent AOTMP research, the number of applications which are currently being supported by enterprises has increased by **50% over the past 12 months**.

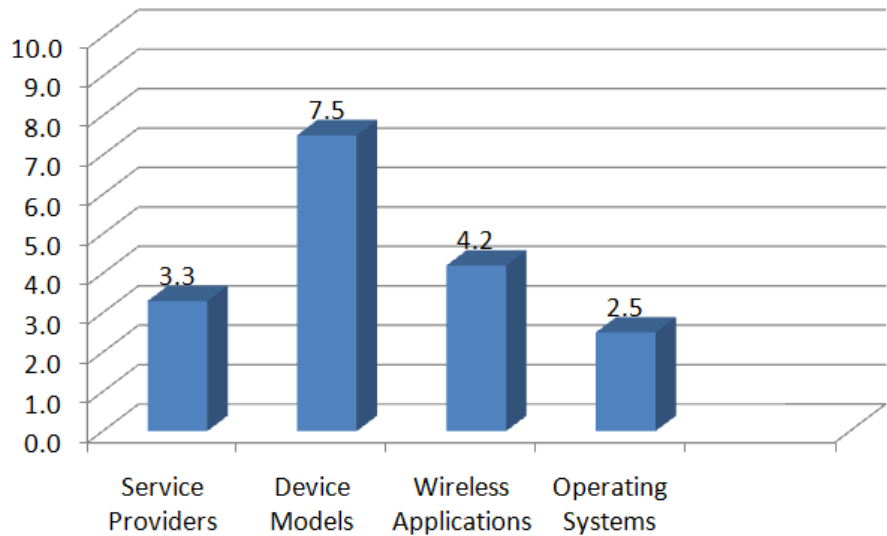


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AOTMP research indicates that Smart Devices and Air Cards are becoming more prevalent, while traditional cell phone acceptance is declining.

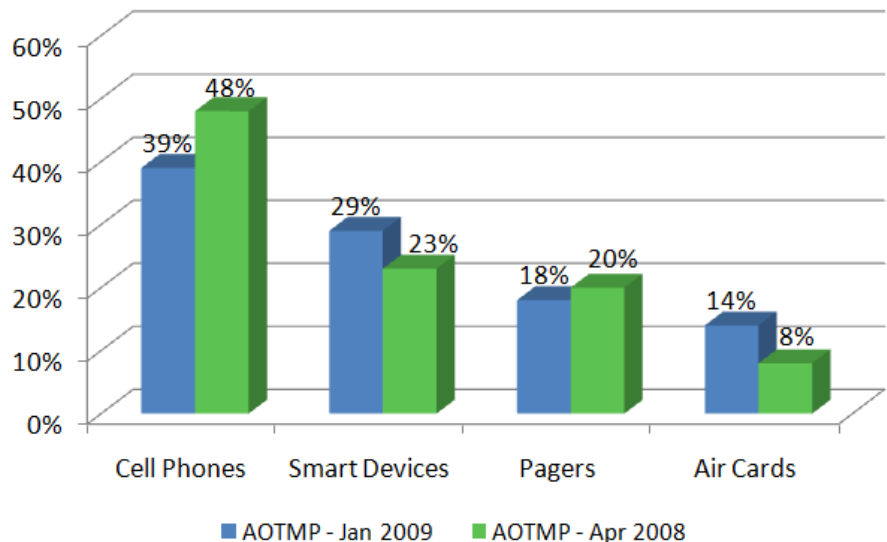
Figure 2: Average Number of Supported Items



Source: AOTMP, January 2009

Other trends reflect an increase in the number of employees who are utilizing more sophisticated devices and a more mobile workforce. Recent AOTMP research indicates that Smart Devices and Air Cards are becoming more widely utilized, while traditional cell phone usage is declining. With these trends, comes more management and help desk support effort while increasing the availability and exposure of sensitive data.

Figure 3: Enterprise Device Distribution



Sources: AOTMP, January 2009 & April 2008



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The wireless landscape is rapidly changing and dealing with the realities and implications of recent trends in the industry may seem overwhelming. With the proliferation of the number of Smart Devices and increases in the number of applications that are currently being deployed onto today's devices, keeping a watchful eye on the wireless space and potential challenges relative to their organization becomes paramount. The next section of the Landscape will outline potential challenges that enterprises and suppliers face in the Wireless Mobility Management space.



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## Challenges for the Enterprise

Enterprises are facing many interesting challenges in managing their wireless mobility efforts. Below are some of the top challenges and topical areas which enterprises are facing today:

### Smart Devices, Applications & Mobile User Growth

As previous AOTMP research supports, there has been explosive growth over the past 12 months in the number of Smart Devices and Applications enterprises need to manage. Mobile and home office workforces also continue to grow at a rapid pace. These trends have obvious implications for the enterprise. For example, as more sensitive data is being transferred over wireless ports, ensuring this data is encrypted and secured becomes critical. Furthermore, the management effort and related support requests can also be expected to increase as a result of the rise in the number of Smart Devices, applications and mobile users.

### Globalization

As the domestic market becomes saturated, global expansion becomes a primary focus for many enterprises. As well, many organizations these days require some level of global presence and/or travel outside of the United States. This may involve a quick trip across the border to Canada or a multi-week tour across Europe and Asia. As global needs and requirements continue to evolve, enterprises must consider the implications of globalization for their wireless mobility programs in an effort to maximize cost effectiveness while providing the best possible service in order for the workforce to stay productive.

### Corporate vs. Employee Liable

The debate around this topic has been on-going for quite some time and is still around today. Do I place the control and responsibility of the wireless device in the hands of the enterprise or the employee? The pros and cons of each approach are well documented. Corporate liable gives the organization maximum control, while employee liable involves less management and requires the individual to pay for monthly service charges. However, the enterprise must weigh the benefits and drawbacks of each approach in order to come up with the scenario that is most appropriate for them.



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## **Variety of Standards (carriers, operating systems, invoice formats, etc.)**

This can be a frustrating area where the enterprise has little control. Each carrier has their own policies and procedures and ways of doing business. They also have different invoice formats, which can change with little notice and leave their wireless mobility program scrambling, for instance, if their program involves electronic invoice scanning. From a manufacturer perspective, the prominence of various operating systems makes it difficult to standardize on one platform and does not allow the enterprise to gain maximum efficiency. The management time also increases as a result of multiple systems.





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## Challenges for the Supplier

The suppliers who provide Wireless Mobility Management solutions are facing a unique set of circumstances of their own. Below are a few of the top considerations within Wireless Mobility Management from a vendor perspective:

### **Market Confusion & Segmentation**

Suppliers offer a variety of capabilities within the scope of Wireless Mobility Management as previously defined. Differences in capabilities between suppliers often create confusion for enterprises seeking the best overall solution; differentiation can be challenging. This landscape seeks to offer standardized management categories based on supplier capabilities to minimize confusion and focus selection.

### **Demonstrating Sustainable Value & ROI**

Particularly with today's economic climate, suppliers must be able to show prospective customers a real and sustainable ROI in order to demonstrate the value their particular solution brings. Although soft dollar savings are important, firm hard-dollar savings must be proven in order to show the value of the solution. Enterprise budgets are being reduced and every angle to reduce expenses is scrutinized. Wireless Mobility Management programs continue to compete with other telecom initiatives for budget so demonstrating value becomes even more critical. If savings are unable to be demonstrated from the out-set, it will be very likely that the enterprise will look elsewhere for similar offerings.

### **Matching Capabilities with Enterprise Needs**

For suppliers, actively listening to and understanding customer needs is an important part of the sales process. To ensure suppliers are recommending and providing "best fit" solutions, they should receive detailed specifications during the RFP process in order to recommend a solution that is within the defined parameters. If a particular aspect is ambiguous or unclear, follow-up should be made with clarifying questions. If suppliers are able to demonstrate that they have truly made an effort to understand the business needs, they begin to create value and credibility with the prospective enterprise. It will benefit both parties in the long run if goals and objectives as well as the related details are understood up-front.



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## International Support

Similar to the enterprise, suppliers must consider their international strategies to ensure they are keeping up with customer and market demands. The question might be whether to open an office and provide “feet on the street” in a particular country or work through an established channel partner within the area. Maybe the question is deciding whether to translate the software into languages other than English. In either case, suppliers must be in-tune with customer requirements. However, it should be noted that some suppliers may have an established customer base or be concentrated in a particular market segment that does not have a strong international presence therefore, focusing efforts on international support and capabilities would not be sensible.

## Background on Supplier Listings

The suppliers within the subsequent pages of this landscape are presented by those who focus solely on Wireless Mobility Management and those that provide both wireless and wireline services. However, the *Current Offering* indication presented for these suppliers represents their capabilities as it relates to Wireless Mobility Management only. Some indications of current offerings may reflect a supplier’s partner is responsible for providing that specific capability, however, this was not distinguished for the purposes of this landscape.

This landscape also indicates the primary market focus for each supplier. Categorization of each market was as follows:

**SMB:** Organizations with less than 1,000 devices.

**Large Enterprises:** Organizations with more than 1,000 devices in the US.

**Global Enterprises:** Multi-national organizations with thousands of devices worldwide.



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## SUPPLIERS FOCUSED SOLELY ON WIRELESS

### [Cellution](#)

[1cellution.com](http://1cellution.com)

#### Overview

Headquartered in Rochester, New York, Cellution provides its customers with core Wireless Mobility Management services around many areas of the wireless lifecycle. Its BillSMART™ software suite was built from the ground-up and provides customers with the ability to effectively gain visibility into expenses. Cellution also prides itself on taking the financial responsibility out of the hands of its customers by recommending a stipend chargeback model for wireless expenses.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	No
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

#### Other Items of Interest

- The company has plans to enhance its software by including tax code related enhancements later in 2009.
- Cellution delivers its solution through a SaaS model.

### [Conceivium](#)

[conceivium.com](http://conceivium.com)

#### Overview

Conceivium is an organization dedicated to providing solutions to assist customers in managing their wireless devices and applications. With its home office in McLean, Virginia, Conceivium's mobileRED™ application provides users with a centralized point in which to send a broadcast communication to any mobile device within the enterprise. MobileMonitor™ and MobileAnalyzer™ also provide remote monitoring, management and reporting capabilities of BlackBerry® Enterprise Servers.

Wireless Management Activity	Current Offering
eProcurement Portal	No
Asset/Inventory Management	No
Expense Management	No
Help Desk Management	No
Mobile Device Management	Yes
Reporting & Analysis Tool	No
Primary Market Focus	Large Enterprises

#### Other Items of Interest

- Conceivium is a smaller organization who partners with others to provide other traditional wireless services such as invoice and expense management.
- The company was originally started in 1999 and was focused on developing custom wireless products.



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[mindWireless](http://mindWireless.com)

[mindwireless.com](http://mindwireless.com)

## Overview

mindWireless is a technology and outsourcing firm focused on the wireless and corporate mobility marketplace. Founded in 2000 and headquartered in Houston, Texas, the organization also offers in-house 24x7 help desk with a single point of contact for company wireless management. The organization has recently added some new global customers.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

## Other Items of Interest

- The company offers its solution via multiple options including a complete business process outsource or a hosted solution.
- mindWireless offers its own help desk and does not outsource this activity.

[MobilSense](http://MobilSense.com)

[mobilsense.com](http://mobilsense.com)

## Overview

MobilSense, founded in 2001, is one of the oldest wireless management solution companies and has headquarters in Agoura Hills, California. The company is focused solely on wireless management, provides a highly automated solution and reviews customer resource requirements to provide the most resource efficient and cost effective solution. MobilSense also sells through both a partner channel and direct sales channel.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

## Other Items of Interest

- Currently expanding device management capabilities by adding a suite of 3rd party functionality such as anti-virus, mobile VPN, BlackBerry® and Windows Mobile® advanced management capabilities.
- Currently enhancing North American carrier support to include selected foreign carriers.



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## [Movêro Technology](#)

[moverotech.com](http://moverotech.com)

### Overview

Established in 2003 and headquartered in Austin, Texas, Movêro Technology is one of the leading providers of managed IT services focused exclusively on enterprise mobility. Movêro's suite of managed mobile IT services provides an integrated solution that fully the entire lifecycle of mobile devices. The company's 4<sup>th</sup> generation Software-as-a-Service platform requires no special hardware, licensing or maintenance and support fees. The solution is backed by a US-based Certified Mobility Support center, staffed with mobility experts and every client receives a unique toll-free phone number along with a dedicated team of agents that focus entirely on that account. The company also recently attained Microsoft® Certified Partner status.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Over 60% of Movêro's clients are Fortune 500 companies.
- Over 90% percent of Movêro's support calls are answered within 60 seconds.
- Movêro has delivered over 10,000 one-on-one training sessions for physicians and healthcare providers deploying mobile ePrescription technology.

## [OneCall Manage](#)

[onecallmanage.com](http://onecallmanage.com)

### Overview

OneCall Manage offers a SaaS software suite that helps business enterprises reduce their monthly cell phone expenditures while managing their mobile devices. Based out of Red Bank, New Jersey, its software was built from the ground-up specifically for Wireless Mobility Management including international clientele. Its core services center around plan optimization, invoice management, inventory management, and policy management.

Wireless Management Activity	Current Offering
eProcurement Portal	No
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	No
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- OneCall provides its clients with periodic self-monitoring scorecards showing how they are performing and delivering on services.
- The company offers its software via SaaS, BPO and Hosted solutions.



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## [Perlego](#)

[perlego.com](http://perlego.com)

### Overview

Based out of Gig Harbor, Washington, Perlego focuses on feature and functionality around device management. Horizons is a multi-platform and carrier-neutral device management solution that supports a broad combination of mobile platforms. The company provides enterprises with over-the-air technology to securely deliver content to device users as well as update installed software and commands to smart phones for remote execution backup.

Wireless Management Activity	Current Offering
eProcurement Portal	No
Asset/Inventory Management	No
Expense Management	No
Help Desk Management	No
Mobile Device Management	Yes
Reporting & Analysis Tool	No
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Perlego is able to wipe devices completely clean including all data, applications, etc.
- In late 2008, the company announced the Horizons application began supporting BlackBerry® devices.

## [Vision](#)

[visionwirelessllc.com](http://visionwirelessllc.com)

### Overview

Vision is a mobility management firm specializing in wireless device and expense management solutions for large commercial and government customers. Based out of Augusta Georgia, the company's comprehensive and intuitive Wireless Tracker application suite allows you to quickly gain control and visibility of enterprise wireless assets, track and manage moves/adds/changes, analyze and optimize expenditures, and allocate costs across organizations.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Although Vision was initially formed as a business solutions partner providing mobility management solutions to Sprint's national and government accounts, it now offers a comprehensive and carrier-agnostic solution built exclusively for the governance of mobile environments.
- The company invests heavily in application development and wireless help desk support and does not outsource any aspect of its operations.



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## [Vox Mobile](#)

[voxmobile.com](http://voxmobile.com)

### Overview

Based out of Cleveland, Ohio, Vox Mobile assists customers in the outsourced management of their mobile device, messaging and platform infrastructure. The company offers 24x7 help desk capabilities and as a RIM® systems integrator partner, is able to offer authorized BlackBerry® Enterprise Server support services. The company also provides professional services to assist with BlackBerry® environment assessments, migration planning, high availability/monitoring deployment and mobile application extension.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Vox Mobile clients primarily include mid to large sized organizations.
- Vox Mobile is an approved reseller of RIM® support services, BES server licenses and CALs.



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## WIRELESS SUPPLIERS WITH WIRELINE SERVICES

### [Advantage IQ](#)

[advantageiq.com](http://advantageiq.com)

#### Overview

Advantage IQ is a subsidiary of an NYSE traded firm and offers utility and telecom expense management that serves corporate and enterprise clients. Based out of Spokane, Washington, the 600+ person company began its expense management services in 1995 as an invoice processing specialist. Its patented Facility IQ™ system provides secure web access to cost and usage information across an enterprise.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

#### Other Items of Interest

- Advantage IQ provides and manages its own help desk.
- Partners with others to provide certain wireless management functions.

### [Advocate Networks](#)

[advocatenetworks.com](http://advocatenetworks.com)

#### Overview

Based out of Atlanta, Georgia, Advocate Networks provides a portfolio of managed services for telecom expense management. Striving to become a trusted advisor with all of its customers, Advocate Networks offers many Wireless Mobility Management service offerings. The company also provides device management capabilities while supporting BlackBerry® Enterprise Servers and Novell environments by accessing configurations on the client's side.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

#### Other Items of Interest

- Advocate Networks managed services solution is powered by Tangoe.
- The company delivers its solution through BPO.





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## [Amtel](#)

[amtelnet.com](http://amtelnet.com)

### Overview

Amtel provides telecom cost management solutions for both wireless and landline services. Based out of Santa Clara, California, it helps customers reduce costs and simplify wireless management. The TIMS™ platform is based on a SaaS model which is able to integrate both landline and wireless expense management visibility.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	No
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Amtel was recently awarded a United States General Services Administration (GSA) Schedule contract number.
- Amtel partners with another company to provide mobile device management capabilities.

## [AnchorPoint, a Division of MTS](#)

[anchorpoint.com](http://anchorpoint.com)

### Overview

AnchorPoint, a Division of MTS, offers a full suite of telecom expense management solutions for wireless and wireline services. The company employs a Map-to-Win<sup>SM</sup> approach to ensure business objectives are understood and solutions are aligned and delivered accordingly. AnchorPoint is able to offer its solution through many different delivery options and is currently looking to expand international capabilities with its parent company MTS, a global telecom solution provider.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	SMB/Large Enterprises

### Other Items of Interest

- AnchorPoint recently released an updated version of its software application with enhancements around the GUI and reporting features.
- The company partners with others to provide wireless provisioning, help desk and rate plan optimization services.



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## [Asentinel](#)

[asentinel.com](http://asentinel.com)

### Overview

Asentinel prides itself on being driven by automation and technology. Based out of Memphis, Tennessee, the company provides its software solution (Asentinel 5.0; 6.0 to be released soon) for wireless as well as wireline services. The company's OIR (Optical Invoice Recognition) Technology is able to read paper invoices efficiently and with impressive accuracy.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Asentinel has received a US patent covering core elements of its expense management software.
- The company is fully integrated with another organization to provide mobile device managed services.

## [Avalon Global Solutions](#)

[avalontechnology.com](http://avalontechnology.com)

### Overview

Avalon Global Solutions is positioned for growth based on the recently announced merger between The Net Results Group (NRG) and Avalon Technology. By combining the government focus of Avalon Technology with the enterprise focus of NRG, it gives the organization a diverse customer base and international expansion opportunities. The merger bolsters Avalon's core competencies in help desk, logistics, and procurement, and expands the overall solution set with the addition of NRG's audit and contract negotiation capabilities, the Clarity™ and Foresight™ TEM software platforms, and IT development resources for customized mobility solutions. The addition of these capabilities enables Avalon Global Solutions to provide a full suite of fixed and mobile TEM services to domestic and international enterprises of any size.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- As Avalon and NRG have been partners for some time, the integration and transition should be more seamless.
- Provides wireless solutions via BPO, SaaS and Licensed models.



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## [Cannon Group](#)

[cannongroupinc.com](http://cannongroupinc.com)

### Overview

Cannon Group, located in Blue Bell, Pennsylvania, is an independent 15 year old consulting firm dedicated to wireless and wireline cost management solutions. The company has extensive knowledge in wireless and telecommunications contract assessments, contract negotiations, RFPs and on-going contract management.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Cannon Group partners with another company to provide its customers with expense reporting capabilities.
- The company is completely independent with no relationships with wireless carriers.

## [IBM Global Services](#)

[ibm.com](http://ibm.com)

### Overview

IBM's Telecom Expense Management Services assist clients in simplifying and reducing costs within their telecom environments. The company provides a modularized approach to its wireless expense management program by offering customers the ability to utilize a single service or the full complement of Wireless Mobility Management services. IBM also offers wireline and consulting expense management services.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- IBM provides certified technical support for the BlackBerry® environment.
- The company is fully integrated with another partner to provide certain telecom expense management services.



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## [Insight Networking](#)

[insight.com](http://insight.com)

### Overview

Insight Networking offers a complete lifecycle management solution that combines expertise in telecom expense management, mobility and professional services. Its call center, located in the greater Chicago area, offers 24x7 mobility help desk services which include troubleshooting and server management. Insight also has dedicated TEM teams in Plano and Tempe supporting mobility. Insight's professional service offering can provide a review of telecom processes, carrier invoices and contracts and audit billed inventory.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- Insight has dedicated product professionals specializing in BlackBerry<sup>®</sup>, mobility and embedded notebooks sales.
- The company's Chicago-based help desk is able to support 85,000 customers.

## [Integrity Communications](#)

[integritycsi.com](http://integritycsi.com)

### Overview

Integrity Communications supports medium and large enterprises by providing telecom expense management solutions for wireless and wireline services. The company began operating as a VAR of wireless devices & an auditor of wireline services. Its customizable procurement/help desk portal allows users to view only relevant devices and accessories for procurement & approval, while providing easy access for all wireless help desk concerns. Integrity strives for automation wherever possible combined with a qualified & knowledgeable staff.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	No
Reporting & Analysis Tool	Yes
Primary Market Focus	SMB/Large Enterprises

### Other Items of Interest

- Integrity's help desk is fully trained and certified on all critical aspects of wireless support including RIM<sup>®</sup>, Microsoft<sup>®</sup> and Good<sup>®</sup> technology.
- Integrity has developed its own custom software which fully integrates with other software partners to provide a centralized point for essential telecom data.



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## [Invoice Insight](#)

[invoiceinsight.com](http://invoiceinsight.com)

### Overview

Invoice Insight is a company that prides itself on being a technology driven organization with a focus on making the technology easy to use for customers. Based out of Manassas, Virginia, the company utilizes an integrated solution for both wireless and wireline services. The company has also been processing invoices in many different languages for a number of years.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- The company is constantly updating and improving its technology by providing minor updates on a weekly basis and quarterly major releases.
- Invoice Insight offers its solution via a SaaS model.

## [iTEMize Technologies](#)

[itemizetech.com](http://itemizetech.com)

### Overview

Headquartered out of Reston, Virginia, iTEMize launched its TEM software solution in 2006. The organization prides itself on being able to offer a simplified and easy to use solution at an affordable price point. Its goal is to assist clients in gaining visibility into their wireless expenses and help streamline the entire telecom process. The company offers management capabilities in key areas of the wireless mobility lifecycle.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	SMB

### Other Items of Interest

- iTEMize partners with others to provide certain wireless management services.
- The company offers its solution via a SaaS based model.



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[MDSL](#)

[mdsl.com](http://mdsl.com)

**Overview**

MDSL provides telecom expense management and market data expense management services and was originally founded in 1995 in both New York and London. MDSL offers a complete Procure-to-Pay system which focuses on automating internal processes for customers. MDSL also offers its new iPortal, where customers have the ability to contact carriers directly using a secure web portal in order to facilitate the management of their telecom environment.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

**Other Items of Interest**

- MDSL specializes in providing global solutions to multi-national customers.
- It works with more than 150 customers which includes implementations with many companies who are headquartered outside of the US.
- The company is fully integrated with another provider to offer over-the-air device management services.

[PAETEC Software Corp.](#)

[pinsoft.com](http://pinsoft.com)

**Overview**

The PINNACLE Communication Management Suite is an Enterprise Resource Planning (ERP) type integrated Service Lifecycle Management (SLM) application that helps customers streamline service delivery and support processes. PAETEC leverages PINNACLE which was built upon an open-ended Service Oriented Architecture (SOA) in order to provide a consistent level of functionality across each of its delivery options and enable direct integration to other enterprise systems via the open SOAP industry standard.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	No
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

**Other Items of Interest**

- PAETEC delivers its solution through many delivery methods (e.g., hosted, licensed, BPO).
- The company is also Sarbanes-Oxley Standards compliant.



# Market Landscape

Industry Research  
from AOTMP

[partnertel](http://partnertel.com)

[partnertel.com](http://partnertel.com)

## Overview

Based out of Atlanta, Georgia, partnerTEL's roots go back to IT consulting and installations of LAN's/WAN's in the mid to late 1990's. For more than a decade, the independently-owned cost management company has helped clients reduce hard dollar costs of wireless and wireline telecom spending as well as internal administrative costs to monitor and manage telecom spending. Service management activities performed by the company are backed by SLAs to ensure customers are satisfied.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	SMB

## Other Items of Interest

- partnerTEL is fully integrated with its partners to deliver its software solution and other cost management services
- The company offers their services on a contingency basis whenever possible, receiving payment only when clients save money

[ProfitLine](http://profitline.com)

[profitline.com](http://profitline.com)

## Overview

ProfitLine is a provider of outsourced telecom expense management solutions for large enterprises and government agencies. Its TLM Mobility™ solution helps clients manage their mobile enterprise through the entire wireless lifecycle from source -to-pay. The company's Lean Software Development methodology coupled with Six Sigma processes allow its technology to keep pace with rapidly changing wireless needs.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

## Other Items of Interest

- ProfitLine is working towards delivering on BlackBerry® Enterprise Server management in 2009 and is on the cusp of announcing a major global expansion.
- The company delivers its solution via a BPO model.



# Market Landscape

Industry Research  
from AOTMP

## [Quickcomm](#)

[quickcomm.com](http://quickcomm.com)

### Overview

Quickcomm provides an integrated platform for wireless and wireline services. Founded in Australia in 1997 and with current headquarters in New York City, the company is focused solely on providing TEM software. Their clients include both direct customers, managed service providers and managed mobility providers who use their tool to power their offerings. Being founded overseas, Quickcomm provides the capability to satisfy most international customer requirements.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- Quickcomm has Safe Harbor certification as well as robust currency and language support which allows it to compete internationally.
- The company is also able to support over 400 electronic billing formats to assist them in supporting international customers.

## [Renodis](#)

[renodis.com](http://renodis.com)

### Overview

Renodis delivers risk mitigation and optimization across four key disciplines which include telecom consulting, enterprise network services, enterprise mobility services and telecom expense management through a continued approach towards operational excellence.

Wireless Management Activity	Current Offering
eProcurement Portal	No
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	No
Reporting & Analysis Tool	Yes
Primary Market Focus	SMB

### Other Items of Interest

- Renodis offers a hosted solution with access through a web based portal.
- The company's software platform is home-grown.





# Market Landscape

Industry Research  
from AOTMP

## [Rivermine](#)

[rivermine.com](http://rivermine.com)

### Overview

Rivermine provides automated solutions that enable organizations to gain visibility and control over their telecom spend for both wireless and wireline services. Based out of Fairfax, Virginia, the company offers international capabilities including multi-currency, invoice loading and software translation into multiple languages. Rivermine also offers its customers various professional services such as policy development and provides device recycling capabilities for enhanced security and to ensure environmental responsibility.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large/Global Enterprises

### Other Items of Interest

- Rivermine delivers its solution through multiple options (SaaS, Managed Service/BPO, and Licensed).
- The company also has partnerships with IBM and other outsourcers.

## [Spectrum](#)

[3spectrum.com](http://3spectrum.com)

### Overview

Spectrum is a telecom management organization with deep roots in the telecom industry. Privately held and headquartered out of Cincinnati, Ohio, the company employs an efficient and fully automated process to process paper and electronic invoices. Spectrum also places great emphasis on simplifying the Wireless Mobility Management strategy and process for its customers while being customer-focused in providing on-going, multi-tier help desk services.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	SMB

### Other Items of Interest

- Spectrum not only has an experienced direct sales channel, but they also work with an indirect channel which utilizes telecom master agents to sell its solution.
- The company has a fully integrated wireless and wireline application built from the ground-up.



# Market Landscape

Industry Research  
from AOTMP

## [Symphony SMS](#)

[symphonysms.com](http://symphonysms.com)

### Overview

Symphony SMS, based out of Palo Alto, California, is a provider of full lifecycle wireless management capabilities. The EMS 11<sup>®</sup> platform offers a robust reporting solution with a modular approach and multiple delivery options. The software is also translated into 10 different languages, which allows the company to support international users. The company has delivery and operations centers across the globe.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- Recently added personal versus business usage identification capabilities.
- The company is able to offer its solution via Licensed, SaaS/Hosted and BPO/Managed service models.
- Symphony also offers Infrastructure Management Services.

## [Tangoe](#)

[tangoe.com](http://tangoe.com)

### Overview

Tangoe provides enterprise software and managed services for communication lifecycle management. With corporate headquarters in Orange, Connecticut, its CommCare™ suite of managed services provides organizations with the ability to manage fixed, mobile, and converged communications throughout a global enterprise and is able to offer mobility management services around the complete wireless lifecycle.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- With its recent acquisition of InterNoded, Tangoe now offers a robust application and mobile device management solution.
- The company is also able to delivery its solutions via different options and offers recently enhanced international capabilities.



# Market Landscape

Industry Research  
from AOTMP

## [Telebright](#)

[telebright.com](http://telebright.com)

### Overview

Telebright is a software company which focuses on managing, controlling and optimizing costs for customers. Telebright's Wireless Mobility Management practice provides various types of services within the lifecycle. The company is headquartered in Rockville, Maryland and has clients in both the commercial and government sectors. The ManageRight® Wireless application is a home-grown solution which assists customers in gaining visibility into their expenses.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	No
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- The company is fully integrated with partners to provide over-the-air device management capabilities.
- Telebright also offers the ability to manage and monitor utilities as well as telecom expenses.

## [Teleopti](#)

[teleopti.com](http://teleopti.com)

### Overview

Based out of Sweden, Teleopti provides telecom expense management and workforce management applications and services. The company conducts business primarily throughout the EMEA and APAC regions and has offices in Sweden, Norway, Finland, UK, Germany, India, UAE, Russia, Spain and Turkey. The organization's Teleopti Pro software effectively assists customers in inventory and invoice management as well as provides targeted reporting based on user inputs.

Wireless Management Activity	Current Offering
eProcurement Portal	No
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	No
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Teleopti sells its products through a partner network that currently covers 25 different countries and has customers in 50 different countries.
- Teleopti's solution is also able to perform on many different platforms.



# Market Landscape

Industry Research  
from AOTMP

## [Telesoft](#)

[telesoft.com](http://telesoft.com)

### Overview

Telesoft is a company that focuses on providing telecom expense management solutions to Commercial and Public Sector entities. Founded in 1982, Telesoft is focused on helping organizations manage and reduce their wired and wireless telecom spend by providing greater visibility, in-depth reporting and proactive control of organizational expenditures. With a long list of Fortune 500 customers, the company prides itself on offering innovative solutions that expand to accommodate the changing needs of today's growing businesses.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	No
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Telesoft can deliver its wireless solution via outsourced, hosted or licensed models.
- Telesoft plans to release a new user interface utilizing Web 2.0 technology later this year.

## [Telwares](#)

[telwares.com](http://telwares.com)

### Overview

Telwares mobility lifecycle management solution helps customers manage, optimize and reduce wireless spend. The company attempts to deliver value by creating short and long term savings, mitigating risk, and aligning technology with business objectives. Headquartered in Parsippany, New Jersey the company adds value for its customers by offering policy development and other detailed advisory services.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- Telwares provides environment friendly, EPA-registered disposal for end-of-life products.
- Telwares is integrated with other companies to provide certain Wireless Mobility Management services.



# Market Landscape

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from AOTMP

## [TnT Expense Management](#)

[tntpartners.com](http://tntpartners.com)

### Overview

TNT Expense Management utilizes its own proprietary software called TeleBase™ to service its customers. TNT's web-based reporting tool allows customers to gain complete visibility into their wireless expenses. Customers are able to access any financial or inventory related information as well as run and send reports through their mobile device. Based out of Sandy Hook, CT, the company is currently celebrating its 10<sup>th</sup> anniversary and prides itself on customer satisfaction.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- TNT has recently opened a new office in London.
- The company has also recently unveiled its new NOC.

## [UTR](#)

[utrglobal.com](http://utrglobal.com)

### Capability Overview

Established in 1991 and with offices in New Jersey and Toronto, UTR began its roots by focusing on wireline invoice auditing. It has grown to now offer Wireless Mobility Management services in a variety of areas. The company developed its web based software system in 1996 with an eye on full integration of wireless and wireline assets. All equipment is tracked through their software system.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- UTR's customer base is primarily mid-sized to large enterprises with a majority being large financial institutions.
- The company is able to deliver its solution through a SaaS or Licensed model.



# Market Landscape

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## [Valicom](#)

[valicomcorp.com](http://valicomcorp.com)

### Overview

Valicom (formerly known as Visicom) is a certified woman-owned business established in 1991 with headquarters in Madison, Wisconsin. The company focuses on hard-dollar expense reduction and expense management services and prides itself on being “100% independent”; meaning they have no financial relationships with any telecom carriers. Valicom’s Clearview technology platform uses “click and drag” functionality to facilitate ease of use.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Large Enterprises

### Other Items of Interest

- Valicom has a Midwest concentration but a nationwide customer base.
- Valicom is a BPO services provider and a hosted software provider.

## [Verizon](#)

[verizon.com](http://verizon.com)

### Overview

Verizon assists customers in gaining visibility into their wireless spend and usage. The company manages the procurement of wireless devices through an on-line portal which will only present approved devices and services established by the customer. The company is also able to review and monitor usage to ensure compliance around non-usage, unauthorized usage and devices that have not been authorized by the organization.

Wireless Management Activity	Current Offering
eProcurement Portal	Yes
Asset/Inventory Management	Yes
Expense Management	Yes
Help Desk Management	Yes
Mobile Device Management	Yes
Reporting & Analysis Tool	Yes
Primary Market Focus	Global Enterprises

### Other Items of Interest

- Verizon is fully integrated with another supplier to offer certain Wireless Mobility Management services.
- The company is currently working on the development of a platform for managed mobility.



# Market Landscape

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## Conclusion

The process of selecting a Wireless Mobility Management supplier should be taken seriously. The enterprise should define its goals and objectives for the wireless program prior to gathering information on any supplier. This will ultimately make the selection process much more efficient when both parties understand exactly what is at stake.

When evaluating suppliers, remember these key areas during the selection process:

- 1) Review your goals and objectives with each supplier.
- 2) Clearly identify and articulate the work to be performed.
- 3) Locate suppliers who have experience with the size and scope of your project.
- 4) Assess and discuss the current state of your inventory with the supplier. If inventory needs to be updated, discuss how this will be accomplished and who will perform the work.
- 5) Identify if additional resources or technology will be needed.
- 6) If procurement portals or reporting software is involved, ensure those who will ultimately be responsible for using the technology reviews it for efficiency and ease of use.
- 7) Determine if the supplier is receiving fees from carriers for new service activations and how any fees received affect service pricing, optimization activities and service recommendation decisions.
- 8) Ask if the supplier provides the ability to tag and separate personal and business calls.
- 9) Ensure the supplier has capabilities to perform plan optimizations each month based on actual usage patterns.
- 10) Ensure the supplier is in a financially stable position.



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## Criteria for Suppliers That Appear In This Market Landscape

The criteria for including Wireless Mobility Management suppliers in this directory include three primary factors:

- The Wireless Mobility Management suppliers have briefed AOTMP on their technology and offerings.
- The suppliers have met AOTMP's Wireless capabilities evaluation criteria.
- Suppliers have demonstrated sufficient sales, revenue, and/or operational presence to support the features and functionality that enterprises are seeking.

Evaluations to determine which suppliers were included were objective and no fees were paid for listings in this market landscape. AOTMP is not endorsing the suppliers and inclusion in this listing is not an indication that AOTMP has certified these suppliers or trained their personnel. There were other suppliers who were invited to participate, however they did not respond to our invitation.

The findings are objective and represent the best analysis available at the time of publication. AOTMP is not endorsing or recommending these suppliers. Enterprises must match their individual needs to their evaluations of suppliers. No fees were paid to be included in this document or to influence the findings.

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# Market Landscape

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## Research Analyst Profile

### **Scott Lawrence**

Director of Research, AOTMP

Scott has over 14 years of experience developing and collecting market research on behalf of global Fortune 500 enterprises within the telecommunications and IT industries. Scott has led teams to accomplish research objectives by designing studies that yielded actionable information while helping clients understand the impact of the results. Scott has a B.S. in Marketing from Ball State University.

Scott is responsible for designing and managing AOTMP's research activities which includes research publications, market landscapes and benchmarks within the areas of telecom expense management, network performance management, Wireless Mobility Management and unified communications management.



# Market Landscape

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## About AOTMP Research

AOTMP research is supported through data collected from a variety of sources. Data points are collected through enterprise and supplier benchmarking projects, training and certification events, research surveys, frequent hot topic polls, virtual conference audience polling, live conference audience polling, and AOTMP Access benchmarking events. AOTMP's data point contributors include over 60,000 IT, telecom and business professionals, supporting domestic and international enterprises and industry suppliers. Data points contributing to research are carefully analyzed using advanced statistical methods. Research findings are confirmed through test/retest validity methodology and, therefore, paint an accurate picture of the industry. The clarity and detail of AOTMP research is unmatched in the practice of telecom environment management, and AOTMP expertise translates analysis into actionable findings representative of the industry and all related industry segments.

## About AOTMP

AOTMP is the leading provider of information solutions for managing enterprise telecom and IT environments. Our proprietary certifications, benchmarks, standards and best practices deliver measurable improvement in efficiency and productivity for managing wireless, voice, data and network services. From Fortune 50 companies to SMB, enterprises seeking the best return on telecom and IT services turn to AOTMP's industry research, advisory services, events, educational programs and performance management systems to achieve operational and financial efficiency.

## Research & Benchmarks

AOTMP conducts industry-leading research to provide benchmarks, reference points, case studies and reports that deliver timely and relevant insight. We help enterprises make confident, informed decisions affecting their telecom and IT environment, and provide information to recognize trends affecting performance and efficiency, determine budget allocations and resources, and understand how others are achieving success.

## AOTMP University

Implementing and executing best practices in your enterprise begins with a staff that understands and supports industry standards. AOTMP University offers staff development and training packages to educate telecom and IT professionals on best practices for driving efficiency and optimizing budgets. You can learn more about our certification programs, online training courses and certified professional program at [www.aotmpuniversity.com](http://www.aotmpuniversity.com).



# Market Landscape

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## **Advisory & Consulting Services**

Our team of industry experts can help you improve and gain visibility into your current management processes, and understand how to effectively measure performance. Put the power of AOTMP's expertise to work in your telecom and IT environment to create the most effective telecom environment management program for your enterprise.

## **Tools & Resources**

AOTMP offers a comprehensive array of tools, templates and reference information for telecom financial, operational, and technology management. Tools like our online Telecom Knowledge Base (TKB), supplier directories, Telecom Environment Management newsletter, and other resources help telecom and IT professionals increase efficiency, make tactical decisions, cut costs, and plan strategic moves.

## **Events & Programs**

AOTMP produces several industry events and programs throughout the year to bring end users, industry experts and suppliers together for education, networking, and collaboration. Our events and programs include semi-annual virtual conferences, monthly web events, an Industry Advisory Board, and an annual in-person conference featuring AOTMP's *Industry Excellence Awards* recognizing the successes of both enterprises and suppliers in telecom environment management.

## **Performance Management Systems**

Our Performance Management Systems help you apply standards and best practices throughout your enterprise to drive continuous improvement of people and processes using benchmarks, metrics and scoring algorithms. AOTMP's Performance Index provides a consistent means of evaluation, and our comprehensive methodology enables you to optimize performance in your telecom environment, and then leverage telecom assets to drive growth, profitability and competitive advantage.

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