Cloud Adoption in Small- to Medium-Sized Businesses
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Introduction

Small- to medium-sized businesses (SMBs) are becoming increasingly important to technology and communications services providers as a means of growing their business. The enterprise market is saturated, highly competitive and very mature with long-term established relationships. In pure number terms, SMBs are prolific and while sales channels and approaches will need to be adapted to reduce the cost per sale, SMBs overall provide a wealth of opportunity, especially as they turn to new technologies for business gain.

A core challenge for many SMBs is being able to keep up with technology change. Communications services and technology management is often a role “fitted around” other activities, with no one in real control. Reliance on the service provider is therefore critical. As technologies start to converge, SMBs could increasingly look for suppliers that will provide a converged communications technology suite, including traditional communications services such as wireless, broadband and wireline coupled with cloud-based services.

Cloud adoption gives SMBs access to state-of-the art technology at a fraction of the cost, provides greater flexibility and the ability to keep up with technological changes. Companies have been swift to embrace “the cloud” as they can see huge commercial and financial benefits. But as the market develops, will SMBs look to their services provider to provide cloud-based services? How should a service provider approach a SMB? What criteria will underpin success and what channels should be used? How fast will the slower adopters move to the cloud? Is convergence even an issue for traditional SMBs across the globe? These and many other issues were the basis of the latest Amdocs sponsored SMB research program.
About the Survey

1,311 SMBs took part in the survey from a selection of countries across the globe (Table 1). Respondents within the SMBs were typically the owner, a director, a partner or the person charged with the responsibility for communication services management. For the purposes of this project, a SMB was defined as having between 5 and 100 employees.

Companies from the professional services; manufacturing, including automotive; retail & distribution; communications, media & entertainment; financial services and energy, oil & gas sectors took part in the survey. No public sector organizations were polled.

### Table 1. Number of SMB Interviews by Country and Market Maturity.

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Number of Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>203</td>
</tr>
<tr>
<td>Canada</td>
<td>100</td>
</tr>
<tr>
<td>UK</td>
<td>200</td>
</tr>
<tr>
<td>Australia</td>
<td>100</td>
</tr>
<tr>
<td>Germany</td>
<td>100</td>
</tr>
<tr>
<td><strong>Total Mature Markets</strong></td>
<td><strong>703</strong></td>
</tr>
<tr>
<td>Russia</td>
<td>101</td>
</tr>
<tr>
<td>Brazil</td>
<td>103</td>
</tr>
<tr>
<td>Argentina</td>
<td>101</td>
</tr>
<tr>
<td><strong>Total Transition Markets</strong></td>
<td><strong>305</strong></td>
</tr>
<tr>
<td>India</td>
<td>203</td>
</tr>
<tr>
<td>Indonesia</td>
<td>100</td>
</tr>
<tr>
<td><strong>Total Emerging Markets</strong></td>
<td><strong>303</strong></td>
</tr>
<tr>
<td><strong>Overall Total</strong></td>
<td><strong>1,311</strong></td>
</tr>
</tbody>
</table>

Controls were also imposed by SMB size as shown in Figure 1.
Cloud Computing is Growing Rapidly Among SMBs

Cloud computing is growing rapidly and adoption is global. Results from the recent Amdocs SMB survey, conducted by Coleman Parkes Research – a business to business market research company – found on average 57 percent of SMBs around the world are subscribing to cloud-based services.

- SMB cloud consumption, however it is defined, is highest in Brazil (77 percent), Indonesia (68 percent) and the US (64 percent) and lowest in Germany (34 percent) and Russia (43 percent) (See Figure 1). This is quite surprising given the traditional assumption that cloud consumption would be higher in mature markets and lower in emerging/transition markets. But with Brazil and Russia both transition markets, Indonesia an emerging market and Germany a mature market, something is driving cloud adoption at a faster rate among SMBs in new markets.

Also, consumption is not driven by a particular industry; although the highest consuming SMBs are found in the communications, media and entertainment (68 percent) and professional services (61 percent) sectors, and the least consuming industries are not far behind: manufacturing, engineering, automotive (48 percent) and energy, oil, gas & utilities (51 percent).

This immediately signals that service providers need a localized sales and communication strategy focusing on individual countries and sectors rather than entire regions; as the uptake rates vary and the approaches will need to be different.

![Figure 1: Does your business currently use any cloud-based services?](image-url)
SMBs with Low Overall Cloud Consumption Subscribe to a Greater Range of Cloud Services

Focusing on SMBs with the highest consumption (e.g. Brazil) and comparing their cloud subscriptions and usage with the lowest consumer (e.g. Germany) reveals that the countries with high cloud consumption may not necessarily mean SMBs are more astute with cloud services, nor are greater investors in cloud-based services (see Figure 2).

- Despite SMBs in Brazil being the highest consumers in cloud services, they are only likely to subscribe to minimum entry level services, some of which are free, e.g. storage and back up services (87 percent) - typically Dropbox and Google Drive - and some paid for services, e.g. computer networks (54 percent). So adoption may be quick in Brazil but it is basic applications. In addition some countries have offered incentives to SMBs to start on the cloud journey which will have impacted the initial take up at an entry level.

- However, when compared to Germany (lowest overall consumer), the SMBs that do invest in cloud are likely to invest in a wider range of paid for services, e.g. unified communications (44 percent), office software (56 percent) and computer networks (53 percent). It seems as though SMBs in Germany are embracing more applications and taking a more strategic approach than others, such as Brazil. This is a key issue as tactical approaches to cloud adoption on an application by application basis will drive up the usage, but not necessarily the overall business benefits. German based SMBs are taking a truly strategic approach to their cloud adoption.

In the mature markets, cloud adoption seems to be a strategic decision as opposed to a tactical response. In a downward economy strategy is key to looking forward, but when in a growing economy like emerging and developing markets, organizations can afford to make short term tactical decisions to respond to immediate issues and needs. This drives up initial cloud usage but only from tactical standpoint.

**FIGURE 2: WHAT TYPES OF CLOUD-BASED SERVICES DOES YOUR BUSINESS USE?**

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Australia</th>
<th>Russia</th>
<th>Germany</th>
<th>Brazil</th>
<th>India</th>
<th>Indonesia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Storage/Back up</td>
<td>87%</td>
<td>69%</td>
<td>68%</td>
<td>68%</td>
<td>63%</td>
<td>68%</td>
</tr>
<tr>
<td>Computer Networks</td>
<td>48%</td>
<td>54%</td>
<td>53%</td>
<td>54%</td>
<td>48%</td>
<td>54%</td>
</tr>
<tr>
<td>Office Software</td>
<td>61%</td>
<td>56%</td>
<td>49%</td>
<td>54%</td>
<td>56%</td>
<td>49%</td>
</tr>
<tr>
<td>Unified Communications</td>
<td>39%</td>
<td>33%</td>
<td>24%</td>
<td>44%</td>
<td>41%</td>
<td>34%</td>
</tr>
<tr>
<td>Server Rental</td>
<td>24%</td>
<td>30%</td>
<td>22%</td>
<td>24%</td>
<td>30%</td>
<td>22%</td>
</tr>
</tbody>
</table>

TOTAL  AUSTRALIA  RUSSIA  GERMANY  BRAZIL  INDIA  INDONESIA
Restrictions Limiting Cloud Subscription

There are specific reasons why high cloud consumption may not necessarily mean SMBs are more astute with cloud services, nor are greater investors in cloud services. This could be due to current state laws and regulations that effect economic performance and private investment:

1. Laws and Regulations

• Germany has comprehensive privacy legislation, but it includes arduous registration requirements that may act as a cost barrier for the use of cloud computing. In addition, Germany has 17 data protection authorities, which leads to uncertainty in the application of the law. This could be the reason why cloud uptake is low and more cautious.

• Brazil is a fast-growing economy that recognizes the importance of information and communications technology (ICT) and the digital economy. However, some gaps in law and regulations have acted as barriers to ICT innovation in Brazil. Therefore, SMBs in Brazil may only have access to minimum entry level cloud services.

• Russia joined the World Trade Organization (WTO) in 2012 and began the process of updating its copyright laws to align with international best practice. Russia also removed tariffs that were acting as trade barriers for cloud service providers (source: 2013 BSA Global Cloud Computing Scorecard).

2. Economic Performance

• According to recent figures from the International Monetary Fund (IMF), emerging markets and developing economies (e.g. Brazil) are growing at much faster rates than advanced economies (e.g. Germany): in 2012 advanced economies grew by 1.4 percent while emerging and developing markets grew by 4.9 percent.

• World trade volumes (goods and services) also show that trade is growing more rapidly in emerging and developing economies (+5.7 percent) than in advanced economies (+1 percent). This trend is set to remain more or less the same in 2013 and over the next two years through 2015.

• The figures from the IMF positively correlate with total cloud consumption. So perhaps SMBs in countries with low growth rate (e.g. Germany) are being more cautious when investing in cloud services and making do with their existing infrastructure.
3. Private Investment

- Early stage venture capital investment (VC investment) and later stage VC investment in Germany were at their lowest levels in 2010 and 2011, but recent figures show that investment is picking up again (source: European private equity and venture capital association).

- In Brazil, early investment and later stage investment (VC) has been consistently higher than in Germany for the past two years.

- Increased investment may not only drive greater SMB cloud consumption, like in Brazil, but also investment across a wider range of cloud services. While German take up overall, as penetration among SMBs is the lowest, the actual implementation of cloud services within the subscribed SMB is higher than others.

Although state laws and regulations are restricting cloud growth in some countries, this should not be interpreted as an intentional measure to dampen growth in cloud computing, but to protect those that use the cloud from cybercrime. Once a secure platform has been developed we can expect to see significant cloud computing growth.

In fact, governments around the world are already incentivizing businesses to use the cloud, as they realize the economic benefits of small business growth. Additionally, economic performance and private investment share a positive relationship; when economies become stable and/or growth is recognized, investor confidence will improve and small businesses will be provided with the capital they need to grow. Overall these are positive signs that growth in cloud computing will significantly move upwards in the near future.
The Benefits are Being Realized but Service Providers Could be Doing More

With a focus on SMBs that currently subscribe to cloud computing, many are realizing the benefits the cloud has brought to their business (see Figure 3). On a scale of 1 to 10 (where 1 is not important and 10 is extremely important) around 7 in 10 of SMBs in the US, Russia, Brazil, Argentina, India and Indonesia rated the importance to their business as 7 or more on the scale. This clearly highlights that cloud-based services are seen as important therefore why the investment has been made, even if only on minimum entry level applications, such as in Brazil. This is the same case across all sectors except for professional services, retail & distribution, and energy, oil, gas & utilities.

**Figure 3: Using this Scale of 1 to 10 (where 1 = Not Important at All and 10 = Extremely Important) How Important are Cloud-Based Services to Your Business?**
Over 7 In 10 SMBs are Engaged in Cloud Solutions and Demand is High

Service providers should realize that even if cloud engagement is high they could be missing out on a major opportunity. Their communication strategy needs to be focused on the needs and demands of SMBs within each region and indeed each country:

- 75 percent of SMBs would like cloud-based services bundled in with their communications services and would really prefer getting cloud-based services from their main service provider. Furthermore 7 in 10 SMBs would prefer to have a single provider. This trend resonates across all sectors and nearly all countries, but only with 6 in 10 of SMBs in Germany.

- SMBs have multiple service providers for their communications services (e.g. mobile phone, fixed landline, Internet/broadband and cloud). The UK has the most with as many as 7 service providers in some cases; a key opportunity for service providers to capitalize on demand for a bundled package.

- SMBs in the financial services industry are the greatest advocates for having a single provider, with 82 percent wanting to reduce their current above average number of service providers down to 1 – a huge opportunity for service providers to capitalize on this demand.

- 68 percent of SMBs are more likely to select a service provider who offers cloud-based services, and would extend their contract with their current primary service provider if they offered cloud-based services. A trend that resonates across all countries, but only with 6 in 10 SMBs in Canada, Germany and the US.

- Again SMBs in the financial service sector are the most likely to select a service provider that offers cloud solutions, but interestingly this is also a draw for 7 in 10 SMBs in all other sectors except energy, oil, gas & utilities, where the response indicates only 1 in 2, but still a significant proportion want this.

- 73 percent of SMBs see no reason why service providers should not provide cloud-based services, and if they did would expect their usage of cloud-based services to increase. If ever there was a call to action for service providers it is here. By providing cloud-based services the service provider will be able to increase its market share and expand the revenue per customer significantly. In addition this trend resonates across all countries, but only with 6 in 10 SMBs in Germany who are seen to be more discerning and strategic thinkers.

- This trend also resonates across all sectors, but again is lowest in energy, oil, gas & utilities (1 in 2) so the approach should be universal.
• 80 percent of SMBs would prefer to get a single bill for all their communication consumptions (cloud and traditional), and that includes Germany. This is also a perceived benefit for moving all communication services to a single main service provider.

• Single bills strike an even bigger chord across all sectors with nearly 8 in 10 wanting this as an option in some sectors.

This all points to a need for service providers to heavily promote their cloud-based services, but also have the technological backbone and infrastructure to provide the bundled services and consolidated billings (see Figure 4). It is clear that consolidation of services is perceived as a step in the right direction for a significant portion of SMBs:

• Around 5 in 10 SMBs perceive the benefits of moving all their communications services to their main service provider to be ease of integration with the rest of their business systems and to consolidate all communication costs into a single bill.

• 6 in 10 of all SMBs believe consolidating all their communication services into a single service provider will reduce costs. This trend is the same across all business sectors, however the cost saving benefits particularly strikes a chord in the retail & distribution sector (64 percent).

• Over 1 in 3 SMBs (Australia, Germany, Brazil, Argentina, India and Indonesia) believe being offered cloud-based services would improve their existing relationship with their main service provider. This is a great opportunity for service providers to improve retention rates by at least one-third.

FIGURE 4: WHICH OF THE FOLLOWING DO YOU THINK ARE THE MAIN BENEFITS OF CHOOSING A CLOUD-BASED SERVICE FROM YOUR MAIN SERVICE PROVIDER?
Boost Demand by Communicating the Benefits of the Cloud

Looking at SMBs that do not use the cloud, it has been established that around 5 in 10 who are not using the cloud are in the market for cloud solutions (see Figure 5), especially those in Australia, India and Indonesia. These are the countries with the highest demand, but some may already have high usage across the whole country. SMBs in the financial services, professional services and retail & distribution industries also have the highest demand and plans to move to the cloud.

However as mentioned before, revenue may not necessarily come from countries with the most demand, as they may only subscribe to minimum entry cloud services. The most strategic countries and industries – that subscribe to the greatest range – could be the greatest revenue generators.

SMBs that are not using the cloud are engaged, but need education on how the cloud could be relevant to their business and their customers. Interestingly those that do not use the cloud are not sure how important it will be to their business in the next 12 months. When asked on a scale of 1 to 10 (where 1 is not important and 10 is extremely important) how important is the cloud, the average rating was 5 out of 10, which is much lower than those who already use the cloud and gave a rating of 8 out of 10 for importance. The same trend exists across all sectors.

It appears that realizing the benefits comes with hands on experience. It also indicates a potential knowledge gap within the non-cloud using SMBs, which must be the focus of service provider communications activities.

**Figure 5: Has your business decided (or is currently deciding) on a strategy for adopting cloud-based computing?**

<table>
<thead>
<tr>
<th>Country</th>
<th>Decided Already</th>
<th>Considering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>8%</td>
<td>50%</td>
</tr>
<tr>
<td>India</td>
<td>10%</td>
<td>46%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>16%</td>
<td>44%</td>
</tr>
<tr>
<td>Australia</td>
<td>18%</td>
<td>44%</td>
</tr>
<tr>
<td>Canada</td>
<td>8%</td>
<td>39%</td>
</tr>
<tr>
<td>USA</td>
<td>18%</td>
<td>37%</td>
</tr>
<tr>
<td>Russia</td>
<td>12%</td>
<td>36%</td>
</tr>
<tr>
<td>UK</td>
<td>12%</td>
<td>39%</td>
</tr>
<tr>
<td>Germany</td>
<td>7%</td>
<td>19%</td>
</tr>
<tr>
<td>Argentina</td>
<td>7%</td>
<td>19%</td>
</tr>
<tr>
<td>Financial services</td>
<td>9%</td>
<td>43%</td>
</tr>
<tr>
<td>Professional services</td>
<td>6%</td>
<td>40%</td>
</tr>
<tr>
<td>Retail &amp; distribution</td>
<td>5%</td>
<td>42%</td>
</tr>
<tr>
<td>Manufacturing/Engineering/Automotive</td>
<td>10%</td>
<td>32%</td>
</tr>
<tr>
<td>Energy, Oil, Gas &amp; Utilities</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Communications, Media &amp; Entertainment</td>
<td>3%</td>
<td>27%</td>
</tr>
</tbody>
</table>

*Yes – decided already*  *Yes – we are looking into it now*
Service providers may want to consider how they can sell cloud solutions by using virtual examples that act as hooks. Additional drivers to cloud adoption are:

- 4 in 10 SMBs want to know how the cloud could benefit their business. Education is key. This trend resonates across the US, Russia, Germany, Argentina, and India and across all sectors except for financial services. It is also the same for 3 in 10 SMBs in remaining countries, except for Brazil where this diver is the lowest (only 2 in 10); however it is likely that these SMBs are focused on entry level cloud services.

- Around 3 in 10 SMBs also want to understand what benefits the cloud could bring to their customers. Again this shows engagement in the benefits of the cloud and also how SMBs can improve their sales, customer service and retention through cloud adoption. This trend mostly occurs in the US, UK, Argentina, India and Indonesia, but also in manufacturing, engineering, automotive; retail and distribution and communications, media & entertainment sectors.

- There is some confusion over which cloud approach to take, which is acting as a barrier for 1 in 3 SMBs; especially for 4 in 10 in the US and India. Again this calls for service providers to take an educating role.

- Increased trust in service providers is also a key driver to cloud adoption, a trend that is highest in Australia, Brazil, Indonesia and India. It is of the least concern in the US where only 2 in 10 see this as an important factor.

- Lack of trust in service providers and security concerns are also considered a major barrier for nearly 4 in 10 SMBs, especially Australia, Germany, Brazil, India and Indonesia. There is some work to be done to create the right relationship with the SMB.

- Cost is also high in the rankings, but this is mainly driven by SMBs in Australia (5 in 10). However it is not considered a major barrier, meaning service providers are willing to pay for the cloud. Yet having the ability to bundle services together is perceived to reduce costs – and this trend resonates across all countries (6 in 10 SMBs) and the professional services, manufacturing, engineering, automotive and retail and distribution sectors.
If these concerns are left unattended by service providers then SMBs may choose to adopt only minimum entry level cloud services, or go other cloud providers. However if addressed, service providers could see revenues significantly increase. It is clear that there is a need to think strategically with go-to-market messaging. Communications need to be localized and tailored to SMB needs. Barriers in moving to the cloud also need to be addressed in the communication strategy.

To help focus the communications, below are the main reasons why SMBs are not using cloud-based services from their main service provider, all of which suggest a possible disconnect between service providers and SMBs.

- Around 3 in 10 SMBs feel the cost of the cloud services are too high from their current supplier, and believe they can get better deals going to an independent cloud service provider. This trend resonates across all countries, and is especially high in Germany (as high as 4 in 10 agree with this) and with the professional services and communications, media and entertainment industries.

- Alarmingly, one-third of SMBs do not know if their current service provider even offers cloud services nor have been asked or sent any information on cloud-based services. This is particularly high (4 in 10 SMBs) in the US, Australia and Argentina – and in the financial services industry - but significantly lower in Germany.
Service Providers Should Adopt a Smart Multi-Channel Strategy to Educate SMBs

SMBs want communication. In fact, the offering of cloud-based services has become a core selection criterion when searching for a new service provider for 1 in 2 SMBs (56 percent). Service providers should invest in communications activities that educate SMBs on the benefits of cloud adoption, the need for clear integration and a strategic approach. Survey findings suggest service providers should adopt a multi-channel approach to communicating the relevance and benefits of the cloud to SMBs’ business.

• SMBs tend to use Internet search engines (39 percent) and company websites (42 percent) to research – so search engine optimization (SEO) and the right call-to-action needs to be in place on service providers’ websites.

• 1 in 3 SMBs prefer direct mail, US (29 percent), Canada (36 percent), UK (31 percent), Australia (30 percent), Germany (38 percent) and India (38 percent). Direct mail also has a particularly high preference in the financial services industry (31 percent), manufacturing (32 percent) and retail & distribution (29 percent).

• Smaller companies appear somewhat traditional in their choice of communications and media providers. Service providers should use a variety of channels with varying messages to have the greatest impact. Social media, such as Twitter and blogs were mentioned by only 1 in 10 SMBs polled as being a good channel for communication. These channels may become more important in the future.
Conclusions

• 1. SMBs around the world are adopting cloud computing. On a macro level it appears as though some countries have higher consumption than others, which is the case. A closer look reveals that high consumption is mainly being driven by entry level cloud services, such as storage and backup services (Drop Box and Googled Drive).

• a. SMBs with low overall cloud consumption are actually subscribing to a greater range of cloud services, and this trend is not biased to a particular market; in fact looking at the regional data shows no real differences; the aim for service providers is to focus their strategies on local markets. Cloud adoption seems to be a strategic decision as opposed to the tactical response seen in mature markets and will demand a different approach.

• State laws and regulations are currently restricting cloud computing adoption, but once a secure platform has been developed cloud adoption will grow; especially with increasing government support towards SMBs. Service providers need to keep their ears to the ground to listen for developments in regulations.

• 2. SMBS are engaged in cloud solutions and demand is high. The drive to cloud computing is there, but service providers need to take the lead on helping SMBs make the move and respond to their demands.

• a. Service providers need to start talking to their customers and perhaps offer cloud consultancy services to help them move to the cloud or expand their subscriptions. Currently one-third of SMBs that currently do not have cloud services do not even know if their service provider offers the cloud nor have they received any information about cloud services.

• b. Service providers need to offer bundled communication offerings that are tailored to SMBs’ needs. This will also respond well to SMBs’ desire for a single bill. Let’s not forget that 7 in 10 SMBs would prefer a single service provider and see no reason why their main service provider should not supply the cloud; a huge revenue opportunity for service providers that respond and potentially damaging for those that do not.
3. SMBs that are currently ‘cloudless’ need education on the benefits the cloud could provide. Spill over effects do exist in SMB communities e.g. word of mouth, but service providers need to do much more to create the required change.

a. As little as one-third of SMBs without cloud usage to date understands the importance of cloud computing. Service providers need to educate SMBs on the positive impact cloud services could have on their business. Furthermore service providers need to address issues of data security and demonstrate their capabilities to deliver the cloud.

b. SMBs perceive cloud computing to be costly. Service providers need to address this issue, perhaps create entry level subscription offers or reduce costs by offering communication services bundles.

c. Communication needs to be multi-channel and local level targeted – they should be country specific and industry specific. Initial investment should go towards SEO and website content.

Additional focus areas for service providers:

- Emerging market SMBs prefer, at present, to have different suppliers for different cloud and communications services unlike their mature market counterparts. Greater education and communication on the benefits of reducing the number of suppliers should be undertaken by service providers.
- Emerging and mature market SMBs are looking for more tailored services and offerings. Cloud service providers need to provide greater ability to tailor services to the SMBs needs.
- Finally emerging market SMBs are focusing more on the strategic adoption of cloud-based services than any others.
- The SMB world is changing fast. Service providers need to ensure that they have flexible and agile solutions and systems in place to cost effectively respond to those changes, while maintaining the high quality network experiences that SMBs demand.
About Amdocs

For more than 30 years, Amdocs has ensured service providers’ success and embraced their biggest challenges. To win in the connected world, service providers rely on Amdocs to simplify the customer experience, harness the data explosion, stay ahead with new services and improve operational efficiency. The global company uniquely combines a market-leading BSS, OSS and network control product portfolio with value-driven professional services and managed services operations. With revenue of $3.2 billion in fiscal 2012, Amdocs and its 20,000 employees serve customers in more than 60 countries. Amdocs: Embrace Challenge, Experience Success.

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