

AN AMDOCS WHITE PAPER FOR
THE COMMUNICATIONS INDUSTRY

amdocs

INTEGRATED CUSTOMER MANAGEMENT:

ADAPT OR PERISH

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EXECUTIVE SUMMARY

It is not news that the Communications and Media industry has changed dramatically over the past ten years, and Communications Service Providers (CSPs) have faced multiple challenges in keeping up. The old world is gone and old world ways simply don't work anymore. In the new world your survival is dependent on your ability to find out what your customers want and act nimbly to give it to them in cost-effective ways.

This means you need to focus on the totality of a customer's involvement with your organization, not just at the point of interaction but through every aspect of a customer's activities.

But focusing on customers does not mean indiscriminately giving customers everything they want. Communications and Media is now a margins business, and the trick to achieving high margin is not uniformly keeping prices high and costs low, but keeping them in the right balance for different kinds of customers. It requires a differentiated go-to-market approach.

Integrated Customer Management (ICM) is the logical response to a highly competitive world characterised by continual change.

Integrated Customer Management is a way of doing business in which all corporate resources are agile and aligned to deliver an intentional, differentiated, customer experience, resulting in the creation and capture of maximum value for the service provider and their customers.

The customer experience thus becomes the driver of operations, and not a by-product of your company's activities. To successfully give customers an intentional rather than incidental customer experience requires integration across the organization at an unprecedented level. This level of integration can only be achieved by the equal emphasis on all three elements of ICM:

- > Customer centricity

- > Agility

- > Alignment

These elements of ICM are not new by themselves. But the combination of these three elements allow you to generate a fundamentally different business model to the one you operate on today. That is, initiatives and projects driven by an ICM strategy can maximize value for service providers and their customers, rather than merely achieving marginal value. Bundling is an excellent example of ICM in action, where putting products together delivers greater value to the customer, at the same time as achieving maximal value for the CSP. It also requires components all three elements of ICM to succeed; customer centricity (understanding customers bundling desires), alignment (coordination amongst lines of business) and agility (business process and IT systems to support bundles).

ICM is intended to provide a long-term approach, a way of doing business, whereby you can be equipped to evolve and adapt throughout the long term.

“It is not the strongest of the species that survive,
nor the most intelligent, but the onemost responsive to change.”

– CHARLES DARWIN

YOU HAVE TO ACT

Applying quick-fix solutions will no longer meet current or new challenges arising in the Communications and Media industry. The new world is characterized by continual, fundamental change and CSPs that do not adapt will not survive.

In the new world, innovative technology alone is not enough to compete on, and products don't differentiate. Even exemplary customer service doesn't suffice. Traditional service providers can persist for a short while longer focusing on any one of these elements, particularly because the whole industry is still coming to terms with the consequences of globalisation, deregulation and dis-intermediation. But time is running out. **New competitors in the wireless are already poised to take a significant share of the mobile market. For example, see Figure 1 below**

In this new world your survival is dependent on your customer focus, your agility and your organizational alignment. Your whole organization needs to find out what your customers want and act nimbly to give it to them in cost-effective ways across their entire customer life-cycle. To do this successfully requires all three elements of an ICM strategy. In fact, new kinds of service providers are already adept at operating in this way in their base markets, and are successfully applying this focus to new markets - yours.

THE OLD WORLD IS GONE

In relative terms the world that Communications Service Providers (CSPs) have operated in has been subject to seismic change. For many decades, CSPs operated in a world with relatively few suppliers due to high barriers to entry, supplying relatively stable products via well-established channels to a relatively predictable customer base. But in the space of just one decade all that has changed. The magnitude and effect of these changes has been profound as well as swift.

CUSTOMERS ARE EXERCISING THEIR CHOICES

For CSPs there are fewer new untapped markets. At the same time, CSPs face competition in their core markets from multiple competitors whose brands afford them instant recognition. As a result, the value chain has been expanded and fragmented. Customers are not necessarily dealing directly with their CSP. They can -and do- switch providers quickly and easily in order to chase the latest fad or the best deal. In a recent survey commissioned by Amdocs, 85% of consumers reported that having negative customer service experiences will drive them to switch providers.

All these factors mean that the customer has high variety, low switching costs and a limited attention span. As the regulatory and technological barriers continue to come down across the industry, lowering switching costs for customers, even more customers will switch.

In fact, CSPs know this and everyone has some kind of project underway to address issues of customer loyalty. This in itself represents a dramatic change in focus, away from only products and infrastructure, and towards customers. But gnawing away the rough edges of customer interaction or fiddling with response times at the contact center has not been enough to gain customer loyalty.

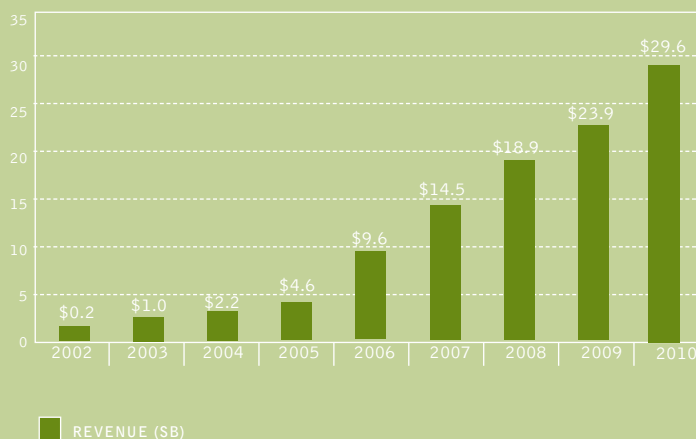
A study by Walker Information in 2003 found that whilst 75% of those surveyed were at least satisfied with their provider, only 28% of telecoms customers surveyed said they were loyal to their current provider. That is, whilst most customers might not go to the competition today, they would move tomorrow for a better offer.

“Churn is a significant global business issue communications companies must effectively manage to be viable, long-term industry players.”

– KPMG, 2002

FIGURE 1:
PROJECTED MVNO
REVENUES IN THE
UNITED STATES

SOURCE: ARC GROUP



IMPLICATIONS OF THE NEW WORLD ORDER

PRODUCTS ARE DISPOSABLE

At the same time, lowered barriers to entry and a proliferation of products mean that CSPs need to change their entire approach to developing, introducing and supporting their products. Improvements in technical capability mean that it is now possible for anyone to enter new markets, and create, replicate and retire products quickly, easily and cheaply.

This means that CSPs can deliver and support products that more precisely meet customer needs and approach true personalisation, but it also means that competitors can do this just as easily. CSPs need to think not in terms of one-off cycles, but a continuing process of evolution and adaptation. Agility and flexibility are key to success.

CSPs need to be equipped to handle the launching of hundreds of products annually. An organization built to deliver tens of products developed to last several years or decades simply cannot cope with this order of change to its operations in product innovation, deployment and support.

MARGIN IS THE MEASURE

The difficulty CSPs face in increasing revenues by developing new markets or products has brought a switch in emphasis from top-line revenues to bottom-line benefit as an indicator of company health and success. Margin is now the most significant measurement of company health. Or to put it another way, to be successful, CSPs need to both increase per customer revenues and decrease per customer costs - at the same time.

CUSTOMER LOYALTY DRIVES SUCCESS

Combining the needs to please customers with increasingly more finely targeted products and to achieve significant margins means that there is a renewed focus on customer loyalty as the prime driver of company success. CSPs can achieve higher value from their customers only by giving customers better value for money.

QUALITY OF THE CUSTOMER EXPERIENCE DRIVES CUSTOMER LOYALTY

Where loyalty is the goal, instead of starting with the network, you must begin with the customer. To achieve customer loyalty, you must be customer-centric across all aspects of operations, not just the customer-facing ones. This means you can start to think about the totality of a customer's involvement with your organization, not just at the point of interaction but through every aspect of a customer's researching, ordering and receiving products and services activities. We call this the customer experience.

Unfortunately, the customer experience has been far from perfect in the communications and media industry, which has kept customers from developing loyalty to most CSPs as shown in Figure 2.

ORGANIZATIONAL ALIGNMENT DRIVES COMPELLING DIFFERENTIATION

But focusing on customers doesn't mean indiscriminately giving customers everything they want at any price. Communications and Media is now a margins business, and the trick to achieving high margin is not uniformly keeping prices high and costs low, but keeping them in the right balance for different kinds of customers. It requires a differentiated go-to-market approach.

" More players are competing for consumers' total telecom budget. As network differentiation disappears, carriers must embrace displacement and base offerings on customer needs – not their own assets."

– FORRESTER, 2003

" ... The entire company may have been overconfident about our technological capability and neglected to pay attention to customers ... "

– KEIICHI ENOKI, EVP PRODUCTS & SERVICES, DOCOMO

Indeed, service providers already differentiate and discriminate their offerings based on what they know about their customers. You can still achieve some success with snippets of knowledge gained from a fragmented company. This has been enough in the past. But it won't be enough in future because you need to be integrated if you want to act on your customer knowledge successfully. It's easier to have good knowledge of your customers where the CSP operates in an integrated way, across departments, divisions and lines of business.

To successfully give customers what they want not just at the point of interaction but at all points of the customer experience requires integration across the organization at an unprecedented level. You need to understand both revenue and cost implications of all actions on a per-customer basis across the entire organization, and use this information to drive not just up sell offers, but the entire customer experience. The entire organization must be aligned to achieve this.

AGILITY IS NEEDED WHEN TARGETS ARE MOVING

Traditional methods for managing costs and improving efficiency work when conditions are relatively stable. However, for CSPs, their industry has not only changed but has entered a state of continual flux.

Today, you need to be able to change WHAT you deliver, WHOM you deliver to and HOW, and you need to be able to do it WHEN you want to - not when your people, processes and technology have caught up.

In fact in order to provide and support the right products and services at the right time to the right customers-and to be able to manage this on a large scale- you need to go beyond achieving ordinary levels of flexibility to achieve high levels of agility. Being agile means that you can evolve and adapt with fluidity, rather than needing to undergo major re-configuration only when forced to by conditions beyond your control.

ABSOLUTE ALIGNMENT DELIVERS INTENTIONAL DIFFERENTIATION

For any organizational strategy to work requires unified focus of the entire organization and an alignment around a common set of goals. But this is particularly important under highly competitive conditions. When you are focused on the customer's experience as a means of differentiation, it becomes crucial that it must be delivered as intended. This means that you must be aware that all actions you undertake can have an effect on the customer experience, whether directly or indirectly. Alignment is critical to intentionality - only aligned organizations can be sure that their actions achieve intentional rather than incidental effects. Alignment is also critical to agility - only aligned organizations can adapt without their underlying infrastructure, processes and structures getting in the way.

“Telcos’ history as monopolies and habit of creating one IT system for each product has led to inefficient manual processes and thousands of internal IT systems that have difficulty talking to each other. This has put OSS/BSS on the critical timeline for all new products, and product development cycles have been measured in years, not days and weeks... ”

– “TELCOS MUST RESTRUCTURE THE WAY THEY INNOVATE”
LARS GODELL, FORRESTER, OCTOBER 6, 2004

FIGURE 2:
FEW CUSTOMERS FIND COMMUNICATIONS OR ENTERTAINMENT PROVIDERS DESERVING OF THEIR LOYALTY

SOURCE: YANKEE GROUP, 2004



INTEGRATED CUSTOMER MANAGEMENT

WHAT IS IT?

ICM itself is simple to understand. It is driven by three needs:

- > you need to service customers' rapidly changing needs appropriate to their value, and in order to do this you need to be capable of knowing both what customers want and what customers are worth
- > you need to build your organization so that you can flexibly and cost-effectively design and deliver products that customers want
- > You need to align your organization around a core set of goals, and align your people, business process and IT investments to support those goals

ICM is the logical response to a highly competitive world characterised by continual change.

Integrated Customer Management is a way of doing business in which all corporate resources are agile and aligned to deliver an intentional, differentiated, customer experience, resulting in the creation & capture of maximum value for the service provider and their customers.

There is actually little new about these ideas by themselves. But putting these together generates a fundamentally different business model to the one you operate on today.

ICM GETS RESULTS

INTENTIONAL, DIFFERENTIATED CUSTOMER EXPERIENCE

In order to achieve an intentional differentiated customer experience, you need to invest in initiatives that positively affect customers. The customer experience must become the driver of CSP operations, and not a by-product of selling and support activities. Making the customer experience an intentional one means focusing on company activities and operations in terms of what the customer sees, rather than in terms of what the company does.

As shown in Figure 3, the customer sees the company in terms of the experience they have. Customers don't think in terms of organizational processes such as 'sales', 'billing', and 'delivery'. As on the left side of the diagram, customers instead think in terms of the activities they carry out - they purchase and consume products, they request support. They hear about an organization both directly and indirectly, creating awareness and interest.

It is up to you to map your processes -such as those on the right- to what the customer sees - on the left. The customer neither needs nor wants to know that when they 'purchase' this triggers processes across multiple organizational departments, such as those shown on the right, including delivery, billing and support. By exposing customers to such process, you destroy value for the customer, and for your organization, as a result. Only when you put the customer at the center of what you do, does it become clear that you need to support your customers' processes, as well as your own.

One key to successful adopting an ICM strategy is to consider the world from the customer's point of view. In this way a customer-centric approach enables the development and delivery of intentional, positive customer experiences, which in turn drives customer loyalty, and creates value for your organization.

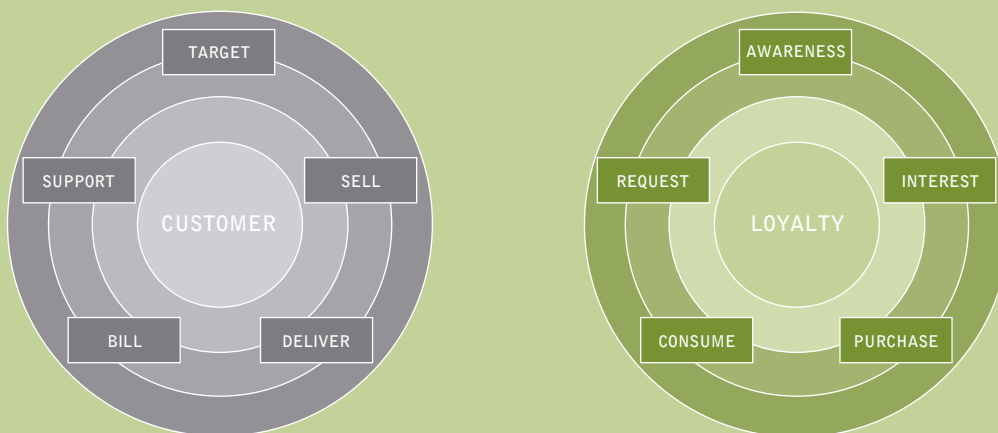


FIGURE 3:
WHAT
THE CUSTOMER
SEES, WHAT THE
COMPANY DOES

SOURCE: AMDOCS
2004

CREATION AND CAPTURE OF MAXIMUM VALUE

The fact that old ways of competing are no longer sustainable in the long-term means that you need to focus on the bottom-line, making profitability and wallet-share a prime determinant of success. The creation and capture of maximum value therefore means that you need to determine what kind of experience to offer to each specific customer, and then to provide this as efficiently as possible according to their worth. You can only achieve this when you have implemented processes and set up technology in such a way that you can deliver and support the right products at the right time to the right customers. Agile and aligned and customer centric companies will be able to accomplish this. Agile companies can evolve and adapt to change any of these variables as required, when required. Aligned organizations can ensure that the customer experience remains intentional across touchpoints and all organizational processes, even when the organization is adapting to meet changing needs. Customer centric organizations understand what these experiences must be to deliver maximum value to both the customer and the organization. Essentially, customer-centricity, agility, and alignment are three legs of a stool. Without each one supporting equally, the strategy will fall. CSPs have begun to reap the early benefits of initiatives that are agile, aligned, and customer-centric. See Figure 4 for an example. This is only the start.

THE THREE ELEMENTS OF ICM

You need to adopt three basic principles to succeed with ICM. You must be:

- > Customer centric
- > Agile
- > Aligned

BEING CUSTOMER CENTRIC

For organizations to talk about the central importance of customers is not new. Customer centricity has been identified with CRM. But true customer centricity requires the attention of the entire organization and all of its processes. There is an obvious and clear link between customer centricity and customer-facing processes; it makes sense that customer-facing processes are more satisfying for customers if they are customer-centric. But to achieve true customer centricity you must also look at the effect that back-office processes have on the customer, an issue that CRM on its own cannot solve. At the extreme, true customer centricity means that if an organizational process has no effect on any kind of customer experience, then there is serious question as to whether you ought to be performing the process at all.

With an ICM way of doing business, customer centricity means putting the customer at the center of everything you do. Customer centricity drives maximum value because there is a direct and intentional match between what you put into the relationship with the customer, and what you get out of it. In other words, knowing your customers and giving them what they want is matched directly by *knowing how much you spend on the entire customer experience both across the entire organization and the entire customer lifecycle*, directly and indirectly, and how much value and profit that spend generates for your organization.

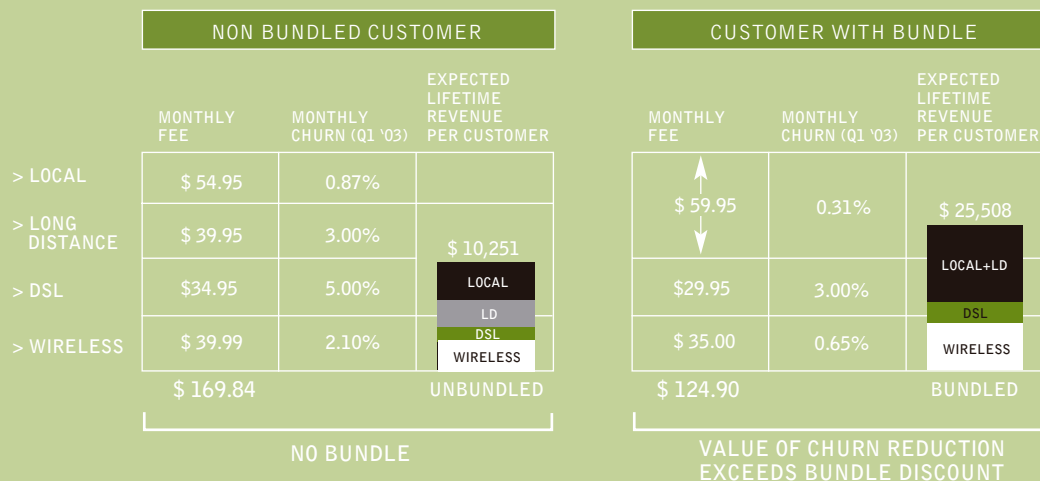
DELIVERING

Having determined that the customer experience should be the focal point of both direct and indirect operations, it is essential to identify the exact experience to be had by a particular segment of customers. This then needs to be put into operation in such a way that it can be delivered every time. In order to do this, it is necessary to understand what the effect is of all business processes on customers, particularly the non-customer facing ones. The customer experience then becomes the driver of business processes, and not a by-product of them.

FIGURE 4:
BUNDLES
HAVE A LARGE
ECONOMIC IMPACT

SOURCE: SMITH BARNEY,
MERRILL LYNCH,
BOOZ ALLEN ANALYSIS

CUSTOMER LIFETIME VALUE IMPROVEMENT



BEING ALIGNED

DIFFERENTIATING

Not all customers want or need the same experience. To ensure the right customer gets the right product at the right time at the right price requires active use of customer data. Ongoing analysis is critical to ensuring that a customer experience is the right experience for each customer, according to both their needs and their value.

DEFINITIVE

The most obvious customer experience is one of interaction, and despite all that we know about the value of managing relationships with customers across their entire lifecycle, organizations still get this wrong. Consistency across channels and across multiple interactions requires a holistic and total view of the customer.

BEING AGILE

For CSPs for whom the market is constantly changing, delivering any kind of integrated customer experience is challenging. You need to be equipped to hit moving targets. Agility means more than being fast, it means being built for change.

New competitive conditions mean that you have to act and react to change more quickly. Where you might currently be introducing a handful of new products a year, estimates are that in a few years CSPs will be introducing - and phasing out - hundreds. CSP products will no longer be akin to high value products, but will in future be akin to commodities.

An organization built to deliver standard products to mass markets simply cannot cope with this order of change the way that it is being approached today.

FLEXIBILITY

Agility is achieved through a solid foundation. Only an infrastructure designed with change in mind can adapt and evolve in response to changing conditions. To be able to achieve agility requires a solid foundation of adaptive processes and organizational culture as well as technology that has been designed for change. In a fast-moving environment, people need to be motivated by change, rather than apprehensive of it.

DISPOSABILITY

You need to think clearly about services as products with a short shelf life and develop and manage them accordingly. This requires a different mindset and different skills. Products are likely to be componentized and delivered in association with multiple partners, both internally and externally. You need to be able to manage the special challenges this generates in organization and development across multiple functionality sets.

In the past it has been possible for companies to succeed even when their various departments, divisions and lines-of-business (LOB) have operated more or less independently of each other. But where top-line revenues are static, you can no longer afford to waste effort and resource. Alignment is necessary to ensure that the whole organization is working together with the same goals in sight. This means that goals need to be common organization-wide, with conflicting LOB or divisional level strategies resolved and removed. Processes supporting these goals must be aligned. IT infrastructure must be rationalized to support process. Alignment means that the organization not only achieves focus, but also intentionality, whereby all effects of company activities are planned rather than incidental. This is essential to achieving an ICM strategy, as well as maximizing value for both you and your customers.

FOCUS

Alignment occurs when all organizational resources are focused on one goal. To achieve ICM, you need to remove non-complementary goals, reduce irrelevant investments and utilise past investments as well as introducing customer experience-focused goals. Prioritisation is key.

COORDINATE

Your resources need to be aligned by strategic goals rather than by individual divisions and departments. The customer experience is fundamental to all operations, not just customer-facing ones. But coordination is not just about creating a cohesive and intentional customer experience; it also enables the organization to become more efficient, to achieve synergies from aligning all priorities, goals, processes and IT investment across disparate parts of the organization.

MEASURE

All business goals require the discipline of constant measurement and review to keep on track. No business strategy can succeed if it fails to generate returns on investment on an ongoing and timely basis.

But more importantly, when metrics are set that span the organization, rather than just on a divisional or LOB basis, they can be used effectively as a tool to focus and balance priorities. Successful alignment occurs when metrics reinforce common goals.

“European telcos should follow BT’s restructuring efforts by splitting into horizontal lines of business, which Forrester believes will double BT’s stock value.”

– “TELCOS MUST RESTRUCTURE THE WAY THEY INNOVATE”

LARS GODELL, FORRESTER, OCTOBER 6, 2004

SYNERGY GENERATED BY THE THREE ELEMENTS

The elements of ICM are not new by themselves. However, the combination of these three elements allow you to generate a fundamentally different business model to the one you operate on today. That is, initiatives and projects driven by an ICM strategy can maximize value for service providers and their customers, rather than merely achieving marginal value.

Customer-centric initiatives, such as customer data analysis or contact center improvements can generate marginal increases in customer loyalty by themselves, but these increases will always be limited when these projects are run in isolation. Similarly, disparate projects focused on increasing efficiency or reducing costs will have limited effects on profitability. Linking these initiatives with some alignment of resources enables a greater increase in loyalty and profitability, whilst complete alignment and integration enables the highest levels of both customer intimacy and operational agility.

The most important aspect of alignment is that it means that ICM can be implemented in a stepwise manner, as long as a common thread runs through all ICM projects. This makes it possible to observe good project management principles, implementing small projects with achievable intermediate goals and measuring and achieving ROI at every stage of implementation. ICM thus becomes an umbrella for all existing organizational projects, ensuring that all projects are aligned to achieve customer centricity and operational agility, rather than a replacement to all principles of good management.

HOW TO ACHIEVE INTEGRATED CUSTOMER MANAGEMENT (ICM)

WHAT WE HAVE LEARNT SO FAR

Economic slowdown means that you are compelled to succeed in every investment you undertake. We have learned that projects can only be successful when the whole company aligns with and commits to a holistic and integrated customer management strategy. Implementing software is not enough, business process and business strategy implications must be major driving factors. Each project must deliver return on investment, and you must measure and monitor performance at every step to ensure it stays on track. You need to address all aspects of how the business is run. You need to observe proper project management protocols, which means no skimping on adoption and change management issues. Most importantly however, we have learnt that a flexible and agile foundation is key to responding quickly to changing customer needs and market conditions, both now and into the future.

DON'T START FROM SCRATCH

ICM is a new approach but adopting ICM does not require throwing out all existing technologies or processes. It does mean that you have to focus and use existing systems and processes in more integrated and effective ways. You should not undertake ICM as a project, but rather apply it as a filter to everything the company does.

IT IS A JOURNEY NOT A DESTINATION

Many business strategies focus on the end point, providing a goal to strive towards and a vision of some kind of perfection on attainment of that goal. The trouble with this is twofold: one, it fails to describe how to get there, and two, it does not tell you what to do once the goal is reached. Any difficulty or failure in achieving the goal can be ascribed to 'implementation problems'. It is little wonder then that so many business strategies are adopted, haphazardly applied and routinely discarded as short-term fixes. ICM is intended to provide a long-term approach as a way of business whereby you can be equipped to evolve and adapt throughout the long term.

AMDOCS KNOWS ICM

AMDOCS KNOWS CUSTOMER CENTRICITY

Amdocs has been one of the major suppliers to the CSP market since its inception in 1982. Our people have deep and global expertise in making CSPs successful. Amdocs services know how to put the customer at the center of strategy, processes and systems to create well-designed cross-functional customer experiences, which can be implemented to incorporate existing practices and tools.

AMDOCS KNOWS AGILITY

With its deep knowledge of the CSP market, Amdocs has unparalleled expertise in making CSPs successful. Amdocs products' common architecture makes it possible to configure, integrate and scale to support growth and change when needed. Our common product common platform enables our customers to flexibly adapt to market conditions as they change.

Further, Amdocs is known for its commitment to its' customers successes, and Amdocs services puts people, processes and technology together for the long term. It is this long-term view that makes Amdocs an expert at enabling agility, since only processes and systems built for change can achieve longevity, adapting rather than breaking over time.

AMDOCS KNOWS ALIGNMENT

Amdocs brings a wealth of its own experience in servicing the CSP market as a practitioner as well as proponent of ICM. Our people are focused on one goal - the success of our customers. Amdocs services knows how to ensure that organisations within our client companies are equally committed to reaching the same goals.

AMDOCS PRODUCTS AND SERVICES ENABLE INTEGRATED CUSTOMER MANAGEMENT

The focus of our product portfolio is on enabling the customer lifecycle at the core of ICM - see Figure x. By providing one common architecture and interface, the Amdocs range of integrated products enables the entire CSP to align around one set of core common goals. The Amdocs architecture is built for change, enabling CSPs to evolve today and into the long term. Most critically, Amdocs products enable a series of total customer experiences to be developed with the customer as focus, for both direct and indirect functions and processes.

Amdocs products allow CSPs to seamlessly link all business processes to focus on the customer experience. Our product portfolio spans marketing and analytics, sales and ordering, delivery and fulfillment, billing and settlement, and service and support. Amdocs products are pre-integrated to speed time-to-deployment, reduce total cost of ownership and reduce risk.

Amdocs' ICM vision enables CSPs to improve operating efficiency by automating key business processes, reducing errors, and providing a real-time view of customers and revenues - ensuring the right information is available to employees.

"...Our #1 goal is to delight our customers. This earns us the privilege of continuing to serve; every interaction is an opportunity to win loyalty..."

- ARUN SARIN, CEO, VODAFONE

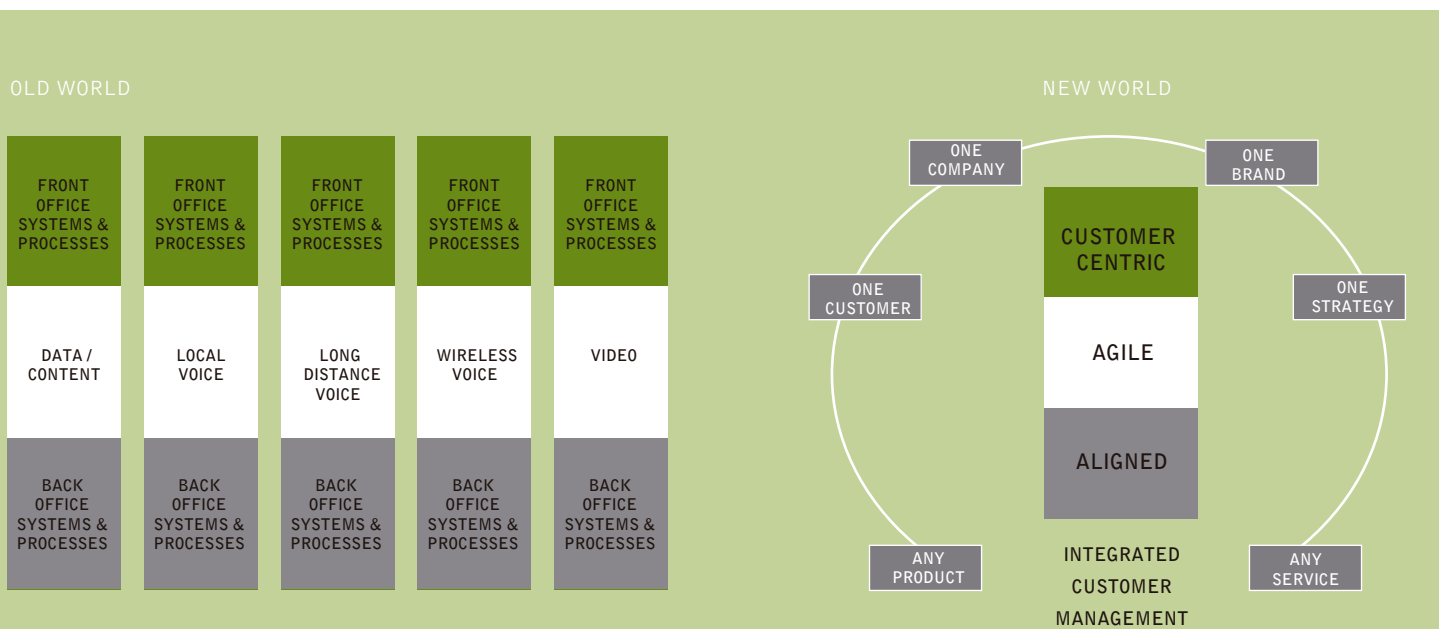
CONCLUSION

ICM is a new way of doing business, whereby you can be equipped to evolve and adapt throughout the long term. Those who aren't built for change on a continual basis will not survive. Those who aren't built for change on a continual basis will not survive.

To successfully give customers an intentional rather than incidental customer experience requires integration across the organization at an unprecedented level. This level of integration can only be achieved by the equal emphasis on all three elements of ICM:

- > Customer centricity
- > Agility
- > Alignment.

Integrated Customer Management is a way of doing business in which all corporate resources are agile and aligned to deliver an intentional, differentiated, customer experience, resulting in the creation & capture of maximum value for the service provider and their customers.



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