

ORION Communications

# TELECOMMUNICATIONS

Marketplace/Industry

# SURVEY

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# Telecom Survey Results

## Introduction

So that Orion Communications can continue to provide the best available support to our customers, we have introduced a survey to the marketplace to obtain feedback related to the industry. Orion continues to review the data that we accumulate to ensure that our services match the expectations of our customers. The questions that we have introduced span the entire process related to telecom services.

1. Evaluation and monitoring of current telecom services
2. Criteria when selecting telecom providers and solutions
3. Assessment of future technology and strategic planning

As detailed in the Survey Background section of this material, the information obtained comes from a wide variety of roles and responsibilities within an organization as well as the vertical market represented.

## About Orion Communications

Orion Communications is a telecommunications support organization focusing on voice, data, Internet and cellular services. Since 1994, Orion has been providing resources to our customers when designing, implementing and supporting vital telecom services. Whether a customer has a single location or a multi-site enterprise network, Orion can act as a single point of contact representing multiple carriers.

## Special Areas of Focus

- **Cost Reduction** – Orion has helped our customers to reduce monthly telecom costs by an average of 27% often obtaining credits for past over-billing.
- **Network Design** – As a representative of over 250 carrier solutions across the country, Orion can help to design a network that best suits both your short and long term communications requirements.
- **Relocation Projects** – Whether moving or adding a new location, the Orion team can assist your internal team to ensure your relocation project occur on-time and on-budget.
- **On-Going Support** – Designing and implementing a communications network is only the first step. Making sure that it continues to run optimally is a whole new challenge. Orion can provide services to compliment your internal team to ensure that everything runs smoothly.

***Orion Communications ... Your Cure for the Common Carrier***

# Telecom Survey Results

## Survey Background

This survey has been conducted starting in January of 2010 and is updated on a semi-annual basis as new data is collected. Through October, 2011, there have been a total of 156 contributors. 68 of the contributors provided responses in 2010. The remaining contributors (88) provided us data in 2011. To our knowledge, a single contributor has not been included more than once.

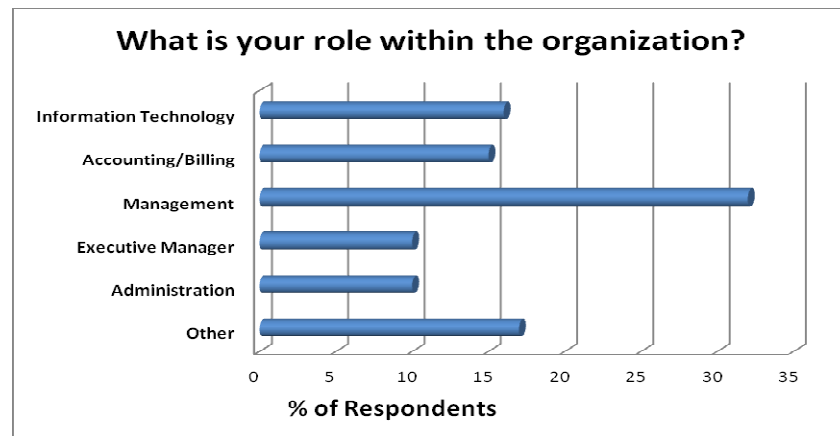
### Vertical Market

Orion asked each respondent to provide information relevant to the vertical market that best describes their organization.



### Role and Responsibility

Orion also asked each respondent to best describe their role within their organization.

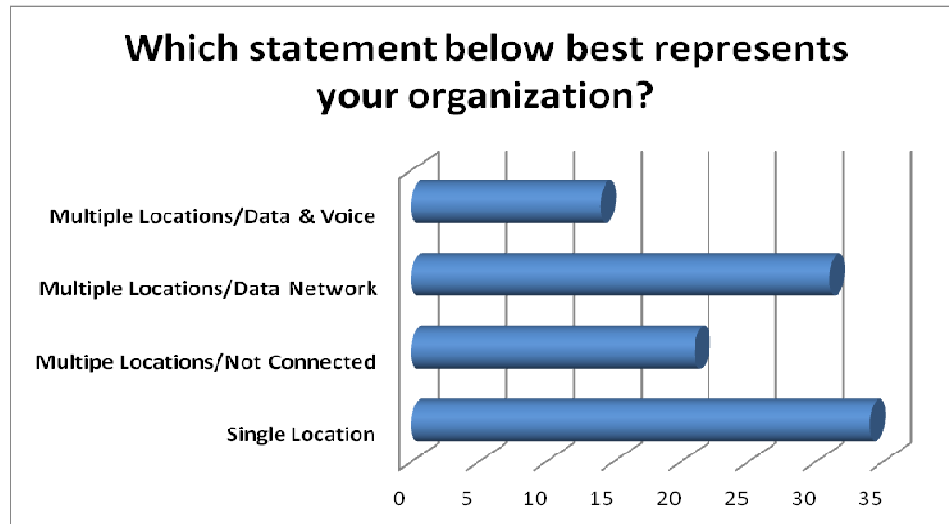


\*\*\* For the response "Other", the majority listed themselves as a user of telecom services.

# Telecom Survey Results

## Locations

In order to better understand the scope of telecom within an organization related to voice, data and Internet services, Orion requested information related to the number of locations within the organization of the individual respondents.



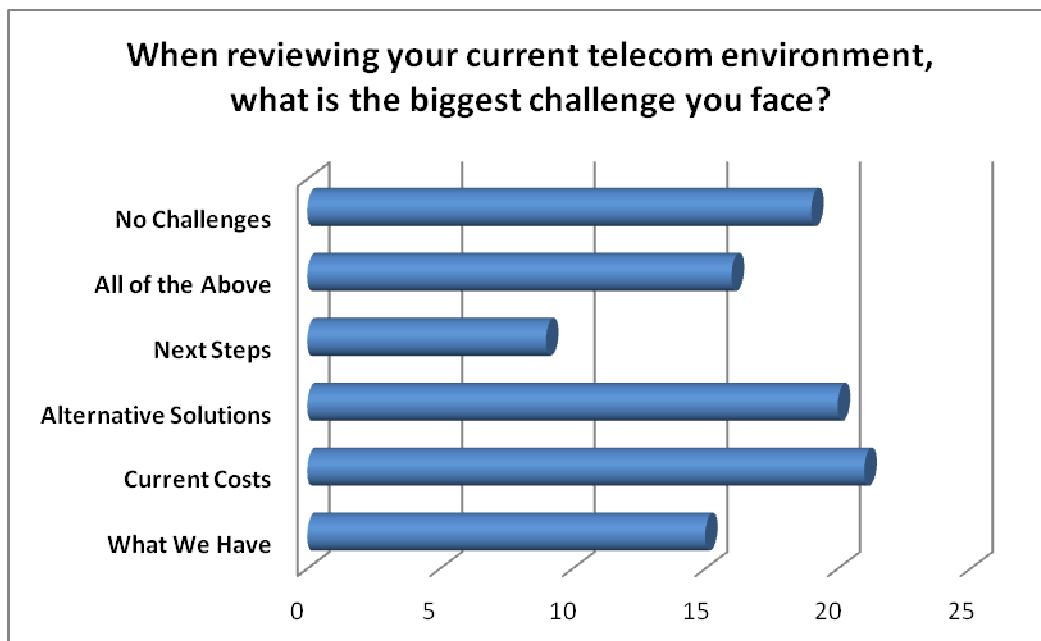
One-third of the respondents had a single location with 45% having some kind of voice and/or data network that integrated their sites.

# Telecom Survey Results

## Survey Results

The following results were collected from our respondents.

Question #1	When reviewing your current telecom environment, what is the biggest challenge you face?
Responses:	<ol style="list-style-type: none"> <li>1. Understanding what we have</li> <li>2. Understanding our current costs</li> <li>3. Comparing our current services with potential alternatives</li> <li>4. Determining the next steps</li> <li>5. All of the above</li> <li>6. None – There are no challenges when reviewing our current services.</li> </ol>

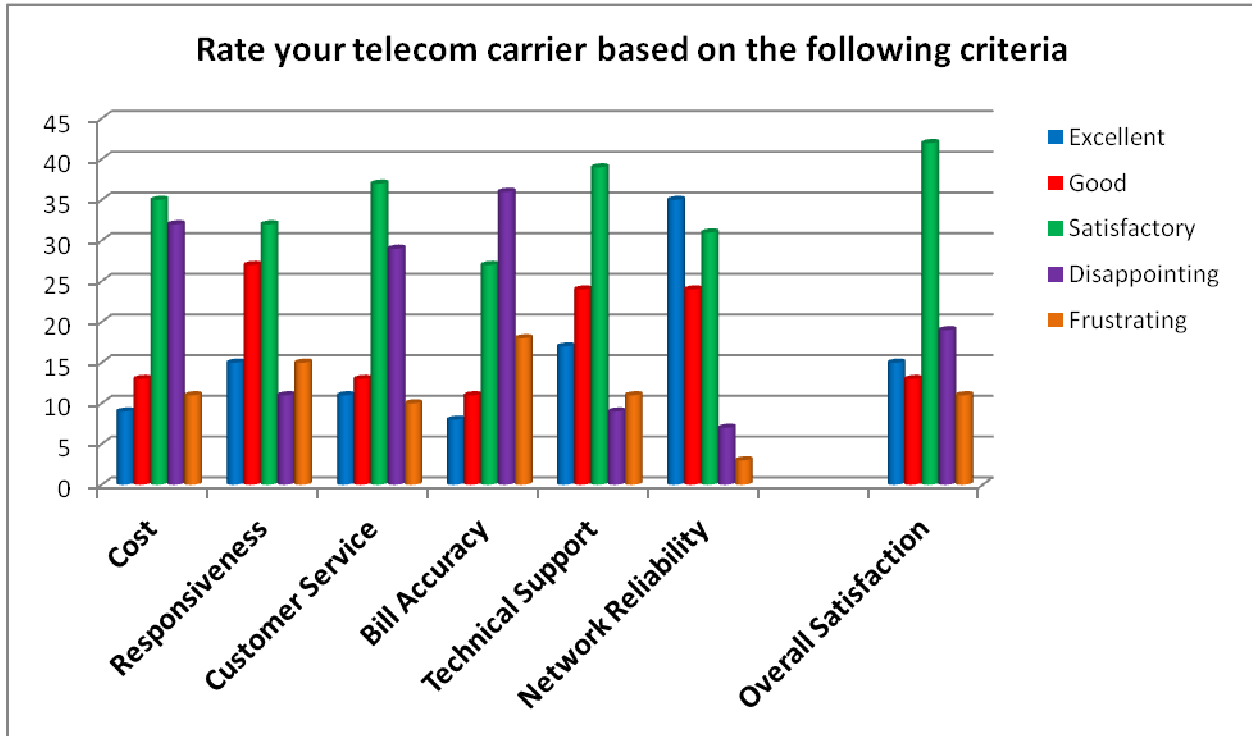


Only 19% of the respondents reported that they had no challenges when reviewing their current telecom services with 16% reporting that they found all of the areas challenging in some regards. Of those reporting only one challenge, 63% said that evaluating current costs and comparing alternative solutions were their largest challenge.

**HELPFUL HINT:** When trying to understand your current services, it is recommended to breakdown your total costs including line charges and usage rates. Because many new solutions bundle these aspects, understanding these costs can be most helpful.

# Telecom Survey Results

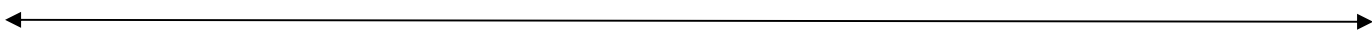
<b>Question #2</b>	<b>Rate your telecom provider based on the following criteria.</b>
<b>Responses:</b>	<b>Respondents were asked to rate five critical areas with the potential responses ranging from Excellent to Frustrating.</b>



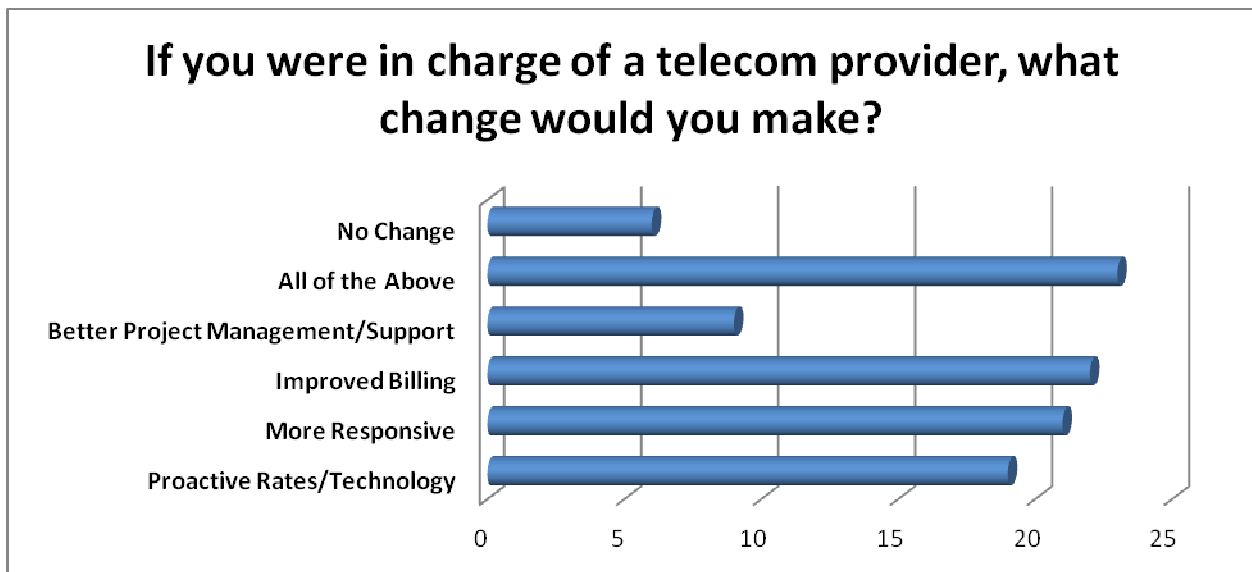
Of these criteria, Network Stability was the only positively rated criteria determined as Excellent or Good. The worst rated criteria listed was Bill Accuracy with 81% indicating this element was Satisfactory or worse followed closely by cost. Overall customer satisfaction was rated at 28% which is far below what a customer should expect when selecting a vendor for any service provided. The table below represents the percentage for each of the criteria and how each was recognized.

	Excellent	Good	Satisfactory	Disappointing	Frustrating
Cost	9	13	35	32	11
Responsiveness	15	27	32	11	15
Customer Service	11	13	37	29	10
Bill Accuracy	8	11	27	36	18
Technical Support	17	24	39	9	11
Network Reliability	35	24	31	7	3
<b>Overall Satisfaction</b>	<b>15</b>	<b>13</b>	<b>42</b>	<b>19</b>	<b>11</b>

# Telecom Survey Results



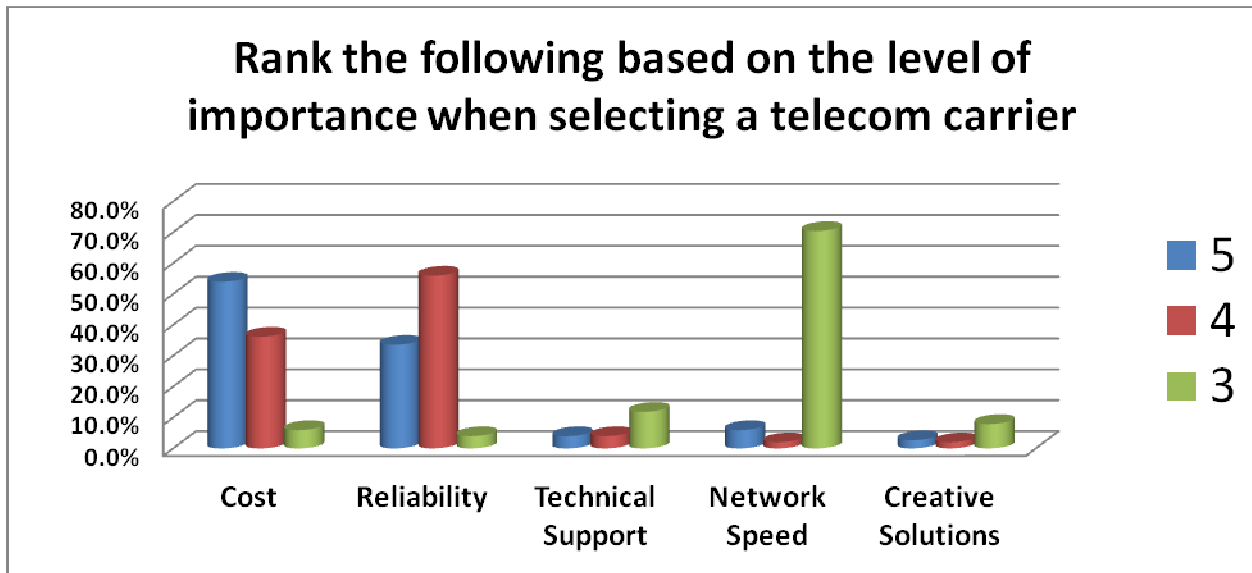
<b>Question #3</b>	<b>If you were in charge of a telecom provider, what change would you make?</b>
<b>Responses:</b>	<ol style="list-style-type: none"> <li>1. More proactive information on technology and rates</li> <li>2. More responsive communications</li> <li>3. Easier to understand billing</li> <li>4. Enhance project management and support</li> <li>5. All of the above</li> <li>6. None</li> </ol>



As can be seen, the greatest quantity of respondents selected “All of the Above” generally stating that some work is required on the carriers behalf to improve overall services received. Besides this general response, proactive communications including rates and technology plus generally being more response reached 40%.

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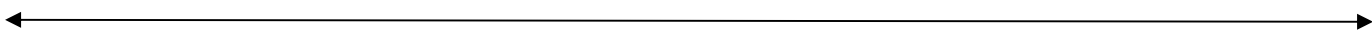
Question #4	Rank the following based on the level of importance when choosing a telecom carrier.
Responses:	Respondents were asked to rate five criteria when selecting a telecom provider for carrier services: Cost, Reliability, Technical Support, Network Speed and Creative Solutions.



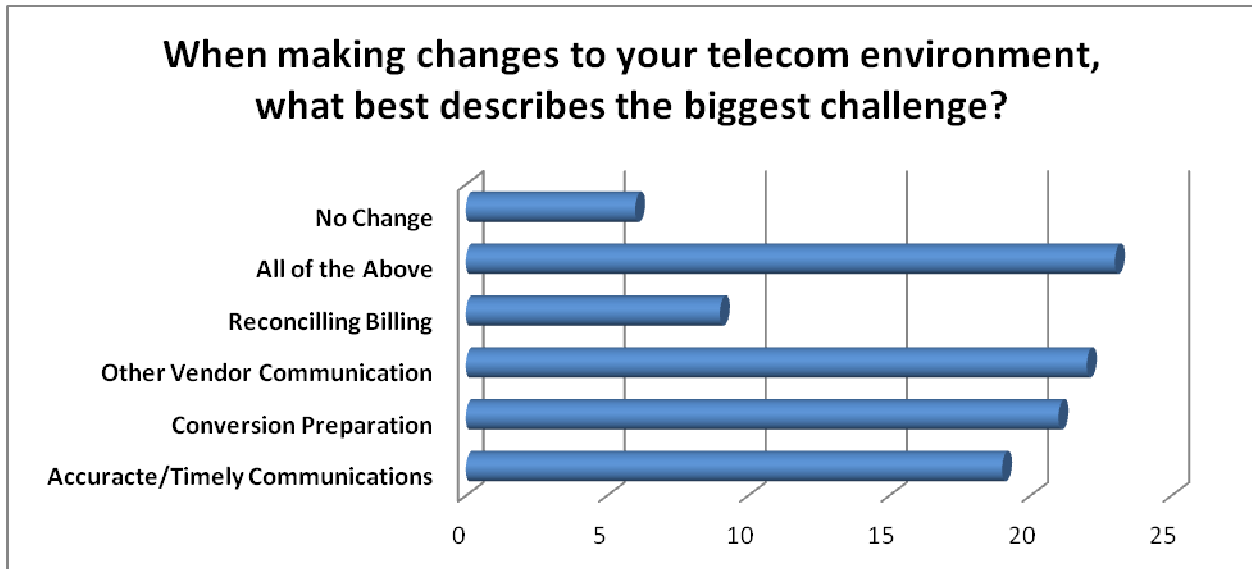
Reviewing the top three criteria when selecting a solution, Cost, Reliability and Network Speed were selected the most. Nearly 54% of the respondents selected cost as the most important element. It is interesting to note that, although respondents selected cost as the most critical element when selecting a provider, only 22% of respondents listed their current cost as Excellent or Good (Question #2).

**HELPFUL HINT:** Although creative solutions were rated as the least important criteria, it is often the most creative solutions that balance cost and reliability. Often, a combination of carriers in a hybrid environment takes advantage of lower cost and higher network resiliency.

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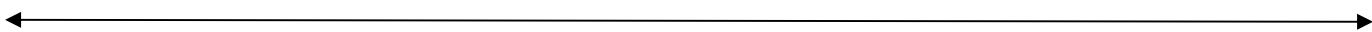
Question #5	When making changes to your telecom environment, what best describes the biggest challenge?
Responses:	<ol style="list-style-type: none"> <li>1. Receiving accurate and timely communications regarding project status</li> <li>2. Preparing effectively for the conversion</li> <li>3. Communications with other vendors that may be engaged</li> <li>4. Reconciling the billing to ensure it is accurate</li> <li>5. All of the above</li> <li>6. None – Changes generally go smoothly</li> </ol>



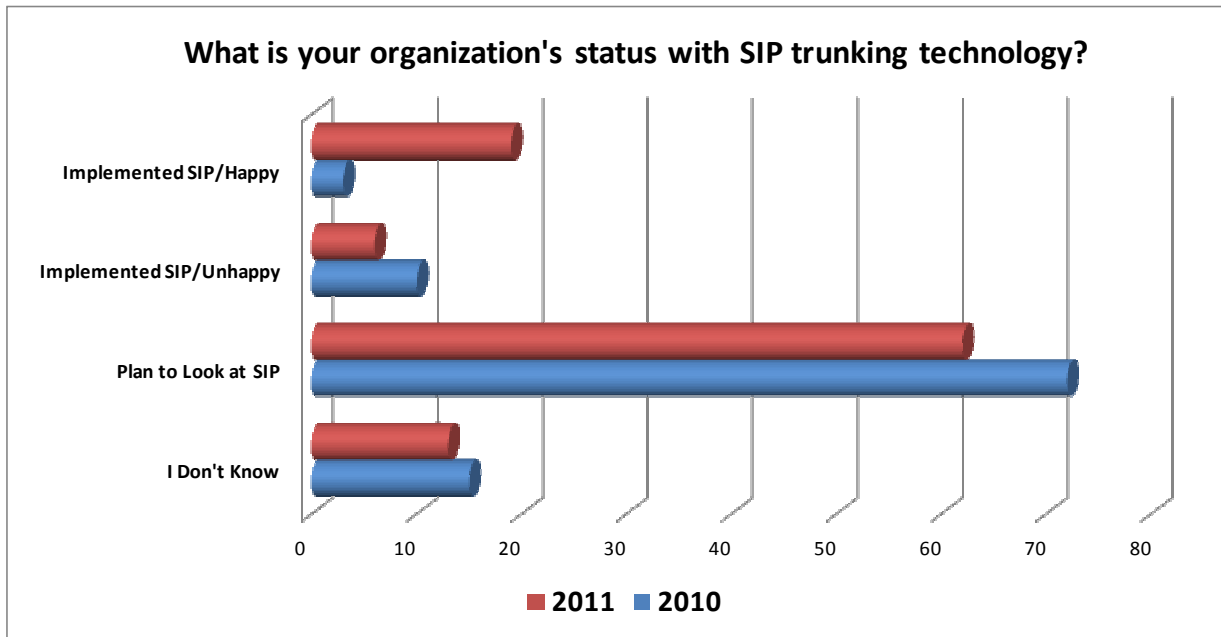
23% of the respondents found that ALL of these areas were a challenge when making changes to current telecom services with only 6% claiming that changes generally went smoothly. When selected individually, third party vendor communications, conversion preparation and accurate/timely carrier communications all rated about the same.

**PROJECT MANAGEMENT HINT:** When in the process of implementing changes to telecom services, we recommend having a single point of contact that hosts all the communications. Create an e-mail group to communicate with all the parties including your internal team, carrier contacts and third party vendors. Often times, a change to one project element can impact other steps. By including the whole team, individuals can manage the role for which they are responsible. And, make sure that all communications is in writing. Even quick verbal conversations should be reiterated in a written format so that everyone is on the same page.

# Telecom Survey Results



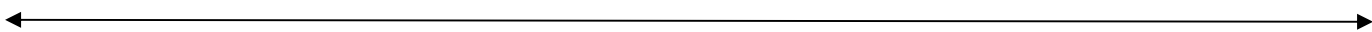
<b>Question #6</b>	<b>What is your organization's status with SIP trunking technology?</b>
<b>Responses:</b>	<ol style="list-style-type: none"> <li>1. I don't know</li> <li>2. Plan to look at SIP</li> <li>3. Implemented SIP, but we are unhappy with the results</li> <li>4. Implemented SIP and we are happy with the results</li> </ol>



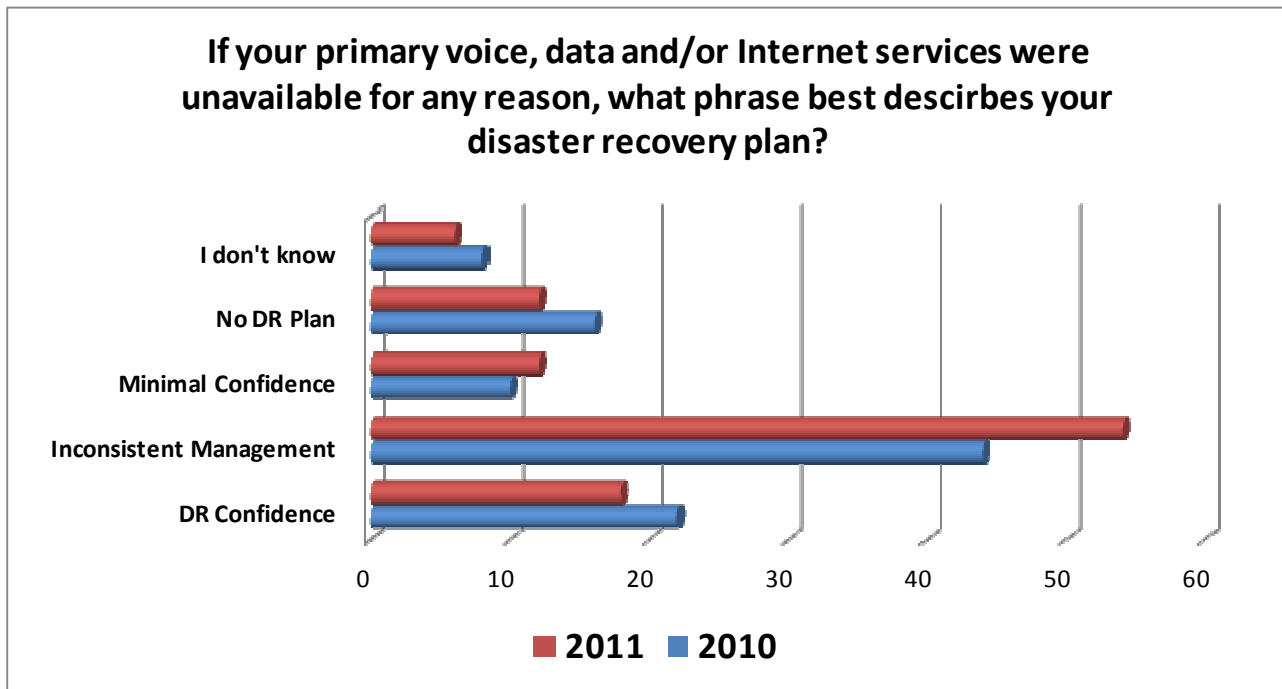
When reviewing the data we received from this question, it was found to be interesting when considering the responses by year. Although the percentage of respondents that will be looking at SIP has decreased by 10%, the percentage of those that have implemented the technology and are happy with the result has increased by over 600%. And in 2011, the percentage for those that are unhappy with the result has also decreased significantly. It has been our experience that an increased number of carriers as well as telephone system vendors have better exposure to the technology accounting for an increased number of satisfied customers.

Overall, a significant number of organizations over the last two years have indicated that SIP is on their radar.

# Telecom Survey Results



Question #7	If your primary voice, data and/or Internet services were unavailable for any reason, what phrase best describes your disaster recovery plan?
Responses:	<ol style="list-style-type: none"> <li>1. We have a DR plan and we are confident it would support our needs</li> <li>2. We have a DR plan, but it has not been reviewed/tested recently</li> <li>3. We have a plan, but we are not sure it would support our needs</li> <li>4. We do NOT have a current DR plan</li> <li>5. I don't know</li> </ol>



Similar to the last question, the data was found to be interesting when segmented by year. In 2011, there are an increased number of respondents that have a DR plan in place. However, there is a decreased confidence in whether the DR plan would work or even support their needs if engaged.

Like any insurance policy, a DR plan is implemented to support communications should primary services be unavailable for any reason. As a business changes, the DR plan needs to follow. It should be reviewed and tested periodically to ensure that it will support your needs.

# Telecom Survey Results

## Customer Satisfaction Survey Results

In order to continue to provide the best service possible, Orion Communications conducts a customer satisfaction survey upon completion of every project. The intent of this survey is to collect data regarding the services that we provide AND to act on this information to continuously improve the service levels that we offer. The following information summarizes those results.

<b>How would you describe Orion’s effort in understanding your business objectives prior to proposing a solution?</b>	
Orion truly made an effort and the solutions reflected this effort	92%
Effort was made, but the solutions offered did not align completely with our business objectives	6%
There was little or no effort from Orion and the solutions seemed generic	2%

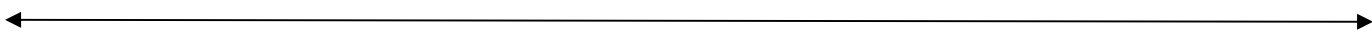
<b>How would you describe the presentation of the solutions offered by Orion</b>	
The solutions were presented in a clear and easy to understand manner	72%
The presentation lacked some details, but overall it was close to what we expected	6%
The solutions were not understood until explained several times	2%
The solutions were confusing and next steps were unclear	7%

<b>How can Orion improve their solution development process?</b>	
Provide more information to better describe the solution	54%
Provide less information to simplify the presentation	36%
Better define how the solutions will add value to my business	7%
Offer a wider range of solutions	3%

<b>What was the determining factor in moving forward with Orion?</b>	
Creative solution design	28%
Previous experience with Orion	17%
Recommended by a trusted vendor	27%
Lower total cost	28%

<b>Describe the communication received during the project implementation</b>	
Accurate, timely and easy to understand	64%
Timely, but confusing	31%
Delayed response time from Orion	5%

# Telecom Survey Results



<b>What did you enjoy most about working with Orion?</b>	
Their commitment of ensuring our objectives were accomplished	19%
Their responsiveness and customer service	36%
The simplicity of the project implementation	39%
I regret doing business with Orion	6%

<b>In which area would you recommend Orion improve their overall process?</b>	
Better explain the process and requirements upfront	8%
Provide a more clear explanation of the technical details	13%
Better outline what next steps need to be taken	23%
Better review of on-going support services	34%

\*\*\* NOTE: 22% of the respondents left this question unanswered.

<b>May we have a potential customer contact you if they request references?</b>	
Feel free to have them contact me	6%
Please contact me first	86%
I am not comfortable recommending your services	8%

Although Orion continues to always improve our service levels and ensure that telecom projects are implemented as expected, it is obvious from the last question alone that 92% of our customers would recommend our services if asked.

# Telecom Survey Results

## Telecom Survey Summary

It is obvious that, for most, telecom services are considered to be a tedious and time consuming process. In a time when most organizations are looking for superior service, most of the customers rate the carriers as satisfactory at best. Although network reliability seems to be a strength, many organizations are burdened with high costs, billing challenges and an overall lack of accountability to the process. By taking some proactive steps, organizations can improve the impact telecom projects have by taking responsibility for managing the project based on the fact that many of the challenges described are a result of clarity of communications.

In addition, organizations are looking to new technologies such as hosted services and SIP. Many are realizing that these new technologies and offerings are providing a greater overall value compared to more traditional services. Disaster recovery is also a consideration for many organizations. With most telecom services only serving as transport for more critical applications such as voice, data and Internet, service outages can be very costly.

At Orion Communications, we pride ourselves in the development of our systematic project management resources. Our experience and expertise in this marketplace has helped guide our customers through the process from network design to implementation all the way through on-going support. In the end, it is all about people being accountable to the same end result.

Should you have any questions regarding the information provided in this document, please do not hesitate to contact us. Contact information has been provided below.

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