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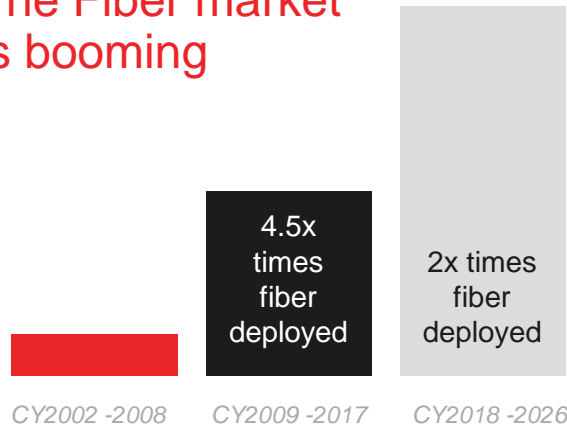


# Ride the fiberization wave with a lean and scalable operating model

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# Deep Fiberization – A strategic objective for global fiber operators to meet the data consumption demands

The Fiber market is booming



- Global fiber **deployment to double** during CY2018-2026, majorly led by 5G
- The global fiber optic cable market is expected to reach **USD 20.8B** by 2026 at a projected **CAGR of 14.5%** between 2020-2026

Source: EY Analysis Report

To ride on the fiberization wave, fiber operators must consider the following imperatives

## Speed

There is a direct correlation between unlocking new revenues from fiber and how fast it is deployed. The ability to acquire or lay fiber quickly is crucial.

## Cost check


Deep fiber demands ambitious infrastructure investments. Keeping an eye on budget, CapEx and OpEx is critical.

## Accuracy

If the research data (population, housing density etc.) is unreliable, the entire plan becomes unstable, and costs will overrun. Analyzing survey data & making informed planning adjustments before rollout must be prioritized.

Today's fiberization era calls for agility and efficiency, driving fiber operators to rethink their business strategies

# To meet the fiberization goals, fiber operators must transform their business operations in challenging timescales

Three key domains of a fiber operator	Typical challenges faced by fiber operators in their journey towards accelerating fiber rollouts		
<b>Plan and build</b> Identify the demand for fiber in cities and towns, build and configure fiber	<b>Massive coverage targets</b> driven by competition and market demand	<b>High cost to build</b> to deliver at scale	<b>Shortage of skilled labor</b> and <b>lack of flexibility</b> in resource utilization
<b>Service delivery</b> Market the fiber premises through ISPs, receive the order, validate, fulfill the order, activate the service and bill the customer	<b>Longer cycle time</b> for service delivery	<b>Siloed and disconnected customer journeys</b> leading to sub-standard user experience	<b>Repeat visits and rework</b>
<b>Service assurance</b> Proactively maintain the network quality, reactively address faults raised by customers	<b>Operational inefficiency due to</b> lack of automation and standardization	<b>Reactive approach in</b> network management	

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A lean and scalable operating model will enable fiber operators to overcome these challenges by transforming their business capabilities

# Build a lean and scalable operating model to meet your strategy, drive superior customer experience and gain a competitive edge

A proven 4-step approach to build a lean and scalable Target Operating Model by transforming your business capabilities



**50%** of CXOs rank **capability building** among the top-three priorities in their organizations.  
- McKinsey

Plan implementation and define a roadmap

- Conduct cost-benefit analysis for the initiatives
- Define change roadmap and develop business and tech blueprint

Step  
**4**

Collaborate and identify change initiatives

- Conduct workshops, collaborate and identify change initiatives across journeys - Plan & Build, Lead to Cash (L2C), Trouble to Resolve (T2R)
- List the initiatives based on business and technology priorities

Step  
**3**

Benchmark capabilities using Capability Maturity Assessment

- Identify your core business capabilities like Event Management, Demand Management, etc.
- Analyze these capabilities from People/Process/IT/Data perspectives
- Use a maturity level to benchmark against as-is, to-be, best-in-industry & best-in-class

Step  
**2**

Perform due diligence and discovery of as-is fiber journeys

- Conduct workshops to understand your organization strategy and objectives
- Discover and document as-is e2e fiber journey (i.e., customer and network-centric value streams) and its associated challenges

Step  
**1**

Led by fiber domain experts

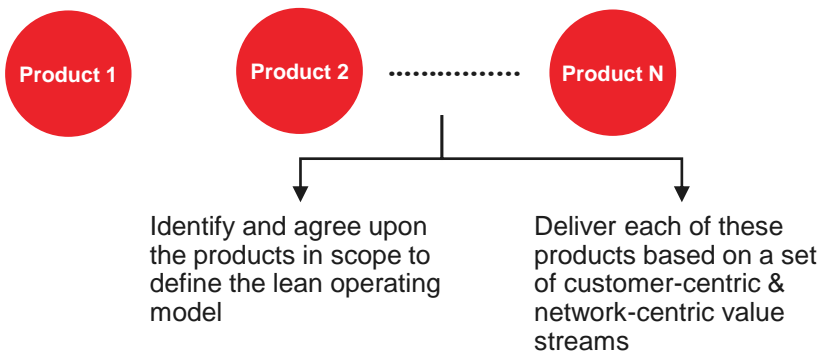
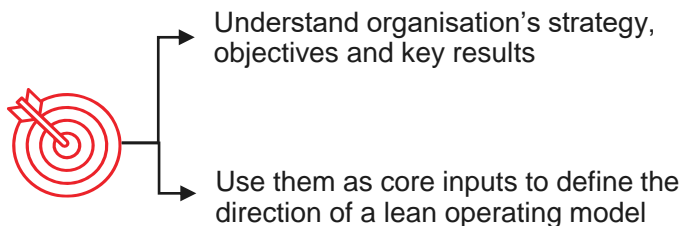
Step 1

# Perform due diligence and discovery of as-is fiber journeys (customer and network centric process flows)

Identify products in scope to define the lean operating model based on fiber value streams. Further, outline the challenges associated with the as-is fiber journeys

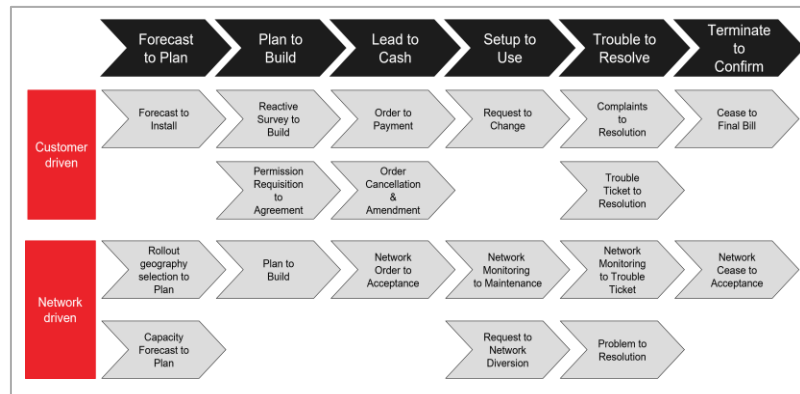
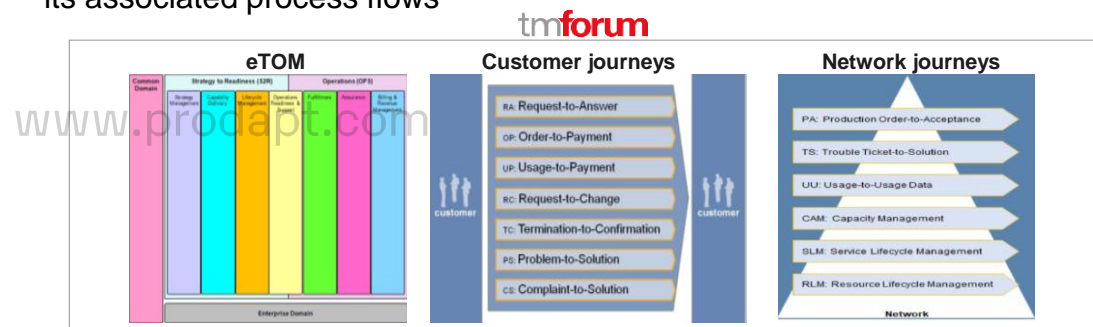
## Deduce

Understand your organization's objectives and strategies, and use them as a baseline to define the lean and scalable operating model



## Define

Identify and define customer and network value streams relevant to a fiber operator and its associated process flows



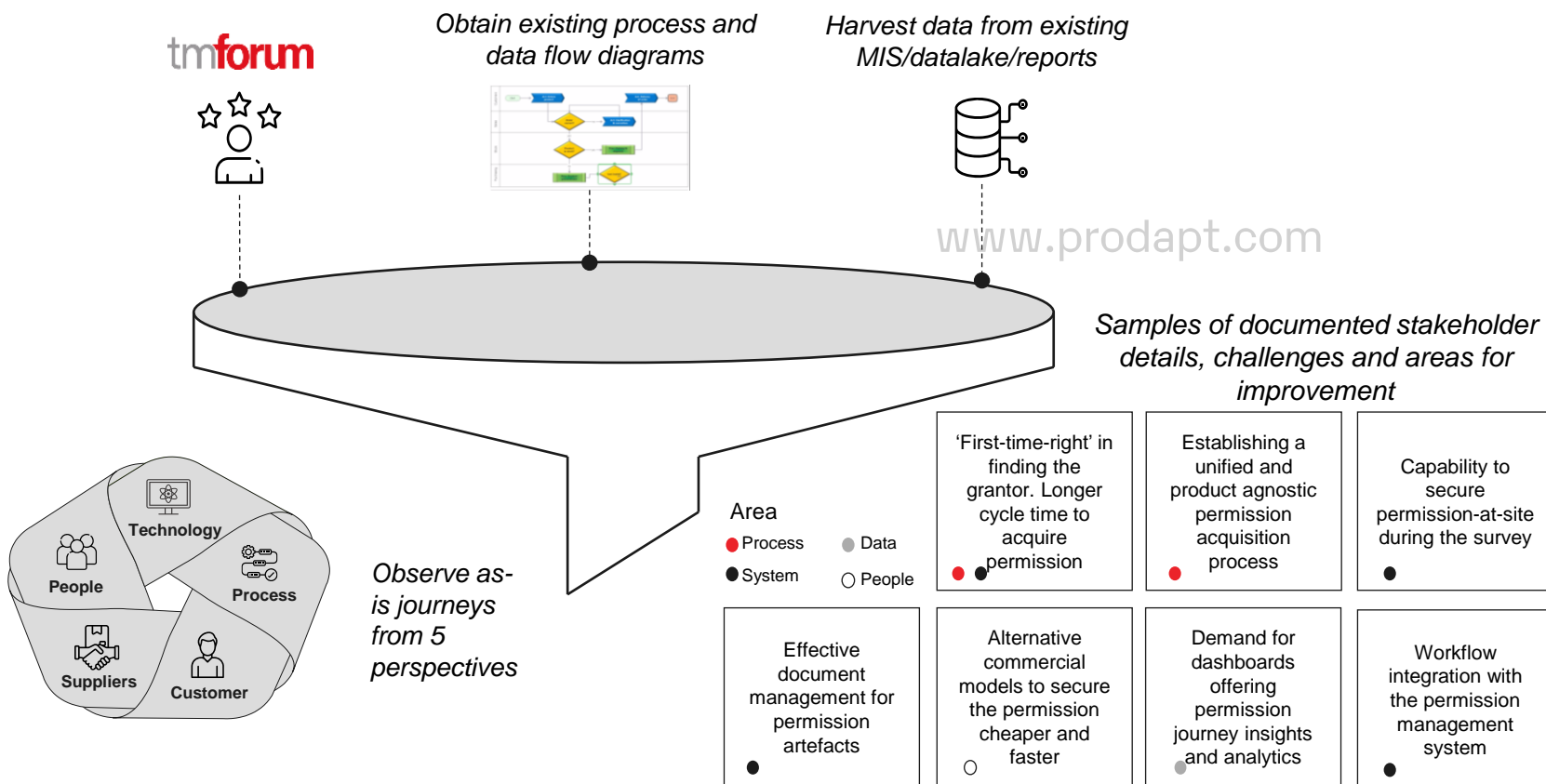
Fiber Domain Experts (SMEs) to conduct workshops and define customer and network-centric value streams and process flows relevant to the fiber operator

Step 1

# Perform due diligence and discovery of as-is fiber journeys (Customer and Network centric process flows)

## Deep-dive

Discover and document challenges in the as-is journeys



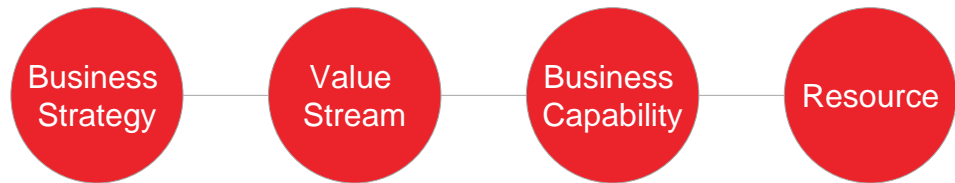
## Recommendations

- Use value streams and process flows as enablers to foster the collaborative and comprehensive discovery of the as-is state
- Leverage TM Forum's ODA process framework (eTOM) to reduce the duration of discovery phase of transformation programs by >70%. It standardizes and simplifies interactions between stakeholders with a global fabric of value streams and processes

Step 2

# Benchmark capabilities using Capability Maturity Assessment

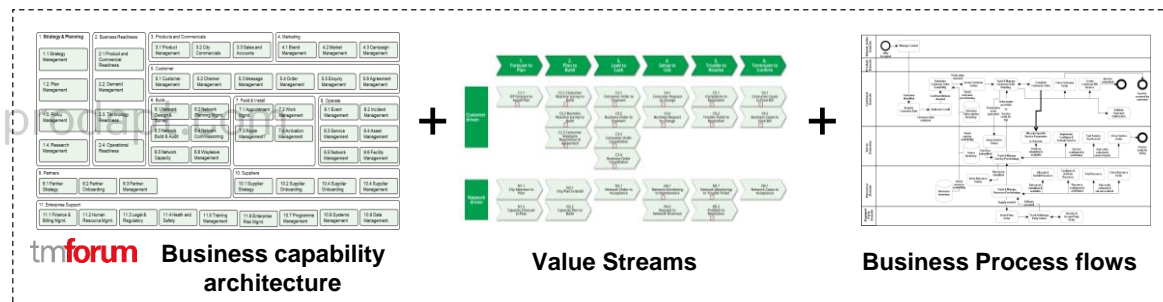
Detail the maturity model to articulate the as-is and define the to-be state across relevant capabilities



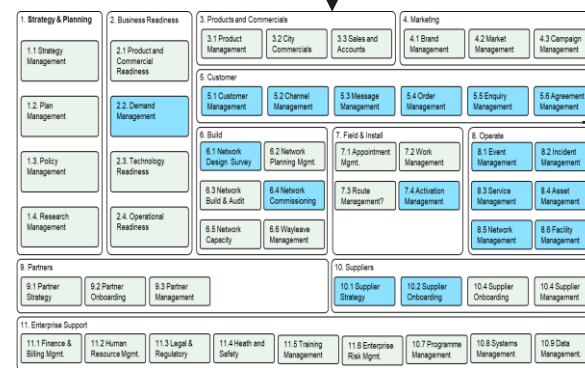
When aligned to value streams, business process flows can guide the value delivery. Business capabilities illustrate “what” building blocks an organization can, must or should have to realize its strategic objectives.

## Identify the core capabilities

Leverage **tmforum** business capability architecture and the identified value streams and process flows to outline the core capabilities relevant to fiber operators. This provides a common basis for articulating and communicating which capabilities are being impacted by the project and to what extent.



**Core Capabilities relevant for the Fiber Operator**



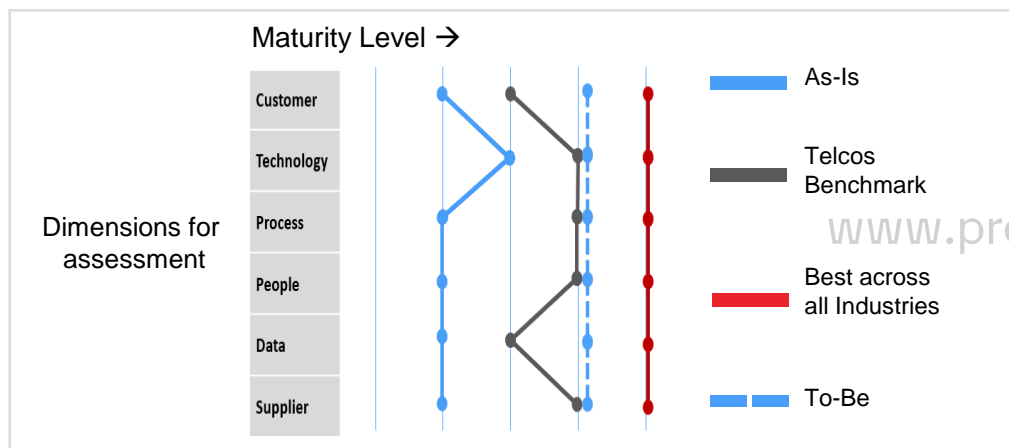
Highlighted Core capabilities (Demand management, Activation Management, Incident Management etc.)



## Step 2

# Benchmark capabilities using Capability Maturity Assessment

## Benchmark the core capabilities



- Fiber Domain Experts (SMEs) to perform a maturity assessment of each identified core capabilities like event management, demand planning etc., across multiple dimensions
- Use a defined matrix of maturity levels to articulate the as-is position and the to-be positions
- Outline industry best and best-in-class positions

## Recommendations

- Overcome the typical tendency to focus only on tech-driven transformations by performing a comprehensive assessment across all dimensions - People, Process, Technology, Data, Customer and Supplier
- Use a common canvas for assessment, TM Forum's ODA Business Capability Architecture, recognized by 100+ leading service providers in the connectedness industry and 80+ technology vendors

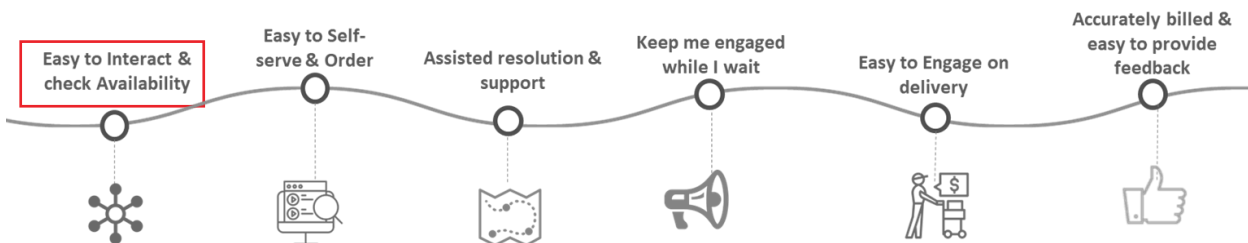
# Collaborate and identify change initiatives to define your target state

Define and embed the target state of each capability into customer journey and identify change initiatives based on business and technology priorities

## Map capabilities across customer journeys

- Map the business capabilities to their customer journeys
- Define 'what good looks like' for those journeys based on customer experience and competition
- Map the target state of capabilities into envisioned customer journeys

Sample of envisioned customer orders and enquiries journey and its touch points

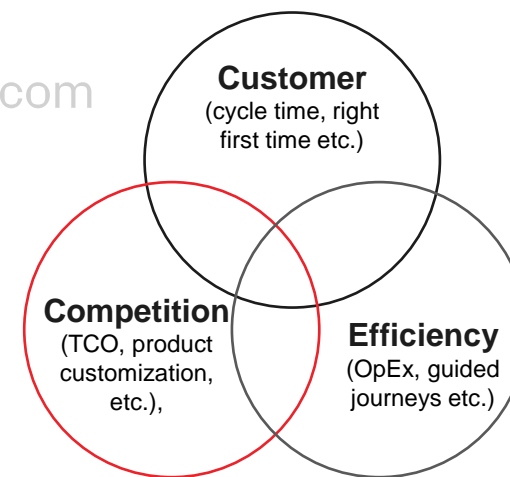


For e.g., the highlighted touchpoint is mapped with the target state of “**Channel Management**” capability which will provide the following features to fulfill customers’ expectation of ‘easy to interact and check availability’.

- Easy to identify services available at a given location
- Easy to identify required products/services
- Digital channels to interact for a query
- Easy to identify myself

## Identify and prioritize the change initiatives

- Identify and define the key drivers ( E.g., customer, competition, efficiency) which are a priority/relevant to a fiber operator
- Use this to drive and prioritize change initiatives



- Define a framework to consider metrics and weighted score across multiple perspectives –
  - Customer experience
  - Competitive edge
  - Efficiency improvement
- Fiber SME to collaborate with stakeholders to score and rank the change initiatives and prioritize them



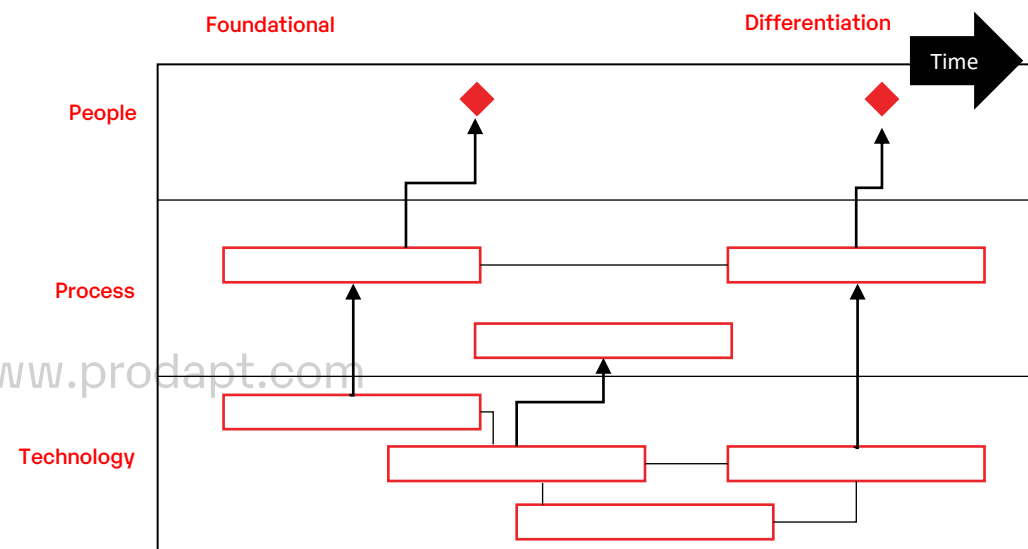
Conduct workshops and brainstorming sessions with stakeholders across key components (people, process, technology, culture etc.) to list, analyze and stack change initiatives across the journey.

## Step 3

## Collaborate and identify change initiatives to define your target state

### Stack initiatives into building blocks

- List the technology, people and process changes required for each change initiative
- Logically group similar initiatives into unique building blocks
- Categorize the building blocks into foundational, developmental and differentiation
- Leverage on categorization for roadmap articulation



Sample roadmap stacking the foundational baseline initiatives to be executed first followed by the differentiating ones

### Recommendations

- Prioritize and stack the change initiatives using key drivers to significantly accelerate capability maturity time by ~25%
- Utilize TM Forum's Business Process Framework (eTOM) to drive your initiative identification and implementation journey

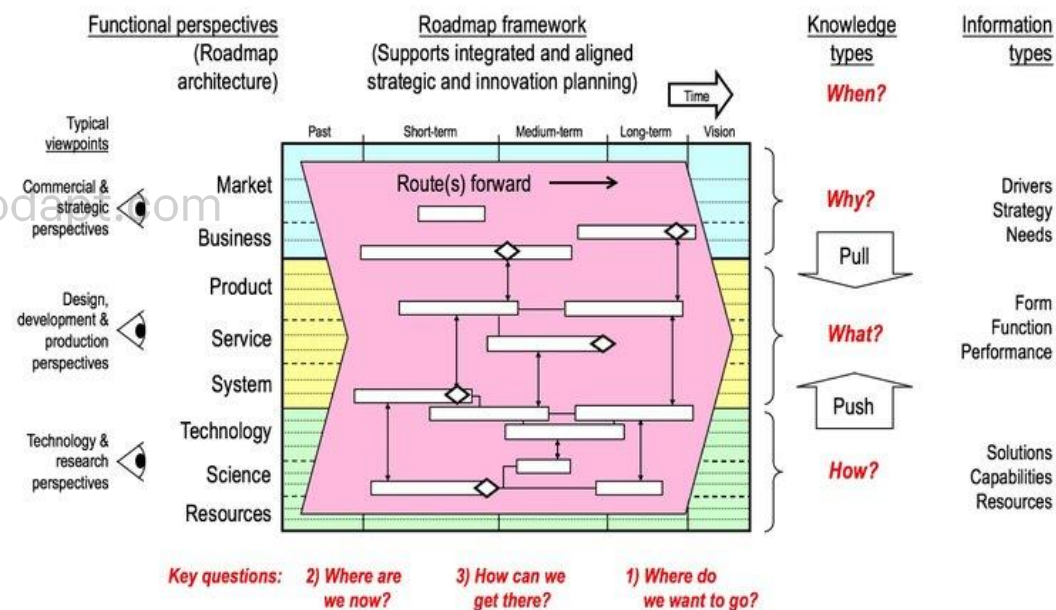
## Step 4

# Define the business blueprint and roadmap

Perform analysis (sizing, effort estimation, cost-benefit)

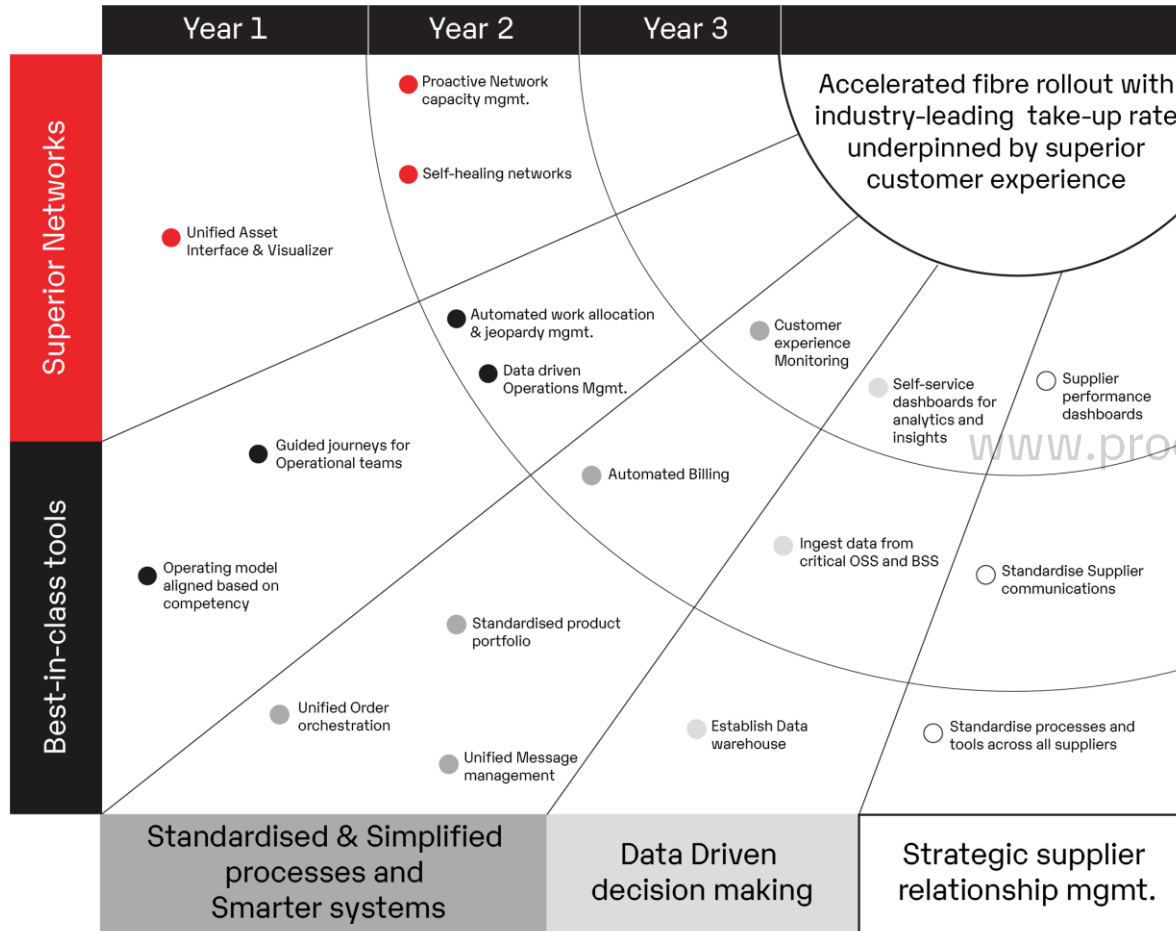
## Value articulation of the change initiatives

- Employ different lenses that can radically transform both business and operating models
- Perform an integrated business technology assessment (investment, time, sizing needed) using industry standard technology framework from TM Forum to derive the blueprint and roadmap for strategic change initiatives



TM Forum-endorsed technology framework

# Define the business blueprint and roadmap



Sample business & technology blueprint

## Finalize a business blueprint

- Perform benefit analysis (ROI) of change initiatives
- Provide initiative level details on investments, OpEx savings, CX improvement, market competitiveness
- Create a business and technology blueprint with quantified progressive benefits to define a change roadmap

## Recommendations & best practices

- The key lenses to consider for a holistic transformation are:
  - Digital native, scaled customer experience
  - Zero touch service and assurance model
  - Cloud deployable apps for scalability
  - Actionable real-time business intelligence for network management
  - Analytics-driven business intelligence
- Utilize TM Forum framework for Business Technology Assessment. It's "market pull" approach attempts to provide products with the market demands
- Ensure the business blueprint is kept up-to-date as events unfold to maximize its value

# Case study: UK's largest full fiber operator built and implemented the lean & scalable operating model for their customer division

Leveraging the key focus areas detailed in this insight helped the fiber operator to: Overcome fiber rollout challenges, accelerate realization of Target Operating Model and improve customer experience

## Activities Performed

15+ eTOM business capabilities assessed

Technology blueprint plotted & aligned to business roadmap

50+ initiatives proposed with targeted ROI

Created a library of 170+ BPMN-compliant processes aligned to value chains

## Key Deliverables

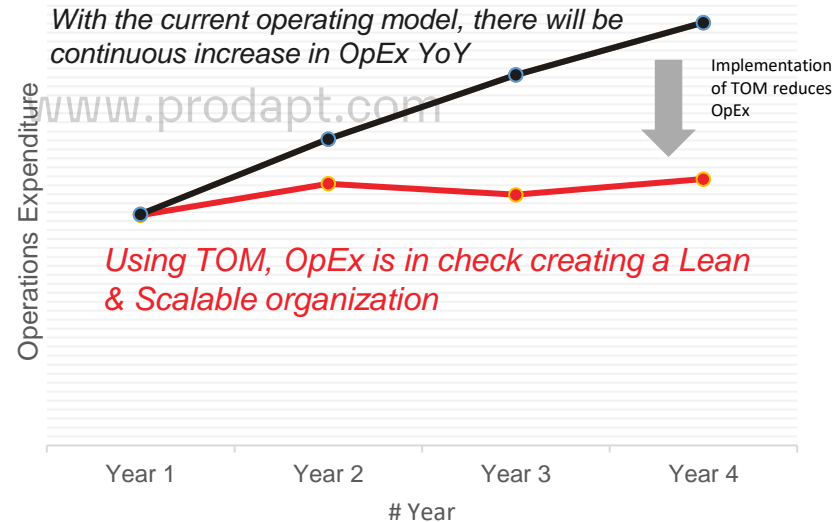
Business capability assessment/gap analysis

Customer journeys

TOM implementation roadmap & business case

IT architecture blueprint

## Operational savings from Target Operating Model (TOM)



## Increased Value Realization

OpEx savings in 3 years

53%

Improved customer, supplier & employee experience



Reduced operational, regulatory & contractual Risk



- BPMN compliant processes across all journeys
- TM FORUM ODA compliant business capabilities defined



Thank you!