



TMIATalk

Your Source for Messaging Industry Information, News, and Events
Fall 2009

Vol. IX Issue III

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Visit us online: www.tmia.org

Mark your Calendars



Go to the 2010 Conference Home Page

to learn more and register for our
12th Annual Conference and Exhibition,
March 1-4, 2010 Clearwater Beach, FL

Click >

Don't miss the next TMIA conference in Clearwater Beach, Florida. The conference runs from March 1 to March 4, 2010 and will be held at the Hilton Clearwater Beach, 400 Mandalay Blvd., Clearwater Beach.

Turn to pages 3 and 4 for more details on logistics, as well as sponsorship and speaking opportunities. Visit TMIA's Web site at www.tmia.org and click on the bright orange box to access the Spring 2010 Conference page, where you can register and complete the exhibition and speaker forms.

Fall Webinars



TMIA will host two November Webinars to increase the shared knowledge in our community. These virtual events will discuss benchmarking and trends in the wireline and wireless services.

The Webinars will answer these questions and more:

- How has the economy affected the adoption and usage of wireline and wireless services?
- Though wireline lines continue to decline, does voicemail continue to grow? Is UC being adopted by the business customer?
- How has new technology, such as smartphones, visual voicemail, and voicemail to text, affected the usage of messaging services on wireless devices?

If you would like to learn more about the state of the wireless and wireline markets and their potential, please join us for these stimulating conversations. Mark these dates on your calendar and watch for your invitation to register.

Wireline Benchmarking and Trends

Tuesday November 17, 1-2 pm EST

Wireless Benchmarking and Trends

Thursday November 19, 1-2 pm EST

Join Us in the Sunshine State!



TMIA will host the Spring 2010 conference at the Hilton Clearwater Beach in Clearwater Beach, Florida. Only a half-hour from the Tampa Bay Airport, the venue offers 10 acres of amazing beachfront on the Gulf of Mexico. After spending the day learning about the latest in messaging, expect a wonderful sunset as you network with your many messaging peers.

TMIA has negotiated an excellent group rate of only \$160 per night (including Internet and parking!), which will be honored from Friday, February 26 to Sunday, March 7 (if available).

The conference will include an Exhibition area—one of the most popular and exciting component of our conferences. Read the next article for more details.

As always, representatives from non-member companies may join us to learn more about TMIA and see the value of TMIA membership for their organizations. Please invite anyone who might benefit from our learning and networking opportunities. Book now to join the fun!

Be a Part of the 2010 Exhibit Area



Looking to boost your network? With a message-focused exhibition area, TMIA creates value for exhibitors and service providers alike. Where else will you have the opportunity to make so many contacts focused solely on the messaging space?

As one service provider mentioned after our last conference, “I saved both the vendor and myself time and expense, as I could better decide who I wanted to have visit a larger audience at my company.”

A valuable feature of all TMIA conferences is the ability to connect with people interested in your technology. One exhibitor at the Savannah conference said that he “made more contacts at TMIA’s exhibition in an hour than three days at larger shows.”

A limited number of booths remain available. Visit the TMIA **Web site** now to reserve exhibit space: Click the orange 2010 Conference box (pictured on page 1), click Exhibit Area Registration in the left navigation bar, and scroll down.

Let Your Voice be Heard

The market for messaging applications—across both voice and data— continues to grow and evolve. TMIA seeks speakers to comment on the growth and change happening in IM, UC, SMS voicemail, email, picture or video. Our attendees are interested in what is new, changing or on the horizon in North America and across the globe and what our customers tell us through research and adoption statistics.

Speaker submissions close on November 1. To complete the speaker submission form, visit www.tmia.org, click the orange 2010 Conference box (pictured on page 1), click Speaker Submissions in the left navigation bar, and scroll down.

If you have a unique perspective or would like a particular topic discussed, please contact Tom Harper at tom@tmia.com.



We Rely On Our Generous Sponsors

TMIA once again thanks the generous sponsors of the 2009 Spring conference. Without these great sponsors, our events would not have the same impact. Sponsorship opportunities for the 2010 conference in Clearwater are available. Please contact tom@tmia.org for further information and to receive a sponsor prospectus.

Platinum Sponsors




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Event Sponsors





























Welcome Yap!



TMIA welcomes Yap (www.yapme.com) to our community. Savannah conference attendees had the opportunity to meet Yap team members Victor Jablovskov and Felix Gofman. Founded in 2006, Yap pioneered the world's first fully automated voice-to-text platform for communications service providers. The Company's award-winning speech recognition technologies provide the foundation for innovative applications such as voicemail-to-text, speech-enabled mobile messaging and voice search. Yap's 100% machine-based approach gives its customers a cost-effective solution that is fast, scalable and secure. The Company is headquartered in Charlotte with offices in Atlanta, Boston and San Francisco.

Guest Articles

This issue of TMIATalk includes three guest articles contributed by TMIA vendor members (turn to pages 4 to 7 to read the articles). Based on interest levels and positive feedback received to date, each subsequent issue of TMIATalk will include a few articles contributed by member companies. The next edition of TMIATalk will be produced in early December. If you are interested in writing an article, please contact **Tom Harper** (tom@tmia.org) for details.

Converged Messaging: Trailblazing in the Land Down Under

Telstra Scores Important Messaging Firsts

Ofer Razon of Converse



Changing Times Call for Changing Approaches

Mobile messaging services are undergoing a profound transformation, and the convergence of telecom with the Web is one of the key catalysts for this change.

Mobile messaging traffic continues to grow, but despite the ongoing increases in usage, commoditization and competition are causing price erosion. This evolving reality is compelling operators to try to cope by means such as offering service enhancements and creative pricing schemes.

Can the mobile industry achieve new services and new business models that meet subscribers' changing needs while maintaining operator profitability?

In this article, we examine a case study of Telstra's MyInbox solution as a litmus test of current thinking, the state of the art, industry messaging trends and ramifications of messaging convergence.

Recapturing and Defending Key Positioning

Telecommunications today encompass a broad spectrum of services, and Telstra is a prime example of an operator that does it all — and does it all well.

Australia's leading telecommunications and information services company, Telstra provides services to more than 9.2 million Australian fixed line and 9.7 million mobile subscribers, including 5.2 million 3G users. Telstra is Australia's incumbent fixed-line carrier, the continent's largest mobile operator, a leading ISP with its own brand (BigPond), and a major media company (FOXTEL).

Telstra is meeting the challenge of Internet-based messaging competitors by utilizing a trailblazing framework for mobile messaging that helps empower it to recapture and defend its key position.

Telstra deployed an innovative messaging project that delivers for the first time on the continent a seamless and consistent messaging experience across all devices and all platforms with a unified approach. Serving as the backbone of a unified messaging strategy, Telstra's MyConnect/MyInbox solution synergizes core fixed line, mobile and Internet messaging capabilities — all with a unified user experience.

A converged Web inbox provides customers with a simple, one-click online solution for retrieving, sending, storing and managing messages across all devices and platforms from a single interface.

Telstra MyConnect™ includes:

- **MyInbox:** Online message, contact and calendar management centre where customers can access email, picture messaging, voicemail and video mail as well as send SMS, MMS and email.
- **MyEmail:** Email on the mobile, with access to up to five existing email accounts, plus alerts of incoming mail on compatible mobile handsets.

- **MySync:** Backup and synchronization of contacts, full automatic daily backup of contacts from compatible mobiles to a secure online Web site, and synchronization with MyInbox.

The Ability to Get Any Message Anywhere Benefits the User and the Operator

Telstra's converged solution provides significant benefits to the user and the operator. Telstra users gain the ability to manage any message anywhere, as well as enjoy limitless well-organized storage for all messages. Users now can, for example, check and send email on their mobile phones while on the move and can effortlessly access, create and send SMS, MMS and voicemail messages while sitting at a PC at home or at the office.

This fundamental transformation of the messaging environment also benefits the operator in key ways, such as:

- **Enhances Customer Satisfaction and Loyalty:** Through an enriched user experience offering the convenience of retrieving all messaging from one source.
- **Creates Market Differentiation:** Positions Telstra as an innovation leader with strong customer orientation.
- **Enhances Telstra's Web Presence:** Increases awareness of and traffic on the operator portal.

In addition, converged messaging can monetize email and boost usage of and revenue from all forms of messaging and can lead to additional revenue opportunities by providing a valuable platform for marketing and promoting operator services.

Looking Forward — and Openness

Telstra looks forward with a flexible and cost-effective evolution path that addresses both current and future messaging needs of telecom operators. The robust, high-capacity solution meets today's traffic demands and current business requirements, while allowing the operator to extend the offerings towards next-generation messaging, facilitating the evolution to emerging messaging standards and platforms.

A key aspect of future-readiness is openness. The formerly closed telecom service environment is evolving to an open market dynamic. Accordingly, relevant components of the solution are designed to be made available for controlled use by relevant third-party application providers, enabling them to interact with end users in more diverse and efficient ways than has been traditionally possible.

The MyInbox solution was built on a service oriented architecture using the Telstra Service Delivery Framework (SDF). The solution has been deployed as an SDF Messaging enabler that integrates with all of Telstra's fixed and mobile voice/video mail, email, SMS and MMS capabilities to provide a unified messaging integration. The messaging element was designed to integrate seamlessly with this environment. SDF can be re-used for other Telstra products and offers a flexible online solution for retrieving, sending, storing and managing messages across all devices and platforms from a single Web interface. ●

Service Providers Need an Email Strategy Beyond Cost Reduction (Too many don't have one)

Paul Engels of Hostopia



Email services and the best platform on which to base them is again a hot topic amongst senior managers and executives of communications service providers. Whether planning to swap out a legacy platform, upgrade the one in place, or just hunker down for another budget year with status quo, service providers are all over their email

these days. Where are these discussions going and in a world of fickle end users and severe cost pressures to serve them – what are the strategies that are working?

First, here is some backdrop to a rapidly evolving category. The ubiquity of high-performance broadband is evoking the law of unintended consequences. Email (or “messaging” or “unified communications” as the grandiose-minded prefer) is experiencing a renaissance of user experiences that affect service providers and their email platforms:

- Social networking and convergence with free, popular, global messaging services such as Gmail are educating millions of users to a variety of new messaging applications that are becoming ingrained in daily life;
- Media storage attached to email has jumped by orders of magnitude since 1999, placing massive capital burden on providers;
- SPAM and network abuse are more threatening than ever – requiring costly, state-of-the-art defenses;
- Users are sifting into segment categories with differing needs from resi' to large enterprise; and
- Unified communications, the once-stalled category that didn't cross the chasm, is rebounding with collaboration, mobility and the promise of IP-PBX integration that works.

In all the excitement, some sobering trends hang over the life of the email service provider:

1. Customer purchasing habits (email-related) are beset by inertia and apathy.
2. User willingness to pay for basic email is near-nil. Free bundling is the most common SP model.
3. As many as 70% of all users don't use their Internet provider's email.

Faced with a market like this, many broadband providers have resorted to the most obvious strategy: cost reduction. The thinking goes: if users don't really care, and email is a cost center anyhow, and margins are critical – then why wouldn't a cost-reduced email platform put a big feather in the CTO's cap?

The 1970s auto-industry wag said it best: “You can't win in this industry by cutting an inch off the tailpipe every year,” implying a diminishing return on linear cost reduction to the exclusion of a competitive strategy.

Indeed, the long term prospects for email cost cutting are limited. It only takes a competent sys admin and procurement officer to grind a few cents-per-user out of your key costs – largely CAPEX weighted. So what's next?

Email services, despite the challenges of execution, are rich with strategic opportunity. Email can:

1. Drive revenue growth;
2. Reduce customer churn;
3. Offer competitive differentiation;
4. And reduce OPEX costs (far beyond equipment and licenses)

How to Increase Revenue with Email

Studies by vendors and service providers show that users are most willing to discuss their value-added email needs when they purchase your broadband services. After that, they are literally immune to up-selling efforts of any kind. Service providers (like Comcast) are seizing upon this “point of inflection” to offer a few bundled Microsoft Exchange licenses to every new broadband subscriber. “Seeding” the enterprise with two Exchange users drives adoption and sells more licenses through peer influence.

The strategy appears to be working. A senior telecom exec remarked recently, “Those cable guys are bundling us to death.”

Microsoft Exchange isn't the only service option. The messaging category is rich with mobility applications, fax-to-email, and collaboration services. Marketing needs to get creative on a bundle; engineering needs to build or hire the service, and the sales channel needs to participate in everyday selling. ***That's a strategy.***

Tip: Put new up-sell features in your Webmail interface and offer it for free. If you have 500,000 users, you can rely on many of them to click on the service sooner or later on their own. They try – they buy. If they don't buy, test and swap in a new feature. You don't need an army of outbound sales agents to execute this.

How to Reduce Customer Churn

Sadly, broadband isn't sticky. Switching barriers are low, to the dismay (or delight) of many providers. Value added services – particularly domain-based services are very sticky. If you are a business, it is a royal pain to move your Web site, IP-fax, network security and synchronized mobility email users. Email services and value-added applications make logical platform partners and compelling customer packages. Having an array of service bundles and a plan to sell them at point-of-purchase is a good strategy.

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Integrated Messaging: Revolutionizing the Messaging Experience beyond Email

Matthieu Lachance of Openwave



Today's user messaging experience is made of many forms of messaging centered around different communication domain/communities (e-mail, IM, mobile, social networks, etc.). Most users today have:

- a few e-mail accounts, some relayed on their mobile phone, some not;
- a capability to send and receive SMS and MMS to/from mobile devices;

- one or more instant messaging accounts;
- one or more social network accounts; and
- one or more user content management account (e.g. Flickr).

However, the current messaging experience is still very fragmented for the end user, as different clients and/or logins and/or devices must be used to access those messaging technologies and services (e.g. an e-mail must be sent from an e-mail client to an e-mail client, an SMS must be sent from an SMS client on a mobile device to an SMS client on a mobile device, a Facebook message must be sent from a Facebook client, etc). This fragmentation is a source of dissatisfaction for the user as well as an impediment to usage. It also prevents the creation of new

types of usage where, for example, asynchronous communication can be mixed with synchronous.

To complicate things further, the user experience is also fragmented in terms of mode. Regardless of the technology used there are only two main messaging modes: synchronous and asynchronous. It is important to distinguish user experience from the technology—for example, some handsets have a chat feature that shows a chat window similar to current IM chat window but in fact uses SMS as transport. From the user point of view this is still a synchronous, or near synchronous, chat experience.

Standards bodies such as OMA (Open Mobile Alliance) and GSMA have begun developing requirements that allow both “asynchronous” and “synchronous” messaging in a unified experience on mobile devices. While these efforts are mostly focused on IMS-based devices and networks most of the deployed devices today are non-IMS and these devices could be benefited by a better messaging experience. Google Wave also intends to bring together different modes of communication, but only for its users.

So what can be done today to improve the messaging experience?

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Service Providers

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Service Idea: Use OMA Data Synchronization (aka SyncML) to offer a PIM backup service for \$1.99 per month. Your email users can access and restore their address books to any device over the net in case of loss, upgrade or what-have-you. Why not make the service free for 3 months to attract new users?

How to Reduce Operating Costs with Email

So you beat up your SAN device supplier for a volume discount and negotiated a two year license extension on your email software at half-price. Congratulations. You win a cookie.

The serious numbers in email platform costs are not entirely CAPEX-based. Your accountants will spread a pricier blade server over years anyway so EBITDA is largely unaffected by nominal equipment cost deltas.

The insidious drain of email cost is in operating expenses. Email is one of the top three support cost drivers to a broadband company. Service providers are the unpaid call centers for Microsoft (and others) as they re-configure, de-bug and educate naïve users through the maze of Outlook settings and re-settings.

Abuse management including SPAM, network intrusion, DDoS attacks, phishing schemes and the rest either tie up costly staff or require layers of third party services – who are known to charge more per user in many cases than the TCO of the email itself. Source: Radicati Group on email TCO and known service prices of numerous MX-routing based filtering services)

The enlightened CEO will challenge the leadership team throughout network engineering and operations to do a fully-absorbed hard dollar and soft-dollar cost of email ownership. This is the OPEX iceberg below the waterline that can be reduced.

Support Call Reduction Tip: Does your Webmail offering have an intuitive user-self-support interface with automated wizards that can detect flawed user settings and correct them? Can your mobility users configure a new Blackberry mail setup by entering their email address and password only?

Email systems can and should offer this – and more to help offset your support cost burden.

Conclusion

Service providers planning their email platform strategy for the next five years need to consider a far more encompassing corporate strategy than just cost minimization. A new generation of cloud-based suppliers of SaaS-type, hosted email and value-added services are challenging the traditional model of the facilities-based email architecture. These services can form a complementary aspect of your offering, or an outright alternative.

In the end, whether the service provider chooses to make, buy or outsource its email, the strategy that addresses customer needs by segment and meets your corporate objectives across functions, will better enable you to win in your market space. ●

Integrated Messaging (continued from page 6)

The most important aspect to improve is certainly to simplify the user experience to remove or at least reduce this fragmentation. It is clear that users would appreciate a “next-generation messaging experience” that would provide them with the ability to send and receive any type of message (SMS/MMS, voice mail, e-mail, Facebook, etc) from a single interface, simplifying the messaging experience. That interface should also include the capability to manage all the content generated from the messaging experience (attachments of all types, pictures, messages, contacts, calendar, etc.) allowing for the mixing of content and message easily for any kind of communications.

While it is not easy to bring the full experience on mobile, the capability to at least leverage the device standard features for contact and calendar synchronization and e-mail, SMS and MMS would provide a level of coherence between the PC and the mobile experience across a large set of existing devices.

While users are looking for a simpler service, so are messaging service operators. Without an integrated messaging solution, operators endure the headaches of managing each messaging service. An integrated solution would help prevent the duplication of databases, management systems and hardware. In addition, integrated messaging would provide opportunities for operators to generate revenue, grow their subscriber base, introduce new services and enable convergent applications. It could also help to monetize next-generation messaging services with add-on functionality through advertising insertion, e-commerce, voice calling, and information services such as location, traffic and news. Additionally, email content could be transformed into actionable content for operators to turn into service revenue.

Messaging service operators are also looking at customizing their end user experience to provide a service that exposes all their capabilities and differentiates them. A critical feature of any integrated messaging system is the capability to easily add customized experiences (e.g. integration with the local popular social network). As it is impossible to predict the next few big Web services and the evolution of each Web service APIs, flexibility is key.

In conclusion, messaging is still largely a siloed experience from the client/transport perspective, the device perspective and the community perspective. Because of this, the user experience is not as evolved as it could be and messaging traffic has therefore not reached its full potential. By enabling users to manage all their messaging experiences from a single interface including e-mails, social networks, voice mail, etc. operators can build and extend their services in new ways for mobile and broadband operators to personalize, brand and monetize their messaging offerings while providing users access through a user friendly interface. ●

TMIA's Social Networking Groups

Influenced by the new generation of messaging professionals, TMIA now has groups on both **Facebook** and **LinkedIn**.

TMIA invites all to join one or both of these groups.



VMA Next Month

Registration still open

October 14-16

Zurich, Switzerland

View the conference agenda at www.theVMA.com.