



AMALGAM INSIGHTS

Vendor SmartList

Why TEM Matters More Than  
Ever in a Cloud, SaaS, and AI  
World

Authors: Hyoun Park & Kelly Teal  
January 2024



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## EXECUTIVE SUMMARY

### Key Stakeholders:

Chief Information Officers, Chief Technology Officers, Chief Financial Officers, Corporate Controllers, Telecom Directors and Managers, Mobility Directors and Managers, IT Architects, IT Operations, IT Sourcing Directors and Managers, IT Procurement Directors and Managers

### Why It Matters:

Amalgam Insights gets it. Compared to overseeing cloud computing, software as a service, cybersecurity, generative AI, or some other flashy technologies, telecom and network management is ... not sexy. In fact, one could argue it's a staid, stale practice that has seen its heyday. But some of this blame comes from outdated TEM vendor positioning. To differentiate between TEM vendors, businesses must take full advantage of the advanced and high-value capabilities that specific TEM vendors bring to market, but do not always state in their public go-to-market positioning. All around, it's a disservice to end users, one that Amalgam Insights, with its particular expertise in TEM, challenges and corrects with this report.

### Top Takeaway:

Perhaps the most significant outcome from Amalgam Insights' new research lies in its ability to help enterprise IT retain — or regain — a seat at the CFO's table. Telecom and wireless usage and planning capabilities are often managed only at a low-level or outsourced level, which prevents the data from being presented at executive-level meetings or integrated with other strategic IT data. IT, especially in the TEM office, must fight for an advisory role by delivering a deep understanding of how and why the organization uses the telecom and network resources it does, the context that TEM can provide for future AI and digital transformation efforts, and how IT controls those expenses for the greater good.

## INTRODUCTION: OUR CONTENTION, THE REASONS FOR THIS REPORT

Look, Amalgam Insights gets it. Compared to overseeing cloud computing, software as a service, cybersecurity, generative AI, or some other flashy technology, telecom and network management is ... not sexy. In fact, one could argue it's a staid, stale practice that has seen its heyday.

We at Amalgam Insights beg to differ. We believe that digital transformation has made dedication to telecom and network management more imperative and impactful than ever.

At the same time, we also know that a number of telecom expense management (TEM) vendors have done little to differentiate themselves over the past decade. While every other technology-centric provider has been forced to adjust its talk track and either subsequently evolved, shut down, or been acquired, few TEM companies have changed their market approaches, much less their messaging even as they are the primary viewpoint for the global telecom, network, and mobility markets that collectively are over a trillion dollars.



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Too many have chugged along in the background, running on commoditized steam — even though their customers have shelled out more and more money for telecom and networking as they adopted next-generation services that rely on wireline and wireless backbones.

Even worse, many have also failed to rein in their customers' expenses to the extent possible.

How can we make that claim? Simple. In our conversations with both vendors and end users, it has become clear that switching TEM providers typically leads to greater savings — on average, 20-30%. This finding aligns, to a degree, with **Amalgam Insights' IT Rule of 30**, which states that every *un*managed technology bucket presents a chance to save an average of 30%. It's disheartening that organizations that manage network and telecom still can save an astronomical amount of money once they move to a new provider.

That's a head-scratcher, because the previous vendor was supposed to be finding, and sealing, all the gaps.

Despite historic technological and industry shifts, many TEM firms have also failed to emphasize value propositions beyond basic, long-held standard aspects of TEM — think cost reduction, "white-glove" customer support, contract negotiation, and inventory tracking as prime examples.

So what's happening? In too many cases, TEM vendors are skating by on table-stakes conversations and offerings. These companies rely heavily on manual processes, as one example, which leaves too much room for error and missed savings opportunities. Given how far automation has come, and how networking and telecom intertwine with cloud computing, SaaS, the internet of things, artificial intelligence, and more, more TEM providers need to step up their games. To be sure, nearly 40 years after telecom deregulation, when bill auditing popped up as the first fundamental piece of what became TEM, any observer would expect to witness advances, not the "same old same old."

Making matters worse, TEM users and prospective buyers get almost no help from behemoth research firms that, once in a while, pay attention to the TEM sector and ignore basic differences between market-leading solutions. When they do, they rehash the same conventional capabilities and advice, failing to look for new twists or deliver compelling guidance to heighten enterprise efficiency. We understand why. TEM is a technically challenging field to cover, where natural language processing, EDI billing, USOC and FID support, eBonding, Single Sign-On integration, Unified Endpoint Management integration, and enterprise application integration are all table stakes. This can lead to a lot of confusion over how TEM should be covered for analysts who lack perspective on this market. Also, the savings opportunities across network and mobility spend are increasingly transformational opportunities aligned to new cloud computing, edge computing, device usage, ESG (Environmental, Social, and Governance) reporting, network transformation, and facilities optimization project rather than just the low-hanging fruit of quarterly usage optimizations and zero-usage reports.



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To differentiate between TEM vendors, businesses must take full advantage of the advanced and high-value capabilities that specific TEM vendors bring to market. All around, it's a disservice to end users, one that Amalgam Insights, with its particular expertise in TEM, challenges and corrects with this report.

TEM vendors often fall prey to overcompeting on commoditized capabilities and features while failing to fully discuss their higher value capabilities to support data, application integrations, business value, and revenue contributions. Amalgam Insights notes that this was a common challenge in our research where capabilities often highlighted in our data integration, analytics, and enterprise applications as high ROI enablers were often ignored by TEM vendors at first pass. Vendor-defined technology approaches and offerings focus so strongly on legacy value propositions that they ignore the past decade of IT lessons regarding Moneyball, "Data is the New Oil," "Metadata is a love note to the future" and all of the other trends and sayings that focus on the value of data and context to supporting real-world business insight.

### HOW DID WE GET HERE?

While telecom and network management admittedly is far from exciting, it remains indispensable. After all, organizations spend over twice as much on telecom, networking, and mobility than they do on cloud computing alone. Globally, organizations spend over \$1 trillion on networking and telecom each year. Over the same period, they put a combined \$400 billion into cloud computing infrastructure and platform as a service: the area commonly described as FinOps or Cloud FinOps.

Consider, on top of how much money goes into network and telecom, that C-suite executives learned tough lessons from the frenzied technology deployments lasting from 2020-2022, and now they're cracking down. During COVID-19, IT departments were allowed to add any and every service and app that would support remote (and then hybrid) work. Enterprises had to do whatever they could to stay operational. Yet, their budgets collapsed under the weight of those unforeseen technology costs.

If one could call those pandemic-fueled rollouts the halcyon days of telecom spend, those days are over. The C-suite has gone from financial freewheeling to serious spending accountability. These days, the more that any technology, including telecom and networking, is consumed, the more line-of-business leaders must be prepared to defend outlay. And if they can't, look out. As inflation bites into profitability, as supply chain disruptions cause delays, as interest rates keep rising, and as other economic factors impinge on the top and bottom lines, executives are keenly sensitive and reactive to overspending.

At the same time, Amalgam Insights believes that there is going to be a massive reconciliation of wireless and wired spend in the next 3-5 years as return to office initiatives settle in and companies can decide on a "new normal" of bandwidth associated with their office footprints and support of remote workers where circuit investments, software-defined wide area networks, 5G connectivity and infrastructure, and cloud-based storage, failover, and continuity services are all reconciled. This is fundamentally going to be a new TEM use case for vendors that can bring network, mobility, and cloud spend together.



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TEM vendors should serve as inherent allies in this arena, preventing excess in the first place, largely because they implemented new methods to tackle the problem. But as we've already pointed out, precious few of them, despite the sector's long history, go beyond the basics. Those that do are highlighted in this report.

### THE CURRENT STATE OF TEM

At this point, Amalgam Insights considers the following capabilities to be table stakes in the Telecom Expense Management world.

**Invoice Processing:** There are still a number of vendors that throw an army of people, potentially aided by some natural language processing and rules-based invoice mapping, at the challenge of the flood of invoices that come into a large enterprise. Frankly, the method of invoice processing is less important than the control that the enterprise has in approving invoices, ensuring that payments happen on time, and that disputed charges are managed according to corporate policy.

**Payment Processing:** TEM firms handle this through a variety of methods ranging from providing guidance to in-house accounts payable departments to managing an escrow account to managing a flowthrough process that typically allows TEM vendors to mediate payments within 2-3 business days after an invoice is approved for payment.

**Sourcing:** TEM firms support the purchasing of devices, wired and wireless services, and usage through a combination of guided service order workflows, eBonding electronic interfaces with service providers, and potentially project management and reseller relationships to support more advanced orders. These latter categories represent opportunities for differentiation depending on the TEM company's approach. TEM firms often also have some professional services capabilities to support RFX activity associated with service provider-based orders and projects.

**Procurement:** The marketplace of services and devices across all corporate-accepted service providers is increasingly taken for granted in wireless management and is increasingly becoming common in the wired world as fiber and circuit marketplaces become more readily available. TEM providers typically also have some capacity to support contract renewals and support contract negotiations efforts. An emerging area is to align contract term enforcement with invoices and usage more granularly with the assistance of automation and artificial intelligence capabilities.

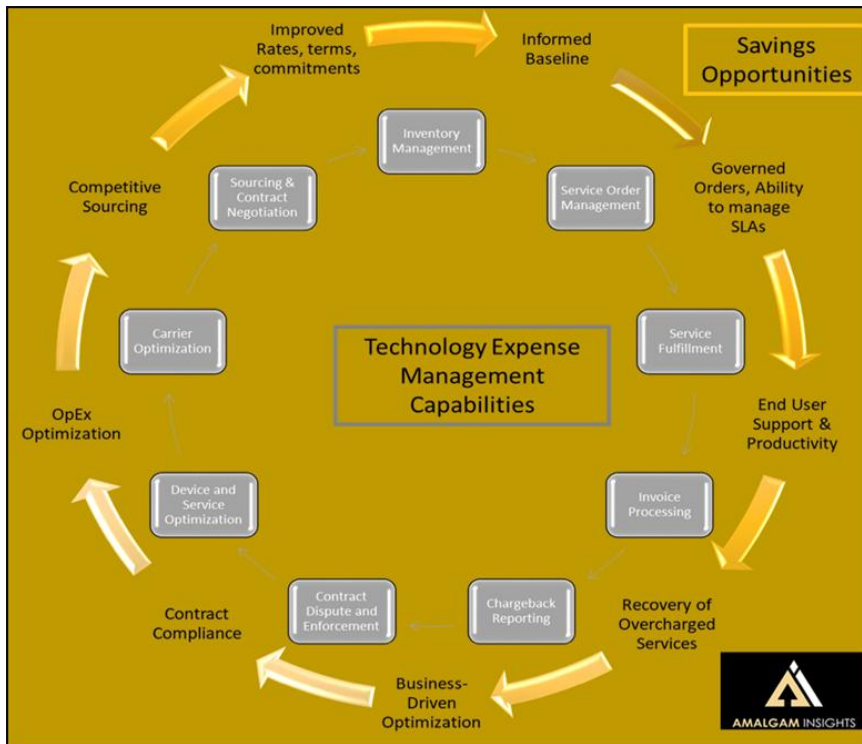
**Cost Optimization:** In 2023, service, rate plan, and usage optimization capabilities should be considered standard capabilities. However, there are a couple of big differentiators that Amalgam Insights sees in this area. The frequency of cost optimization reviews can vary across TEM providers ranging from quarterly down to multiple times per month or based on usage anomalies.

**Usage Management:** Call accounting and text message monitoring are fairly standard capabilities in the larger TEM providers, along with some Unified Communications as a Service usage management capabilities. However, there is a lot of potential differentiation in this area as this data can potentially be aligned with everything from service management to enterprise applications to single sign-on and unified endpoint management solutions to provide companies with greater visibility regarding communications-aligned business processes. Telecom, network, and

wireless usage can simply be seen as a compliance checkbox or as a powerful contextual metadata layer to provide guidance to business activities.

**Network management:** Network inventory management should be considered a standard TEM category, but TEM vendors also differentiate on the level of network visibility, performance, and project management that they support. TEM can be used to better understand cost-performance tradeoffs, support network modernization efforts, and align network connectivity to cloud computing and artificial intelligence efforts as data transport and egress charges become a significant portion of distributed computing projects.

### THE TECHNOLOGY EXPENSE MANAGEMENT LIFECYCLE



As first introduced by Amalgam Insights CEO and Chief Analyst Hyoun Park in 2009, technology lifecycle management has become an established framework for optimizing the total cost of ownership for technology from service orders to invoices to payment management to contractual negotiations and disputes to vendor management. Enterprises and vendors acknowledge that mobile, fixed, cloud, and software expenses are difficult to control without addressing the full lifecycle of vendor services. This strategic approach aligns with the overarching responsibilities of CIOs and CFOs in steering the company towards efficient and cost-effective technology management aligned to core governance and compliance issues.

### METHODOLOGY

To earn a profile, participants had to make their case to Amalgam Insights. The process entailed candid interviews that gave analysts clarity into the ways these companies have differentiated themselves from their peers. Vendors that did not fully participate in our research or could not make a differentiated case to Amalgam Insights were excluded from this report. What we uncovered may come as a surprise as each of Amalgam Insights' Distinguished Vendors has crafted a unique and specific TEM strategy that stands out from the pack.



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Of course, not every vendor will appeal to every enterprise, which we see as a standard for the free market. The IT department must conduct its due diligence to identify the TEM vendor that best fits its processes and needs; this report helps with that undertaking.

Perhaps the most significant outcome from Amalgam Insights' new research, though, lies in its ability to help enterprise IT retain — or regain — a seat at the CFO's table. Considering current economic conditions, that exposure is vital. Organizations cannot afford to axe technology spending willy-nilly, yet they often do. Telecom and wireless usage and planning capabilities are often managed only at a low-level or outsourced level, which prevents the data from being presented at executive-level meetings or integrated with other strategic IT data. And top-level executives do not always understand that cutting back services in ways that hamper and impede productivity and revenue creation. IT, especially in the TEM office, must fight for an advisory role by delivering a deep understanding of how and why the organization uses the telecom and network resources it does, the context that TEM can provide for future AI and digital transformation efforts, and how IT controls those expenses for the greater good.

Achieving that goal comes more easily when the enterprise teams with a TEM vendor that, like its customers, transforms with the times. We profile 11 Distinguished Vendors in this report along with several Honorable Mentions that also stood out among the 50+ telecom expense vendors that we cover.



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## VENDOR PROFILE: APEX BI

### WHY APEX BI FOR TELECOM EXPENSE MANAGEMENT

- ◆ Differentiated call and usage accounting capabilities
- ◆ Customer experience support that extends beyond the contact center
- ◆ Mature enterprise mobility solution with over 2 million SIM cards under management
- ◆ Experience across Africa, Europe, and the United States



### ABOUT APEX BI

Apex BI was founded in South Africa in 2007 by Neil Buckley. The firm supports a software platform called Clarity used to manage, automate, and analyze Microsoft Teams, mobile, telecom, and IoT spend, consumption and inventory. They have their own in-house software development team who support Clarity and focus on invoices, call detail records (CDRs), call accounting, and Microsoft Teams usage. They focus on data extraction, analysis, and presentation, supported by subject matter expertise stemming from the telecoms industry and spanning several verticals such as, manufacturing, financial services, IT, security, vehicle tracking, fleet management and logistics. Apex BI has recently expanded into the UK with a growing customer base now extending into the UK, Australia, Italy and the US.

Clarity is a single web-based platform covering multiple disciplines, which eliminates the need for clients to navigate multiple learning curves and platforms. They emphasize the value of looking at data from a variety of perspectives to derive business insights beyond short-term cost savings. Apex BI targets both end-users and channel partners and provides over-the-top services for most major OEMs supporting call data.

### KEY DIFFERENTIATORS

In addition to managing spend, Apex BI has put significant effort into differentiating its call and usage accounting capabilities to support customer experience, employee behavior, and staffing capacity. It provides a variety of capabilities that are not typically provided as out-of-the-box functionality for call accounting and reporting, such as identifying missed and unreturned calls, flagging missed calls in ring groups, both within and outside the call center, to identify and prioritize replies towards top customers. It also includes sales activity analysis by job roles and supports integration with Microsoft Active Directory, CRM, and structured spreadsheets for comprehensive user profiling and performance assessments.

The solution also supports the customer experience by displaying call flows and routing, especially for escalated issues that go beyond the structured agent experience. It tracks various customer and employee actions, including IVR selections and interactions and behavior such as call abandonments which help and support feedback loops for improved business outcomes.





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From an activity monitoring perspective, Clarity identifies peaks and troughs in call traffic volumes to help support staffing adjustments during busy periods. It assists in monitoring Service Level Agreements (SLAs) by providing accurate information on call answer times, ensuring compliance with agreed-upon terms. The solution enables the tracking of both business and personal call usage and facilitates updates to business directories. It also supports email notifications of call traffic for individual employees.

Clarity has a mature enterprise mobility solution and has a customer base consisting of over 2 million SIM cards, with multiple modes of call and user management including a Radius server for secure user access control, APNs (Access Point Names) management for configuring and controlling mobile data access, and call detail record (CDR)-based visibility for mobility usage. Clarity includes support both for mobile and air-time top ups as well as self-service tools enabling users to perform direct API driven requests from South African carriers.

Apex BI is currently developing an enhanced version of its Clarity for MS Teams reporting module designed to deliver metrics associated with employee burnout, employee productivity levels, coaching opportunities, call quality and Microsoft Teams license adoption to name a few. This product, scheduled for a 2024 release, has the potential to further differentiate Apex BI from traditional TEM counterparts if it is able to deliver on this roadmap.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Apex BI provides a combination of spend visibility and usage visibility across telecom and mobility spend and is quickly adding Microsoft Teams as well. Amalgam Insights recommends that mid-sized and large enterprise customers in South Africa, Australia, the United Kingdom, and the United States consider Apex BI as a solution that can both help consolidate usage visibility and cost management across multiple channels, but help provide visibility to customer and employee calls, especially as calls are routed outside of traditional contact center infrastructure.



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## VENDOR PROFILE: ASIGNET

### WHY ASIGNET FOR TELECOM EXPENSE MANAGEMENT

- ◆ Manages more than \$4 billion in total spend with the acquisition of NTT's Communications Lifecycle Management business.
- ◆ Uses its own low-code Robotic Process Automation platform to support automations and integrations at scale without dependence on carrier APIs
- ◆ Offices across Argentina, Indian, Mexico, Spain, Uruguay, and the United States
- ◆ Uruguay-based multi-lingual help desk
- ◆ Latin American carrier invoice management



### ABOUT ASIGNET

Asignet is a Buenos Aires-based company providing Telecom and IT expense management and automation services. Amalgam Insights estimates that Asignet currently manages approximately \$6 billion in annual spend after the acquisition of NTT's Communications Lifecycle Management business. Founded in 1995, Asignet employs 115 people across United States headquarters in Parsippany, New Jersey, and other offices in Mexico, Uruguay, Spain, India, and California. Asignet is known for its low-code Wayfast automation platform, which is a no-API method of automating any digital process and supported by 11 patents.

### KEY DIFFERENTIATORS

Asignet's wireless expense platform differs substantially from most of its competitors — its software is based on a low-code robotic process automation (RPA) platform called Wayfast. The Wayfast platform is different from the majority of TEM platforms in that it is a standalone RPA development platform that has been in place since 2017. Wayfast is designed as an RPA as a Service platform to support ticket automation and other custom automation solutions. Asignet distinguishes itself from traditional managed services by offering automation solutions to support service orders, integrations at scale with software platforms including ServiceNow and Ariba, data extraction and validation, mobile device and unified endpoint management integration, accounts payable automation, and integration with AI tools such as ChatGPT and Bard to assist in defining regular expressions (regex) and SQL queries. This integration allows for natural language processing and intelligent data extraction based on a centralized source of IT expense data.

In March 2023, Asignet announced acquiring the Telecom Expense Management offerings of NTT (formerly Xigo/Invoice Insight) and is both working on a mimic of that CLM 6 platform as an Asignet module for mid-market customers as well as developing a next-generation CLM 7 solution focused on enterprise customer demands.



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Asignet creates a data plan taxonomy developed by its bots to determine optimal options on a per-user, per-gigabyte, per-group, or per-carrier basis across telecom and wireless spend categories. As an example, Asignet found an additional 11% savings from a client that was already managing its mobility as a shared pool but using sub-optimal plans. Because Asignet's RPA can constantly scan for new plans, this allows clients to always make decisions based on the most current offerings based on geography, data usage, accounts, and other relevant data.

The list price for Asignet starts at 1% of landline spend and \$1.75 per mobile device, and an extra charge per device per month for help desk, which is supported by a multi-lingual help desk in Uruguay. Asignet does not charge for standard integrations and focuses on standardizing workflows, policies, and processes across carriers based on its RPA approach that does not require APIs, since many global carriers lack substantial APIs for service orders. When clients require customized workflows outside of standard technology expense management practices, Asignet charges the time needed to build that tailored robotic automation.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Amalgam Insights believes that Asignet is best suited for mid-sized and large IT departments seeking to automate their IT inventory, expense management, and service management capabilities. Amalgam Insights believes that Asignet provides the greatest value to enterprises with more than 5,000 employees and operations in multiple countries. Organizations seeking to create and control their own workflow integrations across invoice processing, bill payment, contract management, ERP, and accounts payable solutions should consider using Asignet as a comprehensive IT expense low-code automation and management solution.

Although Asignet can handle smaller environments and will likely take on more of these accounts through partners, enterprises should also view the vendor as a solution appropriate for the larger task of IT service automation at global scale. Asignet also has the ability to integrate with enterprise applications, including IT service management, IT asset management, payment, human resources, and enterprise resource planning suites.



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## VENDOR PROFILE: BRIGHTFIN

### WHY BRIGHTFIN FOR TELECOM EXPENSE MANAGEMENT

- ◆ Native access to ServiceNow workflows, analytics, and AI and ability to scale
- ◆ Support for ServiceNow-focused Managed Service Providers
- ◆ Focus on digital workplace
- ◆ Full mobile device lifecycle management



### ABOUT BRIGHTFIN

Since its formation in 2021 through the merger of MobiChord, Mobile Solutions, and Visage Mobile, brightfin has been delivering integrated telecom and mobility expense management services. During this merger, brightfin combined capabilities of each of the three vendors into a single, ServiceNow-based platform that has the ability to access ServiceNow platform capabilities as ServiceNow provides bi-annual releases and a set of telecom, wireless, and IT management services.

In 2023, brightfin implemented a top-down reorganization to focus on mobility and telecom subject matter expertise, and to better match its current financial state. Altogether, brightfin, which operates globally, anticipates that the changes put the vendor closer to customers and position it for growth.

To complement its operational changes, brightfin is providing additional focus on recruiting managed service providers (MSPs) into its ecosystem, particularly those already on ServiceNow. MSPs who host customers on ServiceNow can bolt on Brightfin with relative ease and deliver the vendor's capabilities in a software-as-a-service model.

### KEY DIFFERENTIATORS

**ServiceNow-Native Platform:** brightfin sets itself apart because, based on the MobiChord technology, it has run as a software solution built on the ServiceNow platform since its inception. This native approach lets organizations consolidate ServiceNow workflows and CMDB with various sources of telecom, mobility and cloud data, eliminating disparate, disjointed data and experiences. Although other TEM vendors provide ServiceNow integrations to access specific data from ServiceNow, brightfin is unique as a software solution on the ServiceNow platform able to potentially access ServiceNow process automation, analytics, and AI capabilities as they are developed.

**Digital Workplace Management:** brightfin provides visibility at the user, department, or business unit level to better understand the financial and operational activities. C-suite, line-of-business, and IT leaders may view and act on expenses across telecom, mobility, cloud computing, and other aspects of IT.



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Mobile Device Lifecycle management: brightfin handles mobile device procurement, deployment, exchange, recovery, and recycling on customers' behalf. The breadth of physical kitting and programming support in particular stand out as services frequently noted and praised by IT departments using these services.

Cloud expense management: brightfin offers simple integrations with Amazon Web Services, Microsoft Azure, and Google Cloud. This allows end users to import their cloud data into one portal and compare consumption, costs, and charges across vendors. The IT department can further assign allocations and chargebacks from the same tables where IT service management data reside.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Global organizations seeking to manage IT expenses and tightly integrate with ServiceNow operations would benefit from considering brightfin. Given ServiceNow's prominence in the IT service management market, organizations seeking operational efficiencies associated with using ServiceNow-specific IT service orders and functionalities to manage IT spend and IT vendor relationships would be well suited to use brightfin. brightfin has made the most of this demand by building its software on ServiceNow from the beginning and evolving its capabilities over the years.

Managed service providers with a history of implementing, managing, or augmenting ServiceNow can also leverage brightfin's status of being built on ServiceNow to provide clients with comprehensive telecom, wireless, and cloud spend management.



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## VENDOR PROFILE: CALERO

### WHY CALERO FOR TELECOM EXPENSE MANAGEMENT

- ◆ Market leader due to footprint and spend under management
- ◆ Manages over \$25 billion in global technology spend across 3,000+ clients
- ◆ Over 1,000 employees in offices in the United States, UK, and Hong Kong
- ◆ Oversees other types of technology spend as well, including UCaaS and SaaS spend



### ABOUT CALERO-MDSL

Calero is a technology expense management solution with origins reaching back to the founding of Veramark in 1983 and built over time through mergers of telecom expense management and mobility management companies including Movero, Pinnacle, Veramark, MDSL, and MetaPort. Calero currently manages over \$25 billion in technology spend for over 3,000 clients across over 100+ countries, making Calero the current leader in technology expense management across telecom, mobility, software, and public cloud FinOps and expense management vendors. Currently, Calero is privately owned by Riverside Partners, Oak Hill Capital, and Sumeru Equity Partners.

Calero customers typically have a minimum of 1,000 mobile devices, \$3 million in annual wireline spend, and/or 5,000 UCaaS (Unified Communications as a Service) licenses. Calero has recently expanded its offering to mid-market customers, with an emphasis on the value SaaS management can provide to organizations with a minimum of 1,000 licenses.

As the market leader in technology expense management, Calero has focused its product development on end-user related technologies including enterprise mobility, Software as a Service (SaaS), and Unified Communications as a Service. These developments were accelerated through a combination of the COVID-related push towards remote work as well as the urgency for smarter spend management that has been increasingly top of mind for the office of the CFO. Calero provides a broad range of technology expense capabilities to support spend and inventory visibility, compliance, operations management, and optimization, with specific strengths in automated onboarding and offboarding, SaaS and UCaaS usage, and network management. Calero has also focused on providing increased support for sourcing, contract management, and ESG (Environmental, Social, and Governance) reporting as the CFO office has been increasingly involved in IT spend validation.

### KEY DIFFERENTIATORS

Platform Maturity: As an enterprise application platform, Calero supports regular ongoing monthly updates, technical support of open APIs across human resources and ERP applications, vendor integrations associated with inventory and eBonding, and the ongoing orchestration of network elements. The consistency, configuration, and automation associated with Calero's platform should be considered Best-in-Class.



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UCaaS Management: Beyond basic SaaS management, Calero's support of UCaaS vendors includes call accounting, turnkey API integrations, Single Sign On (SSO) data access, self-service automation, consistent usage comparisons across vendor subscriptions, contract management, and contract renewal. This combination of usage management, governance, subscription management, and contract management provides a lifecycle approach.

Network Inventory: Calero accelerated its effort to build network inventories leveraging technology that allows an automated inventory build based on actual circuits in the enterprise environment with its TrueInsight offering rather than depending only on a billing-based inventory that is often inaccurate, drastically decreasing time-to-value.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Calero is recommended for consideration for US-based companies with over \$3 million in wireline spend across multiple countries for the core Calero platform and over \$1 million in wireline spend based on Calero's acquisition of Network Control that allows for a mid-market Technology Expense Management offering. The Calero global footprint, network inventory capabilities, SaaS and UCaaS management, and focused work on improving each incremental part of the platform have all led to a consistent customer experience. Calero's focus on client onboarding, user experience, and analytics has provided improvements in customer satisfaction and time to action. The Calero combination of mobility expense, SaaS expense, UCaaS expense, and network expense are well-suited to supporting technology cost optimization, value mapping, inventory management, and contract management for mid-market and large enterprise environments.



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## VENDOR PROFILE: CASS INFORMATION SYSTEMS

### WHY CASS FOR TELECOM EXPENSE MANAGEMENT

- ◆ Global bill payment capabilities through its own regulated financial institution, Cass Bank
- ◆ Expertise in a breadth of non-technology enterprise expenses
- ◆ Process accuracy driven by AI and Robotic Process Automation
- ◆ Physical Presence on four continents
- ◆ Breadth of partner ecosystem



### ABOUT CASS INFORMATION SYSTEMS

Cass Information Systems is a publicly traded company (NASDAQ: CASS) that supports enterprise expense management in areas including freight, waste, utilities, telecom, mobility, and public cloud. Across all of its spend areas (freight, waste, utilities, and technology), Cass managed over 50 million invoices and \$100 billion in payments in 2023. Cass targets Global 2000 organizations with \$5 billion or more in annual revenue and 5,000 or more employees.

Cass first entered the telecom expense management space in 2004 through the acquisition of ProfitLab and launched an integrated wired and wireless expense management solution in 2009. This offering was augmented with the 2017 acquisition of UK-based Efttel. The St. Louis, Missouri-headquartered provider also operates in Europe, Singapore, and Sao Paulo, Brazil. Cass goes to market as a full business process outsourcing firm. It delivers managed services along with an expense platform, ExpenseSmart. Standard activities performed through ExpenseSmart include employee self-service ordering; change management for moves/adds/changes/disconnects (MACD); carrier management such as vendor billing disputes; usage optimization; and general ledger/cost accounting. The platform integrates with a variety of financial, human resources, IT service management, and mobile device management systems.

Amalgam Insights estimates that Cass employs around 250 people who specifically work on telecom expense management and managed mobility services across those United States, United Kingdom, and Singapore locations. The company targets Global 2000 organizations with \$1 billion or more in annual revenue or 5,000 or more employees. Cass has traditionally been known for the strength of its process management and governance but has recently worked on upgrading its ExpenseSmart platform with a focus on Artificial Intelligence (AI) and a low-code/no-code architecture to support natural language queries and increasing API accessibility, across self-service management, financials, inventory, order management, and spend optimization.

### KEY DIFFERENTIATORS

**Financial Operations as a bank:** As a commercial bank that is backed by the Federal Deposit Insurance Corporation (FDIC), Cass is able to support payments and funding notifications directly based on its own assets. This





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includes the flexibility to pay on a daily, weekly, or biweekly basis and supporting transactions without accessing a third party or charging for payment transaction support.

**Process Accuracy:** Cass has supported invoice processing at scale for decades based on a combination of technology (including robotic process automation (RPA), machine learning, and AI), technology expense experts and a shared services team to support invoice and document processing. Cass currently supports 325,000 invoices per day with an average late fee rate of 0.01% and an average of 2.1 days from receipt to payment. Cass's process rigor has also allowed Cass to replace internal client teams in providing expense-related audits for month-end financial reports.

**Breadth of partner ecosystem:** Cass works with a variety of top-tier vendors to support IT finance, SaaS management, enterprise mobility management, and technology sourcing including: Apptio, Zylo, Mobile Recell, Cloudcheckr (now part of Spot by NetApp), TRG, HCL, and Scalefusion MDM.

**ESG reporting:** Cass's experience across non-technology categories allows it to support broad environmental reporting, including CO2 tracking across utility, freight, and waste data. Cass also tracks as-needed device refreshes and prolonging of device lifespan as part of Scope 2 and Scope 3 environmental requirements. Cass also provides reporting and documentation support for GRESB (Global ESG Benchmark for Real Assets), Carbon Disclosure Project, and Better Buildings Initiative based projects.

**Patented Technology:** Cass holds six American patents, including its Direct2Carrier payment solution for bring-your-own-device environments (U.S. Patent 8,744,935). This technology manages the BYOD subsidy payment process. The Direct2Carrier solution removes burden from various divisions throughout the customer's organization – HR, payroll, legal – while maintaining accurate data for IT, finance, and the end user.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Based on Cass' wired, wireless, cloud, and facilities management coupled with its status as a bank and process management expertise, Amalgam Insights recommends global companies with at least 5,000 employees and over 1,000 mobile devices consider the provider. Amalgam Insights has found that Cass' offering is especially aligned to technology expense management efforts that have detailed accounting, finance, cash management, and governance requirements.

Cass offers dedicated account specialists by geography — for local support by language, hours, laws, regulations, and culture — and helps its customers largely through manual intervention. The provider emphasizes tailoring each client's solutions to meet unique needs. Amalgam Insights also views Cass' skill in payment processing and non-technology enterprise expense management as giving organizations the necessary ability to consolidate administration of those activities. This makes Cass an attractive solution for organizations wanting to combine global spend across the spend categories that Cass supports, such as telecom, cloud, freight, and waste. The availability of global payments in multiple currencies managed through Cass' regulated banking capabilities is also helpful for multinational organizations.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## VENDOR PROFILE: MINDGLOBAL

### WHY MINDGLOBAL FOR TELECOM EXPENSE MANAGEMENT

- Majority owned by founders, not private equity or public stock
- Monthly reviews of usage leading to differentiated savings
- Sustainability Initiatives
- Manages fixed telecom, enterprise mobility, and cloud infrastructure spending



### ABOUT MINDGLOBAL

Formerly known as mindWireless, Mindglobal specializes in the management of both fixed and wireless telecom services and assets, as well as subscriptions for unified communications as a service on a global scale. Established in 2000, Mindglobal collaborates with various teams within a customer's organization, including the CIO's office, the telecom or data security manager, and the procurement director. Alongside the adoption of its Mobile Intelligence Platform, Mindglobal places a strong emphasis on a consultative and professional services approach. The founders, who initially crossed paths while working at a large consultancy, leveraged their collective advisory expertise to establish and build Mindglobal.

Mindglobal's Mobile Intelligence Platform integrates with several key, commonly adopted systems, including ServiceNow, Coupa, Twilio, and PowerBI. Because of that, organizations may bring disparate carrier and service provider data into a single Mindglobal software domain and manage costs and usage accordingly. Typically, clients are onboarded within six weeks.

Between its software and consulting capabilities, Mindglobal's core across contract and invoice management, rate plan optimization, inventory checks, and mobile device management match expected capabilities for enterprise-grade TEM. Mindglobal also relies on local experts in regions including the UK, Mexico, Brazil, the Philippines, and India to support its global customers. Mindglobal delivers help desk support across business-proficient English, Spanish, French, and Portuguese.

Operationally, Mindglobal remains an independent entity. This stands out in a sector where a number of expense management vendors have undergone M&A, taken private equity (and thus, direction), or opted to trade on Wall Street where investors, notoriously reactive to short-term fluctuations, demand immediate results. Mindglobal continues as an owner-held firm. While this has yielded slower growth compared to competitors that choose faster, and more volatile, routes to expansion, Mindglobal has remained a stable and committed company in an often manic industry. This steadiness appeals to a range of organizations; Mindglobal, for its part, serves organizations starting at 1,000 users and expanding up to more than 10,000 users.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

### KEY DIFFERENTIATORS

**Independent Ownership:** Mindglobal ranks as one of the last independently owned telecom and mobility expense management vendors. This matters in an industry that has seen significant disruption due to M&A, and private and public investor turmoil. Staying owner-led allows Mindglobal to guide its growth and strategy on its own terms.

**Monthly Reviews:** Mindglobal provides monthly rate plan assessments on behalf of clients, which accelerate opportunities to identify savings and put new service orders and account changes into effect. Amalgam Insights sees Mindglobal's take on optimization as one of its biggest differentiators. Mindglobal conducts assessments when it receives a clients' raw data from the carrier and analysts complete the evaluations within five days so to project each user's consumption within the bill cycle and adjust plans accordingly based on proprietary guidelines.

**Sustainability Programs:** Corporations are increasingly being held to political, institutional, and industry-based environmental, sustainability, and governance policies that require oversight. Governance focused vendors including Mindglobal are acting quickly to address this area, delivering reporting, analytics, and recommendations by combining software and subject matter expertise.

**Managed Mobility Services:** Mindglobal provides a full suite of mobility services in addition to managing costs. These capabilities include hardware procurement, kitting, end user computing security and management, software installation, carrier negotiations, device recycling, and an employee help desk to provide individualized support for mobile devices, apps, and configuration. Mindglobal also supports BYOD devices as managed inventory and with customer support for mobile device management, VPN installation, and setup. Clients who want to manage, approve, and pay employee stipends may manage those through the inventory process. In the United States, pricing per line per month starts at \$4 with discounts based on volume. International services run higher, given the additional complexities of geography, compliance requirements, and multiple carriers. Mindglobal also manages clients' mobility requests for proposals for an additional fee.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Amalgam Insights recommends that organizations with over 1,000 mobile devices seeking to manage landline, mobile, and Unified Communications as a Service spend should consider Mindglobal as a solution, especially if these organizations have Latin American and other non-U.S. mobile device environments.

The company's independent ownership lends itself to stability and consistency in its platform and service roadmap. Its steady footing gives customers a sense of long-term security, an important factor in a sector that has experienced notorious upheaval. In addition, Mindglobal's focus on UCaaS, not just telecom and mobility, speaks to the company's evolution alongside customers' digital transformation. Amalgam Insights does note that Mindglobal's start as a wireless specialist has led to decades of proprietary in-house knowledge of wireless and enterprise mobility pricing and support capabilities that allow Mindglobal to shine in managing global wireless environments compared to larger vendors.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## VENDOR PROFILE: RADIUSPOINT

### WHY RADIUSPOINT FOR TELECOM EXPENSE MANAGEMENT

- ◆ Customizable Accounting environment, both for general accounting and specialized categories
- ◆ Centralized IT, facilities, and Utilities management
- ◆ ESG reporting capabilities Along with Expense Management
- ◆ Privately owned by founder



### ABOUT RADIUSPOINT

Founded in 1992, RadiusPoint's telecom expense management approach capitalizes on the accounting background of founder Sharon Watkins. Similar to other leading telecom expense firms, RadiusPoint's software supports telecom bill processing, asset management, help desk, inventory, and payment. It also features ServiceNow integration to combine telecom expenses with IT asset and service management.

RadiusPoint holds telecom subject matter expertise with service provider customer service records, optical character recognition for invoices, and EDI file formats. RadiusPoint also handles mobile device provisioning as part of its managed mobility offerings. Furthermore, it delivers a comprehensive bill pay approach through a dedicated cash management and treasury team.

RadiusPoint differs from other TEM platforms because of its accounting and accounts payable background. Due to that competency, RadiusPoint processes invoices, creates checks and accrual files, reconciles bank statements, and supports 13-month accounting. Its AP-based system can go 16 levels deep and be configured for any spend category or invoice at a granular level. Clients take advantage of this flexibility to oversee and manage a variety of non-telecom expenses, as well, including utilities, managed print and copy, and facility leases. A number of those users take the details for facilities and utility expense management and apply it to their Environmental, Social, and Governance (ESG) reporting. By integrating facilities management into IT management, companies can monitor energy usage so they make informed decisions about equipment efficiency.

### KEY DIFFERENTIATORS

**Support for custom spend category accounting:** RadiusPoint is able to support a variety of accounting, billing, and planning environments based on its deep accounts payable hierarchy. This functionally allows RadiusPoint to support accounting, treasury, and financial visibility more broadly than standard TEM solutions.

**Centralized Facilities spend and lease management:** RadiusPoint supports centralized IT and facilities spending management, including leases, utilities, copiers, and facilities-related spend, in a single platform across IT, accounts payable, facilities management, and the CFO's office. Although RadiusPoint is also capable of more custom accounting



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

capabilities as well, as previously mentioned, the combination of IT, facilities, and utilities management is common among RadiusPoint clients.

Combining ESG and cost management reporting: RadiusPoint provides ESG reporting capabilities along with expense management. The ability to support relevant environmental reporting in conjunction with existing facilities, IT spend, and mobile device footprints provides a relatively broad visibility to the environmental impact that an organization's facilities and establishments are responsible for.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Organizations seeking to contextualize telecom, mobility, and IT spend with broader accounting activity, including facilities visibility and ESG reporting, are best positioned to get the most value from RadiusPoint. As companies worldwide emphasize spending accountability within all divisions and, at the same time, require metrics for their social responsibility efforts, they must think beyond managing disciplines in a siloed fashion. Combining telecom, mobility, IT, and facilities administration into a single practice delivers holistic insight while improving productivity, efficiency, and costs.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## VENDOR PROFILE: SAKON

### Why Sakon for Telecom Expense Management

- ◆ Large operational center of excellence in Pune, India
- ◆ Global pay capabilities supported in-house
- ◆ Quote Module to manage RFX activity
- ◆ Network Intelligence App to support circuit performance.



### ABOUT SAKON

Sakon provides global telecom expense management with a focus on global enterprises with more than \$2 billion in revenue. In aggregate, Sakon manages more than \$7 billion in global telecom and technology spend for 200-plus clients in the enterprise sector. The privately held technology expense management company delivers expense management services in two ways: directly to enterprises (60% of its business) and on behalf of other managed service provider (MSP) vendors. Its lifecycle services consist of connectivity procurement and management; logistics; security; financing; help desk support; insurance; and device repairs and recycling. The company also provides management for internet of things and machine-to-machine networks as well as cloud computing expense management capabilities. Sakon has a ServiceNow integration and supports mobility management workflows across the entire mobility lifecycle within the NOW platform for large enterprises.

Sakon, based in Concord, Massachusetts in the United States, employs more than 700 people throughout the United States as well as at its global delivery center in Pune, India, and at offices in the United Kingdom and Canada. Founded in 2003 as Global Sourcing Group, Sakon is run by Andy Goorno and Amine Doukkali.

### KEY DIFFERENTIATORS

**Support for Internet of Things and Cloud Computing:** Sakon's efforts beyond basic network management allows it to help organizations with distributed and remote computing environments associated with mobility, edge computing, and the cloud. These capabilities help customers to oversee multiple technology categories that are often artificially siloed within the enterprise.

**Global Bill Pay:** Sakon holds bank accounts in 15 different currencies, along with the requisite money transfer licenses and ability to set up inbound and outbound payments. This allows organizations to consolidate their payments, with Sakon paying on their behalf in local regions, removing the difficulty of accurate bill pay for businesses.

**Quote Module:** Sakon Sourcing allows customers to enter their requirements for a project and the system distributes the RFP to various vendors for bidding. Sakon Sourcing helps organizations to visualize contract terms, services, and commitments, and to compare network element pricing across carriers. The capability saves time and streamlines responses by only sending to qualified providers and providing a centralized digital hub to consistently manage and compare potential vendors.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

**Network Intelligence App:** An add-on for the Telecom Service Management module, the Network Intelligence App integrates APIs from Cisco, Aruba, Fortinet, Cradlepoint, and Digi. From there, the app displays performance, consumption, and throughput of every associated circuit. This capability gives teams complete visibility into circuit usage and expense, including cost per megabyte.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Based on Sakon's long history of supporting global clients, Amalgam Insights recommends that large enterprises generating more than \$2 billion in revenue should consider Sakon among the list of vendors they're evaluating. Sakon has crafted its platform, services, and processes to target this sector. Sakon should also be considered from a consultative perspective, as it has successfully pursued digital transformation projects to improve networking and Unified Communications as a Service environments, bridging an operational and financial visibility gap for IT stakeholders across WAN, managed WAN, Unified Communications as a Service (UCaaS), and collaboration vendors.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## VENDOR PROFILE: TANGOE

### WHY TANGOE FOR TELECOM EXPENSE MANAGEMENT

- Manages more than 10 million devices and \$14 billion in technology spend
- Over 60 patents across telecom, cloud FinOps, mobility, and security
- Offices in the United States, France, Romania, United Kingdom, China, India, and Australia
- More than 3,000 billing formats, 550-plus application integrations, and more than 600 bots supporting automation across the platform
- Apple Authorized Service Provider to support Apple for Enterprise and Apple Global Service Exchange (GSX)



### ABOUT TANGOE

Tangoe was founded in 2000 as a pioneer of modern telecom expense management and remains one of the largest providers in the space. Headquartered in Indianapolis, Indiana, Tangoe runs additional offices in Abingdon, United Kingdom; Courbevoie, France; Bucharest, Romania; Kunshan, China; Bangalore, India; and Melbourne and Sydney, Australia. Tangoe is privately held and owned by Marlin Equity Partners. Tangoe currently supports the majority of its customers on the Tangoe One management platform, which has been the vendor's main platform for the past four years. Tangoe's approach to technology expense management includes telecom, network, mobility, public cloud infrastructure, and applications. The technology expense management provider manages more than 10 million devices, including 4 million outside of North America. All told, the company oversees \$14 billion in annual technology spend. Tangoe employs more than 1,800 people to support 1,200 clients, which include nearly half of current Fortune 500 enterprises. While Tangoe historically has focused on large and multi-national organizations, it is expanding to also serve mid-market companies with 500 mobile devices or more.

Over the past decade, Tangoe has had an uneven record in meeting clients' expectations as the vendor underwent a frenzy of M&A activity requiring integration across many acquired systems. Amalgam Insights' limited interactions with Tangoe's current executive team that entered in 2020 hint that the vendor has committed to its current approach of technology expense management and to a consistent platform approach, which is a welcome positioning to Amalgam Insights' analysts who have pushed for holistic IT expense management solutions for the past ten years

Tangoe's annual retention rate averages 96%, a metric that has steadily risen over the past few years and that Amalgam Insights has tracked.

### KEY DIFFERENTIATORS

Tangoe demonstrates expertise and experience beyond telecom and mobility management with a focus on cloud infrastructure and applications. Tangoe One is designed to help companies with infrastructure and platform related spend on hyperscalers including Amazon Web Services, Microsoft Azure, and Google Cloud. Tangoe also offers





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# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

Software-as-a-Service cost insights via direct integrations with 550+ apps and user analytics for Microsoft 365 to align with both mobile spend and the network planning associated with public cloud usage. Based on Amalgam Insights' conversations with Tangoe customers, this approach generally leads to savings of 15-30%

Tangoe stands out as one of the largest technology expense management providers with a global footprint that includes Europe, India, and China. This breadth of physical office space reflects the acknowledgement that global organizations often need providers with reach as extensive as their own. Tangoe's ability to oversee every location's services and assets helps bolster its expertise in handling spend outside the United States, Latin America, and Western Europe where most TEM efforts are typically focused.

Tangoe has [over 60 patents](#) protecting the intellectual property of its software and capabilities across telecom, mobility, cloud computing, FinOps, and data security. Amalgam Insights believes that this is the largest aggregation of intellectual property in the technology lifecycle management umbrella, including telecom expense, cloud FinOps, Software asset management, Software-as-a-Service management, and other IT expense and visibility solutions. Tangoe has maintained a defensive status with this intellectual property to this point with an eye towards protecting its operational capabilities. However, Amalgam Insights notes that a number of these patents describe TEM or FinOps related practices that are performed in a similar manner by Tangoe competitors.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Tangoe should be considered by enterprise organizations earnestly focused on technology expense and IT asset management challenges across telecom, mobility, and cloud computing. Tangoe is potentially also an appropriate potential solution for mid-market companies with over \$5 million in technology spend across cloud, telecom, and mobility and seeking a business process management solution for TEM or a provider of professional services for specialized contract, governance, and IT strategy support. Tangoe is best suited for multi-national companies, as Tangoe's track record as a global provider facing large enterprise IT management challenges provides the organization with a unique perspective in managing telecom, network, mobility, cloud infrastructure, and software categories across costs, inventory, and ongoing asset investments.

Amalgam Insights also advises considering Tangoe when the company has a significant employee base that is non-English speaking as Tangoe's global footprint and language capabilities provide a competitive advantage in supporting native language support outside of English. Tangoe's international capabilities are language-agnostic, and currently support and manage more than 6 million devices outside of the United States.

Tangoe's capabilities across hyperautomation, AI, and RPA provide a compelling toolkit for IT departments seeking to automate mobility orders and onboarding. The company brings several years of experience in developing each of the major bots it uses for cost and order automation. Tangoe should also be considered by mid-sized organizations with more than 500 mobile devices that are committed to an Apple device ecosystem, as Tangoe has made a significant investment in its Apple partnership.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## VENDOR PROFILE: VCOM

### WHY VCOM FOR TELECOM EXPENSE MANAGEMENT

- ◆ Mid-market financial and operational support across telecom, mobility, UCaaS, SD-WAN, and cloud computing
- ◆ vCom's Buyer's Club to consolidate spend
- ◆ vCom's managed pay service to allow clients to pay one lump sum per month



### ABOUT VCOM

Established in 2001, vCom provides IT expense management capabilities for mid-market organizations facilitated through its vManager platform. This platform is designed to support vendor relationships, contract negotiations, product and service portfolios, and expense management challenges. While the company also serves enterprise customers, its primary focus over the past two decades has been on addressing the unique needs of mid-market businesses. Starting with a sourcing solution, vCom has progressively expanded its offerings to encompass telecom, mobility, UCaaS, SD-WAN, and cloud services.

Recognizing that mid-market customers often lack specific skill sets within their IT departments, vCom offers managed services to bridge the expertise gap. The company provides flexibility in its service delivery model—organizations can choose to independently manage operations and expenses through vManager or opt for fully outsourced expertise, including dedicated planning, procurement, and solution architect experts assigned to each client.

Amalgam Insights believes vCom is differentiated in the TEM market by its comprehensive service portfolio and its distinctive go-to-market strategy. For instance, vCom's Buyer's Club allows the company to directly source on behalf of clients, with all contractual discounts returned to the client. vCom's Operations Management module provides a foundation for organizations to track and manage IT inventory comprehensively, covering vendors, technologies, locations, projects, and tickets. Additionally, vCom operates a 24/7 help desk to ensure continuous support.

### KEY DIFFERENTIATORS

vCom specializes in expense and operations management support across telecom, mobility, UCaaS, SD-WAN, and cloud computing for mid-market organizations. The company has proficiencies as both a TEM solution and managed service provider, the latter via its help desk and ability to administer the technologies involved, augmenting customers' IT departments.

vCom's Buyer's Club allows members to consolidate spend across multiple vendors and technologies, which allows vCom to support payment management and mitigate the impact of late fees.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

vCom's managed pay service allows clients to send a weekly or monthly payment as a lump sum for all invoices. vCom assumes the responsibility of processing payments at no cost as part of its overall business model. Clients can autonomously approve and verify invoices without having to directly cut checks or process invoices.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Amalgam Insights recommends that mid-market organizations seeking to control their TEM estates, whether through internal management or via managed services, consider vCom. As businesses face staffing shortages and stringently tightened budgets, the risks associated with attempting to administer their telecom, network, and mobile environments without specialized software and experience can cost millions of dollars even for mid-market businesses. vCom's capabilities provide organizations with the opportunity to channel professional efforts on the most productive efforts while ensuring adherence to the C-suite's spending scrutiny towards the IT budget.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## VENDOR PROFILE: VMOX

### WHY VMOX FOR TELECOM EXPENSE MANAGEMENT

- ◆ Wireless specialist that consistently outperforms competitors in cost reduction
- ◆ Patented Cost Optimization Technologies
- ◆ Direct Data Process Automation
- ◆ Platform with deeply formalized software development lifecycle



### ABOUT VMOX

vMOX is a global managed mobility services (MMS) provider founded in 2011 and headquartered in Port Washington, N.Y. It is a privately held company with no outside investment or debt. They have more than 80 employees across three offices and have increased staff count at a rate of roughly 34% year-over-year. vMOX claims more than 200 customers, including three clients in the Fortune 500, 15 clients in the Fortune 1000, and 46% of clients with over \$1 billion in annual revenue. vMOX focuses on companies with more than 1,000 devices. It places its customers into two separate categories: mid-market, for companies with 500 to 5,000 devices, and enterprise, for larger device fleets.

vMOX goes to market as a pure-play MMS vendor focused on two key areas: expense management and lifecycle management. The expense management offering consists of cost optimization, audit, reporting and analytics, fraud detection, and behavior modification. The lifecycle management offering comprises carrier, inventory, and device management, compliance, mobile help desk, and device logistics. vMOX currently claims 97% client retention year-over-year and spends 25% of vMOX's annual revenue on research and development to improve cost optimization and mobile lifecycle management capabilities. vMOX has three patents to support its cost-optimization technologies. The latest, Patent 10,959,083, awarded March 23, 2021, addresses application-level usage-based optimization.

### KEY DIFFERENTIATORS

**Patented Cost Optimization:** vMOX has a proprietary and patented cost optimization capability that has been market-proven to provide additional wireless cost savings above and beyond what is typically provided by other telecom expense vendors. This approach includes a variety of assumptions, goals, and algorithmic logic with a focus on holistic cost optimization rather than simply trying to avoid certain specific costs such as late fees or usage caps on an individual device level. Amalgam Insights' perspective on vMOX patents are that they describe a technological approach to optimization that is uncommon in the telecom expense industry.

**Single Platform:** vMOX operates on a single database with a documented schema and codebase, ensuring transparency and consistency in the platform's structure as well as extensibility for APIs and other services. VMOX's software development lifecycle includes analysis and AI-based automation to identify potential maintenance issues, technical debt & vulnerabilities rather than simply focusing on bringing new functionalities to market.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

**Automation:** To support efficient multi-national telecom and connectivity costs, vMOX typically focuses on direct data processes that avoid manual swivel-chair vulnerabilities and errors, a common weakness in technology expense management solutions. One example of this is in vMOX's implementation of self-pay which passes credit card information directly to a secure payment gateway rather than through any intermediate channels.

**Organization-wide ISO 27001 certification:** ISO 27001 is the most frequently requested certification for information security to support data confidentiality and integrity. Organizations supporting ISO 27001 typically start on a site or infrastructure-specific basis because it is easier to support. VMOX supports ISO 27001 on an organizational basis, covering infrastructure and people across Finance, Human Resources, Information Technology, Legal, Operations and Product.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Based on vMOX's managed mobility services and capabilities, Amalgam Insights recommends vMOX as a solution for organizations with 1,000 or more devices, either solely in the United States or across multiple countries, seeking to optimize wireless costs and to outsource mobility management. Amalgam Insights finds that vMOX's approach for managed mobility services is especially useful for companies focused on direct digital process automation and seeking assurance that their chosen platform is built to easily support future-facing needs. vMOX's algorithmic approach allows it to automate decisions and support wireless optimization at scale. Amalgam Insights also believes the lifecycle capabilities, security, and process automation vMOX extends as part of its standard management fee stand out compared to vendors that price those same capabilities on a separate, one-off basis.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## Honorable Mentions

Honorable mention vendors frequently show up in Amalgam Insights inquiries regarding telecom expense management and also have a successful record of providing telecom expense and other technology lifecycle capabilities. However, they are on this list either because they did not fully participate in the research process or Amalgam Insights was unable to speak with a current reference customer within the research time frame.

## VENDOR PROFILE: ONE SOURCE COMMUNICATIONS

### ABOUT ONE SOURCE

Founded in 1996, One Source positions itself to enterprises as a provider of managed connectivity, IT, and cybersecurity services. One Source targets medium to large businesses, typically in retail, quick-service food, banks, business services, health care, and manufacturing. This work across more than 30,000 client locations (self-reported by One Source) lends itself to a global focus. The Greenville, N.C.-based company is privately held. It claims a client retention rate of 98% and average customer tenure of 13 years. One Source runs four offices and/or operations centers in the United States – one each in Raleigh, N.C., Portland, Ore.; Mobile, Ala.; and in Greenville. One Source manages \$240 million in annual mobile spend and over two million devices, including IoT and wireless sensors.

One Source often finds that the end users it works with outside of North America and Western Europe need little more than invoice consolidation, depending upon the maturity and capability of the wireless market in question. One Source does not offer global user support, yet it still delivers wireless expense management activities ranging from invoice consolidation and contract compliance to carrier and device selection, deployment, and kitting throughout the world. One Source's global capabilities further include security, compliance, and mobile device management — crucial factors in an era of high cybercrime and stringent government regulations. Amalgam Insights notes that One Source has placed a significant investment in cybersecurity as part of its managed IT offerings.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Amalgam Insights recommends that global companies headquartered in the United States with at least 250 mobile devices seeking a managed service and focused on the importance of end user security are best suited to consider One Source. Amalgam Insights sees One Source's lifecycle approach as thorough, especially with the addition of security and governance capabilities. Amalgam Insights also views the capabilities One Source extends in its standard and advanced managed services packages can exceed those offered by peers on a one-off basis.

## VENDOR PROFILE: SAASWEDO

### ABOUT SAASWEDO

SaaSWedo was founded in 2007 by Christian Cor and Gilles Mezari. Over the past year, SaaSWedo has both merged with TaaS and Mobility and taken a 49% stake in US-based CBI Telecommunications to gain a stronger foothold into the North American market. CBI focuses on specific verticals including automotive, manufacturing, finance, pharmaceuticals, and food and beverage. As a combined company, SaaSWedo and CBI plan to be more global in



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

nature, including a greater focus on sustainability and IT carbon footprint reporting, legacy technology transformation, and a deeper dive into predictive analytics and IT financial management.

## VENDOR PROFILE: TELLENNIUM

### ABOUT TELLENNIUM

Tellennium provides expense management for mobile, network, cloud, software, utilities, waste, and other repeat enterprise costs. Tellennium was founded in 1999; it is based in Louisville, Kentucky. The company is privately held with no outside investment. The vendor targets businesses based in the United States – many of which operate multi-nationally – with at least \$500 million in revenue. That often equates to at least 400 mobile devices, although Tellennium can support fewer if a customer wraps other categories into overall spending.

Tellennium further claims zero customer turnover, which executives attribute to the company's flexibility and service levels, and its terms and conditions, which, with 60 days' notice, allow customers to leave without penalty. Regarding mobility, specifically, Tellennium says it manages 500,000 devices for more than 40 clients. Tellennium secured a federal trademark for its expense-management platform, which now goes by the moniker Management of Things® (previously known as Tellennium's Integrated Management System, or TIMS™). Tellennium's platform developers and support team are based in the United States. Tellennium also notes in its cost management approach that it focuses on the purpose of each unit of technical inventory from a performance and business use case perspective rather than simply managing costs.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Based on Tellennium's telecom and utilities capabilities, Amalgam Insights recommends Tellennium as a solution for organizations supporting a minimum of \$200,000 in telecom spend and seeking to manage some combination of telecom, utilities, Internet of Things, and managed mobility with a single platform. Tellennium's MoT platform extends across traditional and non-traditional wireless equipment, providing end users the ability to manage various recurring expenses. Amalgam Insights believes Tellennium's customer service delivery is differentiated compared to other telecom expense vendors.

## VENDOR PROFILE: UPLAND SOFTWARE

### ABOUT UPLAND

Upland (NASDAQ: UPLD) offers technology expense management (TEM) through software and managed services. The Austin, Texas-based company oversees over \$3 billion in spend under management. Upland specializes mostly in Canada and the United States, due to its 2019 acquisition of Canada-headquartered Cimpl, but with its additional offices in Europe, the Middle East, and Australia, the vendor continues to expand its global footprint. Upland Cimpl targets mid-market to large organizations, or firms with at least 1,000 mobile devices.



## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

Since its founding in 2010, Upland has purchased 29 other firms. This expanded its expertise in sectors including contact center, IT management, enterprise sales and marketing, project and portfolio management, business operations, and HR and legal. TEM falls under many of those umbrellas.

From an operational perspective, Upland groups Cimpl with ComSci, its IT financial management platform, and Eclipse PPM, PowerSteering, and Professional Services Automation for project management. Among all its offerings, Upland serves more than 10,000 customers around the world.

### AMALGAM INSIGHTS' RECOMMENDATIONS

Amalgam Insights believes medium-sized to large organizations supporting at least 1,000 mobile devices, especially in Canada, the United States, or Europe should consider Upland Cimpl. In addition, Upland Cimpl, with its technology-heavy focus, can work well for enterprises interested in handling their own procurement, reporting, invoice processing, and help desk. The ability to integrate Upland Cimpl with Upland's other software (professional services automation, workforce management, project portfolio management, and technology business management) lends a breadth of capability to organizations wanting to combine critical processes under a single software vendor.

Authors:

Hyoun Park, Chief Analyst

Kelly Teal, Senior Research Analyst

## APPENDIX

Amalgam Insights covers a number of telecom expense vendors, although not all operate on a global level. The breadth of providers Amalgam Insights covers and recommends based on propriety for use includes: 4TelecomHelp, Accenture (NYSE: ACN), Advantix, AMI Strategies, Apex BI, Ascension Mobile, Asignet, Auditel, Avail, Avema, BAZ Group, Brightfin, Bruin, Calero, CarrierBid Communications, Cass Information Systems, CMS 360, Enteleger, G2, Genuity, GoExceed, GSI - Bill Genie Mobility, IBM Global Technology Services (NYSE:IBM), ICOMM, Intratem, iRoam, IQT, ISG, Isimplexity, LB3&TC2, Mindglobal, Mobilsense, Motus, MTS (OTC:MTSL), NetPlus Mobility, Network Control, One Source Communications, OpDecision, Ovation Wireless, Profit Enhancement Systems, Radiuspoint, Renodis, SaaS Swedo, Sakon, SmartCell, Smartel, Softeliger, Spearhead, SpikeFli, sutiWEM-S, Tangoe, Tellennium, TeleManagement Technologies, The Bill Police, Upland, Valicom, Veroxos, vMOX, WidePoint Corp. (NYSE:WYY), and Wireless Watchdogs.





## Vendor SmartList

# Why TEM Matters More Than Ever in a Cloud, SaaS, and AI World

## ABOUT AMALGAM INSIGHTS

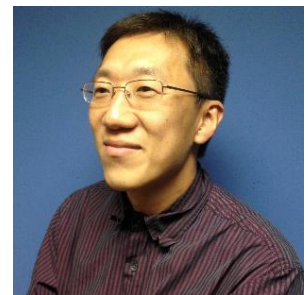
### AMALGAM INSIGHTS

is a leading research and advisory firm focused on the financial, programmatic, and cognitive tools that multiply the value of enterprise technology, including the following research practices: Technology Expense and Lifecycle Management, Analytics and Data Management, Data Science and Machine Learning, Accounting and Finance Technologies, DevOps and Open Source Development, Talent Management, Learning & Development, and Extended Reality.

### HYOUN PARK, FOUNDER AND CHIEF ANALYST

Hyoun is the Founder and CEO of Amalgam Insights. He focuses on Technology Consumption Management challenges of procurement and utilization as well as the practical and value-driven use of AI in the enterprise based on 20+ years of vendor, enterprise IT, and industry analyst experience.

Prior to Amalgam Insights, Hyoun led IT analyst practices at the Aberdeen Group and Blue Hill Research with over 300 research documents across analytics, mobility, finance, and collaboration; managed multi-million-dollar technology budgets at Bose and Teradyne; supported billing data operations for two resale telecom CLECs; and built prediction models for the first Fantasy Baseball website, mosey.com



### KELLY TEAL, SENIOR RESEARCH ANALYST

Kelly has worked as a journalist, editor, and analyst for more than 20 years. At Amalgam Insights, she covers the business value of implementing and managing technologies; this approach includes vendors, processes, and best practices. Kelly helps enterprises, small and medium businesses, and other end-user organizations understand the tools at their disposal, and the ways in which they can improve finances and operations.



### CONTACT AMALGAM INSIGHTS

**Phone:** +1 415 754-9686

**Website:** [www.amalgaminsights.com](http://www.amalgaminsights.com)

**Twitter:** [@AmalgamInsights](https://twitter.com/AmalgamInsights)

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