# Welcome to the new age of business mobility.

Meet the speakers and our experts.







# Welcome to our new age of business mobility event.

We have a clear vision. To be the foundation of UK Digital Business by offering total seamless connectivity to every single one of our customers. It is a big ambition, and it is driven by what we see day in, day out, not only with our customers but also within our own business. And at the heart of this ambition is mobility.

We believe mobile technology is now mission critical, offering huge benefits to businesses, from getting more done, to reducing costs, to improving service. That is why we are more focused than ever on putting ourselves at the forefront of this exciting new age of mobility.

We are proud of our heritage. Our coverage, capacity, bandwidth and availability across fixed and mobile access is unassailable. But we can never stand still. After all it is why we invest over £500m in R&D and have 14,000 people dedicated to finding the next big things in communications technology. And it is why we have brought EE into the BT family. All so we can continue to provide the very best in class solutions that help solve business needs and ready them for the future.

Take convergence. We are making this a reality. Why? Because we know that customers need solutions that work better together, that give them more time, availability and control on any device, anytime, anywhere. That is the reality of modern working.

It is an exciting time. We have more products and services than ever before. Seamless connectivity is within our sights and the opportunity for customers is vast. But with that comes complexity, knowing what is right for you, your people and your future. And that is where we come in - to remove the complexity and make life simpler. Today's event is designed to inspire you and support you on your journey to total seamless connectivity.

I hope you enjoy the event.



**Graham Sutherland**CEO, Business and Public Sector

# Event agenda.

| The Collaboration Conundrum  Dr Nicola Millard, Head of Customer Insight and Futures.  |
|--|
| Future Directions in Business Mobility Shaun Collins, CEO, CCS Insight.  |
| Our approach to mobile Richard Lowe, Commercial Director.  |
| Time for a break!  |
| The power of two Jon Pollock, Director of Corporate Sales.   |
| How we're supporting businesses now and in the future  Jeremy Spencer, General Manager Propositions.  Hillary Sewell, Head of Business Mobility. |
| Live discussion and Q&A  |
| Lunch, demos and networking at the top of the Tower.   |





Largest infrastructure investors in fixed and mobile.

£

Combined investment of £35bn in last 10 years.

Third largest UK investor in R&D.

A major, socially responsible British employer.



Better value for customers through new packages and bundles.

Maintains four major mobile network providers and more than 50 MVNOs.

Complementary businesses with little fixed/mobile overlap.

BT/EE brings more competition to fixed mobile converged products.

1997

of adults in the UK use a mobile device to access the internet





# BT and EE, working towards total, seamless connectivity.

We believe mobility is mission critical to businesses which is why we've put mobile at the heart of our strategy.

The demands on communications are greater than ever. You need better access to data and joined up solutions that allow you to work wherever you are. By joining forces with EE, we'll be combining the UK's largest fixed and mobile networks to give you the best possible connective experience wherever you are. In an 'always on' world where the concept of the office is changing rapidly, you need a mobility partner who can give you the best connectivity experience. Here's what we can offer your business.

# The most complete coverage.



Our mobile service offers outstanding connectivity for business. Combining EE's 4G network with BT's fixed network and BT Wi-fi to deliver excellent coverage and the fastest possible speeds we can to transform the way employees work.

You can switch from working on the move, to working in the office, to working while you're waiting, to working virtually anywhere. as seamlessly as possible.



# 4G is helping London Air Ambulance to save lives.

Seconds count when responding to critically ill patients. Superfast 4G is helping London Air Ambulance to speed up response times and save lives. www.ee.co.uk/business/large/public-sector/ case-studies/london-air-ambulance

# We reach those hard-to-reach places.

With over 5 million BT Wi-fi hotspots all over the UK, you'll be spoilt for choice.

You can access them for free if you're a BT Business Mobile customer, and you can connect with any type of smartphone or tablet, so there's nothing to get in the way of your work.



# Say goodbye to missed calls with BT One Phone.

BT One Phone brings together your phone system, desk phones and mobile phones into a single service that delivers all calls to your mobiles - whether they're to your mobile, landline or office extension number.

Our BT One Phone customers typically benefit from big productivity improvements, smoother processes and improved efficiency from your employees being available more. The platform has the potential to cut a company's overall telecoms operating costs by upwards of 20%.



# How EE makes us stronger.

EE are the UK's No 1 network coming out top for network reliability and speed, mobile internet, call and text performance in Rootmetrics® tests.

Their 4G network has won many UK industry network awards since its launch in Oct 2012. It's now the UK's biggest 4G network with 97% coverage of the UK population.



# Choose from the latest handsets.

We offer a full range of the latest handsets from all the leading manufacturers, so we're bound to have a device that's right for you and your business. Our 4G devices give you access to the 4G network at no extra cost.

# A glimpse of the future.

Joining forces with EE, coupled with our firm rooted belief of putting mobility at the heart of our strategy, means we can build services that are much faster and more convenient than those of today. Our vision is that customers will enjoy seamless connectivity, using wi-fi and fibre where possible and 4G everywhere. You won't need to search for the best connection, your devices will do that for you – wherever you are.

# Meet the speakers.



#### Jon Pollock Director of Corporate Sales

Jon has 15 years' experience in the telecoms industry, in particular in mobile technology. Currently Jon is Director of Corporate Sales at BT and was previously Head of Corporate Account Management at EE.



#### Dr Nicola Millard Head of Customer Insight and Futures

Despite working for a technology company, Nicola isn't a technologist and combines psychology with futurology to try and anticipate what might be lying around the corner for both customers and organisations (sadly, her crystal ball is broken). She got her PhD from Lancaster University in 2005 and spends much of her time doing research, travelling the world running customer workshops and speaking at conferences.



#### Shaun Collins CEO, CCS Insight

Shaun founded CCS Insight in 1993 – a team of researchers and analysts who cover the mobile communications market and the expanding eco-system around the connected space. Shaun has a strong track record in the global wireless equipment manufacturing business, having held a number of senior sales and service roles in the UK, Europe and the US. He is widely quoted in the FT, Reuters and others and has appeared on the BBC and CNBC commenting on the mobile market.



# Jeremy Spencer General Manager Propositions

Jeremy has over 25 years' commercial experience in the global and corporate technology and telecoms market. He has worked in a variety of roles developing and launching new technology solutions for corporate and public sector organisations. Most recently, as the head of corporate propositions for EE, he launched the first commercial 4G service into the UK market. Jeremy is now part of BT, creating new propositions for the corporate market that combine the best of BT and EE.



#### Hillary Sewell Head of Business Mobility

Hillary has worked in the telecoms industry in Australasia and in the UK over the last 16 years in both channel management and commercial roles. She joined BT 4 years ago, leading proposition development across Mobile and FMC products.



# Richard Lowe Commercial Director

Rich began his career training as a Chartered Accountant with KPMG in Melbourne, Adelaide and Chicago working in Audit, Advisory, Transaction Services. He joined BT in 2003 as a Corporate Development Manager. He followed this with various roles in Corporate Development and Finance (including Finance Director of BT Vision) before being appointed as CEO, Retail solutions Expedite and Fresca. In 2011 he led BT's global conferencing business into Asia Pac & Latin America. During 2012/13 he was then responsible for turning around BT Business Direct and Dabs.com. More recently Rich led the integration and scaling of BT's IT Services business as CEO of the unit.



### Dr Nicola Millard

**Head of Customer Insight and Futures** 

#### How long have you worked with BT?

25 years (I started when I was six).

# What do you see as the biggest challenges businesses are facing around mobility?

The main challenge is mindset. If managers don't think that they can manage people they can't see, then people will be forced to travel into a fixed office location all the time. That's fine if you find the office a productive place to work and love sitting in traffic jams getting there. However, we have an increasingly diverse (and virtualised) workforce which means a one-size-fits-all solution doesn't fit everyone.

As we work older – maybe into our 70s – we may not want to commute. Younger workers may not want the routine of an office, but probably don't have a home to work from. Parents need the flexibility to work around their family commitments. The ability to choose where, when and how you work is a great way of recruiting and retaining great people but it also requires managers to manage effectively remotely – it requires GOOD management rather than a lazy 'I can see them at their desk so they must be working' mentality.



# As a futurologist, what trends are you noticing in the world of mobility?

I think hub working is becoming a big thing now. Mobile workers can choose where and when they work but working from home can be tough for some. Work hubs (sometimes also called 'coffices') are becoming a popular way of working as people choose to work from a place close to their home where the essential four 'C's are available – coffee, cake, connectivity and company (this may just be me, though). I met an entrepreneur recently who ran his business from the café in his local gym because he found working from home rather lonely.

#### Is there one thing that's changing the way we work?

We are untethered now in so many ways. We once had to come into an office, work a specific shift, have a desk with a fixed phone, a massive computer tower and monitor and stacks of paper. A combination of more portable technologies, smart phones and increasing wi-fi and 4G connectivity means that the only reason many of us need a desk is more to do with emotional ties rather than practical need.

#### How do you personally make the most of the latest technology?

I'm classed as a mobile worker, so I have the tools that enable me to work anywhere in the world. I'm based at BT's main R&D centre, Adastral Park, but because I'm with clients all over the world about 95% of the time, I'm only there two or three days a month at the moment. So I have secure remote access to all the tools and apps I need through multiple devices (including my own tablet as well as my work smartphone and laptop). I have my own Dolby Conferencing bridge (handy because I tend to be the noisy person on the train or in a coffee shop, so the noise cancelling capabilities are brilliant and mean that I don't spend all my time on mute).

The biggest change I've had to make to the way I work, after we did some research with Cambridge University on techno-stress and work-life balance, is to make sure that I turn everything off at the end of the day – so I can depressurise and relax rather than doing my emails in bed at 2am!

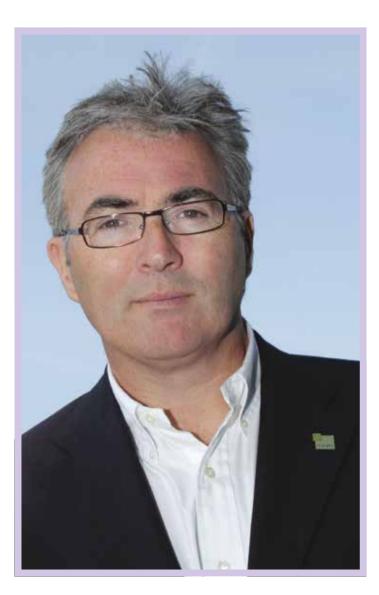
#### What do you think the office of the future looks like?

The one thing the office is undoubtedly good at is being a collaboration tool – for socialising about work, presenting ideas and stimulating discussions all in a place where the brand values can be reflected and there is a locked door.

What offices ultimately look like in the future is probably down to what is being done in them. We are starting to see environments that are built around the activities that take place in them – with collaboration environments being built to incorporate the ability to beam people in remotely using video, audio and shared online environments. Many of the best ones I've seen also incorporate quiet environments for concentration and contemplation because we aren't always collaborating and communicating.

Someone recently described the office of the future as 'theatrically fluid' – and I think that is an apt description as they need to be as agile as the work in them.

One thing is for sure – there will also be a lot of increasingly intelligent technologies embedded in them to help us be more productive – from robots to wearable tech and ambient collaboration environments to intelligent environment management.



# Shaun Collins CEO, CCS Insight

You predicted that BT and EE would join forces almost a year before it happened. Now that prediction has come to life, what do you think it means for business?

The tie up between BT and EE has created a telecoms giant of the scale we have not seen in the UK for 30 years. Unquestionably the combining of the fixed and mobile assets will create a formidable and almost unique competitor in the UK enterprise market. Once the dust has settled on the integration of the two companies, we expect the largest benefits of the deal to come to the enterprise market first. Combined tariffs, automatic authentication on networks, large integration of solutions like BT One Phone using 4G will all move quickly. Indeed the fact that EE was BT's MVNO wholesale supplier means there is already a working relationship there. The enterprise market is the sector that will see the benefits of the deal long before the impact is felt on the high street for consumers.

# What do you think 4G is doing for mobility in business? Is it making businesses more flexible?

Yes, but I'm not fully convinced that 4G has reached its potential in business. There's growing awareness, but more needs to be done to educate organisations on how it helps productivity, workflow and business mobile solutions, to make them more efficient and productive. It's good to look at it from a device and application point of view. In the UK there's a big difference in the quality and coverage of 4G networks, and that will have to improve.



# Do you see any new areas that will extend the drive for the mobile provision of data?

We see two big trends. One is the increased use of wi-fi to improve customer experience, reflecting how many consumers are now using tablets and mobile phones to interact with a business. The other is for businesses to support mobile devices in-building, coming from the way employees are turning more and more to mobile rather than fixed-line desktop PCs. Both these trends are going to drive the innovation of wi-fi.

# With convergence being the buzz-word, how difficult is it for IT decision makers to manage the complexity of an ever-evolving mobile and device estate?

Our research suggests that exemplary digital executions create real value for businesses, large and small. The combination of great value smartphone, tablets, and even PCs and the widespread adoption of applications has prompted all businesses to look at how these huge opportunities can be explored. However, these decisions are no longer simple. Regardless of how digitally mature any business is, the skill sets required are diverse and unlikely to be held in-house. It now requires companies to create a small network of trusted advisors and partners to navigate the opportunities.

# What do you think businesses will want from mobile solutions over the next five years?

There are three things I see at the moment. The first is more interest in applications; as companies engage with customers through their mobile devices, it'll become more important to give employees the tools they need to work on the move. So far it's been experimental and focused on interacting with customers, but we're going to see more employee applications for business processes.

The second is security. With the trend towards more organisational data running on mobile devices, and companies engaging more with customers through the channel, the security, service guarantees and liability of the network will become more important.

Finally, the mobile market is becoming very complicated, with its own ecosystem, and enterprises tend to adopt at a slower pace than enthusiastic individuals. This creates a need for managed services to help enterprises navigate the complexity. They'll need support services in areas like technical implementation as well as the design, building and support of applications. Becoming a trusted service provider will become important in this environment.

The mobile market is becoming very complicated, with its own ecosystem.

Shaun Collins





# Richard Miller

**Director of Business Mobility** 

How are the changes in smartphone technology affecting the demands on your networks and services?

Firstly, there's clearly a much bigger demand for access to data, and we think that with the move to 4G that will grow substantially.

There's a demand to control costs, so we're creating better bundling options. It wasn't long ago that you didn't get bundled data, but it's something that's now becoming the norm while the demand for shared bundles is increasing, which means we are looking at different ways for users to share them. Also, BT has the best 4G network (EE) in the UK, with over 5 million BT Wi-fi hotspots that customers can access as part of their package.

Secondly, the utility the customer can take from a smartphone is evolving very quickly, and that generates a demand for security and control. We're seeing a growing demand for security and mobile device management.



# You're now deploying small-cell technology along with your mobile and fibre networks.

It means our customers can look at removing some of their fixed infrastructure and move to a mobile-based service. A dedicated office mobile phone network planned around your needs, and the ability to use it outside on BT Mobile.

We can meet the customers' evolving needs by increasing and reducing their capacity, and providing the best possible mobile coverage in places such as basements and lift shafts. It's delivered through radio planning; we send engineers to customers' premises to find the best places for antennas. When a user is within range, their mobile phone will go over the BT One Phone coverage and backhaul out to the world by BT. If you want to go out but continue a call, as you walk out of the office the phone will seamlessly hand over to BT Mobile.

The boundaries between consumer and business technology are being broken down, and we see things moving towards an 'always connected' world.

Richard Miller

### What does the bringing together of mobile and fixed networks offer to business?

It provides the basis for our BT One Phone service, and in doing so helps to reduce the total cost of ownership of many customers' telephone services. This isn't just about the bill, but the amount of time spent in managing the service and time lost by users due to inefficiencies. BT is acknowledging that mobile is the de facto service for many processes, helping customers get more from it, and driving improvements in their businesses.

### What are the future possibilities for technology advances and new services?

The boundaries between consumer and business technology are being broken down, and we see things moving towards an 'always connected' world. The customer and end user decide how and when they want to connect their business and personal worlds, and the platform they connect with is completely agnostic. The possibilities for the future can be summed up as 'network and device-agnostic; always best-connected'. Our mobile network coupled together with our fixed network, puts us at the cutting edge of where that trend is going.



# Andy Summerfield Managing Director, Corporate Accounts

### How would you describe, in layman's terms, the BT strategy when it comes to mobile?

Like many things in life, the simpler the better; our goal is total seamless connectivity. To achieve this, our strategy is all about investing in our underlying network capability, mobile and fixed, and the business solutions portfolio that this networking infrastructure enables. And, perhaps most importantly, ensuring customer experience remains at the heart of everything we do—this primarily means a single customer journey and single customer service to support delivery of the solution.

# Coming into the BT fold, what do you see as the biggest opportunities for customers?

It's undoubted that together, BT and EE are more than the sum of our parts. And that can only be a good thing for our customers. What has been very interesting is the cultural fit between the two businesses – both teams believe everything we do should be about the customer first, not the technology for technology's sake. And what we're seeing is that the customer wants choice. So we want to give them just that – whether it's devices, bespoke billing solutions, support, applications – whatever they need, we can provide it. It's having this capability that, I believe, makes us the number one choice for our customers.



### What demands do you see from customers that point towards the need for 4G?

"Remote working" has been a strategic goal for many customers for some time. One of the most exciting things about 4G is that for the first time, working out of the office is a valid and genuine choice for customers. Any data or applications you can access in the office, you can use on the go. As I've already mentioned, customers want choice and that means regardless of whether they choose to work from the office, from home, or out and about, they have access to data and applications at their fingertips. And the upshot for business is greater productivity, greater efficiency and greater customer service. 4G with BT and EE really is a win-win.

#### Seamless connectivity – is this a reality in your opinion?

Yes, it is. We are now the best mobile network combined with the best fixed network and by continuing to invest in this powerful combination e.g. in 5G and Ultrafast, we aim to provide the best possible availability, reliability and quality of service. But seamless connectivity is just the start. The shift to true convergence is a reality – fixed and mobile working better together than ever before and that opens up huge opportunities for businesses today and in the future. It's exciting.

# If there was one silver bullet you could give to business, what would it be?

Don't plan for today. Plan for what's to come so you're ready to capitalise on every opportunity. The mobility market is moving faster than ever – those ready will thrive, while those dragging their heels will be left behind.

66

It's undoubted that together, BT and EE are more than the sum of our parts. And that can only be a good thing for our customers.

**Andy Summerfield** 

99

