

ICT News

The IT & Telecom Channel News for Marketing & Sales Managers
by compuBase

Editorial

Does the 80/20 rule really work in the ICT industry?

I remember meeting an IT manufacturer who wanted to optimise his distribution network. After explaining that his company was the third biggest player on the market, he told me that, in fact, when he examined his portfolio of partners closely, he realised that 20 % of his customers generated 80% of the company's turnover, which rapidly led him to conclude that if he concentrated marketing and support on the 20 %, his ROI from marketing would be much greater than if he tried to work with the other 80 %, who were absorbing 80% of the marketing budget but producing a very poor ROI.

Another time, I met a manufacturer from a different sector, whose company was one of the market challengers and who also wanted to optimise its distribution network. He explained to me that 80% of his resellers achieved just 20 % of the company's turnover, and he wondered whether knowing them better would allow him to significantly increase its revenue and therefore its ROI from marketing... Today, the first manufacturer is still third or fourth in the market, while the second has become no.1...

How can we put this experience into perspective?

1 The ICT sector is a highly mobile sector, and today's market leaders probably won't be in the same position tomorrow. While this is the case for vendors, it also applies to partners. The 80/20 rule is often invariable, but the 20% who achieve 80% of turnover are often highly variable. Compare the 20% in question from one year to the next and you will see that 20% of them have changed.

2 We know that technical departments need R&D, but sales and marketing need R&D just as badly. This R&D is tantamount to investing marketing resources into accounts that, on the face of things, are currently not the most profitable.

3 Investing in the Research and Development of new partners does not mean "taking shots in the dark". Let's not forget that the first word in R&D is Research. This requires a methodical and thorough approach. Launching into development (be it in terms of turnover or number of partners) without having invested in Research is often money poorly spent.

4 Effective research relies upon having facts and tools to hand. In the field of ICT partners, the facts are:

- a. Knowing your current partners
- b. Knowing the sales achieved by these partners
- c. Knowing your partners' business
- d. Knowing the total turnover these partners generate in your product segment
- e. Knowing which of your main competitors work with this partner
- f. Knowing who the main competitors are in this product segment.



These different points constitute an "investment" which will very quickly pay off thanks to the Development activity.



5 Development is the phase during which your investment will become profitable. The approach described above will allow you to correctly distribute resources among your different partners. Instead of handling your partners according to the turnover they help you generate (as it is the case in many accounts nowadays), you will handle them according to their "potential".

Potential can be defined in several ways

- Turnover to be preserved
- Turnover to be captured
- Weight of the product in the business
- Position in the region, etc...

To conclude, the quest for maximum ROI should be the absolute priority for all marketing departments, but very rarely is this maximum ROI achieved using simplistic solutions. Our world is suffocating under the weight of information, but because this information is so difficult to put into perspective, it is hard to exploit it in a way that is relevant. There is a tendency in business to choose optimisation over conquest at all cost. Manufacturers already have vast banks of underused information at their disposal internally, and their ability to put it into perspective with market data is now a crucial strategic requirement without which they will be unable to maintain or improve their position.

■ Jack Mandard
CompuBase CEO

SUMMARY:

Special report: *The time has come for SMB's*

Testimony: *Freedata*

Marketing tools: *Benchmark your Channel ...*

Mapping, Ranking & Scoring Services

Statistics: *Set course for the east!*

Page 2 to 4

Page 5

Page 6

Page 7

The time has come for SMB's

While managing key accounts involves pursuing around 1000 groups per country, launching into the world of SMB's increases the size of the target by a factor of a thousand while reducing profit margins. To succeed in this sector, indirect selling seems to be the best weapon.

For around 10 years now, the IT industry's major players have described the sector of SMB's and SMI's (small and medium-sized industries) as being their main target market and a major source of growth.

After countless attempts, ventures and a great deal of trial and error, certain suppliers appear to have succeeded in fine-tuning their strategy in order to conquer it. "Today, the most promising market is without contest that inhabited by medium-sized, small and even very small businesses" points out one organizer of a specialist IT trade show, of which this year's theme was, incidentally, SMB's. The problem resides in the infinite dilution of the target, combined with highly-scattered decision centers and reduced purchasing volumes. The only

solution is to concentrate on achieving high sales volumes (products or services), to make up for dwindling profit margins.

● A real wasp's nest

For many manufacturers and publishers, launching into the SMB market is something of a headache. Because while the key accounts market is fairly congested, with everyone wanting their share of the spoils, it is nevertheless quite simple to decipher. Small and medium-sized businesses are an altogether riskier proposition, however. With several million of these organizations (3.3 million in Germany, 2.4 million in France, 3.7 million in the UK, etc...), of which more than 10% appear or disappear each year, one is inevitably faced with a highly heterogeneous and fluctuating mass. The mechanisms set up to attract key accounts have little effect in this market: a direct sales force is ineffective because the target is too wide, closer relationships need to be developed and suppliers need to communicate differently so that a non-specialist target is able to understand them.

● Indirect sales as a spearhead

Faced with this complexity, resorting to a reseller network would appear to be the obvious route. The next step is to determine which resellers to use. "We have at least 50,000 establishments in our database," explains Jack Mandard, CEO of compuBase "before we choose a network we have to ask all the right questions ". Of course, it is important to know what one's objectives are and what means are available. A manufacturer of multifunction printers who

targets some 1,000 points of sale isn't going to seek out the same company profiles as a publisher of vertical software. But it isn't purely a question drawing up a list of criteria and searching through the database.

One also needs to examine and analyze the portfolio of suppliers cultivated by each of the target resellers. Because in the SMB market, very few resellers, other than the reseller chains, seek to develop an exhaustive catalog. While suppliers understandably wish to select the network they use, they must also remember that not all resellers are there to be captured or enticed, as some are already deeply committed to a rival brand. Once again, knowledge of this group of intermediaries, which is what a reseller network essentially is, shouldn't stop at the contents of one's address book. To succeed in the SMB market, one needs to "professionalize" one's own network. No longer is it enough to gather a few contacts here and there, via the company's salespeople. A specific database of resellers dedicated to SMB-SMI's must be built-up systematically to cover the entire country, because proximity is obviously a crucial factor, but it is important to ensure that this is not used alone, far from it. It is vital, in particular, not to focus too much on proximity to the detriment of skills and expertise. Combining a range of partner profiles (maintenance, training, consulting, ISV's, etc...) is a good way of enriching one's reseller network while avoiding spreading oneself over too wide a geographical area or going head-to-head with the competition too frequently, both of which create conflicts within the different channels.



● Regaining the initiative

In the days when the strategic importance of the SMB sector was not yet fully understood, certain suppliers "left" the market and its indirect sales channel to their wholesalers. But, as suppliers placed more intermediaries between themselves and the end customer, they lost the ability to understand the latter's real needs. Today, manufacturers and publishers want to take back the reins. And, because it is impossible for them to follow user SMB's closely, instead they concentrate their attention and efforts on the reseller networks. Thus, not a week goes by without a partnership program burgeoning somewhere. But if we took stock of the situation one year after the launch of these marketing tools, how many of them would have stood the test of time or have really been used? All too often, attention and budgetary investment have been focused on launching these programs, with no measures really being taken to ensure that these initiatives take root as the months go by. However, penetrating a market such as SMB's and gaining the confidence of a network of resellers or VAR's, cannot be done in a month. Recruiting and developing reseller loyalty is grueling work. Sometimes it is only through sheer perseverance that a supplier can overcome the reticence of certain resellers, who may take some prompting before considering a proposal they had previously left on the back burner.

Some suppliers also fall into the trap of simply readapting the way they talk to the big players, in other words "recycling" marketing and communication material for key accounts before sending it to SMB-SMI's. There is no need to reinvent every single tool, but it is important to take into account the heterogeneous nature of the target. How can you address an SMB that employs 10 people as you would a company that employs 400 people, and does it have anything in common with a large international group? Admittedly, there is some common ground between these small and medium-sized businesses. They are more sensitive to "usage benefits" than key accounts. Some of them launched headlong into considerable investments when the Internet first appeared. Three years later, they were left with CRM software whose publisher had vanished, a website they no longer knew how to manage and production management software that refused to speak to the accounting tool! Having got their fingers burnt after listening to spiel about the potential of such and such a product, they altered their reasoning. For example, while SMB's have been largely won over by the benefits of mobile phones that offer a real service, they haven't fallen for Wap. For all companies, IT has become an indispensable production tool. As a result, they place a lot of demands on their resellers, who now have to provide numerous services: technical support,

Not all SMB's are the same

The European Community has defined three official categories of SMB:

- **Medium-sized SMB's:**
250 employees and more than 50 million € in turnover.
- **Small SMB's:**
50 employees and more than 10 million € in turnover.
- **Very small SMB's:**
up to 10 employees and 2 million € in turnover.

Together, small and medium-sized businesses represent 18 billion euros of IT investment, 55% of which comes from very small SMB's (which, most notably, include independent professionals).

ensuring that hardware and software work properly and are up to date, training, etc... And if a problem occurs, it's to them that SMB's turn. These networks therefore expect more in the way of support than simply attending an annual road show. And, if they are to take to the roads each day to serve their customers, they need to be able to rely on teams that can understand and produce the marketing and communication tools that will help them do their job. ■

The SMB market and distribution channels

Marketing and sales divisions put a great deal of energy and money into supporting their SMB distribution channels, but the fundamental problem of determining the main target of level one and two partners, and consequently the return on their investment, is seldom resolved completely. CompuBase's 2004 report provides a breakdown of turnover by target customer according to the main activities of NICT organizations.

Total number of ICT organizations targeting SMB's and % of turnover generated from SMB's

European statistics June 2004	SMB as client target *	% /total	More than 20%	More than 40%	More than 75%
Software publisher	3,594	71.59%	8.64%	9.16%	10.28%
Publisher of software for a specific activity	3,917	72.90%	11.05%	11.68%	12.67%
Publisher of software for a specific process of companies	2,676	74.44%	6.78%	7.10%	8.05%
Software solutions integrator (developed by third parties)	1,994	71.37%	4.65%	4.72%	4.54%
IT services, Software development (hosting, maintenance, training, bespoke software development...)	18,939	70.02%	35.15%	36.32%	39.02%
Telecom & network infrastructure integrator	1,490	69.33%	2.99%	2.66%	2.07%
IT infrastructure integrator	1,229	66.43%	3.70%	3.48%	2.63%
Reselling to individuals	3,946	39.24%	0.9%	0.23%	0.08%
Reselling to enterprises (hardware, software & services & assemblers)	10,218	70.45%	20.98%	18.27%	14.83%
Total all activities reselling to SMB	66,752	70.90%	100.00%	100.00%	100.00%

* by nb of companies

Drawing an overall comparison between a manufacturer's SMB distribution network and the profiles of partners by type of activity opposite gives an initial indication of potential and of the best choice of partners. A detailed comparison, with the inclusion of additional factors such as geography and skills (technical or vertical), would provide a comprehensive analysis of a network's strengths and weaknesses when addressing the SMB market.

The SMB market and distribution channels

What is the best type of distribution for SMB's?

	Self-employed	Very small firms	SMB	Large firms	Administration	Nb of companies
Resale activity	32.31%	66.03%	80.97%	43.80%	27.98%	42,196
IT resellers	31.68%	65.08%	81.01%	41.52%	26.55%	35,694
Independent IT resellers	37.44%	70.16%	84.77%	37.33%	28.12%	16,860
IT resellers chains	36.09%	63.39%	48.91%	26.17%	17.82%	4,207
IT group resellers	54.75%	72.77%	66.16%	25.79%	33.08%	1,159
Exclusive brand dealers	44.71%	77.10%	89.59%	50.23%	30.14%	1,242
Assembler resellers	41.20%	75.24%	84.58%	36.41%	31.38%	6,802
Software only resellers	20.72%	60.06%	85.64%	55.86%	26.91%	2,086
On-request reselling	16.55%	47.58%	87.84%	52.78%	26.06%	6,962
Resale on web	36.81%	80.48%	80.33%	55.34%	36.93%	2,932
Other resellers	41.01%	74.21%	75.97%	44.31%	35.13%	9,605
Mass distribution	19.28%	34.23%	27.18%	8.83%	6.54%	3,174
Mail order and catalogues	37.49%	71.94%	83.24%	53.32%	39.12%	928
Other	34.73%	74.00%	91.99%	68.66%	38.38%	1,211
Total	29.82%	64.38%	79.90%	45.34%	26.54%	50,215

- How to read it: The 2 main types of resellers that work with SMB's are independent resellers (nearly 85% of them resell to SMB) and exclusive brand dealers (nearly 90% of them resell to SMB).

Top 15 market and technical skills of SMB resellers

Targeted Markets	Nb of Companies	%	Technical skills	Nb of Companies	%
Miscellaneous Services	12,362	51.71%	LAN Networks	10,955	53.17%
Miscellaneous Industry	6,404	26.79%	Internet – Intranet	8,590	41.69%
IT Industry	4,665	19.51%	Client – Server	7,294	35.40%
Government Bodies	4,520	18.91%	WAN Networks	6,523	31.66%
Distribution – retail	4,331	18.12%	Commercial Management / Sales - CRM - SFA	5,882	28.55%
Banking – Finance	2,762	11.55%	Accounting – Management	4,760	23.10%
Education / Training	2,577	10.78%	Software Engineering	3,792	18.41%
Telecom	2,413	10.09%	Network Security	3,299	16.01%
Medical – Health	2,359	9.87%	Multimedia	3,032	14.72%
Building - Architecture - Public W	2,319	9.70%	Help Desk	2,835	13.76%
All market types	2,094	8.76%	E-Commerce	2,535	12.30%
Miscellaneous Primary Sector	2,075	8.68%	CAPM - Production Management	2,012	9.77%
Local Authority	1,932	8.08%	Groupware	1,883	9.14%
Automobile	1,690	7.07%	CAD	1,645	7.98%
Insurance	1,610	6.73%	Personnel Management	1,628	7.90%

- The primary target markets of resellers who target SMB's are services, industry and the IT industry itself. The latter is understandable, as 50% of all IT spending occurs within this very market. One should also note the importance of government bodies and the public sector (Education, hospitals...) in general. Indeed, more than 18% of resellers who target SMB's also target government bodies.
- With regard to technical skills, network services are the most strongly represented (Local area networks, Internet, Client-Server...). Indeed, over 53 % of resellers who target SMB's declared that they possess skills in the field of local area networks.

News flash:

• New e-directory partners!

The e-directory is a directory of IT suppliers (on the theme of your choice: resellers who market your brand, mobility...), but it is also a search engine for product, application and service offers, a platform to enrich relationships with partners and a reference system. This service allows you to create a directory of partners who specialize in your sector. Create your directory simply by selecting the activities or skills the companies it contains must possess.

At the same time, compuBase is launching a platform that will reference specialist IT companies on the web

for the first time. Centralized referencing enables companies who update their data to increase their visibility in compuBase's partner databases.

This service is available throughout Europe (itindex.com, itrnews.com...). Our new partners are ITChannel.info in France, ChannelMinds for Europe, TCN in Spain and Top Trade in Italy!

• The compuBase database for Poland is available:

Not only is Poland by far the largest of the new EU member states, it is also undergoing drastic economic

changes. Having traditionally focused on the primary sector, its activities are evolving quickly. Poland has around the same number of inhabitants as Spain but its GNP per capita is four or five times lower. Around 2.1% of its GNP is devoted to IT investment, which is slightly less than Spain or France (3.63%). We estimate that some 4000 organizations work with the IT sector in Poland, and 1000 to 1500 of these are resellers who work primarily in this sector. The compuBase database currently covers almost 1900 partners.

For more information about developments in Eastern Europe, do not hesitate to contact us: info@compubase-europe.com.



Valeria Severini
FreeData - CEO

ITALY - ICT MARKETING SPECIALIST

FREEDATA: e-marketing & datamining

FreeData history and current market position

FreeData is a based in Milan company of integrated marketing services specialised in the Information Technology and Telecommunications sectors.

It was founded in 1993 to meet the operative and strategic needs of Business to Business marketing combining three fundamental skills: Database Management, Data Mining and Marketing Research. FreeData is able to offer a substantial support to companies which carry out direct marketing activities, due to its highly technological infrastructure and advanced statistical analysis methods.

The company is divided into three different integrated areas following a specific Project Management approach which allows us to coordinate our work and, most importantly, to reach our objectives and our main aim of satisfying the clients.

FreeData is subdivided into three main areas:

- Statistical area
- I.T. area
- Call Centre

Partnership & collaboration with compuBase

FreeData is the only Italian key partner of compuBase one of the most important world players offering services of commercial and Marketing Information which supports companies in the development and growth of their IT channel.

Today, the partnership with compuBase allows Free Data to respond with a greater flexibility and competence to the needs of Italian companies. Thanks to the back up of its research and consultancy services, many companies have been able to concentrate on and perfect a winning strategy in asserting their presence in the market. In addition they have been able to calibrate their own investments based on market needs.

Thanks to the collaboration with compuBase, FreeData is in a position to optimize the comprehensive advantages dedicated to the customers and makes a substantial contribution to project success. FreeData has implemented a commercial network to develop and to consolidate the

dedicated services from compuBase.



The Italian IT Channel

Particularly, FreeData is proposed to make acquaintance to the customers, the services associated to the database like the Data Cleaning, the Channel Services: Mapping / Ranking and Scoring solutions, the Channel Recruitment Program, etc.

FreeData clients:

Oracle*, Epson*, Siebel*, ITWay*, Cognos, Cisco, HP, IBM, Microsoft, Sybase, Colt...

* In collaboration with compuBase.

Repartition of ICT players in Italy by main activity	Total	%
Manufacturer	400	4,10%
Software publisher	448	4,59%
Publisher of software for a specific activity	279	2,86%
Publisher of software for a specific process of companies	273	2,80%
Software solutions integrator (developed by third parties)	212	2,17%
IT services, Software development (hosting, maintenance, training, bespoke software development....)	3136	32,13%
Telecom services (Telecom operator, ISP...)	405	4,15%
Telecom & network infrastructure integrator	182	1,86%
IT infrastructure integrator	328	3,36%
Consulting	280	2,87%
Reselling to individuals	808	8,28%
Reselling to enterprises (hardware, software & services & assemblers)	1942	19,90%
Wholesaler (resale of ICT products to resellers)	477	4,89%
Large Assembling company	48	0,49%
Other ICT connected activities	164	1,68%
Main activity non qualified	375	3,84%
Total	9759	100,00%



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Statistics for Europe

FOCUS ON...
↓
Eastern Europe!

Statistics drawn from the compuBase database, which covers 17 European countries and 100,000 IT firms – July 2004

	ICT expenses (2003)	IT* expenses in '000 € (2003)	IT expenses/ Total % (2002)	IT / GDP ratio (2002)	IT expenses per capita in € (2002)
Bulgaria	2.013	353	2.7 %	2.10 %	37
Czech Rep.	6.818	2.824	22.5 %	4.00 %	252
Estonia	857	253	2.1 %	3.80 %	162
Hungary	6.730	2.104	16.5 %	3.20 %	187
Latvia	1.046	248	2.0 %	2.6 %	97
Lithuania	1.224	282	2.3 %	1.80 %	71
Poland	16.241	4.596	35.4%	2.10 %	106
Romania	4.404	764	5.9 %	1.50 %	30
Slovakia	2.571	806	6.3 %	3.40 %	136
Slovenia	1.793	558	4.4 %	2.40 %	257
Central E tot.	43,697	12,788	100.00	2.69%	110
Western E tot.	592,016	293,773	100.0 %	3.33 %	755
"East/West" ratio	7.4 %	4.4 %			

* IT spending: Hardware only – Sources EITO 2003

ICT market assessment	in number of sites	compuBase coverage	
		Q1 2005	Q2 2005
Czech Republic	2.300	750	1.000
Estonia	240	100	150
Hungary	1.600	200	900
Latvia	240	100	150
Lithuania	240	100	180
Poland	4.480	2.000	2.800
Romania	1.510	200	800
Russia	10.600	-	1.500
Slovakia	770	200	400
Slovenia	510	100	250
ECE total	22.490	3.750	8.130

News flash:

• **Store customer information in compuBase Online!**

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Today, it is possible to create "private fields" linked to a company profile in your compuBase subscription. In other words, you will be able to enter values (Alpha, Numeric or Date) into a compuBase company sheet.

The primary purpose of this function will be to allow you to locate your own ID's in a sheet. These fields can also be exported, and when they are, you will see a column with your own personalized fields.

This is a function that many of our customers requested. It is combined with our Keyword option, and together they are known as "Keyword and Private ID".

Example of how the Private ID module can be used

- Making the Registration code visible in the private section of the compuBase sheet
- Finding out one's registration date
- Allowing data to be exported

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France	200
United Kingdom	200
Italy	200
Netherlands	200
Sweden	100
Poland	100
Russia	100
China	100
India	100
South Africa	100
Japan	100
USA	100
Canada	100
Latin America	100
Australia	100
New Zealand	100
Other	100
Total	2000

...on in Europe
...all about indirect distribution in

...sed specialists regarding ICT
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...the zone covered
...cts/country

Distributors categories extract:

- Accessories
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- Consumables
- Software
- Storage peripherals
- Printing peripherals
- Mobile products
- Telecom and network products
- Systems
- Digital Home products
- And 15 others categories...

...f business

...territory, etc.
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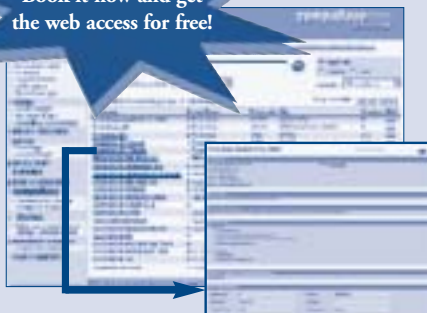
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■ Jack Mandard CompuBase CEO

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Upcoming trade

•Software, multimedia and telecommunication*

IIPSEC

Dedicated to innovation in security
January 25 - 27, 2005,
Coventry, Stoneleigh Park - UK

CRN STORAGE SOLUTION DAY

The storage branch vent
in Germany
February 2, 2005
München - Germany

3GSM WORLD CONGRESS

Stay in touch for tomorrow
February 14 - 17, 2005
Cannes, Palais des Festival - France

SITI 2005

IT Professionals meeting point
March 8 - 10, 2005
Madrid, Juan Carlos I Exhibition
Center - Spain

CEBIT

World Business Fair for Office
Automation, Information

Technology, Telecommunications
March 10 - 16, 2005
Hannover, Deutsche Messe -
Germany

INFOSECURITY.BE

Be secure, Be there
March, 23 - 24 2005
Brussels, Brussels kart - Belgium

•Marketing, sales and communication*

TECHNOLOGY FOR MARKETING

The UK's premier event for
marketing-related & CRM
technology solutions
February 8 - 9, 2005
London, London Olympia - UK

CHANNEL FOCUS UK

The UK's most important event
for IT Channel sales & marketing
executives
February 16 - 17, 2005
Brighton, De Vere Grand Hotel -
UK

IDMF

The UK's Biggest and Best Direct
Marketing Show
February 22 - 24, 2005
London, Earls Court - UK

FOCUS: 2ND ITALIAN CHANNEL DAY

Panorama of the IT Channel
in Italy
March 17, 2005
Milan, Marriott Hotel - Italy

10TH COMPUBASE DAY

One day for a full comprehension
of French ICT Channel
April 7, 2005
Paris, Hotel Sofitel
Porte de Sèvres - France

MD Expo

The French Direct marketing show
April 12 - 14, 2005
Paris, PariExpo
Porte de Versailles - France

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available when the newsletter went to
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