Gartner Market Guide for Telecom Expense Management Services

Including the MetTel Portal, Powered by Bruin

Summary

Of Gartner's hundreds of TEM-related client inquiries in the 12 months leading up to August 2020, it is clear that the main benefits sought from TEM providers are improved business process outcomes, better visibility and control of assets, ensuring asset performance, and naturally reduced cost for the communication services under management. Organizations aim to have clarity around SD-WAN deployments are now very common, leading to increased monitoring and management requirements for enterprises, adding to an ever-more complex environment to manage.

About Bruin

Bruin offers midsize and large, complex North America-based enterprises and government agencies fully managed services for financial control; and operations for telecom services, including service optimization (wireline, wireless, IoT and IaaS) over the Bruin platform, also branded as "MetTel Portal." Headquartered in New York City, Bruin now has sales presence globally. There are more than 1,500 customers on the Bruin platform, of which 100 are MNCs. Bruin has over 75 employees.

Bruins' capabilities include account management, invoice auditing, contract management, true inventory, vendor gateway (for enabling customers to access all their vendors at once, place orders for new services or make changes to existing ones using customizable workflows and lines of approvals) and business intelligence reporting.

Recent enhancements include a homegrown RPA engine; Bruin's Honey AI and Parser to further enhance automation on invoice data gathering and processing; and Intelligent Actions for cloud implementations. Bruin uses "Genie Boards" to allow customers to post the most critical data onto their Bruin dashboard, and Bruin will then customize any report to feed their systems. The Bruin technology and expense management platform can also deploy mobility management and utility expense management modules.

Key Findings

Through the COVID-19 outbreak, and as organizations try to recover from the 2020 economic disruption caused by the global pandemic, enterprises are looking to cut hard costs, reducing like-for-like spend. Going forward, this will also add focus on softer cost savings for process improvements and keeping inventories up-to-date.

Gartner client interactions show that end-user enterprises are looking for TEM providers to take control of more of the communications-related expenses, such as for mobile, wireline and cloud services. Alternatively, they want TEM providers to take on an increasing role in also offering life cycle management services for end user devices.

Advanced data analytics and intelligence from TEM systems are being used to make top-down and bottom-up decisions by context (for example, role, sites, location, business units) for spending, inventory and usage in easy, single-view and multidimensional formats. Deeper analytical capabilities, including cost predictability and improved user experience, are expected from platforms to generate more detailed analytics. The data is used for tactical and strategic business decisions for communications and associated IT investments, budgets, inventory, future service provider contract negotiations, and to enhance processes within different contexts.

Bruin North America

- $1.5 billion 8.9 million devices
- Midsize to large North Americ enterprises, government age and U.S.-based MNCs, expanding internationally
- Annual spend from $250,000 to hundreds of millions
- 300+ devices per month

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TEM providers have pursued further investments in platform automation to strengthen their platforms' performance in complex environments in the form of robotic process automation (RPA). Enhancements continue for automated invoices, workflow links, vendor integration, inventory count and data processing in cases where standardized APIs or other methods aren't available and manual efforts are too slow and can't be scaled. More cognitive artificial intelligence (AI) abilities are added as AI and advanced data requirements evolve.
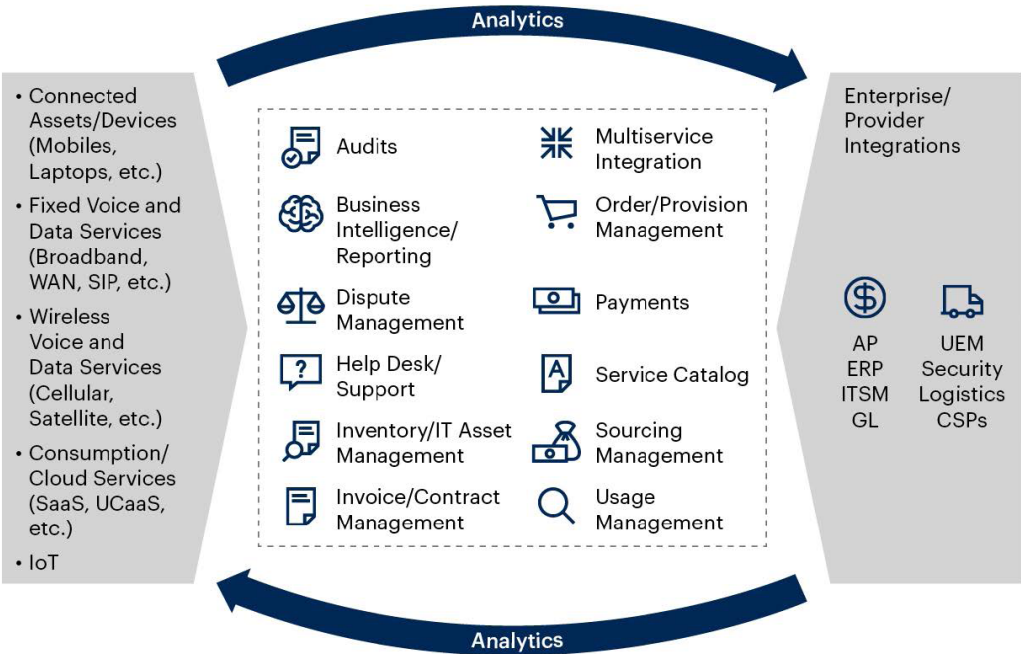
Clients expect preintegrated capabilities with leading IT service management (ITSM), general ledger (GL), accounts payable (AP), ERP and unified endpoint management (UEM) systems, and the use of APIs is expected. This will enable seamless workflows and data flow, internal chargeback allocations, and inventory classification by user, person, estate or even individual.

MARKET DIRECTION

Enterprise communications and IT services continues to grow, driven by more video usage, cloudbased services, and the use of IoT services as these and other services fulfill an increasingly enabling role for enterprises on their journey toward digitization. Enterprises use TEM services to optimize and manage the cost for communications services.

Additionally, some enterprises are also looking to TEM providers to manage a broader set of communications-related IT and cloud-based services. Also, some enterprises are also increasingly looking to TEM providers to provide full life cycle management, particularly of mobile assets (see Figure 2). The power of data analytics for more effective cost control, cost management and cost avoidance will continue to increase in importance, along with the quality of the service delivery.

FIGURE 2

Telecom Expense Management Evolution

Beyond Traditional Fixed and Mobile TEM

• Connected Assets/Devices (Mobiles, Laptops, etc.)
• Fixed Voice and Data Services (Broadband, WAN, SIP, etc.)
• Wireless Voice and Data Services (Cellular, Satellite, etc.)
• Consumption/ Cloud Services (SaaS, UCaaS, etc.)
• IoT

Analytics

Audits
Business Intelligence/ Reporting
Dispute Management
Help Desk/ Support
Inventory/IT Asset Management
Invoice/Contract Management

Multiservice Integration
Order/Provision Management
Payments
Service Catalog
Sourcing Management
Usage Management

Enterprise/ Provider Integrations

AP
ERP
ITSM
GL

UEM
Security
Logistics
CSPs

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