FROST & SULLIVAN

CLOUD CONTACT CENTRE

A Disruptive Force in the Contact Centre Industry

A White Paper by Frost & Sullivan

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ABOUT THIS WHITE PAPER

The cloud contact centre market witnessed a growth rate of 99.1 percent in 2014. As more and more organisations start to adopt the cloud model for delivery of their customer contact services, the cloud contact centre market will experience a CAGR of 35.4 percent between 2014 and 2021. However, the market awareness of the benefits cloud contact centres is still very low in Australia. Consequently, cloud contact centre solutions providers are spending the majority of their resources in educating customers about the flexibility, capability and cost advantages of cloud based solutions.

Whilst the benefits of the cloud model are becoming more apparent, many organisations still remain cautious about embracing a pure cloud model for their customer contact operations. For example, organisations from highly regulated industries, such as Financial Services, are often reluctant to adopt a cloud model due to concerns over privacy and security. In other sectors, concerns over reliability as well as legacy investments in infrastructure have hampered the widespread adoption of cloud contact centres. However, in years to come these concerns are likely to ease, and the benefits of cloud contact centres – such as agility, cost savings and flexibility - will continue to stimulate the use of the cloud model for delivery of customer contact services.

In this White Paper, we examine how the use of cloud contact centres is developing in Australia, and some of the benefits and advantages that organisations are experiencing from adopting the cloud for delivery of customer contact solutions. Case studies of organisations that are successfully using cloud contact centres are included. We also provide a list of key criteria that need to be assessed before considering the right cloud contact centre solutions provider.

THE DIGITALISATION OF AUSTRALIAN BUSINESSES

Australia has about 2.1 million small-and-medium businesses (SMBs), and roughly 300,000 SMBs are started every year.[1] The vast majority of Australian businesses now use the Internet, with almost 95% of businesses having Internet access.[2] This growing digitalisation of businesses is driving adoption of services delivered over the cloud. Overall, almost 70% of Australian businesses are now using cloud services, including paid services (such as software as a service) or free services (such as cloud based e-mail or storage solutions).

Of these, about 20% of businesses are now using paid cloud services.[3] Although usage of paid cloud services is somewhat lower in SMBs than in larger businesses (about 20% of small businesses are using paid cloud services compared to almost 40% for large businesses), SMBs have bridged the gap in cloud usage significantly, which is an indication of a maturing cloud market. Compared to other regions, Australia's adoption of cloud computing is very high. For example, amongst all the countries that Amazon Web Services (AWS) operates in, Australia is ranked as being in the top three for cloud adoption maturity and growth. A higher number of companies are moving to adopt a full range of cloud solutions, by migrating all their legacy applications to the cloud, relative to many other countries.[4]

The traditional contact centre is also moving towards the use of hosted and cloud-based solutions. Many vendors of traditional on-premise contact centre software and their channel partners are adapting to the changing market conditions to address this opportunity.

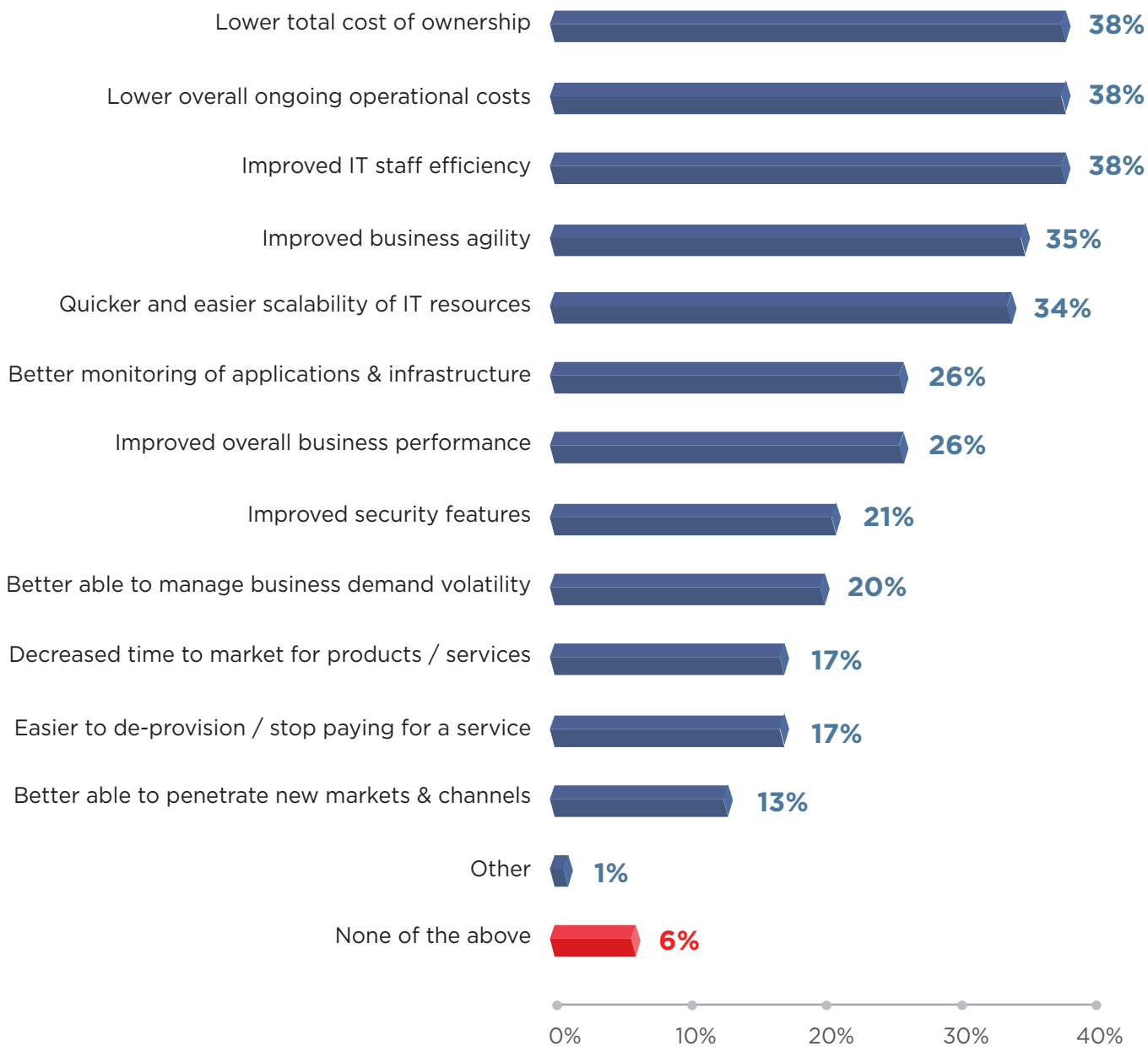
[1] Depart of Communications, Australia
[2] Frost & Sullivan State of Cloud Computing Report,2014
[3] ABS, Business use of Information Technology, 2013-14
[4] Frost & Sullivan State of Cloud Computing Report,2014

TAKE UP OF CLOUD COMPUTING IN AUSTRALIA

The adoption of cloud computing services amongst Australian businesses is now widespread. As mentioned above, almost 70% of all organisations in Australia use some form of cloud computing services (including free services) and the use of cloud services is expected to continue to grow. Use of cloud services is being driven by a number of key advantages that the cloud model offers, including lowering total cost of ownership, the flexibility to scale up or down services, better monitoring and increased agility.

The main reasons for adopting the cloud for delivery of IT services by Australian organisations are summarised in Figure 1.

Figure 1: Main Reasons for Adoption of Cloud Services

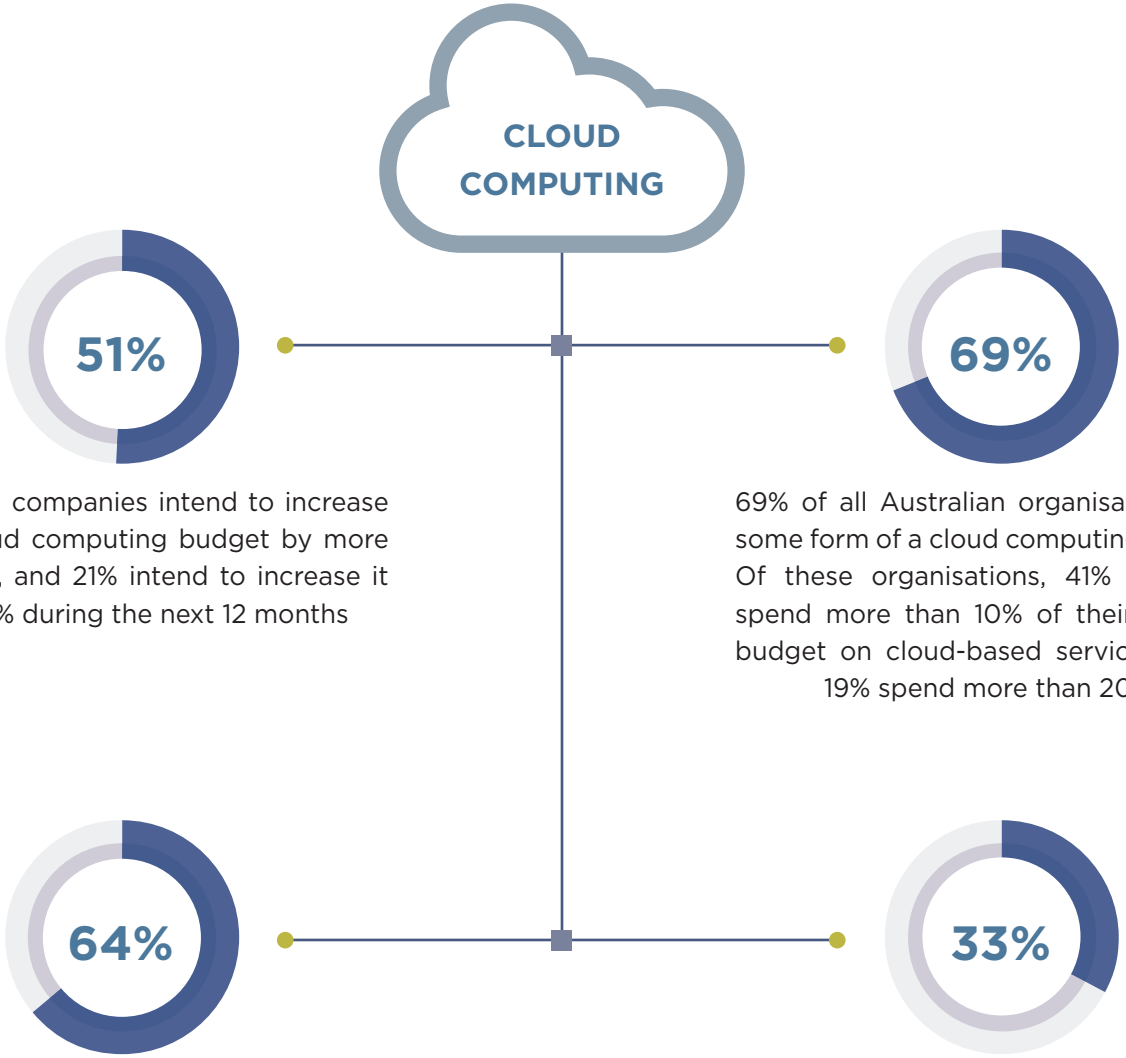


Source: Frost & Sullivan, State of Cloud Computing in Australia, 2014

[5] Ibid

Some of the key trends in the use of cloud computing in Australia are illustrated in Figure 2.

Figure 2: Trends in the Australian Cloud Computing Market



51% of all companies intend to increase their cloud computing budget by more than 10%, and 21% intend to increase it by 20% during the next 12 months

69% of all Australian organisations use some form of a cloud computing service. Of these organisations, 41% currently spend more than 10% of their total IT budget on cloud-based services, while 19% spend more than 20%

Just under two-thirds (64%) of organisations in Australia that are currently using cloud-based services plan to increase their cloud expenditure over the next 12 months. 70% of larger organisations plan to increase their cloud-based solutions budget, compared to 58% for SMEs

Organisations are satisfied with the cloud computing system they currently have (33%) or due to budget constraints within their organisation (32%). Some organisations also indicate that their cloud computing capacity is currently adequate to meet their current requirements (23%)

Source: Frost & Sullivan, State of Cloud Computing in Australia, 2014

KEY BUSINESS CHALLENGES ADDRESSED BY CLOUD

Across most organisations, CIOs or IT managers are generally being asked to do more with less. In other words, organisations are looking to manage IT budgets while maintaining or improving performance. IT departments also need to address evolving employee needs and demands in order to maximise performance. While addressing these challenges, organisations also need to remain secure and compliant. To ensure the safety of sensitive employee and customer information organisations must meet increasingly stringent cybersecurity standards. Failure to abide to these requirements can lead to data breaches, which can in turn result in fines and damage to a company's reputation.

The advent of cloud computing offers a way for IT managers to respond to these trends. Cloud technology offers the pay-per-use model, which eliminates the risk of over or under investment, allowing organisations to pay for the quantity of services utilised. Services delivered over the cloud can also be superior to those delivered from legacy on-premise systems with regards to mobility, capacity and flexibility. Finally, cloud services help meet compliance regulations and can offer improved security. This may seem counterintuitive, as security concerns are the biggest barrier to broader cloud adoption. However, as long as the technology is utilised effectively, cloud has the potential to improve the overall cybersecurity of an organisation. To ensure the safety of cloud based environment and networks, cloud service providers deploy an entire team of professionals dedicated to such tasks. Most SMB's do not have the luxury to insource these professionals.

HOSTED IS CLOUD: THE COMMON MISCONCEPTION

Contact centres are delivered in three main ways: the traditional model is "on-premise", (that is an organisation owns and operates its own facilities), however, hosted contact centres and cloud contact centres are becoming more common. A hosted contact centre is a network-based contact centre service, where the service provider hosts the contact centre infrastructure and leases out functionalities, applications and features to end-users. The end-user typically pays a usage based fee for the service. The infrastructure is owned by the service provider and hosted in the service provider's premises, while the agents belong to the customer and are located at the customer's premises or other remote locations.

Cloud based contact centres refer to the supply of contact centre functionalities such as voice and applications through an "as a service" model. The solution is delivered over the internet from a multi-tenanted infrastructure owned by a service provider. Recently, the use of cloud contact centres has grown significantly due to advantages such as multi-tenancy, reliability, scalability and cost savings.

Although hosted solutions are sometimes marketed as "cloud" they are not true cloud solutions. Cloud and hosted contact centre solutions have significant differences. There are also significant cost differences between the two models. Multi-tenancy is the key differentiating factor between these two alternatives. All customers engaged with a true cloud solutions provider are able to access the same solution from the same cloud. This model leverages the advantage of using shared resources to deliver economies of scale. Since the resources are shared by multiple tenants, cloud vendors are able to allocate excess capacity across all their clients to support spikes in demand. This means that users are able to scale up and down, depending on their needs. Customers also have instant access to the latest upgrades. Additionally, in the case of a cloud based solution, the vendor is responsible for managing and maintaining the equipment and applications. Cloud vendors not only offer a customisation platform to allow customers to customise their applications, but also ensure the continuous functionality of those applications when new products are rolled out by the vendor.

Table 1 below compares the features of both the hosted and cloud contact centre models based on price, accessibility, upgrades, time to deploy solutions, integration, type of server and scalability.

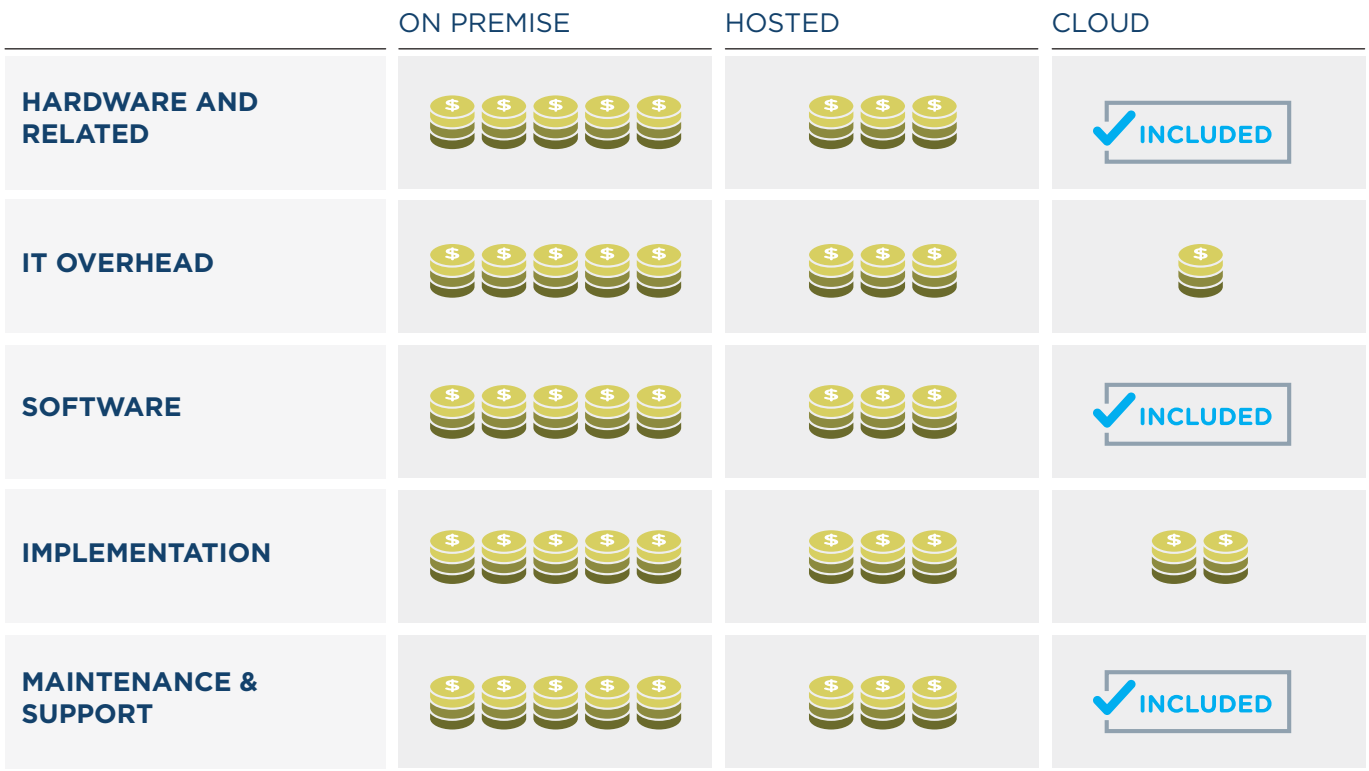
Table 1: Comparison of Hosted and Cloud Contact Centre Models

FEATURES	HOSTED	CLOUD
PRICE	Contract or subscription based	Usage based
ACCESSIBILITY	Local hardware and client application login	Any mobile device, internet based delivery with browser login
UPGRADES	Manual and requires assistance	Automatic
DEPLOYMENT	About 6 weeks	Typically 3-4 weeks
INTEGRATION	Tends to be more flexible	Can be limited due to standards and protocols
SERVER TYPE	Dedicated	Multi-tenanted
SCALABILITY	Requires assistance from the service provider	Can be done manually without intervention from the IT department

Source: Frost & Sullivan, Australian Contact Centre Report, 2015

Figure 3 depicts the costs associated with using an on-premise, hosted and cloud contact centre model. The average price per agent per month in a cloud contact centre market is low when compared to a hosted contact centre. In a cloud contact centre, costs associated with maintenance, software licenses, hardware and IT personnel can be avoided, making the cloud contact centre model attractive financially for businesses of all sizes.

Figure 3: Cost Comparison of On-Premise, Hosted and Cloud Contact Centre Models



Source: Frost & Sullivan, Australian Contact Centre Report, 2015

MAIN TRENDS IN THE CLOUD CONTACT CENTRE MARKET

As well as the overall benefits that the cloud offers, cloud contact centres are a response to a number of trends that are stimulating interest in the cloud option.

1. HIGH SPEED CONNECTIVITY CRITICAL TO CLOUD CONTACT CENTRE ADOPTION

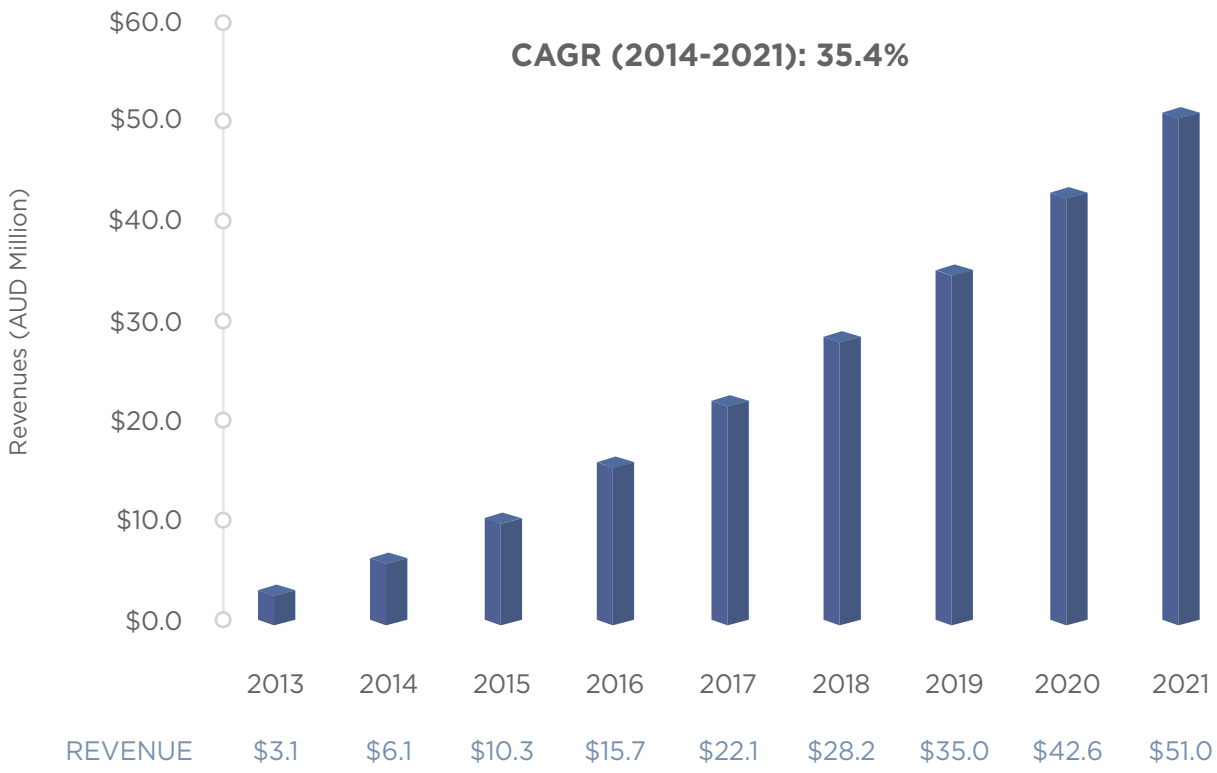
A recent study by Frost and Sullivan indicated that lack of internet bandwidth was rated as the top concern of adopting a cloud model by over a third of the Australian businesses. Similarly, the global competitiveness report by the world economic forum ranked Australia 37th out of 144 economies for the internet bandwidth. These factors strongly indicate that low speed internet connectivity is continuing to impede the mainstream adoption of cloud contact centre solutions in Australia. High speed internet connectivity is integral to cloud contact centre adoption and the introduction of NBN is expected to change this scenario. Moreover, the first of the two national broadband network satellites was launched late last year to help serve 200,000 residents in remote regions. Modern day Australian businesses are increasingly promoting remote working to lower costs incurred and to increase employee satisfaction and

productivity. Since over half of the employed Australians now work away from the office (Over two thirds of whom spend more than one day per week out of the office), the NBN initiative will benefit remote agents by allowing them to attend to customer queries without having concerns of latency and voice quality.

2. GROWTH OF CLOUD CONTACT CENTRE SOLUTIONS

The contact centre market in Australia is undergoing a transformation as the traditional on-premise contact centres are displaced by cloud contact centre models, particularly in the SMB segment. Many vendors of contact centre software focused on the on-premise segment have been witnessing declining revenues in the last two years. This is largely a result of the migration towards cloud contact centres. As indicated in Figure 4, expenditure on cloud contact centre services in Australia is anticipated to grow at over 35% a year.

Figure 4: Cloud Contact Centre Market, 2013 to 2021



Source: Frost & Sullivan, Australian Contact Centre Report, 2015

Demand for cloud contact centre solutions is expected to increase as more organisations look to move to a pay as you go model. The uptake of cloud contact centre solutions so far has been largely driven by the SMB segment. Costs associated with consulting, implementation, maintenance and service are quite high for the on-premise model for many SMBs. Services such as consulting & implementation are being offered in the cloud segment for a nominal upfront fee, and the cloud contact centre model requires no maintenance. This makes cloud contact centres particularly attractive to SMBs.

3. WEBRTC TO REDEFINE THE CONTACT CENTRE ENVIRONMENT

WebRTC (Web Real-Time Communication) offers seamless omni-channel touchpoints to customers without losing the context of the interaction, and is changing the way customers communicate with an organisation. WebRTC enables browser to browser communication, where audio and video are streamed between browsers. Hence, any browser enabled device (laptop, mobile phones, and tablets) could potentially be used for communication. Organisations find this feature attractive as browser to browser communication does not require dedicated software. A zero cost of installation or subscription is another factor in favour of WebRTC. Through WebRTC, a cloud contact centre solution can enable pure browser to browser based audio and video communication between the agent and the customer. This feature will favour uptake of cloud contact centre solutions in the future.

WebRTC is supported and promoted by Google, which allows audio and video conferencing applications to run on browsers via JavaScript APIs without needing special add-ons or plugins. Contact centre managers can launch one-to-many video conference sessions and route them to another agent without interrupting the broadcast. Customers and agents are moving towards mobility, and to support seamless interaction between the two, WebRTC needs to evolve in the contact centre space. Amazon and American Express are supporting video in their applications in tablets, and both these services use WebRTC.

BENEFITS OF A CLOUD CONTACT CENTRE

Cloud contact centres can offer significant financial benefits, such as a usage based pricing model and lower costs, but many organisations are also looking beyond these, and are looking to cloud contact centres to bring greater agility to their business. An increasing number of organisations are deploying cloud based solutions in response to customer demands and market conditions, and are recognising that the cloud model involves more than just a shift in the IT delivery model. The high growth of mobile devices, flexible work practices and the growing demand for web and mobile applications are driving the uptake of the cloud model in Australia. Cloud contact centres offer flexibility, scalability and mobility. Figure 5 below outlines the benefits of cloud contact centres that are driving their uptake in Australia.

Figure 5: Benefits of Cloud Contact Centres

Source: Frost & Sullivan, Australian Contact Centre Report, 2015

Some of these main benefits of using a cloud contact centre are described in more detail below.

ENSURING BUSINESS CONTINUITY THROUGH DISASTER RECOVERY

The potential impact of natural disasters, illustrated by examples such as the Queensland floods in 2010 and 2011, has driven many organisations to invest in business continuity and disaster recovery (DR) technologies. The on-premise contact centre model is not equipped to handle major disruptions, as it offers limited resiliency at a rather high cost. Mirroring of critical applications to another site could act as a disaster recovery option for an on-premise contact centre. However, mirroring is resource and capital intensive as it involves duplicating both the hardware and the software.

The cloud model offers organisations the ability to restructure their contact centre model, and is an ideal solution for disaster recovery and business continuity. DR is offered as a standard solution at no extra cost in the cloud model. If the physical location of the contact centre is inaccessible in the case of a disaster, the continuity of the contact centre remains unaffected. Contact centre agents are able to log in through a remote internet enabled location to access the applications.

LOW UPFRONT FEE

For a low upfront fee which usually ranges between $15,000 and $20,000, organisations can now deploy cloud contact centre solutions. The cloud contact centre model requires no infrastructure, hardware and software investments unlike the hosted and the on-premise contact centre model. This model helps organisations trial cloud contact centre applications quickly and with little risk. If the trial is not successful organisations are able to decommission the service with no additional ongoing cost. If the trial is successful organisations are able to scale the cloud solution rapidly into other business teams.

PAY-AS-YOU-GO MODEL

There are significant differences in the payment models between hosted and cloud solutions, and clients utilising the cloud model often benefit from cost savings due to multi tenancy. Cloud contact centres offer what can be described as a “pay-by-the-sip” model, in which the customer is solely charged on a consumption basis. Hosted contact centres, however, have a “pay-by-the-glass” model, which involves a certain degree of capital expenditure (both hardware and software costs) by the client.

FLEXIBILITY IN ADDING AGENTS

Organisations are finding it increasingly challenging to manage call volumes due to the increasingly unpredictable nature of customer contact, which often results in underestimating or overestimating the number of seats or licenses required for the contact centre. For instance, contact centres in the food and beverage industry hire contact centre agents depending on the seasonal demands. A peak season (such as Christmas and New Year) could see contact centres doubling their agent requirements to cater to the increased customer demand. Underestimating resources required can increase workload, which could result in a significant increase in customer wait times, whilst over-estimating resources can result in unnecessary costs. A cloud contact centre solution enables a contact centre supervisor to add, remove or reallocate agents through the self-service web portal within minutes. This model also saves costs traditionally associated with professional services. The self-service web portal also allows supervisors to manage other system elements e.g. update/change the IVR, amend scripts, change dialler settings; without seeking professional help.

ZERO MAINTENANCE AND UPGRADES COSTS

Cloud contact centres offer significantly lower maintenance and upgrade costs than their hosted and on-premise counterparts. The on-premise and hosted contact centres are capital and resource intensive, with high maintenance and upgrade costs. With a cloud contact centre solution, the service provider is responsible for all the maintenance and upgrades. This means that customers benefit from the latest upgrades without any extra cost. Cloud service providers also offer backup of the data at no extra cost.

RAPID DEPLOYMENT

Deployment of on-premise contact centre solutions requires a complete IT infrastructure installation such as hardware, software, telephony etc. The process of installation is both capital intensive and time consuming. However, cloud contact centre solutions are deployed in a shorter time frame, typically only three to four weeks. Adding extra agents can happen instantaneously, eliminating unnecessary wait times.

KEY CRITERIA IN SELECTING A CLOUD CONTACT CENTRE PROVIDER

The choice of a cloud contact centre provider can be complex. In this increasingly complex environment, Frost & Sullivan has ten key criteria that should be considered in the choice of a cloud contact centre provider.

Figure 5: Ten Key Criteria in Selecting a Cloud Contact Centre Provider

Source: Frost & Sullivan, State of Cloud Computing in Australia, 2014

SPEED OF DEPLOYMENT

The timescales for a fully-fledged cloud contact centre deployment are likely to be around four to six weeks. Although majority of the cloud contact centre vendors deploy solutions within this time frame, some vendors take longer than 6 weeks. Businesses looking for quick deployment of a contact centre should choose a provider that guarantees to deploy solutions within six weeks.

UPGRADES AND NEW FEATURES

As requirements of the customer develop, a resilient cloud contact solution should roll out upgrades and new features without impacting the business operations and at no extra cost. Also, these upgrades and new features must be added to the existing system automatically without IT intervention. Agents should have access to the new features and upgrades by simply logging out and logging back in to the system.

ONGOING COSTS/ TCO

One of the key benefits of the cloud contact centre solution is the flexible licensing model. Customers should look for a provider that offers a concurrent licensing model so they pay only for the number of agents logged into the system, instead of paying for all the registered agents. Customers also need to ensure there are no hidden costs related to implementation, upgrades, training and maintenance.

SCALABILITY

The cloud contact centre provider should offer flexibility to manage peaks and troughs due to seasonal variations. For instance, instead of paying upfront for the licenses for the next 12 months, customers should have the flexibility to scale up and down. This will ensure maximum returns at a low cost.

INTEGRATION AND OPEN APIs

A cloud contact centre solutions provider must offer a solution that can easily integrate with existing applications that might be running on either an on-premise or a hosted platform, ensuring a simple and quick implementation. Moreover, to enable advanced software integrations with other applications (For example Salesforce) and services, the contact centre vendor must offer an open API (application programming interface).

MULTI-TENANT ARCHITECTURE

To leverage the real benefits of the cloud model, the contact centre solutions provider must offer a true multi-tenant architecture wherein the applications are shared by the tenants on the cloud.

SECURITY

Customers need to ensure that the contact centre platform is secure. For this, customers need to choose a reputable solutions provider with a proven track record. Although cloud security is often considered as a barrier to cloud, a reputable cloud contact centre solutions provider will offer high levels of security. This is commercially viable for most SMB's as opposed to insourcing security professionals. Intrusion detection, real-time threat management, automatic failover and resilience are some of the features a cloud contact centre solutions provider must offer.

DISASTER RECOVERY

Disaster recovery is considered a key benefit of cloud contact centre solutions. In case of an emergency or a crisis, agents should be able to log into the system from any location. To ensure 100% uptime of the service, the solutions provider must host the contact centre solutions from multiple geo-resilient data centres.

SYSTEM AVAILABILITY AND UPTIME

Customers should be given full transparency so that they are aware of the availability and system uptime of the solutions provider. Although most solutions providers claim 99.99 percent reliability and uptime, it is essential to check for a proven track record.

RETURN ON INVESTMENT

Although all three contact centre models (on-premise, hosted, cloud) deliver the same functionalities, the financial impact of purchasing a cloud contact centre solution is substantially different from buying an on-premise or a hosted contact centre solution. Hence, customers must engage in ROI related discussions with the cloud contact centre solutions provider to understand the real tangible return on their investments.

CASE STUDIES

A number of organisations have successfully adopted cloud solutions for their contact centres. Two examples from the Australian market are given below:

CASE STUDY 1:

LAITHWAITES WINE PEOPLE

Laithwaites Wine People, headquartered in the UK, is one of the biggest wine merchants in the world, catering to over 1 million customers globally. In Australia there are over 65,000 customers. Laithwaites Wine People set up their business in Australia in 2006, delivering wines to both homes and offices in Australia.

Laithwaites Wine People's inbound contact centre was previously outsourced to a third party provider. As the demand for its products grew, Laithwaites Wine People decided to add outbound systems to its contact centre to understand the shortfalls of their business. They did this through a proactive customer outreach program to get the customers feedback on the products and the delivery. However, the outsourcing partner failed to meet the business expectations of Laithwaites Wine People. The company then decided to deploy a low cost 50 seat cloud contact centre with minimal lead time that offered the option of scaling up and down to handle seasonal spikes in demand. After weighing different options, Laithwaites Wine People decided to adopt ipSCAPE's cloud solution for its contact centre.

ipSCAPE's hosting and support services enabled Laithwaites Wine People to address their critical requirements and increase its customer base rapidly. ipSCAPE deployed the solution in less than four weeks. During the off-peak season, Laithwaites Wine People contact centre engages 12 outbound agents and 8-10 inbound agents, with the number doubling during the peak season. The cloud solution enables the supervisor to add and remove agents and also change the IVR script through a web self-service portal without help from the IT team. Additionally, significant savings were accrued as a result of the pay-as-you-go model with minimal set up costs.

ipSCAPE were able to cater to Laithwaites Wine People requirements through an affordable and scalable cloud based contact centre solution.

"We pride ourselves on great customer service and ipSCAPE allows us to develop close relationships with our customers without breaking the bank. We're a very seasonal business, with demand spiking around holiday periods. ipSCAPE's flexibility allows us to grow our contact centre quickly and easily to meeting changing consumer demands"

JONATHAN MATTHEWS - CUSTOMER SERVICE MANAGER.

CASE STUDY 2:

AUSTRALIAN CATHOLIC UNIVERSITY

The Australian Catholic University (ACU) is a publicly funded university which hosts more than 30,000 students. With seven campuses across the country, and one expected to open in Rome in September 2015, ACU offers programs in four faculties namely education and arts, health sciences, law and business and theology and Philosophy. According to the Australian Government Department of Education and Training, ACU was named the fastest growing university in Australia in 2014.

Previously, ACU did not have a dedicated contact centre to answer queries from both existing and prospective students and for payment related outbound calls. As a result, ACU was unable to determine call volumes, which resulted in high call drop-out percentages. This made it difficult to allocate resources (agent) effectively. ACU was looking to engage with students across multiple channels such as text, voice, instant messaging and email. However, the lack of a dedicated contact centre to manage multiple channels of interactions restricted them in doing so.

ACU has a strong cloud vision, with the implementation of ServiceNow as the enterprise service management ticketing tool being the driving factor for choosing to deploy a cloud contact centre solution. To mitigate challenges faced due to limited functionality offered by the on-premise contact centre model, ACU decided to partner with RXP's enterprise service management division for advisory and implementation of the cloud contact centre solution. After careful scouting and consideration, RXP a technology consulting and professional services firm, decided to deploy ipSCAPE's cloud contact centre solution at ACU.

ipSCAPE's cloud contact centre solution helped address ACU's critical requirements. Almost immediately, ACU was able to track the volume of incoming calls, which enabled them to allocate agents more effectively. ACU added the call back feature as an option for those unwilling to wait for long periods of time to speak with the contact centre agent. This strategy helped them to reduce the call drop-out percentage.

During the off-peak season, ACU engages 25-30 agents. However, the number doubles during the peak enrolment season. During the peak season, ACU also employs students as contact centre agents on a part-time basis, and these students were able to use their mobile devices to log into the system to gain the functionalities even from a remote location. Additionally, significant savings were accrued as a result of the pay-as-you-go model.

ipSCAPE were able to cater to ACU's requirements through a scalable, mobility based cloud based contact centre solution

"The pay-as-you-go model was incredibly attractive to us. We now have a powerful and scalable contact centre that is also incredibly cost efficient"

ANGELA FORRESTER, ASKACU PROJECT MANAGER.

FROST & SULLIVAN'S LAST WORD

The contact centre market in Australia is undergoing significant transformation. The on-premise contact centre model is being displaced by both the hosted and the cloud contact centre models. The cloud contact centre market is still at its nascent stage of growth in Australia, with growth driven primarily by uptake in the SMB segment. Concerns regarding security are still discouraging many larger organisations from adopting a cloud contact centre solution.

Cloud contact centre vendors are increasingly looking to partner with data centre services providers to offer local hosting capabilities. Costs associated with consulting, implementation and maintenance have traditionally prevented many SMBs from establishing their own contact centres. However, the cloud model is an attractive option for these companies as the costs associated with ongoing maintenance, implementation and consulting are extremely low.

As cloud computing matures and becomes more established, organisations are starting to understand the benefits it offers. These are not just purely on lower costs but include scalability, agility and flexibility.

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