



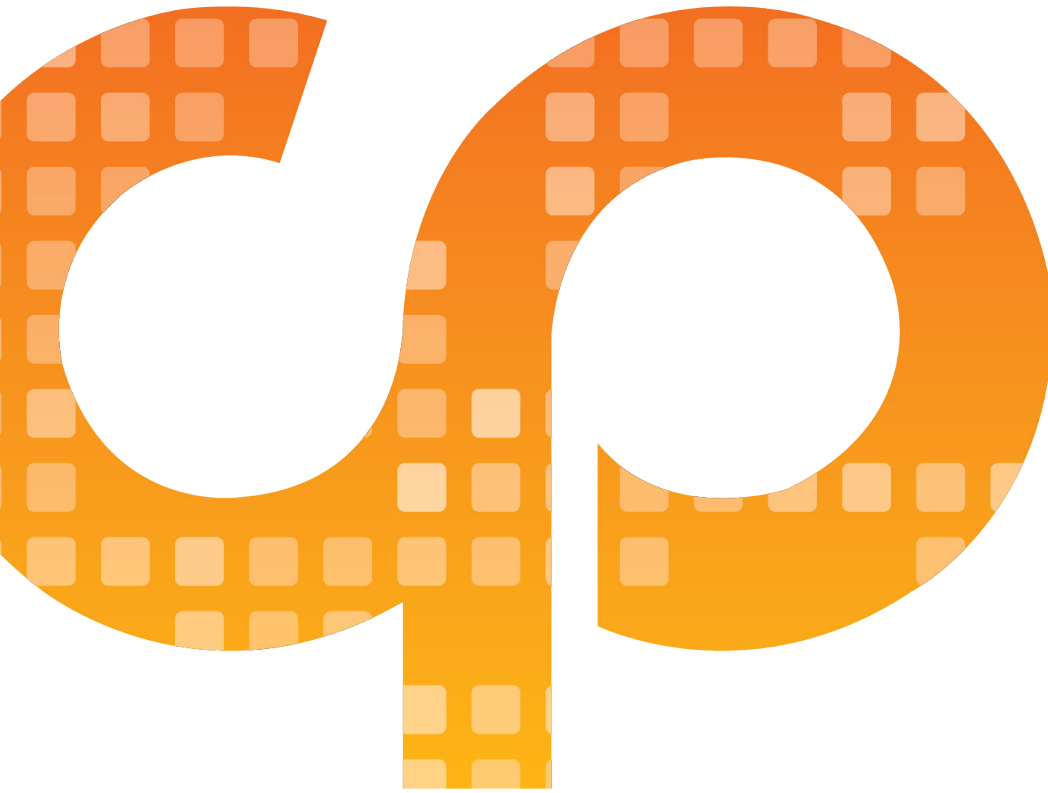
# Cablecos & The Channel: State of the Cable Market 2018

By Craig Leddy

**Channel Partners™**

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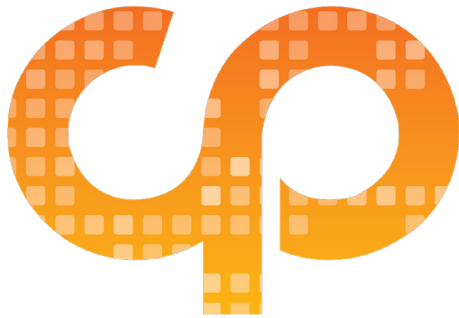
# About the Author



**CRAIG LEDDY** is a veteran cable industry writer, speaker and market analyst, and a contributing analyst for Heavy Reading, an Informa property. Leddy founded Interactive TV Works, a media consultancy, to promote understanding of advanced digital services. He is a former editor of Cablevision Magazine, senior analyst for The Myers Group and contributing editor for Multichannel News. He teaches the popular How Cable Works industry courses, including the CTAM Advance Executive Education series. He also founded and hosts the Interactive Launch Competition, a leading case study contest for business students.

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# Cablecos & The Channel: State of the Market 2018

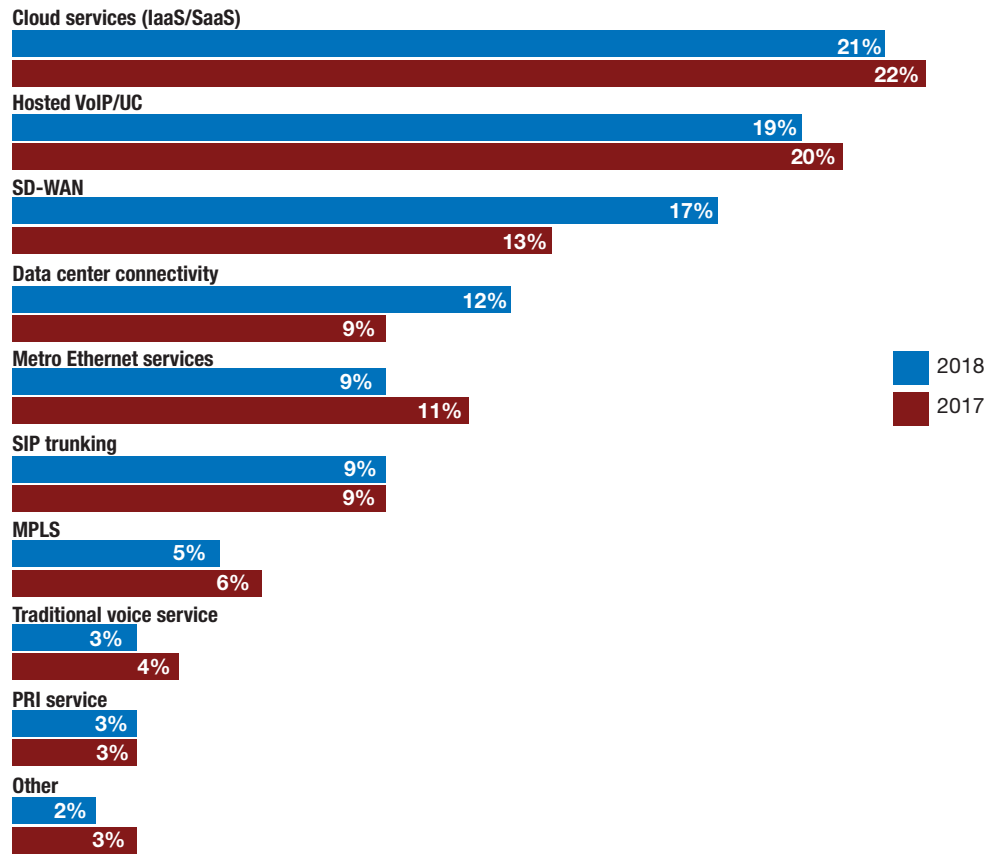
## **CABLE SERVICE PROVIDERS, EMBOLDENED BY EXPANDING SERVICE FOOTPRINTS AND ADVANCED BROAD-**

band capabilities, continue to solidify their relationships with their channel partners as they both migrate toward new product opportunities, as Channel Partners' eighth annual State of the Cable Market survey reveals.

The 2018 survey, taken by respondents throughout the channel partners sales and distribution chain, shows strong interest in SD-WAN (software-defined WAN) and gigabit internet services that U.S. cable providers have begun to deploy. In perceptions of cable products and sales support services, cable continues to attract a solid base of channel supporters, although flat results for some survey responses suggest areas for improvement remain.

This report includes the survey results, perspective by leading agents, related industry activity and profiles of major cablecos courtesy of CTAM (Cable & Telecommunications Association for Marketing).

## What services are MOST important in driving your growth as a channel partner?

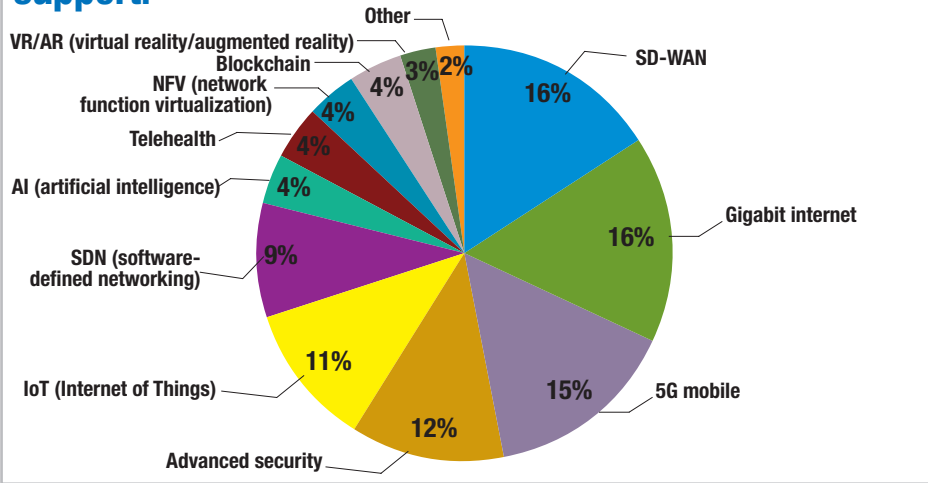


Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

### New Product Focus

Channel partners remain mostly interested in cable internet and voice services that serve as their bread-and-butter products, but attention to higher-capability products is growing. When asked what services are most important to drive their growth, the top answers were cloud services (infrastructure or software-as-a-service) and hosted VoIP/universal communications. No surprise there. But this year, interest in SD-WAN increased over 2017, as did data center connectivity.

**Please select the next-gen technologies that you could sell to your business customers if you received cableco support.**



Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

When asked to select next-generation technologies they could sell to business customers, channel partners showed strong interest in [SD-WAN](#) and gigabit internet. Respondents are also intrigued by 5G mobile, which, while not yet available commercially in the United States, holds potential service opportunities for cable. Advanced security and the Internet of Things (IoT) rounded out the top five technologies of interest.

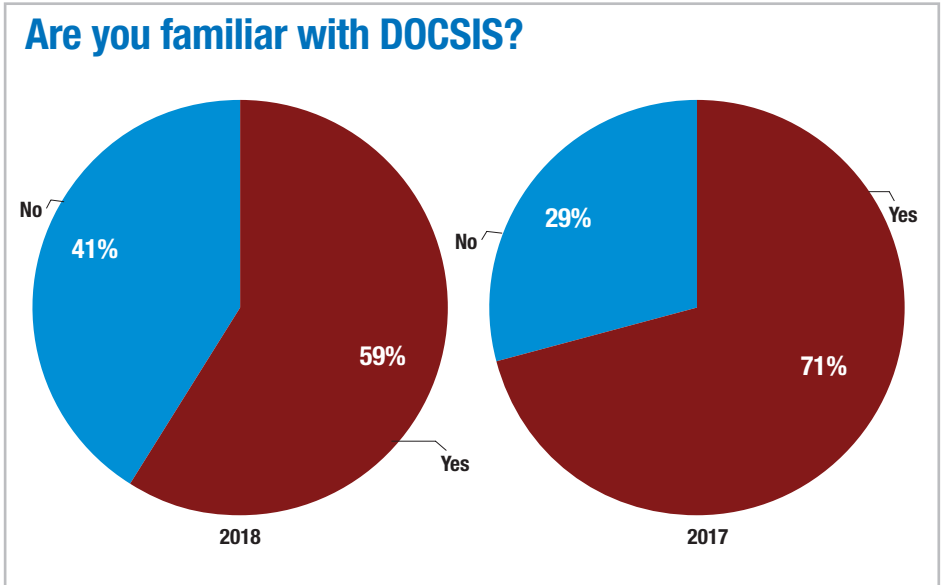
Cable providers are starting to use both their fiber and coax plant to support SD-WAN and gigabit internet (see [Coax or Fiber: Which Is Right for Your Customer?](#))

“SD-WAN is a perfect fit for cablecos because they can provide it using both types of access, fiber and coax,” said Rick Ribas, senior vice president of partner sales, east, for Intelisys, a master agent that supports all the major cable suppliers. Ribas said cable has brought a healthy “whirlwind storm” of disruption to the telecom space.

Alan Sandler, founder and managing partner for master agent Sandler Partners, sees proven dependability as key for cable providers. “Current trends are that business customers need reliable and substantial bandwidth for all the cloud offerings,” said Sandler. “The building blocks will continue to be coax and fiber from the cable companies for both primary and SD-WAN redundant networks.”

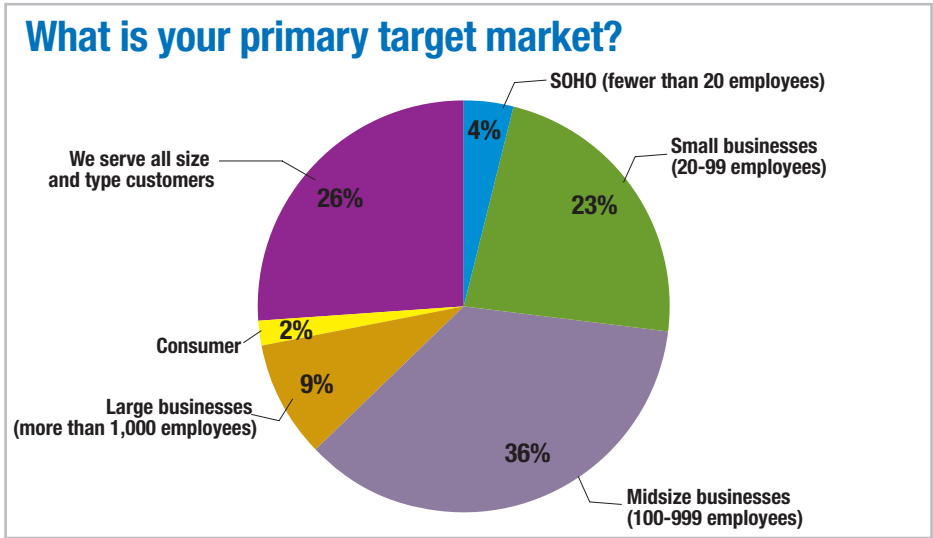
Comcast Business is deploying an SD-WAN product as part of its ActiveCore SDN architecture. The SD-WAN solution, based on Versa Networks’ Cloud IP Platform, supports a variety of Internet connections, including Comcast’s Metro Ethernet or coax [utilizing DOCSIS 3.1](#) (D3.1), the latest version of cable internet technology that enables gigabit-level downstream speeds. Charter Communications’ Spectrum Enterprise is trialing a hybrid SD-WAN solution using Nuage Networks’ technology and leveraging its existing Ethernet footprint – it ranks as the fourth largest U.S. Ethernet provider. Cox Business is in trials with SD-WAN, and Altice Business has the tech on its product roadmap.

Cable providers large and small are building out fiber lines and using D3.1 with existing coax infrastructure to provide dual approaches for higher internet speeds. However, a significant amount of partners remain in the dark about cable’s DOCSIS technology. Compared to the 2017 survey, this year’s respondents showed even less familiarity with DOCSIS, including a surprising number of experienced agents who said they were unfamiliar with it.



Source: Channel Partners’ Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018





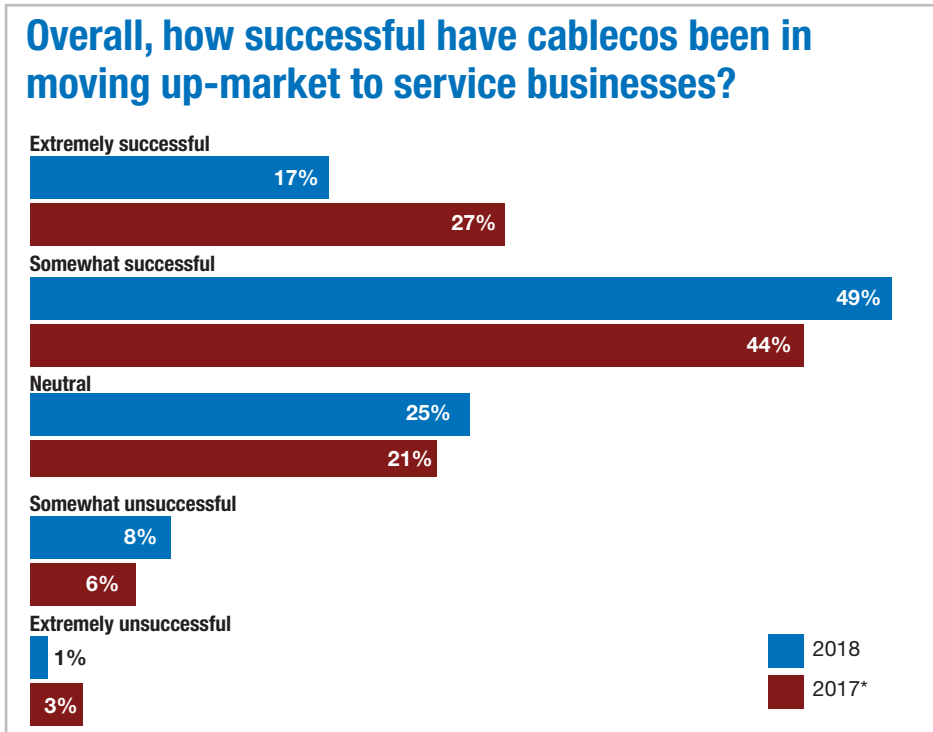
### Moving Up-Market

While SMBs still represent the bulk of customers for cable providers and their channel partners, new offerings and enhanced capabilities are supporting their mutual goal of moving up market to attract large companies and multi-site enterprises. SD-WAN is regarded as an important part of that effort because it is a more affordable and flexible platform than MPLS for wide-area networking by enterprises with remote offices or multiple customer locations.

“We have seen tangible growth in cable for enterprise, and with Comcast in particular,” said Jed Kenzy, partner, Innovative Business Solutions, which dubs itself as a “cable-first master agency.”

“We’ve made it our job over the last year to be evangelists for why these cable businesses are right for customers.”

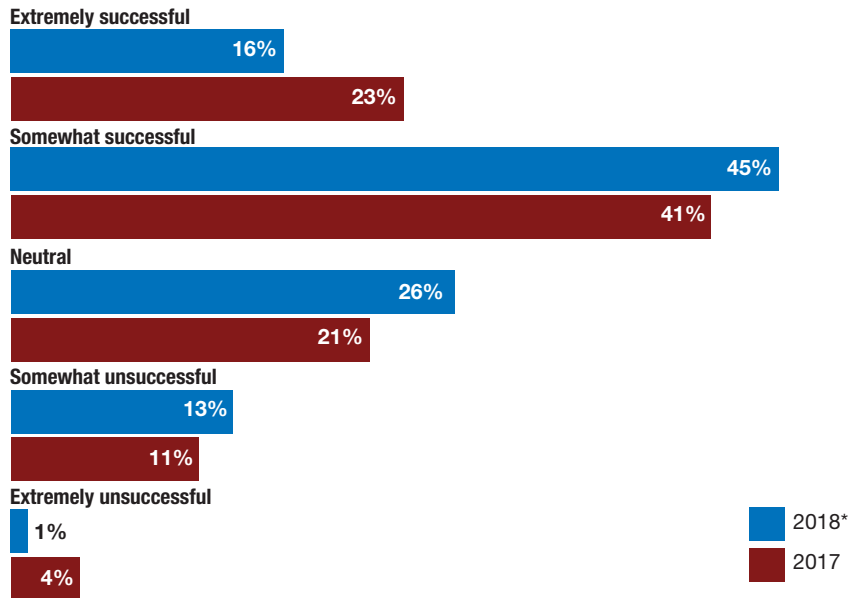
In the survey, the majority of partners said their primary target market for sales are SMBs, but there is a small shift toward large businesses. This year, 59 percent identified SMBs as their primary target market versus 68 percent last year, while 9 percent said large businesses compared with 6 percent in 2017.



\*Figures do not total 100% due to rounding.  
 Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

Nearly half of those surveyed think that cable so far has been somewhat successful in moving up market, although the number who said cable has been extremely successful dropped from last year. Apparently cable’s efforts to move up market still have not resonated with a portion of channel partners.

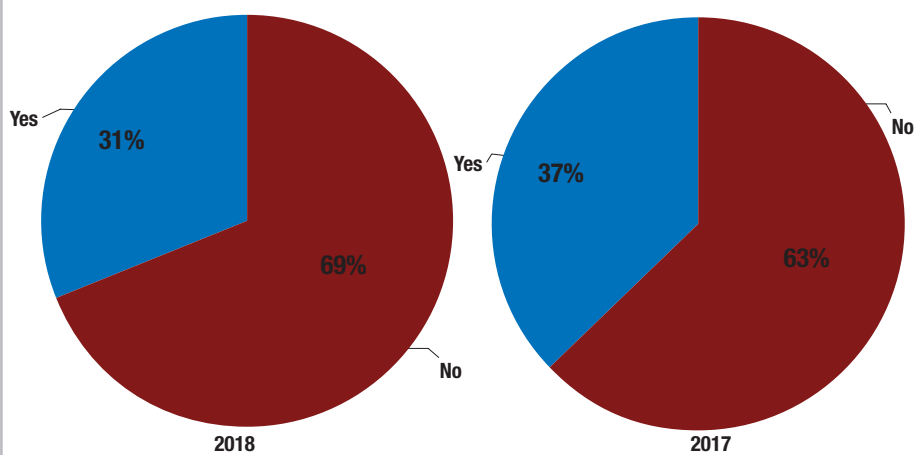
## Overall, how successful have cablecos been in adding new products that customers want to buy?



\*Figures do not total 100% due to rounding.  
 Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

Similarly, 61 percent of respondents said cable has been somewhat or extremely successful in adding new products customers want to buy, but 14 percent deem its product additions as unsuccessful so far.

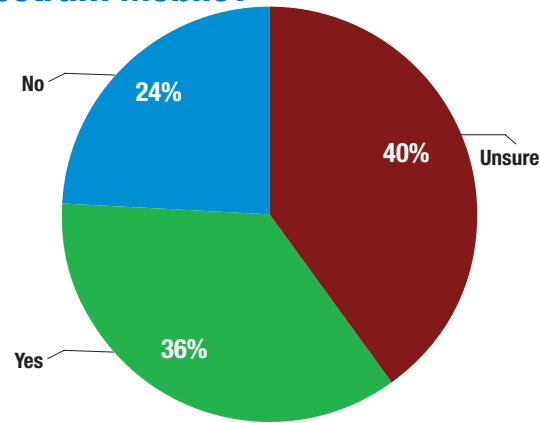
## Are there products your customers want to buy that cablecos are not selling in your service areas?



Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

While more than two-thirds answered no when asked if there are products their customers want to buy that cablecos are not selling in their service areas, 31 percent suggested there's room for more products.

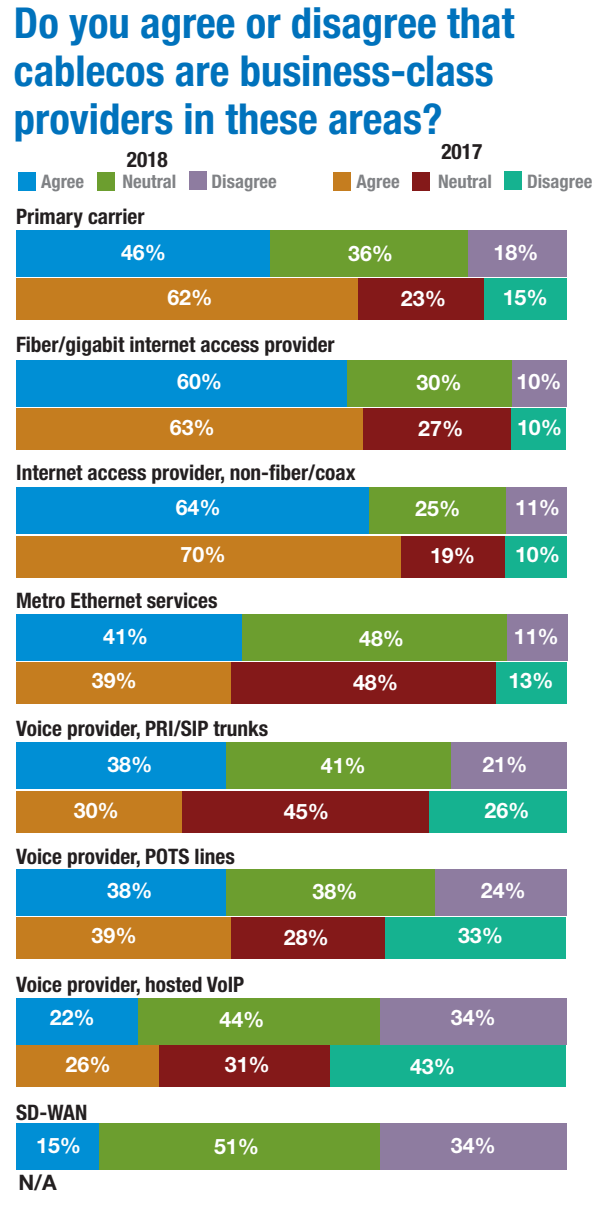
## Do you have an interest in doing business with cablecos' mobile virtual network operator (MVNO) services such as Comcast's Xfinity Mobile and Charter's Spectrum Mobile?



Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

Among recent product cable launches are new mobile phone services: Comcast's Xfinity Mobile and a forthcoming service planned by Charter. The mobile services, which rely upon a mobile virtual network operator (MVNO) partnership with Verizon and are backed up by an extensive Wi-Fi network, currently are aimed at residential customers. However, it's easy to see how these offerings could be attractive for businesses bedeviled by [BYOD complexity and costs](#).

And in fact, more than one-third of survey respondents said they are interested in doing business with the cablecos' mobile services, although at this early stage, 40 percent said they were unsure. That's not bad considering that, as mentioned, the services are currently marketed to consumers. Meanwhile, cable providers are exploring their options for 5G, including the potential for 5G mobile broadband service and small cell backhaul support. That could open new horizons in business mobility.

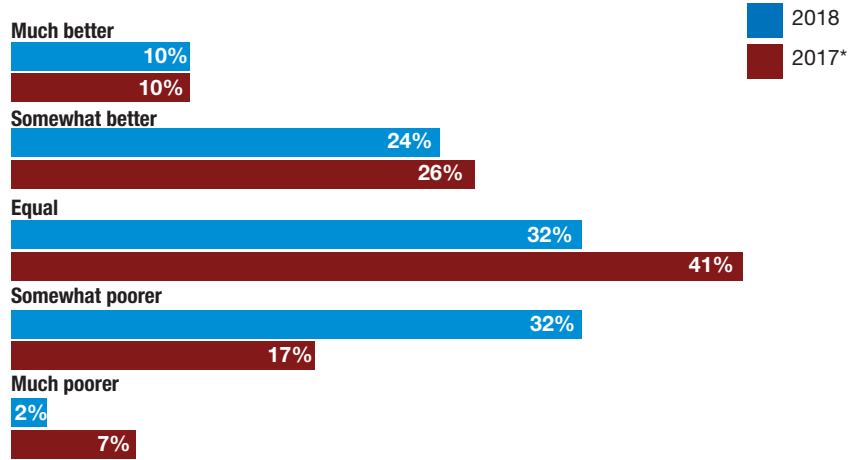


Figures do not total 100% due to rounding.  
 Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

## Cablecos as Business-Class Providers

Compared to earlier Channel Partners surveys, partners' perceptions of cablecos as business-class providers have improved significantly. However, when compared with [2017 results](#), opinions of cable providers this year improved in some areas and declined in others. Cable lost some ground on the question of whether it is perceived as a primary carrier, an area where it made substantial progress in recent years of the survey. (Direct year-to-year comparisons with earlier surveys are difficult because the survey questions were updated in 2016.)

## In relation to telecom providers, the quality of NETWORK SERVICES from cablecos is:



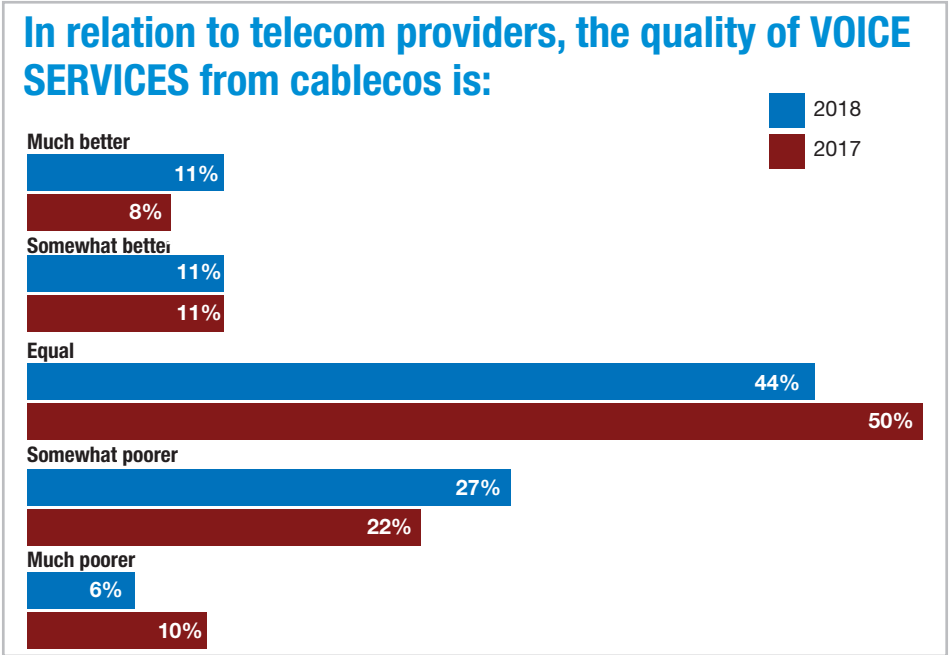
\*Figures do not total 100% due to rounding.

Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

While two years of survey results do not necessarily represent a trend, the results may speak to the highly competitive nature of the telecom business, in which providers' perceptions can change quickly. In addition, the low result for SD-WAN most likely is attributable to the fact that cable's products are not widely available yet. That particular rating is likely to improve in the future, provided cablecos can make their products stand out in the competitive SD-WAN field.

As cable has stepped up its game, it has put the major telcos "back on their heels," said Intelisys' Ribas. Now, he said, the LECs are rebounding by addressing their pricing and programs, including residual income, national channel programs and simplified product lines. Competition is good for partners and their customers, especially given that two-thirds of respondents said cable's quality of network services is equal or better than other telecom providers.

However, that marked a decline from 77 percent who responded similarly last year. In addition, the number saying network services were somewhat poorer or much poorer increased from 24 percent in 2017 to 34 percent in 2018.



Figures do not total 100% due to rounding.  
 Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

Similarly, two-thirds of respondents said the quality of cable’s voice services are better or equal to other telecom providers, a relatively flat result from last year. Perhaps again this is attributable to the competitive nature of the telecom market: One agent said cable’s voice services are “sub-par” when compared to the latest offerings by other voice providers.

Despite the relatively flat year-over-year survey results, agents we interviewed for this report praised cablecos for their commitment to the channel, products, programs and people, from those who lead the companies to those who handle accounts. In terms of how the cablecos compare to other telecom competitors, Randy Friedberg, executive vice president, sales and marketing, CNSG (Converged Network Services Group), summed it up: “They stack up extremely well against them.”

## Please rate your perception of these BUSINESS & SERVICE attributes for cablecos vs. telecom providers.

	Much Better		Somewhat Better		Equal		Somewhat Poorer		Much Poorer		Not Available	
	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017
Acceptable SLAs for the end customer	8%	7%	14%	16%	43%	38%	21%	19%	12%	16%	1%	4%
Financial stability	9%	9%	24%	19%	60%	62%	4%	5%	0%	0%	3%	4%
Network availability/coverage	9%	7%	22%	19%	37%	24%	23%	41%	7%	8%	1%	1%
Network quality	10%	7%	15%	22%	45%	47%	26%	16%	3%	7%	0%	1%
Network redundancy	6%	4%	13%	22%	52%	39%	21%	27%	6%	5%	2%	3%
Network reliability	6%	5%	15%	20%	48%	42%	23%	22%	7%	9%	0%	1%
Price for the end customer	24%	26%	46%	42%	25%	24%	2%	5%	2%	1%	0%	1%
Service and support for the end customer	7%	12%	26%	18%	39%	38%	16%	20%	9%	11%	2%	1%

\*Figures do not total 100% due to rounding.

Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

### Business and Service Attributes

In terms of perceptions of business and service attributes, cable received higher marks this year for its network availability and coverage. The industry's recent consolidation has increased the footprints of Charter's Spectrum Business and Altice Business while other MSOs continue to expand their networks for fiber and coax connections, as well as their channel programs.

"Outside a few bumps related to acquisitions, it was a great year for the cablecos," Friedberg said. "We look forward to continued success from our partnerships with them."

Sandler said he has seen an increased commitment to the channel, and not just from Comcast.

"Cox also has jumped on the bandwagon and embraced agents," he said. "We are excited for them to open up Arizona to partners the way they have in other markets."

This year 70 percent of respondents said cable was a much better or somewhat better price for the end customer. In fact, for some agents, the price is too good, especially for coaxial service.

"They should increase the pricing of coax," Friedberg said. "In some cases, the price dropped over 50 percent, and contracts were eliminated. There's no reason to continue to reduce coax pricing."

In another result, one-third said cable has somewhat poorer or much poorer SLA support than telecom providers. Cablecos have recognized that acceptable SLAs are a key component in their efforts to move up market and serve enterprise customers.



**Please rate these CHANNEL PROGRAM ATTRIBUTES in order of importance to your business, from most to least.**

2018 2017

1	1	Access to human sales support
2	2	Commission to the partner
3	5	Access to in-person training
4	7	Access to multiple cablecos through one agent agreement
5	4	Access to self-service sales support (e.g., portal)
6	3	Ease of ordering
7	8	Ease of quoting
8	10	Assistance with lead generation
9	9	Dedicated channel manager
10	6	Ease of provisioning
11	11	Access to web-based training
12	12	Field sales assistance
13	13	Joint educational, marketing or communication initiatives facilitated by the cablecos
14	14	Industry-standard training on cable networks and technology and how to optimize selling success
15	18	Working through a master agent/master VAR
16	16	Online peer community to discuss cableco solutions to customer requirements
17	15	Teaming with cablecos' direct sales representatives
18	17	Partnering between non-like peers (agents and VARS) facilitated by the cableco
19	19	Working through an aggregator (rebillor)

Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

## Program Perceptions

Within their channel support programs, cablecos are striving to provide tools and automated processes to make quoting, ordering and provisioning as easy as possible. These efforts appear to be recognized by survey respondents while master agents said these systems are going in a promising direction. But, they said, automation still has a ways to go, and providers in general have not developed a simple app or user interface to provide visibility and management of the process — an “Uber for telecom,” as Ribas described it.

While automated processes are a hot button in sales these days, it’s interesting that channel partners consistently rate access to human sales support as the most important program attribute to their businesses, even ranking it above commission to the partner.

Access to in-person training also moved up in the new rankings.

**Please rate your perception of these CHANNEL program attributes from cablecos vs. telecom providers.**

	Much Better		Somewhat Better		Equal		Somewhat Poorer		Much Poorer		Not Available	
	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017
Access to human sales support	13%	8%	19%	23%	45%	35%	12%	22%	10%	12%	0%	0%
Access to in-person training	10%	7%	8%	11%	46%	43%	20%	19%	7%	18%	8%	3%
Access to multiple cablecos through one agent agreement	14%	8%	15%	23%	49%	36%	8%	14%	3%	12%	10%	7%
Access to self-service sales support (e.g., portal)	10%	9%	11%	16%	56%	42%	11%	20%	8%	9%	4%	3%
Access to web-based training	9%	3%	12%	20%	60%	50%	6%	15%	7%	9%	5%	3%
Assistance with lead generation	7%	3%	9%	12%	41%	35%	13%	15%	10%	20%	19%	15%
Commission to the partner	9%	5%	17%	22%	43%	35%	17%	18%	9%	18%	4%	3%
Dedicated channel manager	12%	7%	15%	22%	48%	43%	13%	12%	6%	12%	5%	4%
Ease of ordering	11%	12%	19%	28%	45%	35%	16%	14%	7%	11%	1%	0%
Ease of provisioning	10%	14%	19%	22%	45%	29%	13%	20%	11%	15%	1%	0%
Ease of quoting	14%	16%	20%	24%	41%	34%	15%	14%	8%	12%	1%	0%
Field sales assistance	9%	7%	14%	18%	49%	38%	15%	16%	8%	18%	4%	4%
Joint educational, marketing or communication initiatives facilitated by the cablecos	8%	7%	9%	14%	60%	45%	8%	14%	5%	12%	10%	9%
Industry-standard training on cable networks and technology and how to optimize selling success	8%	8%	9%	16%	54%	36%	13%	16%	5%	14%	11%	9%
Online peer community to discuss cableco solutions to customer requirements	9%	4%	7%	14%	51%	43%	12%	18%	5%	9%	16%	12%
Partnering between non-like peers (agents and VARs) facilitated by the cableco	9%	4%	7%	14%	46%	38%	16%	22%	7%	12%	14%	11%
Teaming with cablecos' direct sales representatives	7%	4%	7%	15%	45%	22%	13%	22%	15%	26%	12%	12%
Working through a master agent/master VAR	12%	7%	22%	24%	54%	53%	7%	4%	2%	4%	3%	8%
Working through an aggregate (rebillor)	9%	3%	10%	11%	56%	43%	6%	16%	2%	8%	17%	19%

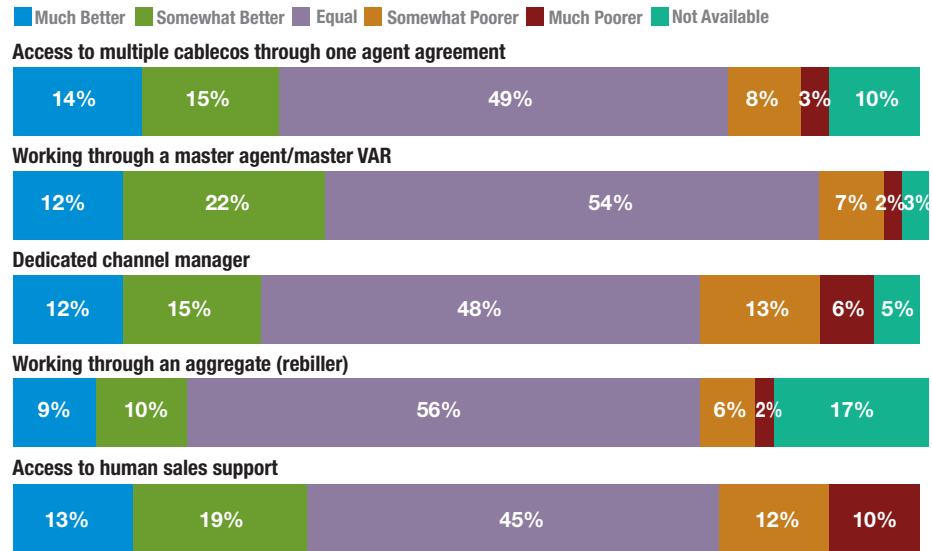
\*Figures do not total 100% due to rounding.  
Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018

Survey respondents were asked to rate their perception of many channel program attributes by cable versus other telecom providers. Cablecos made modest increases in the perceptions of the human support they provide. These perceptions might improve further as the major cable providers continue to establish their business brands with channel partners and business customers alike. Cable receives nearly equal levels of high marks and low marks in certain areas of support for channel partners or end users, showing that some partners still need to be won over. Many of the ratings in 2018 show only minor differences from 2017.

Based on a ranking of the top channel program attributes, partners like to have access to multiple cablecos through one agent agreement, and they appreciate cable's work with master agents. Among respondents, 88 percent said cable was equal to, somewhat better or much better than telecom companies for working through a master agent, an area where LECs had a large head start.

Opinions are divided over cable's commission to the partner, although the industry appears to be making modest gains. Cable gets low marks for its ability to team with cablecos' direct sales representatives.

## Perception of CHANNEL PROGRAM ATTRIBUTES From Cablecos vs. Telecom Providers – Top 5

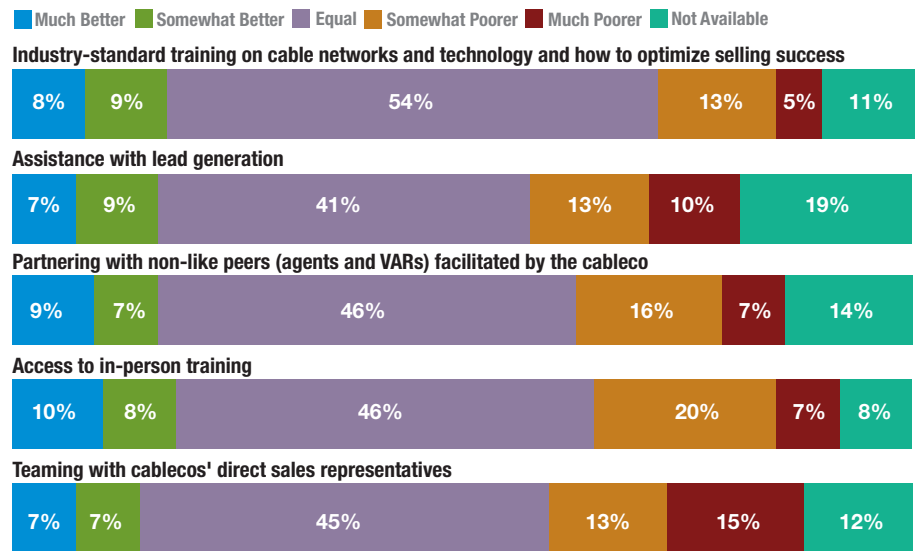


Figures do not total 100% due to rounding.  
Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

Cable generates a wide variance of opinions; it has its fans and its detractors. And of course, partners also grouse about the telecoms' support and services, too. This can be a tough crowd whose laser focus is on growing their reach, breadth and profits.

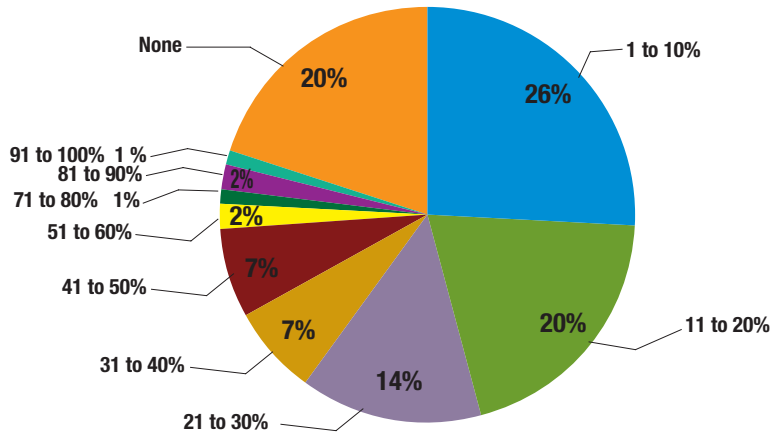
"Cable can be challenging at times, but it offers products for everything from a small single person office to a 500-person WAN," said Kenzy of Innovative Business Solutions. "We'll see tremendous growth with cable for this year."

## Perception of CHANNEL PROGRAM ATTRIBUTES From Cablecos vs. Telecom Providers – Bottom 5



Figures do not total 100% due to rounding.  
Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

### What percentage of your or your partners' current average monthly sales is from selling cable services?

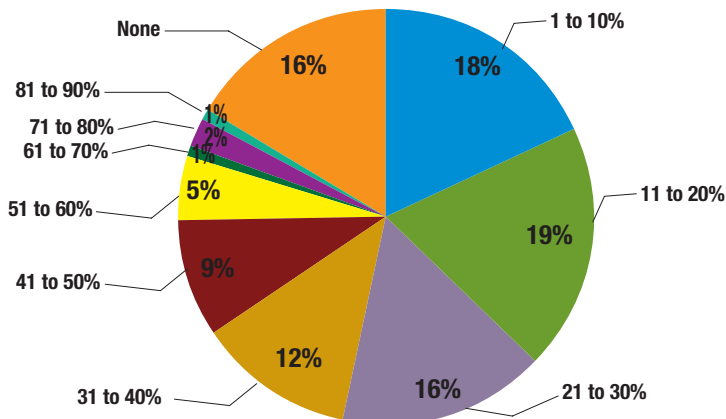


\* 61 to 70% scored 0%  
 Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

### Sales Potential

The Channel Partners survey provides a snapshot of the channel partners business and where it is headed. With the vast number of service provider, technology supplier and other partner solutions that channel companies support, currently cable represents less than 20 percent of average monthly sales for nearly half of them. But for others, cable comprises a hefty chunk of the business: 21 percent said 21-40 percent of their sales, 9 percent said 41-60 percent and 4 percent count on cable for 80-100 percent of sales.

### What percentage do you predict your or your partners' average monthly sales will be from selling cable services in 12 months?

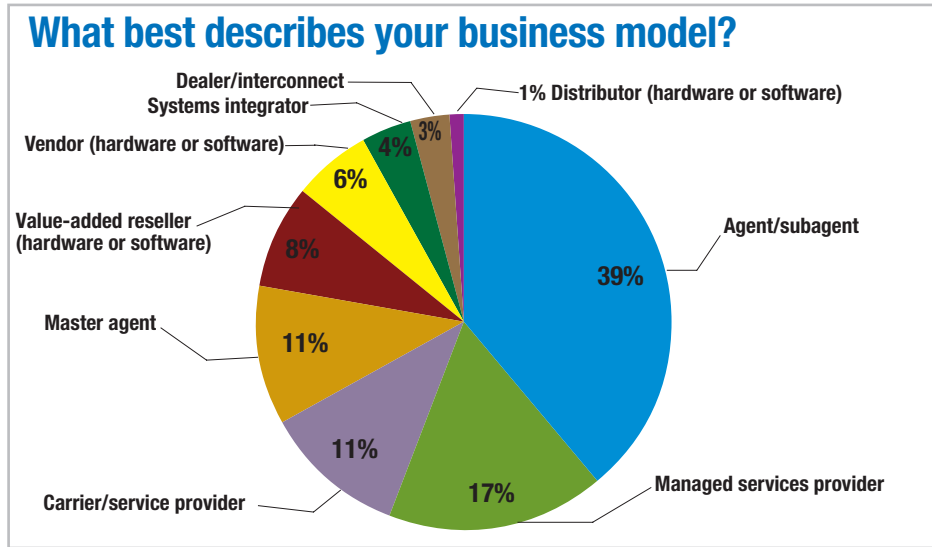


\*Figures do not total 100% due to rounding. \*\* 91 to 100% scored 0%  
 Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

And, when looking ahead at their businesses in 12 months, partners expect their monthly sales of cable products to remain consistent or increase. That's good news for cable providers.

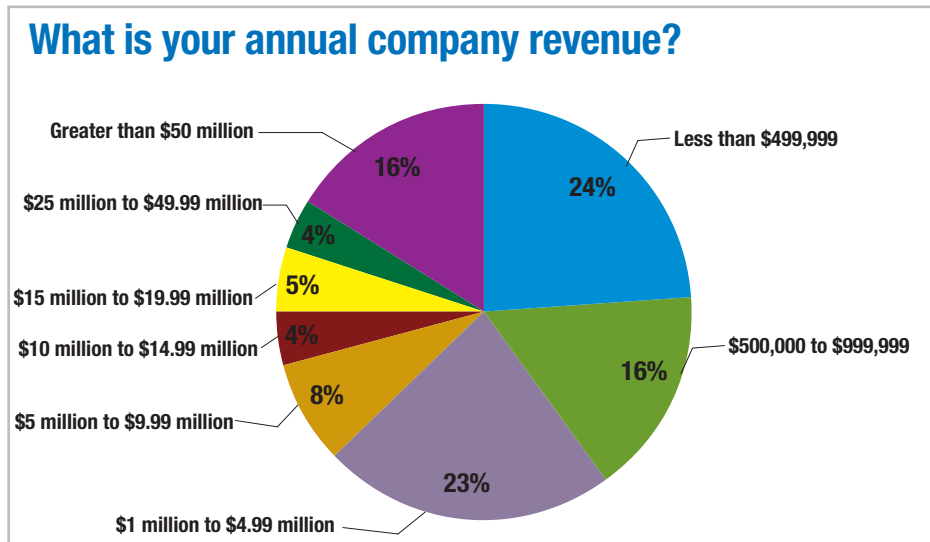
## The 2018 Respondent Profile

Channel Partners surveyed its readership using an online poll in February 2018 to ascertain channel partners' interest levels, adoption and challenges with selling cableco telecommunications services to businesses. The survey was completed by 139 qualified respondents.



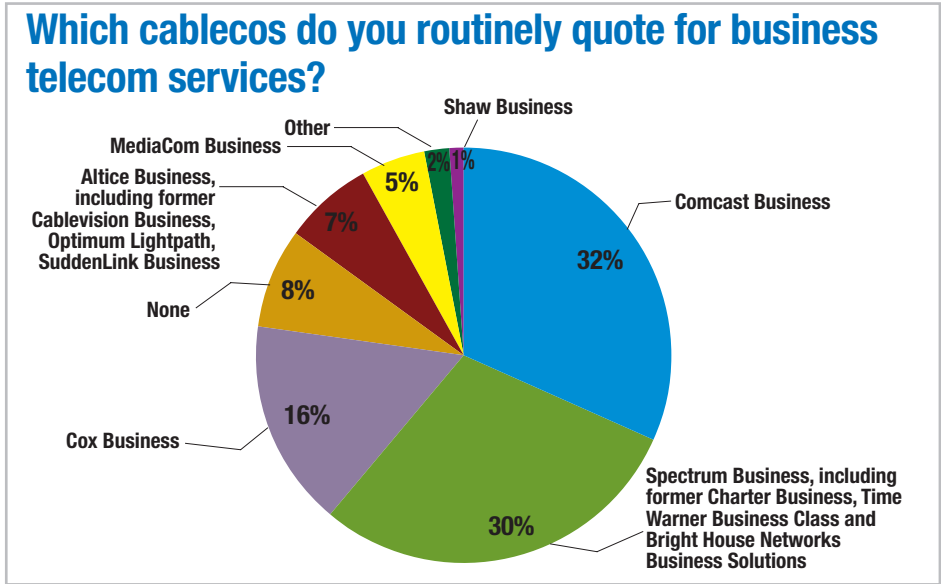
Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

About half of the respondents identified themselves as an agent/subagent or master agent, a level consistent with last year's survey.

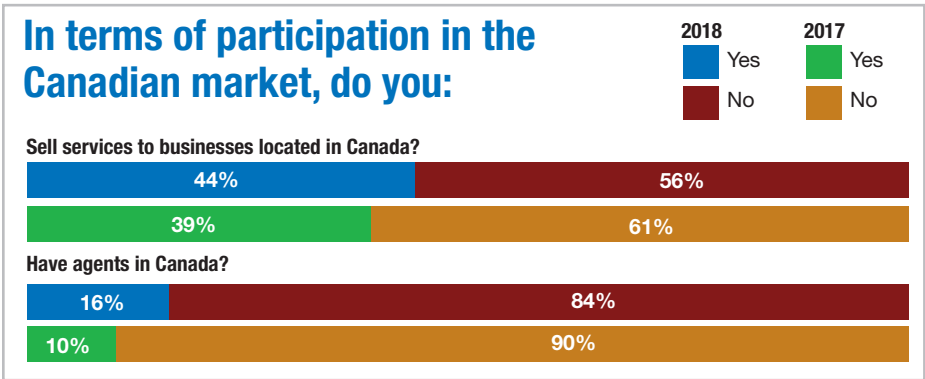


\* \$20 million to \$24.99 million scored 0%  
 Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, February 2018

About two-thirds of the respondents are in channel companies with annual revenue of less than \$5 million, but 16 percent are in companies earning \$50 million or more, an increase from last year's level of 7 percent in that category. Twenty-one percent are in companies with annual revenues between \$5 million and \$50 million.

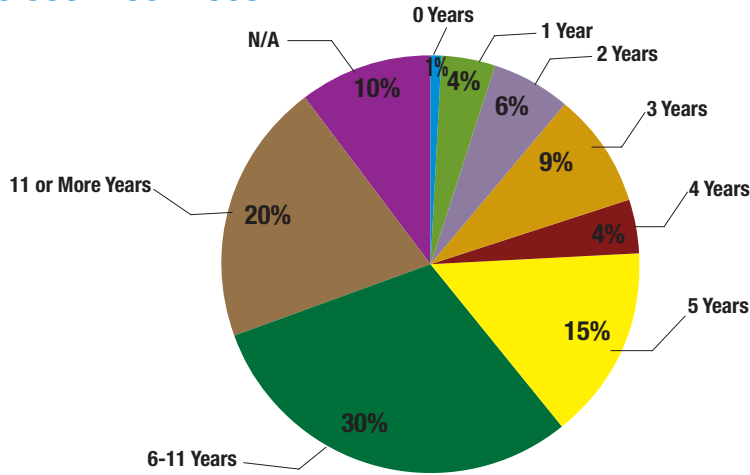


Channel partners routinely quote all of the major cablecos. The order of the percentages are consistent with the size of the cablecos based upon their customer reach. The past year saw greater efforts by Charter to rebrand its business divisions and services under its Spectrum brand, including Spectrum Business and Spectrum Enterprise, and Altice USA to apply the Altice Business brand to its business services operations and assets.



Based upon the survey responses, it appears that channel partners increasingly are selling services in the Canadian market.

## How many years have you sold cableco business telecom services?



\* Figures do not total 100% due to rounding.

As the cable and channel partner relationship has grown, it has created a class of experienced sales veterans. In this year's survey, half of the respondents said they have six or more years of cableco sales experience; 20 percent have been in the field for 11 or more years. Twenty percent have been selling cable for three years or less.

## 2018 Cableco Profiles

Through [CTAM](#), the major cable providers submitted the following profiles of their channel partner programs.

### Altice

**Company Description:** [Altice Business](#) in the U.S. offers data, internet, voice, managed services and pay TV products and services to more than 375,000 small, medium and large-sized businesses, with a network that includes more than 15,000 fiber-lit locations in the United States. To meet our customers' growing business needs, Altice's 100 percent fully-owned fiber network delivers high-performance fixed and mobile connectivity across the globe.

**Channel Leader:** Joe Magliulo, Vice President, Partner Sales

**Date Established:** 2007

**Number of Indirect Sales Partners:** Undisclosed

**Geographic Territory Partners Can Sell Into:** Twenty-one states across the U.S., including the greater New York metro area, including Manhattan.

**Products Partners Can Sell:** Phone, television and internet for any size business.

Phone service includes digital phone lines, business trunking (SIP and PRI) and toll-free.

Internet access products include premium tiers with speeds to meet the needs of all businesses Internet service includes Optimum Wi-Fi.

**Enterprise Level Services:** Ethernet-based products from 20Mbps to 1,000Mbps; 1Gps to 100Gps optical transport services; voice services including toll-free, enterprise voice and hosted voice.

### Comcast

**Company Description:** [Comcast Business](#), a unit of Comcast Cable, provides advanced communication solutions to help organizations of all sizes meet their business objectives. Through a next-generation network that is backed by 24/7 technical support, Comcast delivers Business Internet, Ethernet, TV and a full portfolio of voice services for cost-effective, simplified communications management. The award-winning Comcast Business Solutions Provider Program is a comprehensive indirect channel program that enables partners to sell a full line of small and mid-market business products from Comcast. As a Comcast Business Solutions Provider, partners are able to diversify their portfolio and earn recurring commission while providing their customers with a valuable alternative to traditional telco carriers and aging MPLS services.

**Channel Leader:** Craig Schlagbaum, Vice President, Indirect Channels

**Date established:** 2011

**Number of Indirect Sales Partners:** The program launched with three national master agencies — Intelisys, Telarus and TBI. It now features 11 master agents and thousands of selling partners and the program continues to grow at a significant pace.

**Geographic Territory Partners Can Sell Into:** 39 states and the District of Columbia

**Products Partners Can Sell:** Business Ethernet, Business Internet, Business Voice portfolio, Business TV, SD-WAN, Video Monitoring, Hospitality Solutions



## Cox

**Company Description:** [Cox Communications](#) is a broadband communications and entertainment company providing advanced digital video, internet, telephone and Wi-Fi services over its own nationwide IP network. The third-largest U.S. cable TV company, Cox serves more than 6 million residences and businesses. Cox is known for its pioneering efforts in cable telephone and commercial services, industry-leading customer care and its outstanding workplaces.

**Channel Leader:** John Muscarella, Senior Director of Alternate Channels

**Date Established:** Referral Agent program, July 2012; Selling Agent program, 2015

**Number of Indirect Sales Partners:** Cox Business has three authorized master agents — Intelisys, Sandler Partners and Telarus, approximately 90 authorized selling agents and more than 1,000 referral partners.

**Geographic Territory Partners Can Sell Into:** All Cox franchise areas

**Products Partners Can Sell:** All voice, data and video products

## Mediacom

**Company Description:** [Mediacom Business](#) delivers internet, phone and TV services to businesses of all sizes. With a coast-to-coast fiber network, we offer anchor institutions bandwidth and connectivity with speeds of 10 gigabit and beyond. Our state-of-the-art national broadband network serves businesses in some 1,500 communities across 22 states.

**Channel Leader:** Jim Phipps, Vice President, Commercial Sales

**Date Established:** 2011

**Number of Indirect Sales Partners:** 45

**Geographic Territory Partners Can Sell Into:** Entire Mediacom Business footprint which includes 22 states with a significant customer base in the Midwest and Southeast.

**Products Partners Can Sell:** HFC suite of solutions (Business Internet speeds of 60, 100 and 200 Mbps and 1 Gbps; Business Phone including Managed Voice Solutions, Business TV & Music) and Gigabit+ Fiber Solutions, enterprise-level Ethernet services including Dedicated Internet Access, Transparent LAN, SIP/Primary Rate Interface.

## Shaw

Today, as [Shaw Communications Inc.](#), we proudly serve 3.2 million customers, including 1.9 million subscribers to Shaw Internet and more than 1 million Shaw Home Phone customers. Our extensive and reliable network is comprised of 860,000 kmof fiber.

**Company Description:** Shaw Communications Inc. is an enhanced connectivity provider. Our Consumer division serves consumers with broadband internet, Shaw Go WiFi, video and digital phone. Our Wireless division provides wireless voice and data services through an expanding and improving mobile wireless network infrastructure.

Shaw is traded on the Toronto and New York stock exchanges and is included in the S&P/TSX 60 Index.

**Channel Leader:** Mike Walker, National Manager, Partner Channel

**Date Established:** 2008

**Number of Indirect Sales Partners:** 11 national partners, 120 regional direct Partners and 190 referral partners

**Geographic Territory Partners Can Sell Into:** Western Canada (British Columbia, Alberta, Saskatchewan and Manitoba)

**Products Partners Can Sell:** All business services offered by Shaw Business

## Spectrum

**Company Description:** [Spectrum](#), a division of Charter Communications, is a national provider of fiber and coaxial based technology solutions serving many of America's largest businesses and communications service providers. The broad Spectrum portfolio includes internet access, Ethernet access, voice, TV, managed services, and cloud. Cloud solutions are offered by its affiliate, Navisite.

**Date Established:** Spring 2010

**Leadership:** Michelle Kadlacek, Vice President, Enterprise Indirect Channel, and Chris Czekaj, Vice President, Alternate Channels, SMB

**Number of Indirect Sales Partners:** Numerous national master partners and thousands of active subagents

**Geographic Territory Partners Can Sell Into:** 41 states

**Products Partners Can Sell:** Partners have access to enterprise solutions (fiber internet access, Ethernet, PRI, SIP, hosted voice\*, managed services, and cloud) and Broadband solutions (phone, internet, and TV).

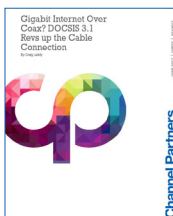
\*Hosted Solutions currently available in the Legacy Bright House Network footprint

## Related Reports



### Coax or Fiber: Which Is Right for Your Customer?

When customers have a choice between coaxial cable and fiber, partners need to take a few critical factors into consideration before making a recommendation. In this Report we: Deliver insights from Satya Parimi, Spectrum group vice president of data and cloud products; Cary Tengler, executive director, national partner programs, Comcast Business; Todd Esenwein, senior director, business services, CTAM; and others. We also explain why 2018 is the year SD-WAN will pop and run down five decision points for customers with coax and fiber options



### Gigabit Internet Over Coax? DOCSIS 3.1 Revs Up the Cable Connection

The advent of DOCSIS 3.1 is making gigabit internet speeds available over cable as well as fiber. And as the technology prepares to enter the business arena, channel partners should be learning what it can do and how their cable partners plan to use it. This Report examines how DOCSIS 3.1 will help businesses better prepare for richer cloud solutions, more video applications, virtualization and the IoT, as well as help channel partners move up-market.

# Appendix

The following chart is for responses to a question in the 2018 Channel Partners Cablecos & The Channel: State of the Market Survey that was not included within the body of the report.

**Please rate these SUPPORT ATTRIBUTES in order of importance to your business, from most to least.**

2018	2017	
1	1	Access to human sales support
2	2	Commission to the partner
3	7	Ease of ordering
4	6	Access to in-person training
5	4	Access to self-service sales support (e.g., portal)
6	5	Access to multiple cablecos through one agent agreement
7	8	Ease of quoting
8	9	Access to web-based training
9	3	Dedicated channel manager
10	11	Assistance with lead generation
11	10	Ease of provisioning
12	12	Field sales assistance
13	14	Joint educational, marketing or communication initiatives facilitated by the cablecos
14	16	Partnering between non-like peers (agents and VARs) facilitated by the cableco
15	13	Industry-standard training on cable networks and technology and how to optimize selling success
16	15	Teaming with cablecos' direct sales representatives
17	17	Online peer community to discuss cableco solutions to customer requirements

Source: Channel Partners' Cablecos & The Channel: State of the Market Survey, March 2017 and February 2018