Danielle Royston   00:00:00
Can you feel it? I'm Danielle Royston and this is Telco in 20.

So a few months ago, I threw my name into the MWC sorting hat to see if I would be selected for a talk at MWC 22. And lucky me, my talk got picked again. If you know me, you know I put a ton of effort into making my talks great. When most people get a chance to speak on the big stage, they put together some boring-ass slides and phone-in a rehearsal or two. But not me. When I got the talk, I was like, "Bring it on, baby!". I knew that I needed something different, something powerful and something entertaining that would set my talk above the rest.

Last year, my MWC keynote was about the public cloud coming to telco. This year, I want it to be clear: The public cloud is HERE. I wanted the audience to feel the cloud, and so I brought in… wait for it… a Japanese Taiko drum! You know those huge drums that you can feel to your core? Yeah. One of those guys.

For those of you who don't know, Taiko drums are used to motivate troops, call orders and set pace back in the 1500s. They were used to communicate orders; to retreat or advance the troops. And I thought that was the perfect metaphor to call telco to join the CLOUD CITY Army. It's Wednesday, March 2nd, and I just got off the GSMA stage. If you didn't get a chance to watch it in person, it sucks to be you! You can watch the video on my website at telcodr.com. A link to the video version of the talk is also in the show notes. And so here it is, my talk in its full unedited glory for you to enjoy. Fair warning, the drums are loud. So slap on your AirPods, take your dog out for a walk, and take a listen. The public cloud is NOW. It's time to get going!

Danielle Royston   00:02:47
Hello, MWC, and welcome everyone – whether you're here in the room or watching from elsewhere around the world. My name is Danielle Royston, but you can call me DR. Last year, I came to MWC with a clear message for the telecom industry. The public cloud is coming. And it will change everything. Well, I'm back to beat the drum about the public cloud.

Danielle Royston   00:03:16
Can you feel it? If you don't believe me, look around. The industry's most important event now has the cloud theme: CloudNet. And yesterday, a hyperscaler CEO delivered a keynote here at MWC. Our industry is changing right before our eyes. But even though I know the public cloud has come to telco, I'm still hearing from execs all the reasons why they can't start, when we should be talking about all the things we can do with the public cloud. The proof points about the public cloud are everywhere.

Danielle Royston   00:03:54
Vodafone signed a strategic partnership with Google to move all their on-premise analytical workloads to the public cloud. Last summer, AT&T sold out their network cloud business to Microsoft who will refactor it to run natively on Azure. And of course, the news that rocked the

industry: the move by DISH to go all-in with the public cloud with AWS. Let me be clear, if you haven't started your move, then you're already behind. It's time to get going.

Danielle Royston   00:04:29
Telco should be the center of the tech universe, but we are not. Enterprises used to look to telco for tech leadership, now they don't. Worst of all, revenue is going elsewhere. As leaders, your job is to come up with great ideas and use your assets to better position your organization for success. The public cloud is a big opportunity. For those of you who embrace it, the public cloud will open up new greenfield dimensions to compete on. It's not zero sum. It's really, really big. Once you realize what you can do with the public cloud, you will have wished you started yesterday. Do you know who wishes he started yesterday? Jamie Dimon, CEO of JP Morgan Chase. He started out thinking the public cloud was just about outsourcing. He used to think, "why in the world would I move anything to AWS, when I've already built up my own data center capacity and capability?" But on his latest earnings call, he made it clear that he was all in. He said, if he could spend $2 billion to get to the cloud tomorrow, he would do it in a second. He would do it in a heartbeat.

Danielle Royston   00:05:51
What is it about the public cloud that causes a CEO of a nearly half a trillion dollar company to change his tune? He believes that using the public cloud is a competitive advantage, and he's right! I bet you're wondering, can telco create a competitive advantage by using the public cloud? Totally! But you have to change the three things that are slowing you down: Your systems are outdated, built on a tech stack from the nineties. Your data is messy; different data models and different databases spread across your telco. And your teams don't understand how to use the public cloud. To get on track, you need to modernize your systems, cleanse your data, and hire cloud talent. Let's start with modernizing your systems. Inside a telco, there are thousands of legacy applications running on-premise loaded with technical debt; a heavily customized, heavily integrated rat's nest of crap. While modernizing legacy systems will give you the opportunity to save lots of money, that's not the main reason you move these workloads to the public cloud. It's the need for speed.

Danielle Royston   00:07:16
See your legacy systems hamstring you, and getting a new idea to market takes five times as long as it should. It's time to change that. You need to be nimble and responsive to win in your market. You need cloud-based systems that allow you to use all the greatness of the public cloud, to compute, scale, and software seamlessly. You need systems that give you the power to add a new database or AI capability to a legacy system, quickly. You need systems that are flexible. You can integrate to whatever you want and customize it easily and you need systems that are open so you can change them without needing expensive CRS or consultants. Your current systems can't do any of that. But new modern systems built with cloud-first principles that are fast, flexible, open, and easy to use are coming to telco and you need to go buy them.

Danielle Royston   00:08:16
The second thing you need to do is cleanse your data. One of the most valuable assets inside of telco is the petabytes of data you have about how subscribers use a network. It's hard to extract the signal from the noise to get the insights that can drive revenue growth. It's a mess! You're going to need to tackle the difficult task of cleansing your data to make the decisions that matter, and you can do that by moving your data to cloud databases and using the world's best data tools to drive a more personalized experience for your customers. I'm talking about AI, machine learning, and analytics. You need to be able to extract personalized insights in seconds, not days, and put them into action the moment they are needed. But you can't do that until you cleanse your data. So clean it up! And last but not least, you need to acquire cloud talent.

Danielle Royston   00:09:18
To start using the public cloud, you don't need to turn your telco into a tech co. But you need to start hiring and up-skilling your people on how to design applications using cloud-first principles, and you need to modernize your HR programs to attract top talent. Cloud is the most in-demand technical skill in the job market today and you're competing for talent against the best tech companies in the world. You need leaders that set aggressive goals for moving the organization to the cloud and you need software developers that can build applications in hours that are auto-scaling, self-healing, lowest TCO, and use the right cloud service for the job. Your talent is the heart of your company and will set the tempo of change.

Danielle Royston   00:10:12
Hiring and upskilling your team for cloud skills is not impossible, but it will take time. So get going and start to build that muscle. Once you do these three things, you'll be set up to unlock a competitive advantage for your telco and put you in position to technically leverage your biggest asset: your network! You will be able to turn network events into moments of excitement for the customer. Use your technical advantage to drive higher MPS. For example, let's talk about super apps. No other industry has the assets and the super app better than telco. Telcos own the network. You own the relationship with the subscriber, but your terrible MPS is stopping you. Global tech leaders like Amazon, Netflix, and Apple have customer loyalty that is through the roof. They understand that without customer love, you cannot expand your ARPU footprint. They don't have the leverage to force their customers to use the next generation like telco does. The tech companies put customer love at the center of their business models. They focus relentlessly on their customers. They provide great experience after great experience and their revenue continues to grow and grow. They do it because that's how you support a growing demanding customer ARPU. Amazon started with books and now they sell you everything, including data centers.

Danielle Royston   00:09:47
Uber Eats can only exist if Uber Rideshare is awesome! The customer experience offered by Apple is world-class, so people line-up to buy their products. These brands can expand because

all the customer experiences are great. Can you see the pattern? Can you feel it? These guys can expand the ARPU because they have high MPS. But telco, you aren't even close. You have to drive MPS up so you can expand ARPU. If telcos use the next 10 years to adopt the public cloud, change their culture, and fix their MPS, they will be the future of the digital consumer. The telcos that make that transition have the most exciting decade in front of them. As acting CEO of telco software company Totogi, this is our focus. We are creating the modern software for telco that is making the move to the public cloud, a reality. We know that telcos need to get high MPS scores, so they are invited to compete, and 10 times larger ARPUs. This is doable when you embrace the public cloud and change your culture to focus on customer love.

Danielle Royston   00:11:06
You have to give up the security blanket of the network. But you can't do it until you've modernized your legacy applications. You can't do it until you've cleansed your data, and you can't do it until you've hired cloud talent. This is a massive opportunity, but you have to start in a real way. The best day to start was yesterday, but the second best day to start is today. The public cloud is now! It's time to get going. Thank you.